

Business Requirements and Technical Design

Indiana State Department of Agriculture (ISDA) Grants Salesforce Implementation

DOCUMENT MAINTENANCE LOG

VERSION	DATE	RESOURCE	PURPOSE
1.0	12/16/19	Sherry Inman	Initial Document
1.1	12/20/19	Sherry Inman	Adding Approvals
1.2	1/22/20	Sherry Inman	Update Section R-4.0, R-5.1.2
1.3	1/29/20	Sherry Inman	Update Section 1.3.4.1 Add Approvals

RESOURCES

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NAMING CONVENTIONS AND DEFINITIONS

Application	The website created for Indiana State Department of Agriculture (ISDA) Grants
Client, You	Lt. Governor's Office – Indiana State Department of Agriculture (ISDA)
Us, We, Company	Revelant Technologies, Afit Staffing

DOCUMENT PURPOSE

The purpose of this document is to describe the business requirements necessary for the implementation of the Application. All business requirements must be reflected in a version of this document in order to be included in the final implementation. This document also details the technical design which will include each of the business requirements.

PROJECT OBJECTIVE

The project will allow Indiana State Department of Agriculture (ISDA) to run a website for the purpose of gathering information and reviews. The project will allow reports to be generated from the data gathered.

PROJECT DEFINITION

Indiana State Department of Agriculture (ISDA) identified areas that would have the greatest return and still be reasonable in time to implement within the given time frame, resulting in the Minimum Viable Product (MVP). The features to be created or modified for the MVP include:

- Incorporate a robust, yet simple-to-use user interface.
- Allow for user-entered information.
- Allow for data integration into the existing Grants Administration system.

The remaining features to be created or modified as time allows include:

- Provide email notifications to the users at pre-determined stages of the data retrieval process.
- Provide notifications to specified internal users that data has been entered and reporting is available.

The project will be considered complete when the items required for the MVP are completed. The remaining features can, but do not have to be completed during the specified Sprint schedule. Any outstanding features not completed during this Sprint schedule will be added to a future Sprint as agreed upon by Indiana State Department of Agriculture (ISDA), Revelant Technologies, and Afit Staffing.

CURRENT METHODS

Toward the end of the fiscal year there is often grant money that was not awarded. The grant money cannot roll into the following fiscal year. In an effort to distribute the remaining amount of grant money, Indiana State Department of Agriculture (ISDA) contacts individuals that will be selected to apply the grant money. Indiana State Department of Agriculture (ISDA) emails the application form to the Preselected Applicants, who fill out and return the application. The applications are received by Indiana State Department of Agriculture (ISDA) in early April/end of May, which is the end of their fiscal year. Indiana State Department of Agriculture then reviews and approves the applications. The application information then moves to Grant Administration to complete the grant award process. Indiana State Department of Agriculture (ISDA) then forwards a form to the Approved Applicants that contains the report information needed. The Approved Applicants fill out the report and return the information to Indiana State Department of Agriculture (ISDA).



ISDA grant
application 4.5.2019.d



ISDA Status Report
Template Round-Up 2

FUNCTIONAL REQUIREMENTS

Business Requirements

R-1.0 Application Access

- R-1.1 The Application shall be usable by all web Registered Users that have a username and password.
- R-1.2 The up-time availability of the Application is solely the responsibility of Indiana State Department of Agriculture (ISDA)'s hosting provider, not Revelant Technologies or Afit Staffing.
- R-1.3 A four-tiered security method will be implemented as follows:
 - R-1.3.1 Tier I: System Administrator
 - 1.3.1.1 The System Administrator will have access to do all updates and modifications to the Application as the content management system allows.
 - R-1.3.2 Tier II: ISDA Executive
 - 1.3.2.1 ISDA Executive is an elevated user, designated only by a System Administrator. The ISDA Executive will be able to review reports and dashboards, and view and update all information. The ISDA Executive has access to additional confidential information that the Program Manager does not have access to.

R-1.3.3 Tier II: Program Manager

1.3.3.1 The Program Manager is an elevated user, designated only by a System Administrator. The Program Manager will be able to add or modify questions and instructions. A Program Manager must be a Registered User.

R-1.3.4 Tier III: Registered User

1.3.4.1 The Registered User is any person who has signed up for an account through Indiana State Department of Agriculture (ISDA). The Registered User shall have access to a personal and customized page detailing their profile information. The Registered User will be able to browse all non-restricted areas of the site.

R-1.4 Each Registered User will have a personalized profile and greeting on the Landing Page once they successfully log into the Application.

R-1.4.1 The profile page will include:

1.4.1.1 First Name

1.4.1.2 Last Name

1.4.1.3 Email

R-1.4.2 Upon registering, the profile page will be created, once the email address has been validated. The Registered User will be able to update their Name, Email, Address, and Phone.

R-1.5 If a Registered User cannot remember either their login name or password, they will have an opportunity to retrieve or reset the information after validation of their email address. If the Registered User cannot remember the currently registered email address, they must email Indiana State Department of Agriculture (ISDA) for support.

R-2.0 Landing Page

R-2.1 The Landing Page is the home page for the Application

R-2.2 The Landing Page will contain:

R-2.2.1 The logo for Indiana State Department of Agriculture (ISDA)

R-2.2.2 A way for users to login or register

R-2.3 User Login

R-2.3.1 Users will click on a login link which will open a page where credentials (username and password) can be entered.

R-2.3.2 Upon successful login, the user will be redirected back to the Landing Page.

R-2.3.3 If a login attempt is unsuccessful, the user will have unlimited opportunities to enter a correct username/password combination. The account will not be locked due to multiple unsuccessful login attempts.

R-2.4 User Registration

R-2.4.1 Users can become Registered Users by clicking on the link to register.

R-2.4.2 To become a Registered User, they must enter their first and last names, Community name, and a valid, conformable email address. Other information can be collected, as determined by Indiana State Department of Agriculture (ISDA) but will not be required.

R-2.4.3 Once a user has successfully submitted the registration form, they will receive an email with a link. Upon clicking the link, their account will be activated, a personal profile page created (to which they will be automatically redirected), and a confirmation email sent to them.

R-3.0 Questionnaire Pages

R-3.1 ISDA Grant Application

R-3.1.1 The ISDA Grant Application will duplicate the existing information on the current document with the following exceptions:

3.1.1.1 Section I Applicant Information

3.1.1.1.1 Remove question, "Federal EIN: DUNS:".

3.1.1.1.2 Remove question, "Event or Project (if different from Org) Location:".

3.1.1.2 Section II Proposal Information

Remove entire Section.

3.1.1.3 Section III Project Summary/Scope of Work

3.1.1.3.1 Keep the first question, "Summary – Describe the project/event include the impact or purpose or issue? The description should be sufficient length to provide a clear picture of the project.

3.1.1.3.2 Remove question, "What is the area of need this project or event will address?"

3.1.1.4 Section IV Objectives, Goals, and Milestones

3.1.1.4.1 Section A

Keep as is.

3.1.1.4.2 Section B

3.1.1.4.2.1 Keep the first question in Section B, “List and explain what objectives will be accomplished in order to reach the goal”.

3.1.1.4.2.2 Remove the last question, “How will the project encourage the development of the Indiana livestock Industry?”

3.1.1.4.3 Section C

Remove entire section.

3.1.1.5 Section V Budget

Keep as is.

3.1.1.6 Section VI Recognition

Remove entire section.

3.1.1.7 Section VII Affirmation

Keep as is.

R-3.1.2 All remaining questions and fields not listed in R-3.1.2 should duplicate current state.

R-3.1.3 The fields and field attributes for the Grant Application page are listed in the table located in R-3.1.4. The same fields will be displayed for each user’s Landing Page.

R-3.1.4 TABLE



ISDA Grant App
Fields and Attribute

R-3.2 ISDA Status Report

R-3.2.1 Question 2. - Remove second question, “If yes, did you include all receipts and proper documentation?”

R-3.2.2 Question 3. – Remove, “For Federal Grands SCBG ONLY. Did your program earn income? If so, how much?”

R-3.2.3 Question 5 – Remove question, “Best month for a site visit?”

R-3.2.4 All remaining information should duplicate current state.

R-3.2.5 The fields and field attributes for the Status Report page are listed in the table located in R-3.2.6. The same fields will be displayed for each user’s Landing Page.

R-3.2.6 TABLE



R-4.0 Grant Administration

R-4.1 Data collected from eight (8) fields will feed into the existing Grant Administration system. The fields to be integrated with the existing Grants Administration system are listed in the table located in R-4.2.

R-4.2 TABLE



TECHNICAL DESIGN

Business Processing/Rule Design

R-5.0 Email Notifications

R-5.1 Initial Notification Email to Selected Preliminary Applicants

R-5.1.1 The Initial Notification Email will notify applicants Indiana State Department of Agriculture (ISDA) is open for accepting application. The Initial Notification Email will go out to a preselected group of organizations and/or individuals. The text for the Initial Notification Email can be found in R-5.1.2.

R-5.1.2 TEXT



R-6.0 Internal User Notifications

R-6.1 Application Submitted

Notifications will be sent to the Program Managers and ISDA Executives each time an initial Application is successfully Submitted. The Application will qualify as successfully Submitted once all required fields are populated, and all field attribute validation requirements have been met. The field attribute validation requirements are documented in the table located in R-3.1.4.

R-6.2 Status Report Submitted

Notifications will be sent to the Program Managers each time an Status Report is successfully Submitted. The Proposal will qualify as successfully Submitted once all required fields are populated, and all field attribute validation requirements have been met. The field attribute validation requirements are documented in the table located in R-3.2.6.

R-7.0 Reports

None needed

User Interface Requirements

R-8.0 User Interface

R-8.1 The User Interface (UI) will contain intuitive navigation functions.

R-8.2 The UI will contain user registration, user login, and user profile pages.

R-8.3 The UI will contain methods to retrieve and reset passwords.

R-8.4 The UI will present all information clearly, in a professional format.

Quality of Service Requirements

R-9.0 Volume, Capacity, Performance

R-9.1 The Application will be designed to handle numerous simultaneous requests and database transactions. The load handling capability of the web server is the responsibility of the hosting provider and Indiana State Department of Agriculture (ISDA).

System Interface Requirements

R-10.0 System Interface

R-10.1 None noted.

Operational Requirements

R-11.0 Schedule

R-11.1 The project schedule will be four sprints that last two weeks each. This scheduled timeframe shall be adjusted only if agreed to by the Revelant Technologies, Afit Staffing and Indiana State Department of Agriculture (ISDA).

R-11.1.1 Sprint 1 – Requirements. Discovery and requirements documentation will occur during this two-week sprint.

R-11.1.2 Sprint 2 – Configuration. Development and configuration of the Application will occur during this two-week sprint.

R-11.1.3 Sprint 3 – UAT. User testing, development and configuration rework, and user approval will occur during this two-week sprint.

R-11.1.4 Sprint 4 – Training and Launch. User development of training documentation and Application launch will occur during this two-week sprint.

R-12.0 Support/Help Desk

R-12.1 Indiana State Department of Agriculture (ISDA) will handle all non-technical support issues.

R-12.2 Revelant Technologies will handle all technical issues related to Application functionality.

R-12.3 Indiana State Department of Agriculture (ISDA)'s hosting provider will handle all website technical issues.

R-12.4 Revelant Technologies will determine, at no cost, which party is responsible for the issue at hand.

CONSTRAINTS AND ASSUMPTIONS

Assumptions

R-13.0 Scope

R-13.1 If the project scope deviates from the originally approved version, all scope differences will be reflected in a Scope Change Document. This document will also be revised. The change in scope must be approved by all parties in order to be included in the implemented product. Any change in scope may increase the project complete date. Indiana State Department of Agriculture (ISDA) may also incur additional charges.

R-14.0 Resource Availability

R-14.1 Indiana State Department of Agriculture (ISDA) will be readily available for questions.

Risks

No known risks at this time.

Open Issues

No known issues at this time.

APPROVALS

The document has been approved as the official Business Requirements and Technical Design Document for the Indiana State Department of Agriculture (ISDA) Grants Implementation to Salesforce and accurately reflects the current understanding of business requirements. Following approval of this document, requirement changes will be governed by the project's change management process, including impact analysis, appropriate reviews and approvals.

Approver Name	Project Role	Signature	Date
Leah Harmon	Primary Business Contact		12/20/2019
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