

Case Study for Mohini Tea's Mobile & SharePoint based System



Turn O Biz Solutions Private Limited



REQUIREMENT DOCUMENT

Number/Name and Version	Date	Author/ Reviewer	Remarks
<i>SharePoint based Application for Mohini Tea</i>	February 17, 2015	Samsher Roy	Baseline - Based on the information provided on conference.



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1 Introduction

This document covers all the functional needs for the proposed mobile & SharePoint based web application for automating some their business needs.

1.1 Purpose

The purpose of this document is to communicate business needs in common terms to all project and technical team members to ensure the end product meets the business objectives. This functional requirement document is prepared on the basis of requirements indicated by Mohini Tea key users during the telephonic conference held on 16th February 2011. This document defines the current project scope by listing the functionalities required by users of Royal.

1.2 Intended Audience

- a) Management & Development team of Mohini Tea.
- b) Management and project team of Alletec.

1.3 Scope of Work

Mohini Tea is looking for three different solutions for meeting their business needs. Following is the summary of their desired functionality:

- SharePoint based Web Application
 - Management of Customer's Complain
 - Document Management System
 - Case History and maintenance of legal document

2 SharePoint based Web Application

Mohini Tea requires a SharePoint based web application managing some of their business functionalities. Following section covers the details of the desired functionalities:

2.1 Document Management System

In this section they wish to maintain all the required documents in a central repository and download the document on need basis. All the documents shall have secured access so that only the authorized user can upload/download the documents. Following is list of some document types along with the business process:

Procurement of Various Registration Documents - SSI, Factories Act, PAN, TAN,VAT, Service Tax etc – Only authorized user can view, upload & download these documents.

AMC - Computer, P&M, Gen-Sets – A renewal date shall be captured while uploading this kind of document so that system can generate a reminder/alert before the due date.

Case History- Income Tax, VAT, Labour Laws – Day to updation & its disposal. This kind of document shall be stored in a group on basis of case along with short description and date so that user can search the required document in future easily.

Agreement Renewal- Rent, SS, CFA etc – Expiry date shall be captured while uploading this kind document so that system can generate auto reminder/alert in time.



2.2 Advertisement Management

Warehousing of all release of Advertisements in print and electronic media along with their versions. Along with media file system shall have provision for keeping the following information:

- Advertisement Media type
- Advertisement Media Name
- Published on
- Short Description

Query – Do they also want to keep the media file, image file (If image which type).

Do you also want to play the video file from this web application?

2.3 Periodic Activity

- ISO Audits & Its Documentation
- HACCP Registration
- Bank Limits Renewal

Note – Need more clarification on the above functionality.

2.4 Complaint Management

This would be a section primarily for customer for lodging their complaints. The complaint can be resolved through multiple level escalations through a workflow. The information to be captured for complaint management is not yet identified. Following is the list of some steps to be performed for complaint management:

- Capturing the Complaint through internet / intranet
- Movement of complaint to the related Person
- Standardization of time limit of its disposal
- Escalation of complaint to next hierarchy till MD

All the above steps shall be performed through a workflow, where user can assign the job to a person and defined the time limit. Auto notification shall be generated by the system in case user miss the deadline. This process can be performed till the closure of the complaint.

Query – Do you need to integrate your NAV system for displaying the products of any other details for capturing customer's complaint?

2.5 DAK (Correspondence) Inward & Outward Management

The incoming and outgoing correspondence management needs to be captured in the system. 'Sender Name', 'Address' shall be captured for incoming mail & couriers and 'Addressee Name', 'Date of Dispatch' shall be captured outgoing mail & couriers.



(i) Document Management System

Process: - Create Document Library for the following section:-

1. Registration Documents.

Required Fields: -

- a. Registration Document Type – Dropdown field (SSI, Factories Act, PAN, TAN, VAT, Service Tax, Others)
- b. Registration Document No - Number field
- c. Registration Document Name - Text field
- d. Registration Start Date - Date field
- e. Registration End Date - Date field
- f. Assessment year – Date field
- g. Financial year – date field
- h. Related Document – attachment field

Workflow: - Triggers one week before the Expiry date and send mail to concern person.

UI: -

The screenshot shows a 'Registration Document - New Item' form. The ribbon includes 'Edit', 'Commit', 'Clipboard', and 'Actions' tabs. The form fields are as follows:

Field Name	Value / Options
Registration Document Type	<input checked="" type="radio"/> SSI (dropdown) <input type="radio"/> Specify your own value: (text input)
Registration Document Name *	(text input)
Registration Document No	(text input)
Registration Start Date	3/28/2011 (calendar icon)
Registration End Date	3/28/2011 (calendar icon)
Financial year	(text input)
Assessment year	3/28/2011 (calendar icon)

Buttons: Save, Cancel



2. Insurance.

Required Fields: -

- a. Insurance type – Dropdown field (Life, Stock, Machinery, Others)
- b. Insurance no - Number field
- c. Insurance company name – text field
- d. Vendor – text field
- e. Premium – number field
- f. Start date – date field
- g. Due date – date field
- h. Resource – attachment field
- i. Claim Amount – number field
- j. Realized amount – number field

Workflow: - Triggers one week before the due date and send mail to concern person.

UI: -

The screenshot shows a SharePoint 'New Item' form for 'Insurance'. The form has a title bar 'Insurance - New Item' and a toolbar with buttons for Save, Cancel, Paste, Copy, and Attach File. The form fields are as follows:

Field Name	Field Type	Value
Insurance type	Radio buttons	Life (selected)
Insurance company name *	Text	
Insurance no	Text	
Vendor	Text	
Premium	Text	
Start date	Date	3/28/2011
Due date	Date	3/28/2011
Claim Amount	Text	
Realized amount	Text	

Buttons: Save, Cancel



3. AMC

Required Fields: -

- a. AMC type – Dropdown field (Computer, P&M, Gen-Sets, Others)
- b. Resource no - Number field
- c. Resource Name – Text field
- d. Current Visit Date – date field
- e. Next Visit Date – date field
- f. Visitors Name – text field
- g. Vendor Name – text field

Workflow: - Triggers one week before the next visit date and send mail to concern person.

UI: -

The screenshot shows a web form titled "AMC - New Item". At the top, there is a toolbar with the following buttons: Save, Cancel, Paste, Cut, Copy, and Attach File. Below the toolbar, the form fields are as follows:

- AMC type:** A radio button is selected for "Computer". There is also an option "Specify your own value:" with an empty text input field below it.
- Resource no:** An empty text input field.
- Resource Name *:** An empty text input field.
- Current Visit Date:** A date input field containing "3/28/2011" and a calendar icon.
- Next Visit Date:** A date input field containing "3/28/2011" and a calendar icon.
- Visitors Name:** An empty text input field.
- Vendor Name:** An empty text input field.

At the bottom right of the form, there are two buttons: "Save" and "Cancel".



4. Case History

Process: - Create Case History folder.

Required Fields: -

- a. Case type – Dropdown field (Income Tax, VAT, Labour Laws, Others)
- b. Case Title – text field
- c. Case Start Date - Date field
- d. Case End Date – Date field
- e. Case Comment – multi text field
- f. Resources – Attachment field

Workflow: Triggers day-to-day updating and send mail to concern person.

UI: -

The screenshot shows a web browser window titled "Case History - New Item". At the top, there is a dark blue header bar with the text "Case History - New Item" and a close button. Below the header is a ribbon with an "Edit" tab. The ribbon contains several groups of icons: "Commit" (Save, Cancel), "Clipboard" (Paste, Copy), and "Actions" (Attach File). The main content area is a form with the following fields:

- Case type:** A radio button is selected for "Income Tax" (shown in a dropdown menu). There is also an option for "Specify your own value:" with an empty text input field below it.
- Case Title *:** A text input field.
- Case Start Date:** A date input field containing "3/28/2011" and a calendar icon.
- Case End Date:** A date input field containing "3/28/2011" and a calendar icon.
- Case Comment:** A large multi-line text area.

At the bottom right of the form, there are two buttons: "Save" and "Cancel".

5. Agreement Renewal



Process: - Create Case History folder.

Required Fields: -

- a. Document type – Dropdown field (Rent, SS, CFA, Others)
- b. Agreement Title – text field
- c. Agreement Details – multi text field
- d. Agreement Start Date - date field
- e. Agreement Renewal Date – date field
- f. Resources – Attachment field

Workflow: - Triggers one week before the Agreement Renewal Date and send mail to concern person.

UI: -

The screenshot shows a SharePoint 'New Item' form for 'Agreement Renewal'. The form is titled 'Agreement Renewal - New Item' and has a ribbon with the following options: Edit, Save, Cancel, Paste, Copy, Attach File, Commit, Clipboard, and Actions. The form fields are as follows:

Document type	<input checked="" type="radio"/> Rent <input type="radio"/> Specify your own value: <input type="text"/>
Agreement Title *	<input type="text"/>
Agreement Details	<input type="text"/>
Agreement Start Date	3/28/2011 <input type="button" value="Calendar"/>
Agreement Renewal Date	3/28/2011 <input type="button" value="Calendar"/>

At the bottom of the form, there are two buttons: Save and Cancel.



(ii) Warehousing of all release of Advertisements in print and electronic media along with their versions.

Required Fields: -

- a. Media type – Dropdown field (Audio, Video, Others)
- b. Agency – Text field
- c. Area – Text field
- d. Site – Text field
- e. Media Title - Text field
- f. Theme Title – Text field
- g. Time Duration – Text field
- h. Size – Number field
- i. Created Date – date field

UI: -

Advertisements - Wildlife.wmv

Edit

Save Cancel Paste Cut Copy Delete Item

Commit Clipboard Actions

i The document was uploaded successfully. Use this form to update the properties of the document.

Media type Audio Specify your own value:

Media Title

Name * Wildlife .wmv

Agency

Area

Site

Theme Title

Time Duration

Created Date 3/28/2011

Created at 3/28/2011 5:10 PM by System Account
Last modified at 3/28/2011 5:10 PM by System Account

Save Cancel



(iii) Periodic Activity

Process: - Create Sub site for Periodic Activities
Create Document Library for the following section:-

(A) ISO Audits & Its Documentation

Required Fields: -

- a. Title – Text field
- b. Auditor – Text field
- c. Audit Date – Date field
- d. Next Audit Date – Date field

Workflow: - Triggers before the Next Audit Date and send mail to concern person.

UI: -

ISO Audits & Its Documentation - Ribbon customization.docx

Edit

Save Cancel Paste Cut Copy Delete Item

Commit Clipboard Actions

i The document was uploaded successfully. Use this form to update the properties of the document.

Name * Ribbon customization .docx

Title

Auditor

Audit Date 3/28/2011

Next Audit Date 3/28/2011

Created at 3/28/2011 5:30 PM by System Account
Last modified at 3/28/2011 5:30 PM by System Account

Save Cancel



(B) HACCP Registration

Required Fields: -

- a. Title – Text field
- b. Registration Date – Date field
- c. Expiry Date – Date field

Workflow: - Triggers one week before the Expiry Date and send mail to concern person.

UI: -

HACCP Registration - Ribbon customization.docx

Edit

Save Cancel Paste Copy Delete Item

Commit Clipboard Actions

i The document was uploaded successfully. Use this form to update the properties of the document.

Name * Ribbon customization.docx

Title

Registration Date 3/28/2011

Expiry Date 3/28/2011

Created at 3/28/2011 5:34 PM by System Account
Last modified at 3/28/2011 5:34 PM by System Account

Save Cancel

(C) Bank Limit Renewals

Required Fields: -

- a. Title – Text field
- b. Created Date – Date field
- c. Expiry Date – Date field

Workflow: - Triggers one week before the Expiry Date and send mail to concern person.



UI: -

Bank Limit Renewals - Ribbon customization.docx

Edit

Save Cancel Paste Copy Cut Delete Item

Commit Clipboard Actions

i The document was uploaded successfully. Use this form to update the properties of the document.

Name * Ribbon customization .docx

Title

Created Date 3/28/2011

Expiry Date 3/28/2011

Created at 3/28/2011 5:36 PM by System Account
Last modified at 3/28/2011 5:36 PM by System Account

Save Cancel

(iv) Complaint Management & its escalation

Process: - This is an anonymous site and root site of this portal. Anonymous user can access this site without authentication and put their complaint using the complaint form and also see the status of the complaint. Admin user can login using the admin panel which is hiding according to privileges.

Create **Hierarchy level list** with the following fields: -

- Name – text field
- Level – text field
- Required Time – text field
- Email – text field

Create **Complaint Record List** with the following fields: -

- Customer Name – text field
- Email ID – text field
- Contact No. – Number field
- Heading – text field
- Message – multi text field



Priority – Dropdown field (High, Low, and Normal)

Status - Dropdown field (In Progress, Completed)

Starts Date – date and time field

End Date – date and time field

Current Level – text field

Option – number

Create **Complaint Task List** with the following fields: -

Complaint Id – Number field

Approver Id – Number field

Approver level – text field

Approver Comments – multi text field

Status - Dropdown field (In Progress, Completed)

Workflow: - Check complains status Day – to - Day automatically. If specified level was not response to the Required Time duration then escalations of complaint to next hierarchy to till MD forwarded automatically and send mail to lower level.

If customer is not satisfied with the solution then customer can reopen the complaint using the menu items “Reopen the Issue”. In that case that complaint will be forwarded to the next hierarchy level and also send mail to the lower level related to that issue.

(v) DAK (Correspondence) Inward & Outward Management

Process: - Create the following list using the following fields:

Inward Management: -

Fields: - Courier Name – text field
Sender name – text field
Sender Address – multi-text field
Sender Phone – number field
Sender Email – text field
Receiving Date – date field
Receiver Name – text field
Receiver Address – multi-text field
Receiver Phone – number field
Receiver Email – text field

Outward Management: -

Fields: - Courier Name – text field
Sender name – text field
Sender Address – multi-text field



Sender Phone – number field

Sender Email – text field

Sending Date – date field

The incoming and outgoing correspondence management needs to be captured in the system.

(vi) Task Management

Process: - Create Task Management List.

Required Fields: -

- a. Task type – Dropdown field (Interoffice, Intraoffice, Others)
- b. Task Title - Text field
- c. Task Details – multi text field
- d. Task Assigned Date – Date field
- e. Assign to – text field
- f. Assign By – text field
- g. Priority – Dropdown field (High, Low, and Normal).
- h. Status – Dropdown field (In Progress, Completed).

Workflow: - Reminder of open task is to be incorporated in the system and send mail to related person.

(vii)Senior Management - Stockiest Visit Control Management

Process: - Create minutes of meeting List.

Required Fields: -

- a. Meeting Title - Text field
- b. Date – date field
- c. Host Name – text field
- d. Client Name – text field
- e. Meeting Details – multi text field
- f. Attachments – attachments field
- g. Issue – text field
- h. Issue Details – multi text field
- i. Issue Priority – Dropdown field (High, Low, and Normal)
- j. Status – Dropdown field (In Progress, Completed).

Workflow: - tracking of disposal of issues and send mail to related person.

(viii) Visitor Management & Directory Management

Process: - Create Visitor Management List.



Required Fields: -

- a. Visitor Name - Text field
- b. Visitor Address – multi text field
- c. Visitor Phone – Number field
- d. Visitor Email – text field
- e. Contact person – text field
- f. Contact person Phone – attachments field
- g. Entry Time – Date and time field
- h. Exit Time – Date and time field

(viii) Admin Config List

Process: - Create a config list for storing the global variable data.

Required Field: -

- a. Title – Text field
- b. Value – Number field
- c. Key – Text field