**System Requirements Specifications (SRS)**

***GWSI Mapping Portal using***

***Salesforce Communities***

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| **Prepared by** | **Siveen Laryan (with RF inputs)** |
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Related Documentation

[List the RFP and any other documents that have been received from the customer as an aid to understanding their business requirements]

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# The Purpose of the Project

## Background of the Project Effort

[Give a short description of the work context and the situation that triggered the development effort. It should also describe the work that the user wants to do with the delivered product, and its criticality for the enterprise. Without this statement, the project lacks justification and direction]

## Goals of the Project

*For the next round of the GWSI mapping the goal is to provide RC/RC National Societies the ability to complete their own GWSI mapping inputs on a portal owned, managed and coordinated by the IFRC secretariat.*

*This will help reduce the manual, double entry of data and take away the multiple email exchanges that is currently part of the process.*

## Fitness Criteria

An implemented platform that is tangible and provides the flexibility needed by the Health and Care Department to report on what is being delivered to vulnerable communities worldwide.

# Client, Customer and other Stakeholders

## The Client

Health and Care Department and WASH Team.

## The Customer

Host and Partner National Societies who have been, are or will be active in the GWSI.

Internal and external stakeholders,

## Other Stakeholders

Internal RC/RC and IFRC departments, at all levels.

External existing and potential partners and stakeholders.

Target communities and governments.

# Users of the Product

## The hands-on users of the product

National Societies who support or implement GWSI projects,

## The priorities assigned to users

* Key users –
  + IFRC WASH Team – who will validate the inputs received from the National Societies
  + National Societies (HNS & PNS)
* Administration users. Will manage any needed super user tasks, access mgmt. etc.

## User participation

* Feeding in information/data
* Validation of information/data
* Consolidation of information/data
* Visualization of information data – Global, Regional and country by country.

## Maintenance users

See 3.2

# Mandated Constraints

Keep solution as out of the box as possible re-using standard features where possible.

## Solution design constraints

The solution scope is currently limited to the online enablement of the GWSI mapping spreadsheet and the ability for National Societies to login and enter their data.

It will be built using Salesforce Communities which is a cloud based solution meaning there are no impacts on physical infrastructure(hardware/software).

## Implementation environment of the current system

The Salesforce platform is cloud based and has not impact on the current implementation environment.

## Partner or collaborative applications

Currently there is no integration planned.

## Off-the-shelf software

(RF comment – can we revise this section to language that is less corporate, focusing upon the vulnerable communities we serve and our primary clients in this case National Societies)

*Salesforce Communities are a great way to share information and collaborate with people outside your company who are key to your business processes, such as customers or partners.*

*You can use Communities to:*

* *Drive more sales by connecting your employees with your distributors, resellers, and suppliers*
* *Deliver world-class service by giving your customers one place to get answers*
* *Manage social listening, content, engagement, and workflow all in one place*

*You can create multiple communities within your organization for different purposes. For example, you could create a customer support community to reduce support costs, or a channel sales community for partner deal support, or you could have a community dedicated to an upcoming event.*

*Communities can be based on standard Salesforce functionality and tabs, or on one of our preconfigured templates. Communities may contain a subset of features and data available in your internal Salesforce organization and can be customized to use your company branding. In addition, you can choose which members from your company and which customers, partners, or other people outside your company can join.*

*Communities live inside your org and can be easily accessed from the global header using the drop-down menu in the top left corner of Salesforce or in the Salesforce1 Mobile Browser App. Use this menu to switch between your communities and your internal Salesforce org.*

## Anticipated workplace environment

* National Societies with internet access
* National Societies with poor or intermittent internet access
* National Societies with no internet access will continue to fill out the current excel and this will be uploaded into Salesforce

## How long do the developers have for the project?

We wish to field test with a National Society in a less developed country (by December 2016)

Then roll out to all GWSI NS’s by end of 1st quarter 2017.

Results consolidated and analysed/validated by May 2017.

# Naming Conventions and Definitions

GWSI – Global Water Sanitation Initiative

WASH – Water Sanitation and Hygiene

HNS – Host National Society

PNS – Partner National Society

MDG – Millennium Development Goals

SDG – Sustainabilty Development Goals

# Relevant Facts and Assumptions

## Factors that have an effect on the product

## Accessible software/portal may encourage more interaction and data collection but ‘human’ element and interface with NS’s will still be required linked to effective marketing to NS’s.

## One great advantage is if the system can provide standardized fact sheets tailored to each NS GWSI contribution that can visualize their contribution for marketing purposes.

## Assumptions that the team is making about the project

* It will be more simple, accurate, quicker and easy to manage.
* It will due to the above encourage more NS participation and buy-in.
* It will produce or contribute to better visualization at all levels (global, regional, country)
* Field test will go well and iron out any glitches
* Roll out to all NS’s will be effective.

# The Scope of Work

## The current situation

1. What are the existing process / system?
   * Email containing the GWSI mapping excel spreadsheet sent to the national societies
   * National Societies capture the data and email back to the WASH team
   * Data is validated by WASH and email confirmation is provided is data is correctly validated, if not the National Societies will review and update.
   * Once completed a brochure is created containing the cumulative data for all the impacted National Societies.
2. What are the good points in the process that should be there in the new process?

* Manual Validation and knowledge of country contexts and individual NS’s

1. Do the users have any existing ideas or suggestions on how the process could be made more efficient?
   * A portal like facility to allow National Societies the ability to capture their mapping data – easier and quicker, uncomplicated.
   * Reporting capabilities that match field level capacities
   * Ability for the Federation and the countries to have a separate view on the data

## The context of the work

The work context diagram identifies the work that we need to investigate in order to be able to build the product. Note that this includes more than the intended product. Unless we understand the work that the product will support, there is little chance of building a product that will fit cleanly into its environment.

The adjacent systems on the example context diagram e.g. Weather Forecasting Bureau, indicate other subject matter domains (systems, people and organizations) that need to be understood. The interfaces between the adjacent systems and the work context indicate why we are interested in the adjacent system. In the case of Weather Forecasting Bureau, we can say that we are interested in the details of when, how, where, who and why they produce the District Weather Forecast information.

Without clearly defining the boundaries for the work study and requirements effort, there is little chance of building a product that will fit seamlessly into its environment.

Examples

The names used on the context diagram should be consistent with the naming conventions discussed in section 5.

## Work partitioning

TBC

# The Scope of the Product

## Product Boundary

1. What are the tasks that the user needs to perform within the system? <Give a list of all major tasks performed by the system>
   1. Each National Society will be provided a login to the Salesforce
   2. Each National Society will be able to first review the GWSI mapping from the previous period (and make any changes by request on historic data).
   3. The National Society will be able to capture(create a new record)for the current GWSI mapping and the ability to save the record.
   4. The WASH team at the secretariat will have the ability to view and validate(manually) the input from the countries
   5. The WASH team at the secretariat will have access to a dashboard that provides an overall view on what the results look like
   6. The WASH Team will have the ability to export data into a .pdf format
2. What are the priorities associated with each task?
   1. Setting up the Secretariat and National Society users with the appropriate system access.
   2. Providing a portal that National Societies can use to capture the GWSI mapping data.
   3. A reporting dashboard displaying the metrics associated with the GWSI mapping process
3. What are the benefit, cost, penalty and risk associated with each system feature?
   1. Appropriate access ensures that there is no unnecessary administration
   2. The portal will reduce the manual actions, multiple emails and double sometimes triple reporting
   3. The dashboard will give the WASH team at the secretariat better overview and as close to real-time reporting capability.
4. What is the sequence of user actions and system responses as the user performs a task using the system?
   1. National Society logs into Salesforce Community
   2. They first review their previous mapping
   3. National Society creates a new record and captures the current reporting period
   4. National Society saves the record
   5. Completed mappings are flagged (email, workflow etc.) to the WASH team at the secretariat
   6. The mappings are manually verified for correctness and completeness
   7. If approved a message is sent to the National Society confirming receipt.
   8. The WASH team at secretariat can view a dashboard which displays all the approved mappings
   9. Another dashboard will display the total number served by Water, Sanitation and Hygiene.
   10. The local countries will also have access to a simply dashboard showing what their individual country has achieved.
5. What are the reports to be provided by the application?
   1. See above
6. What is the frequency of each report?
   1. A dashboard will need to be created once and continually refreshed (annual)
7. Is the report required for a specific period (i.e. from date1 to date2)? From last mapping (early 2014) to next mapping 2017 and thereafter annually in January/February so data is ready for World Water Day March 22nd each year.
8. Are there standard headers and footers, company logo etc. which should be present on every report?
   1. Yes standard IFRC and where appropriate donor/partner logo’s and NS logos.
9. Are there any specific requirements for printing the report (e.g. Paper size, printer type, margins)
   1. A4 standard brochure size (4 to 6 pages)
10. Does the report need to be downloaded as a file? (e.g. PDF, Excel, HTML, CSV)
    1. Yes, PDF

## Product use case list

The use case diagram is a graphical way of summarizing all the use cases relevant to the product. If you have a large number of use cases, we find 15-20, is around the limit, then it is better to list the use cases and model each one individually. For each use case on the list you should have: use case number, user/actor name, use case description and use case fit criterion. Also if you have built a use case description and/or any scenario models for this use case then this list can point to them.

Use Case 8

* User/actor name
* Truck Depot Engineer
* Pre-condition
* Post-Condition
* Business Rule
* Description
* Produce road de-icing schedule
* Fit Criterion
* Sensor readings shall be used to prepare a schedule for the de-icing trucks.

Use Case Scenarios (includes exceptions)The description for this use case describes the normal way that it operates. Scenario models 8.1, 8.2, 8.3 illustrate exception cases for this use case.

Each of the individual requirements that relates to this use case will contribute to meeting the fit criterion of the use case. Each individual requirement will also have its own detailed fit criterion.

# Functional and Data Requirements

## Functional Requirements.

TBD

The system should emulate the current GWSI mapping spreadsheet and allow for simple data entry and not allow text where a number is required and vice versa, however extra data fields will be added for broadened data and information collection.

## Data requirements.

TBD

Initially we would create a custom object to house the GWSI mapping data and would expand the data model as the solution develops.

The development team will need to discuss any changes in the data model with the WASH team at the secretariat.

# Look and Feel Requirements

## The User Interface

The user interface will be developed using [Salesforce Lightning](https://developer.salesforce.com/lightning) and will endeavor to follow the IFRC standards when it comes to look and feel.

The development team will need to work closely with the WASH Team to ensure that the user interface represents the IFRC and the GWSI program.

# Usability and Humanity Requirements

## Ease of use.

The [Salesforce](https://www.salesforce.com/products/what-is-salesforce/) solution is based on Cloud technology and will be available to users 365 days a year.

The solution can be accessed by any internet connected device.

## Personalization and internationalization requirements

Initially the portal will be released in English.

Future releases will endeavor to support French and Spanish

## Ease of learning.

The solution will endeavor to be a simple as working in excel today but with added collaboration capabilities

## Accessibility requirements.

TBD

## Error Processing requirements

Error handling that cannot be fixed by the WASH team at the secretariat will supported by Salesforce and the development team.

# Maintainability and Support Requirements

## Maintenance requirements

As this is a cloud solution any maintenance is handled by Salesforce. Salesforce has 3 release cycles per year.

## Supportability requirements

TBC

## Installation requirements

The solution is cloud based and has no installation requirements, all the user needs internet access and browser to access the portal.

# Security Requirements

## Access requirements

Only trusted individuals from the National Societies and Partner National Societies will be allowed to access the portal

## Integrity requirements

TBD

Once the mapping is submitted the user will not be allowed to edit the record unless the WASH team at the secretariat approves it. This also applies to editing historic data.

## Privacy requirements

TBD

NS’s will need to agree at some point before any data or information is put into the public domain.

# Open Issues

## Issues that have been raised and do not yet have a conclusion.

The following questions could help in gathering these requirements:

1. Which are the requirements which are yet to be determined?
2. Which parts of requirements are volatile and liable to change?

# New Problems

## Potential problems with respect to current environment

None currently identified

## Potential effects on existing installed systems

No impact

# Tasks

## What steps have to be taken to deliver the system?

TBC by Development Team

## Development phases

TBC by Development Team

# User Documentation and Training

## The plan for building the user documentation.

* TBD

# Annexures

## Glossary

## Use Case Diagrams and Use Case Specifications

## Standards

## Input and Output Formats

## Supporting Documents (Meeting Notes, Manuals etc.)

## Interview Details

## IFRC - Website Application Branding and Design Guidelines

Please refer to the following document that you have to attach to this document:  
Website Application Branding and Design Guidelines v1.3.doc

## IFRC – Available connectivity per location

Please refer to the following document that you have to attach to this document:  
?under construction? V?.?.doc

## Authorizing Signatures

Prepared By: Prepared By:

Name/Date Name/Date

Title Title

Department Department

Approved By: Approved By:

Name/Date Name/Date

Title Title

Department Department

Approved By: Approved By:

Name/Date Name/Date

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