**Document 1 – Business Case Document Template**

**Why is the project initiated-**

1. Currently we do not have any provision to visualize all the features of the project.
2. Analysts have no platform to compare their Actuals vs Estimate figures, Audit Feedback Reports, Coverage Summary, also they cannot upload their Blogs, research related material, News related to their coverage across the globe.
3. Analysts can better track, update, visualize and update important documents under one roof. This is the main purpose of this project to ease the analyst in their daily work.
4. To showcase all this information, features, manage their summary, coverage details, and need of a Dashboard this project is initiated.

**What are the current problems?**

1. Currently we do not have any provision to visualize all the features of the project.
2. Analysts must rely on word files to save all their important work.
3. They can’t raise Issues faced by them regarding the Research Application on a common channel so that others can also check on it.
4. They can’t see their Productivity Report so that they can improvise on that. Boosts their performance etc.
5. Also, they can’t post a collaborative document regarding a company so that others can also read that.
6. They can’t post a blog which can be useful for all others, they can’t post newsletter blogs, price triggers blogs
7. They can’t provide feedback to each other on each other’s work.
8. So, these are all the current problems faced.

**With this project how many problems could be solved?**

1. Analysts can be able to perform all the analysis work through dashboard
2. They can be able to post the Actual VS Estimates blog automated via this feature.
3. Auditors can be able to audit their models and post the Audit Observations Blogs through which analyst can reply, and Ratings can be finalized.
4. Stock Stories, Newsletters can be published
5. Coverage initiation blogs can be published.
6. Industry related knowledge can be shared with all the analysts via collaborative posts.
7. Analyze their Performance and improvise over it.
8. Get details about their coverage, country wise and industry wise.
9. All the details related to companies, like earning release dates, news, major events can be seen on the dashboard.
10. They can raise issues faced in their files by tagging developers and BA, so that it gets resolved quickly.

**➢ What are the resources required?**

Resources required are Front End Developer (UI/UX), Software Developer, Testers, BA, Project Manager, Database Administrator, Support Team.

**➢ How much organizational change is required to adopt this technology?**

No Organizational change is required.

**➢ Time frame to recover ROI?**🡪 Within a two years ROI will be recovered.

**➢ How to identify Stakeholders?**

* **By** **Creating a stakeholder list**

I will Make a list of stakeholders and identify their key attributes.

* **Also, I will Use a stakeholder map**

Place stakeholder attributes on a chart, compare their positions, and analyse them based on their attributes. Stakeholder maps are often used at the beginning of a project to identify who should be involved and when.

* **Conduct a stakeholder analysis**

This helps you understand who is interested in your business and what their interests are. It can also help you identify key decision makers and how they might respond to your proposal.

* **Define project scope and objectives**

The project's scope and objectives can help you identify the primary stakeholders, who are directly involved in or affected by the project.

**Document 2: BA Strategy**

**First, I will prepare a detailed project plan outlining tasks and timelines.**

1. Project Definition Document

This document will include Details about the project's goals, benefits, constraints, risks, stakeholders, and budgets. Communicates the essence of a project. Provide a shared understanding of the project. Authorizes the project Acts as a contract, holding all participants accountable for their roles and responsibilities. Defines the authority of the project manager.

As a Business Analyst I will conduct Workshops sessions for brainstorming ideas and Interviews to gather insights from stakeholders which will give me a clear idea about the requirements.

I will use a stakeholder map and stakeholder List to identify the key stakeholders like internal or external, such as clients, users, sponsors, developers, testers, and regulators.   
Use Stakeholder Map, Matrices to categorize Stakeholder based on their interest, power and impact. I will use a RACI Matrix that helps define and assign roles and responsibilities for a project.  
I will also Consider the Environment because the internal and external environment can influence the project, so it's important to link stakeholder analysis with an analysis of the environment.  
then I will **Consider customer expectations** byCapture customer expectations in a requirements analysis and prioritize them.

1. **Plan communication**

Create a communication plan, choose communication methods, and execute and monitor communication.

1. **Manage communication issues**

Manage any issues that arise in communication.   
The documents that I will prepare in this are Project Statement/Project Definition Document,  
Requirement Specification, Design Document, Test Plan.  
To take sign off from stakeholders on documents -  
I will follow these steps can include the following steps:

* **Define sign off criteria**: Set the conditions that must be met for the document to be considered complete.
* **Prepare the document**: Create and format the document for electronic signature.
* **Identify signatories**: Determine who needs to sign the document.
* **Review and approve**: Check the document for accuracy and completeness.
* **Electronically sign**: Have the signatories affix their electronic signatures to the document.
* **Verify**: Ensure that all required signatures have been obtained.
* **Archive**: Store the signed document securely for future reference

**I will get Approvals from Clients in the following way** –

* **Set Expectations:** I will set a clear expectations and milestones about the project. I will see what’s important to each of the internal and external client.
* **Use collaboration tools**: Provide a centralized platform for sharing, commenting, and discussing documents.
* **Review and evaluate:** Assess predefined criteria and identify potential bottlenecks.
* **Explain your work:** Thoroughly explain why you did what you did.
* **Implement feedback:** Implement feedback and streamline the review and approval process

I will Communicate through Skype calls followed by an E-Mail with all the Clients, Stakeholders.  
I will entertain Change Requests in below way -

* **Identify and analyse changes**: Identify the source and scope of the change request. Changes can come from stakeholders, customers, vendors, or team members.
* **Evaluate the change**: Assess the impact of the change against the baseline.
* **Get approval**: Will Obtain approval for the change request from the appropriate authority. This could be the project sponsor, the change control board, or the stakeholders.
* **Implement and monitor changes**: Plan and implement the approved changes and monitor them.
* **Learn from changes**: Learn from the changes and balance them with stability.

I will Update the progress of the Project to Stakeholder via Mails or Project Tracker Excel.  
To take a sign-off on a User Acceptance Testing (UAT) client project acceptance form, I will:

* **Prepare**

Gather all the necessary information about the user requirements, testing plan, and expected results.

* **Create a sign-off template**

Use a spreadsheet program to design a UAT sign-off template. Include fields for the task ID, task name, assigned to, status, categories, start date, end date, feedback, and approved by.

* **Conduct UAT**

Demonstrate that the product meets the agreed scope and criteria, and that all feedback and change requests have been resolved by mentioning various test case scenario’s which I tested.

* **Ask for sign-off**

Have customers or users sign off on the product quality, functionality, and usability.

* **Review and update**

Review the results and make any necessary changes to the document.   
After these steps the product will be ready for deployment.

**Document 3- Functional Specifications**

|  |  |
| --- | --- |
| Project Name | GlobeFlex Dashboard Project |
| Customer Name | GlobeFlex research India Pvt Ltd |
| Project Version | Version 1.0.1 |
| Project Sponsor | Mrs. Vijay Kumar Malhotra |
| Project Manager | Mr. Sameer Singh |
| Project Initiation Date | 21-11-2024 |

**Functional Requirement specifications:**

|  |  |  |  |
| --- | --- | --- | --- |
| Req ID | Req Name | Req Description | Priority |
| FR001 | Login | Analysts must be able to Login through Username, Password along with One time password through Authenticator | 10 |
| FR002 | Analyst Summary | After Login Analyst should be to navigate to Analyst summary page via Menu. In that page, can view his Coverage companies whichever he is covering, Task section, News/Event Section. | 9 |
| FR003 | Company Summary | In this Page, All the Details regarding a company can be seen like company Profile, Price Charts & Company Events, Financials, Research Content, Analysts Models etc. | 8 |
| FR004 | Productivity Report | Here we get the list of all companies its earning release date, country, period, Scenario, Shared by, Status etc. details. This help Managers to get an idea about the analyst productivity. | 7 |
| FR005 | Audit Report | Here we get a list of companies audited, Audit observation raised by auditors for each file and analyst feedback on that along with the Audit Ratings for a particular scenario. | 7 |
| FR006 | TAT Report | The turnaround time Report is the calculation of how many days required for the Analyst to implement earning release data into their model. Useful for Managers should be able to see which analyst is lagging, which is automatically calculated based on release date and implemented date | 6 |
| FR007 | Stock Stories | Analysts should be able to post stock stories on the Dashboard | 5 |
| FR008 | Coverage Assignment | Managers should be able to see which company lies under which analyst and who is the Global Lead. | 5 |
| FR009 | Coverage Report | This provides a holistic view of all the Active companies, countries wise coverage %, proposed addition, reduction of companies etc. details are provided here. | 4 |
| FR010 | Accuracy Report | This List provides how much revenue numbers are deviated from the Actual numbers, used by analysts, managers to get the idea behind assumptions. | 2 |
| FR011 | Document Manager | All the collaborative documents, company specific documents such as company reports, translated reports can be uploaded here which are used by analyst; managers | 9 |
| FR012 | Software Issues | Analysts can be able to raise Issues here. | 8 |
| FR013 | Notifications | Analysts and managers can be notified of all the changes made which should show a symbol here in the notification bar. | 9 |
| FR014 | Time Management | Analysts and managers can be able to see their office timings hours completed, can be used for tracking purpose. | 1 |

**Document 4- Requirement Traceability Matrix**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Req ID** | **Req.**  **Name** | **Req.**  **Description** | **Design** | **D1** | **T1** | **D2** | **T2** | **UAT** |
| FR001 | Login | Analysts must be able to Login through Username, Password along with One time password through Authenticator | Yes | No | No | Yes | Yes | Yes |
| FR002 | Analyst Summary | After Login Analyst should be to navigate to Analyst summary page via Menu. In that page, can view his Coverage companies whichever he is covering, Task section, News/Event Section. | Yes | No | No | Yes | Yes | Yes |
| FR003 | Company Summary | In this Page, All the Details regarding a company can be seen like company Profile, Price Charts & Company Events, Financials, Research Content, Analysts Models etc. | Yes | No | No | Yes | Yes | Yes |
| FR004 | Productivity Report | Here we get the list of all companies its earning release date, country, period, Scenario, Shared by, Status etc. details. This help Managers to get an idea about the analyst productivity. | Yes | No | No | Yes | Yes | Yes |
| FR005 | Audit Report | Here we get a list of companies audited, Audit observation raised by auditors for each file and analyst feedback on that along with the Audit Ratings for a particular scenario. | Yes | No | No | Yes | Yes | Yes |
| FR006 | TAT Report | The turnaround time Report is the calculation of how many days required for the Analyst to implement earning release data into their model. Useful for Managers should be able to see which analyst is lagging, which is automatically calculated based on release date and implemented date | Yes | No | No | Yes | Yes | Yes |
| FR007 | Stock Stories | Analysts should be able to post stock stories on the Dashboard | Yes | No | No | Yes | Yes | Yes |
| FR008 | Coverage Assignment | Managers should be able to see which company lies under which analyst and who is the Global Lead. | Yes | No | No | Yes | Yes | Yes |
| FR009 | Coverage Report | This provides a holistic view of all the Active companies, countries wise coverage %, proposed addition, reduction of companies etc. details are provided here. | Yes | No | No | Yes | Yes | Yes |
| FR010 | Accuracy Report | This List provides how much revenue numbers are deviated from the Actual numbers, used by analysts, managers to get the idea behind assumptions. | Yes | No | No | Yes | Yes | Yes |
| FR011 | Document Manager | All the collaborative documents, company specific documents such as company reports, translated reports can be uploaded here which are used by analyst; managers | Yes | No | No | Yes | Yes | Yes |
| FR012 | Software Issues | Analysts can be able to raise Issues here. | Yes | No | No | Yes | Yes | Yes |
| FR013 | Notifications | Analysts and managers can be notified of all the changes made which should show a symbol here in the notification bar. |  |  |  |  |  |  |
| FR014 | Time Management | Analysts and managers can be able to see their office timings hours completed, can be used for tracking purpose. | Yes | No | No | Yes | Yes | Yes |

**BRD – [Business Requirement Document]**

**<GRI Dashboard Project>**

**<DBDP\_24112024>**

**<DBDP\_V1.0.1>**

**<Parimal Waghmare>**

* 1. **Document Revisions**

|  |  |  |
| --- | --- | --- |
| **DATE** | **Version Number** | **Document Charges** |
| **04-11-2024** | **1.0** | **Initial Draft** |
| **14-11-2024** | **2.0** | **Changes Based on Feedback from Vijay Kumar** |
| **24-11-2024** | **3.0** | **Changes Based on Feedback from Sameer Singh** |

* 1. **Approvals**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Role** | **Name** | **Title** | **Signature** | **Date** |
| Project Sponsor | Mrs. Vijay Kumar Malhotra | Mr. |  | 22-11-2024 |
| Business Owner | Parimal Waghmare | Mr. |  | 22-11-2024 |
| Project Manager | Sameer Singh | Mr. |  | 16-11-2024 |
| System Architect | Rahul Roy | Mr. |  | 16-11-2024 |
| Development Lead | Neeraj Kumar | Mr. |  | 18-11-2024 |
| User Experience Lead | Amit Kumar | Mr. |  | 18-11-2024 |
| Quality Lead | Unmesh Gaikwad | Mr. |  | 20-11-2024 |
| Content Lead | Somesh Gupta | Mr. |  | 20-11-2024 |

**3. RACI MATRIX**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Name** | **Position** | **\*** | **R** | **A** | **S** | **C** | **I** |
| Parimal Waghmare | Business Analyst |  | \* |  |  |  |  |
| Sameer Singh | Project Manager |  |  | \* |  |  |  |
| Rahul Roy | System Architect |  |  | \* |  | \* |  |
| Neeraj Kumar | Development Lead |  |  | \* | \* |  |  |
| Unmesh Gaikwad | Quality Lead |  |  |  |  | \* | \* |
| Somesh Gupta | Content Lead |  |  |  |  | \* | \* |

**4. Introduction**

* 1. **Business Goals**

The main business of our investment company is to hold and manage securities for investment purposes, but they typically offer investors a variety of funds and investment services, which include portfolio management, recordkeeping, custodial, legal, accounting, and tax management services.

* 1. **Business Objectives**

The primary objective of business research is to support firms' decision-making processes. It aims to provide facts grounded in data rather than assumptions or guesswork.

To provide an IT solution for:

Dashboard where all the research related work can be done

Develop various pages for areas such as Company Summary, Coverage Report, Audit Report, Blogs ,News Articles, Software Issues, Accuracy Report, etc.

* 1. **Business Rules**
     + - * Firms must establish policies and procedures to identify and manage conflicts of interest. These policies should separate research from investment banking and prohibit promises of favourable research.
         * Analysts must be fair and objective with all users and ensure that research is distributed fairly to all users.
         * Employees must obtain prior permission to engage in any outside business activity or interest.
         * Firms must disclose investment banking and other material conflicts of interest.
  2. **Background**

In the beginning we did not have any such tools, software, or dedicated platform where we perform, collect, analyze, visualize, save all our research related work and it was becoming difficult to maintain such huge data at various places.  
So we inclined towards solving this problem and after lots of R&D we can to a conclusion that we should develop a Dashboard to make things better and more clearer.  
So our Manager proposed on developing Research Dashboard where all the different areas of research will included.  
The expected benefits will be on a larger scale that we will now have a dedicated platform rather than scattered material.

Productivity will increase.  
Things will be sorted at a much more pace.  
Analysis will become easier  
We can now be able to visualize data  
Issues related to models can be raised and tracked.  
Research material will now be managed and sorted.

* 1. **Project Objectives**

Project dashboards support a culture of continuous improvement by enabling teams to monitor performance metrics and identify areas for enhancement. Tracking critical indicators over time allows project teams to spot trends, analyze root causes, and implement corrective actions.

* 1. **Project Scope** 
     1. **In Scope Functionality**
* Coverage Report page
* Company Details page
* Audit Report Page
* Research Contents
* Productivity Report
* TAT Report
* Analyst Summary
* Time Management
* Software Issues
* Accuracy Report
* Task management
  + 1. **Out Scope Functionality**
* Analyst Based Customization in the Dashboard.

1. **Assumption**  
   5.1 Analysts must know how a basic dashboard works.

5.2 Analysts should report any incorrect information/data.

5.3 Analysts know about all the features of the dashboard.

5.4 Dashboards should be easy to understand and accept quickly. They should be designed to build situational awareness, which is the ability to understand the current state of a system and project its future.  
5.5 Dashboards should be consistent with chart scales, colours, and dimension ordering.

5.6 Dashboards should be careful when encoding quantitative data. For example, it's easier to read "3.4 million" than 3,400,000.

5.7 Dashboards should remove unnecessary data labels from charts.

5.8 Dashboards should be clear, interactive, and user-friendly. They should use data visualizations to help users identify patterns and trends and find opportunities for improvement.

* 1. If the Offline Script is utilized for the data source, the data should be synchronized with CIQ to achieve a reliable result. The ultimate data source is Capital IQ; thus, the reporting should match CIQ.

5.10 Updates to existing reporting and systems are being worked separately under the following JIRA tickets:

* + 1. INS-1532 – Macro Data Status Updates
       1. This request was completed on the 10.6.1.0 release.
    2. INS-1540 – Coverage Reports, Company Search tabs.
       1. This request was completed on the 10.6.1.0 release.
    3. INS-2036 – Audit Reports, Issues raised by analysts’ notifications
       1. This request was completed on the 10.7.3.0 release.
  1. The ability to change company details rights has not been given to analysts. They should raise requests for Business Analysts and then they can proceed with the Change Requests.

1. **Constraints**Constraints in a dashboard can refer to limitations that can impact the dashboard's performance, such as:

Connectivity and compatibility: If a dashboard can't connect to a critical business system, the information it provides may be incorrect or outdated.

Lack of real-time anomaly detection: This can prevent proactive incident management.

Over-reliance on historical data: This can lead to missing small incidents that have a negative impact.

Cluttered dashboards: This can lead to false positives.

Lack of intelligent prioritization: This can be a limitation of dashboards.

Constraints can also refer to limiting factors that can impact a project, task, or stakeholder's performance, deadline, or task success. Some examples of project constraints include:

time, cost, scope, quality, resources, and risks.

1. **Risks**

Project risk is the possibility of an event that could negatively impact a project's success. When assessing a project's risk, you can consider the following elements:

* Risk event: What could happen to affect the project?
* Risk timeframe: When is it likely to happen?
* Probability: What are the chances of it happening?
* Impact: What is the expected outcome?
* Factors: What events might trigger the risk event?

**Technological Risks**

Technology risk, also known as information technology risk, is the potential for a technology failure to disrupt a business. It can include:

* Cybersecurity threats, such as malware and ransomware
* Data breaches and loss
* System downtime or failure
* Compliance and regulatory risks
* Technology obsolescence
* Hardware failures
* Software malfunctions
* Data integrity issues

Technology risk can have a significant impact on an organization's operations, reputation, and financial health. To manage technology risk, we can:

* Identify, assess, and prioritize risks
* Develop strategic mitigation and response strategies
* Ensure regulatory compliance
* Align IT performance with business goals
* Conduct a thorough review of all IT systems, processes, and data
* Use a probability tree to map possible risk outcomes and their likelihoods

**Skills Risks**A skill resource risk in a project is the possibility that the project team lacks the skills, knowledge, or expertise to complete the project successfully. This risk can be caused by a few factors, including changes in project scope, unexpected technical challenges, resource availability, and turnover of key project team members.   
We can avoid or mitigate this risk by hiring enough team members of technical team and trained them with all the latest technology required.

**Political Risks**

There is no political risk, regulatory risk, that political decisions, events, or conditions will significantly affect the profitability of a business actor or the expected value of a given economic action. The domestic political environment remains stable**.**

**Business Risks**

Business risk is the possibility that a company's profits will be lowered or that it will fail.   
If the project is cancelled the decisions made on the financials research will be impacted, it will not be accurate.

Analysts will not be able to visualise the graphs, charts, price patterns etc.  
They will have to be depended on excel sheets for Coverage tracking

Manual work will increase, accuracy of the data will be impacted.  
 **Requirement Risks**We should pay attention while identifying the Stakeholders, so that no key stakeholders can be missed out.

We should pay attention towards wrong stakeholders who don’t have the requisite knowledge, skills or authority to deliver, validate and sign off on requirements.

**Business Risks**Internal factors: Managerial decisions, operational inefficiencies, technological disruptions, poor investments, or strategic mistakes

External factors: Economic downturns, regulatory changes, geopolitical events, natural disasters, supply chain disruptions, or changes in consumer preferences

Cyber threats: Privilege escalation, vulnerability exploitation, or phishing

Financial risks: Rising interest rates, debt service obligations, or credit agreements

Businesses can't prevent all setbacks, but they can prepare for them by:

Identifying vulnerabilities: Staying vigilant and flexible, and proactively identifying potential vulnerabilities

Developing risk management strategies: Creating strategies to mitigate potential impacts

Purchasing insurance: Researching and purchasing an insurance plan to protect the business

Researching loans: Researching available loans and taking a loan that is financially viable for the business

Documenting finances: Keeping records organized to lower the risk of fraud or theft

Implementing safeguards: Installing fire alarms, smoke detectors, and sprinkler systems, and holding fire drills and safety training sessions.

1. **Business Process Overview  
   8.1 Requirement:**

The first phase involves gathering requirements from stakeholders and analyzing them to understand the scope and objectives of the project.   
Firstly, all the requirements regarding the dashboard project are gathered from the stakeholders and then the gathered requirements are analysed.   
The goal of the analysis part is to remove incompleteness (an incomplete requirement is one in which some parts of the actual requirements have been omitted) and inconsistencies (an inconsistent requirement is one in which some part of the requirement contradicts some other part).

These analysed requirements are documented in a software requirement specification (SRS) document. SRS document serves as a contract between the development team and stakeholders.   
In future if any dispute arises regarding the requirement, then this SRS Document will act as a contract between the stakeholders and the developers can be settled by examining the SRS document.  
  
**8.2 Design**:  
  
The goal of this phase is to convert the requirements acquired in the SRS into a format that can be coded in a programming language. It includes high-level and detailed design as well as the overall software architecture.

* A Software Design Document (SDD) is used to document all this effort. Here designers develop solutions that meet the requirements. In this stage, designers:
* Create schedules and project milestones.
* Determine the exact deliverables.
* Create designs and/or blueprints for deliverables.
* Deliverables could include software, or they could consist of a physical product. For instance, designers determine the system architecture and use cases for software. For a physical product, they figure out its exact specifications for production.

**8.3 Development:**

In the coding phase software design is translated into source code using any suitable programming language. Thus, each designed module is coded. Design hands off their specifications to developers to build.

To accomplish this, developers:

* Create an implementation plan.
* Collect any data or research needed for the build.
* Assign specific tasks and allocate resources among the team.

**8.4 Integration and System testing:**

The unit testing phase aims to check whether each module is working properly or not.

QA also:

* Writes test cases.
* Documents any bugs and errors to be fixed.
* Tests one aspect at a time.
* Determines which QA metrics to track.
* Covers a variety of use case scenarios and environments.

Integration of different modules is undertaken soon after they have been coded and unit tested. Integration of various modules is carried out incrementally over several steps. During each integration step, previously planned modules are added to the partially integrated system and the resultant system is tested. Finally, after all the modules have been successfully integrated and tested, the full working system is obtained, and system testing is carried out on this.

* **Alpha testing:** Alpha testing is the system testing performed by the development team.
* **Beta testing:** Beta testing is the system testing performed by a friendly set of stakeholders.
* **Acceptance testing:** After the software has been delivered, the stakeholders perform acceptance testing to determine whether to accept the delivered software or reject it.

**8.5 Maintenance**

After the product release, developers might have to squash bugs. Stakeholders let you know of any issues that come up. Then, it's up to the team to address those requests and release newer versions of your product.

As you can see, each stage depends on the one that comes before it. It doesn't allow for much error between or within phases.

For example, if a stakeholder wants to add a requirement when you're in the verification phase, you'll have to re-examine the entirety of your project.

The effort spent on maintenance is 60% of the total effort spent to develop a full software. There are three types of maintenance.

* **Corrective Maintenance:** This type of maintenance is carried out to correct errors that were not discovered during the product development phase.
* **Perfective Maintenance:** This type of maintenance is carried out to enhance the functionalities of the system based on the customer’s request.
* **Adaptive Maintenance:** Adaptive maintenance is usually required for porting the software to work in a new environment such as working on a new computer platform or with a new operating system.

**8.1. Legacy System (AS-IS)**

A legacy system is any outdated computing system, hardware or software that is still in use.   
Legacy systems include computer hardware, software applications, file formats and programming languages. However, not all legacy systems are obsolete technologies. Most legacy systems work even if they are outdated, and enterprises will often continue using legacy systems that are critical to their daily functions and business needs.

Applications, systems and other technologies become legacy IT systems for the following reasons:

* They no longer receive updates, support or maintenance from their software developers or creators.
* They are no longer available for purchase or depend on obsolete technology to run and maintain.
* In the case of hardware such as mainframes, they are no longer able to support an organization's software.
* Repairs take too long compared with new systems.
* Maintenance costs become too excessive to continue.
* They are overexposed to security vulnerabilities and cannot be updated to meet modern cybersecurity standards.
* As of now we have Excel sheets in which we are maintaining all the data and carrying out operations on it.
* Excel Sheets gets corrupted sometimes and data is not being saved, it gets hanged, overloaded due to this data gets vanished.
* This is not the solution we are expecting to overcome this we can make a centralised dashboard.

**8.2. Proposed Recommendations (TO-BE)  
  
  
  
  
Process Flow Diagram:**A diagram of a company

Description automatically generated

* We are developing a Dashboard where all the documents get stored, analysis parts can be shown, visualizations can be seen, and all the other operations are carried out.
* In the Dashboard various Menu/Sections will be there so different operations so that we can separate all these things.
* We can track all the Files under Coverage, Company Details, Feedback, Stock Prices, Accuracy Reports, Audit Feedback, Productivity Reports, Coverage Reports, Company Summary etc.

**10. Business Requirements:**

* 1. Analysts must be able to access the Company Summary Page in which they should be able to see all the Details related to the Company when we enter Company Name, details such as price chart, Scenario Shared Details, Historical Scenario’s, Blogs related to the company etc.
  2. **Analysts Summary Page** – This page must include List of Companies which are under their Coverage, when are their earning releases date, Analysts Tasks section, News/Events section etc.
  3. **Productivity Report** Page which includes all the company details along with Release date, Share Date, Model Analyst Name etc.
  4. **Coverage Assignment** Page contains List of all Companies, who is currently covering the company, who shared last version, who is the Global Lead. Status – Active, In Active etc.
  5. **Coverage Report** – This page contains Summary of Coverage Status History on Chart with time, Count of Files per Month having Status as – Active, Proposed, In Process, Newly Added, Dropped, Also in Universe Coverage section we can see Market Region Group, Market Cap Data, Volume Data etc.
  6. **Audit Report** – which shows all the Audited Company List per Month, Scenario Audited, Auditor Name, Audit Rating per Analyst, Audit Blog Link, etc.
  7. **Analyst Blog** page which contains all the blogs uploaded by the Analyst such as Actual vs Estimates, Audit Blogs, Company Reports, Scenario Revision Blogs, Price Triggers, Stock Story, Industry Newsletters etc.