Build Assist | Backend Application | Epics - User Stories

Target release	
Epic	
Document status	DRAFT
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Designer	
Tech lead	
Technical writers	
QA	

Objective

Technology Stack

Modules	Technology
Business Admin Front-end	PHP
Services	Node

Assumptions

	List Of Assumptions
1	**Phase 1** will consist of Website , Authorization and Tendering Module
2	Project Management Module will be in **Phase 2**
3	Mobile App Development will not be considered for the list of features.
4	After approval of the following features, any change will be considered as a **'Change Request'**

Success metrics

Goal	Metric

Assumptions

Milestones

Styles Used

	Epics
	Phase 1 - User Stories

	Phase 2 - User Stories

Requirements

Title	User Story	Notes
Authorization		
Sign up		*Assumption: Admin is created in the DB and provided the credentials for further login. There is no standard sign up process for the Admin.*
Login	As a product owner, i want admin to login into the admin panel for managing users and client projects	Selecting the login option user has to enter: • Email • Password If the filled data is correct user is navigated to the Users management screen
Logout	As a product owner, i want admin to logout of the application .	If the admin , clicks on the “Logout” button , the user is logged out and navigated to the “Logged Out” page which will contain the following : • A message showing “You have been successfully logged out” • Sign In Option • Get back to Home page link
Consultant Hub		
Invite and Send Profile Form to Consultants	As a product owner, i want the admin to send invite form to the consultant so that they can be listed i the website.	• The admin would click on ‘Invite Consultant' button . On clicking, there would be popup which would ask the user to fill up a valid email address. • On clicking, “Submit” , an email would be sent out to the email address. • A confirmation message would be shown saying “ Invite Sent Successfully” in the admin panel.

Consultant Hub - Profile Form	As a product owner, i want the invited consultant to fill up a form .	When the invited consultant clicks on the link on email, a form would open which needs to be filled up.
		
		The following fields would be present in the form :
		
		1. Consultant Company Name
		    a. Type : Text
		2. Company Logo
		    a. Type : Image
		    b. Size : Cannot be greater than 5 MB.
		3. Phone No
		    a. Type : Number
		4. Facebook Link
		    a. Type : Text
		5. LinkedIn Link
		    a. Type : Text
		6. LinkedIn Link
		    a. Type : Text
		7. Instagram Link
		    a. Type : Text
		8. Website Link
		    a. Type : Text
		9. Pinterest Link
		    a. Type : Text
		10. Whatsapp No
		    a. Type : Text
		11. Company Profile
		    a. Type : Long Text
		12. Add Company Services
		    a. Type : Relation
		    b. Cardinality : 1 to Many
		    c. Fields :
		        i. Service Name (Text)
		        ii. Service Description (Long Text)
		    d. A maximum of 12 services can be added.
		13. Add Engineers
		    a. Type : Relation
		    b. Cardinality : 1 to Many
		    c. Fields
		        i. Engineer Name
		            1. Type : Text
		            2. Mandatory : Yes
		        ii. CV
		            1. Type : File
		            2. Validation : The file must be a pdf and cannot be less than 10 MB.
		            3. Mandatory : No
		        iii. LinkedIn Profile
		            1. Type : Text
		            2. Mandatory : No
		        iv. Facebook Profile
		            1. Type : Text
		            2. Mandatory : No
		        v. Instagram Profile
		            1. Type : Text
		            2. Mandatory : No
		14. Previous Projects
		    a. Type : Image
		    b. Multiple Images can be Uploaded.
		    c. Minimum no of images that can be uploaded : 6
		    d. Maximum Size of Image that can be uploaded = 10 MB
		
		• When the user clicks on Submit, the user would be notified that “Your profile has successfully been submitted. E-Binaa will confirm your participation soon.”
		• If the user clicks on the link again from his mail , he would be shown “Form already submitted”
		• The user cannot save the form a s a draft and come back later to fill up the details.

<table>
<tr><td>Invite and Send Article Form to Consultants</td><td>As a product owner, i want the admin to send article forms to consultants to submit their articles.</td><td>The admin would click on the “Send Article Request” to approved consultants for submitting the articles.

On clicking , a popup is shown which contains the following fields:

1. Article Topic
  a. Type : Text
  b. Mandatory : Yes
2. Article Description
  a. Type: Long Text
  b. Mandatory : Yes
3. Consultant Email Id
  a. Type : Email
  b. Mandatory : Yes
  c. The user must be allowed to insert multiple email ids.
  d. The invited users will be receiving invitation in their respective emails to write article.

As the admin, clicks on submit, a mail is sent to the invitees and a confirmation message saying “Article Request Sent” will be displayed in the admin panel.</td></tr>
<tr><td>Consultant Hub - Article Form</td><td>As a product owner, i want the consultant to be able to write articles using the request link sent by the admin from the admin panel.</td><td>When the consultant clicks on the request link , the user is navigated to ‘ Submit Article’ form which contains the following fields :

1. Article Topic
  a. Type : Text
  b. Auto populated
  c. Editable : No
2. Article Description
  a. Type : Long Text
  b. Auto populated
  c. Editable : No
3. Article Text Editor
  a. Type : Text Editor
    i. The user will be able to add texts and images in the editor.
    ii. The user will be able to change the font style and size of the text if necessary.

The user can save the form as a draft and if revisits the link, he would be able to edit from where he left off.

Once the consultant is confident and clicks on save/submit, the consultant is shown a message “ Article Submitted Successfully”

If the user clicks on the link after submission, the user is show “Article already submitted”.</td></tr>
<tr><td>Send Email Notifications to Invitees on Submission</td><td>As a product owner, i want the system to send email notifications on successfully submitting the article for the desired topic.</td><td>The mail would contain confirmation about article submission along with the following contents :

1. Article Topic
2. Article Description
3. Article Text Editor Content</td></tr>
</table>

<table>
<tr><td>List of Submitted Profile Forms</td><td>As a product owner, i want admin to see the list of consultant profile form submitted in a list view.</td><td>Once the consultant submits the form, a record is shown in this page. The following fields will be displayed.
1. Consultant Company Name
2. Phone No
3. Email Id
4. Status
  a. Values : Submitted , Published
5. Submitted On

There will be three action buttons :
1. View
  a. This would open the details of the submitted form in view mode,
2. Edit
  a. This would open the details of the submitted form in edit mode, where the admin can make necessary changes if necessary.
  b. Once the article is ‘Published’, admin will be able to edit the profile details.
    i. In this case, the updated profile will be published on Website.
3. Publish/Remove
  a. This would publish the Consultant’s profile in the Marketing Website.
  b. There would be validation if all the required fields for publishing is not filled up in the form.
  c. Once the article is ‘Published’, the ‘Publish’ button should switch to ‘Remove’ button.
    i. On Clicking the Remove button, the published profile will be removed from the website.

Once the profile is published or removed, a confirmation push message is shown in the admin panel.</td></tr>
<tr><td>Send Email Invitation Link to Published Consultants</td><td>As a product owner, i want the system to send invitation link to the published consultants to sign up into the system</td><td>• On publishing the consultants profile, the consultant will receive an invitation link.
• The link will redirect the users to the Sign Up page for the consultants.
• In the Sign Up Form , the email id will be auto populated. The rest of the fields , the consultant needs to fill up and then register into the system.</td></tr>
<tr><td>Search and Filter Submitted Profile Forms</td><td>As a product owner, i want admin to search and filter the submitted forms so that they are able to quickly find what they are looking for.</td><td>The admin should be able to search the list of submitted forms by
1. Consultant Company Name
2. Email
3. Phone
4. Submitted On

Admin is also able to filter forms by
1. Submitted Last Week
2. Submitted</td></tr>
<tr><td>View Submitted Profile Forms</td><td>As a product owner, i want the admin to view the forms submitted by consultant.</td><td>The Consultant Form will be displayed in view mode,</td></tr>
<tr><td>Accept Profile to publish on Website</td><td>As a product owner, i want the admin to publish the submitted consultant form in the website.</td><td>The admin can publish the submitted form so that the consultant is listed in the marketing website.</td></tr>
</table>

<table>
<tr><td>List of Submitted Article Forms</td><td>As a product owner, i want admin to view the list of submitted article forms in a list page.</td><td>The admin would be able to view the list of submitted articles in a list page. The following fields would be there :
Article Name
Article Writer
Status<ol type="a">
Values : Submitted , Published
Submit Date
There will be two action buttons :
View<ol type="a">
The user will be able to view the submitted article in read only mode
Edit<ol type="a">
The user will be able to view the submitted article in edit mode and make changes if necessary
Once the article is ‘Published’, admin will be able to edit the article details.<ol type="i">
In this case, the updated article will be published on Website.
Publish/Remove<ol type="a">
This would publish the Consultant’s article in the Marketing Website in the Consultant Hub - Articles section.
Once the article is ‘Published’, the ‘Publish’ button should switch to ‘Remove’ button.<ol type="i">
On Clicking the Remove button, the published profile will be removed from the website.</td></tr>
<tr><td>Search and Filter Submitted Article Forms</td><td>As a product owner, i want the admin to search and filter the list of articles submitted.</td><td>Admin would be able to search through the submitted articles by
Article Name
Admin would be able to filter the list of articles by
Article Writer
Admin would be able to sort the list of projects
Ascending by Submit date
Descending by Submit Date</td></tr>
<tr><td>Accept Article to publish on Website</td><td>As a product owner, i want the admin to publish the articles from the admin panel.</td><td>Admin can click on ‘Publish’ button from the actions menu to publish the article in the Consultant Hub- Articles section in the website.</td></tr>
<tr><td>Users management</td><td></td><td></td></tr>
<tr><td>Review the list of users of the system</td><td>As a product owner, i want admin to review the list of users in the system so that admin would be able to manage them from the back end admin panel.</td><td>Administrator views the list of users in the system - Clients, Contractors and Consultants.
The below parameters are displayed in the table:
User ID
Username
Email
Role
Date when the last updates of the profile have been done
User status: for Contractor - New, Approved, Unapproved, Inactive; for Client - New, Active, Inactive; for Consultant - Active, Inactive
Actions that are applicable to the users in a list: Edit, Approve and Decline (only for Contractors), Archive (additional option for users not using the system for a longtime)</td></tr>
</table>

<table>
<tr><td>Apply the actions to the users</td><td>As a product owner, i want the admin to apply actions to the list of users from the admin panel.</td><td>For Contractor: Edit, Approve, Archive, Decline For Client: Edit, Archive

For Consultant: Edit, Archive

<u>Edition</u>
the edition of the user’s profile. Admin ios able to change the data provided in the profile.
<u>Archive</u>
the option allows to add users to the Archive list so the users become inactive do not have access to the system. Admin is able to Restore the people from the archive list - in this case the access to the system becomes available for the users again.
<u>Approve</u>
the action can be applied only to the ontractor as administrator should approve the Contractor’s application.
<u>Decline</u>
the actions is also for Contractor. If any changes are required for the application the Contractor declines the application and add the comments for the Contractor to be changed in the application. After it the Contractor is able to resubmit the application once again.</td></tr>
<tr><td>Search the list of users</td><td>As a product owner, i want ad,min to search the list of users for quick search.</td><td>Search panel is available for user management. Admin is able to enter the required parameters and see the search results</td></tr>
<tr><td>Filter the list of users</td><td>As a product owner, i want admin to filter the list of users.</td><td>Admin can filter the list of users according to the below parameters:
User role (Client, Contractor, Consultant)
Status (New, Approved, Unapproved,Archived, Active,Declined)</td></tr>
<tr><td>Sort the list of users</td><td>As a product owner, i want admin to sort the list of users.</td><td>The sorting parameters are Username and Last updated</td></tr>
<tr><td>Review the details of the user</td><td>As a product owner, i want admin to review and edit the user information from the admin panel.</td><td>Admin is able to select the user in the list and follow his details screen.

On the details screen the below information is available: For Client:
Personal data (first and last names)
Phone number
Email
Password For Contractor:
Company name
Relationship to the Company - Dropdown list with the predefined list of parameters
Personal data (first and last names)
Phone number
Email
Password
For Contractor admin is able to view the application. When the application is submitted by the Contractor it has New status on the Admin panel so he is able to review it and approve.

For Consultant:
Company Name
Phone number
Email
Password</td></tr>
</table>

Approve and Decline the Contractor application	As a product owner, i want admin to approve or reject the contractor application from the admin panel so that they are able to sign in into the app and access the projects.	Admin is able to approve or decline the Contractor's application after reviewing. If the information is not correct or not enough for improvement the admin selects the parameters from the list that are not correct and leaves the comment for the Contractor.After submission the Contractor receives the comments, the application becomes Declined so he needs to provide corrections and send the application for approval once again.
Tender Management		

Review the list of Clients projects		Project Management is also available for the Admin. He is able to see the list of projects created by the Clients that include the below parameters:
		• Project ID
		  ◦ System Generated
		  ◦ Type : Text
		• Project Name
		  ◦ Type : Text
		• Created By
		  ◦ Type : Text
		• Project status
		  ◦ Type : Dropdown
		• Late Modified Date
		  ◦ Type : Datetime
		  ◦ Format : Date/Month/Year
		Action that can be applied for the Project (Approve, Decline,Archive)

Search the list of projects		Search panel is available for projects management. Admin is able to enter the required parameters and see the search results.
Filter the list of projects		Admin can filter the list of projects according to the below parameters: • Status (New, Approved, Active, Declined,Closed)
Sort the list of projects		The sorting parameters are Username, Project name and Last updated
Review the details of the project		Admin is able to see the details of the selected project that includes the information filled in by the Client during the Project creation and information addition for three stages (Project Info, Project Scope and Project Docs). Admin is able to Approve or Decline the project. If all the required information is filled in correctly - admin provides the approval. If not - decline and add the comments for the Client which parameters should be updated. The Client corrects the data and submits the Project once again
Create stages and Tasks for Projects		• Projects created by Clients needs to be approved by Admin. • Admin can create stages for the projects with status = New, i.e when they have been submitted by the client for approval. • Admin will create stages in the projects (**Create Stage** button) • Or they will import stages-tasks from the template. (**Import** button) • Note : At the beginning there will be no templates during first time project approval. If the user saves stage configuration as template, then '**Import**' button will be enabled.

- Creating Stage will have the following information :
    - **Stage No** : System Generated
    - **Stage Name**
        - Type : Text
    - **Stage Status**
        - Values
            - In Tendering(Before Contract is signed),
            - On Track (After Contract is signed),
            - **In Delay ,**
            - **Completed**
    - **Stage Description**
        - Type : Long Text
    - **Sequence**
        - Type: Number
    - **Maximum Allowed Pullback Stage** –
        - If this is mentioned, the stage cannot be pulled back before this stage using drag and drop feature in the Gannt Chart.
    - **Maximum allowed OMR percentage**
        - Type : Number
    - **Tasks (Type : Relation ,Cardinality (Stage to Tasks) =1 to M)**
        - **Task No** : System Generated
        - **Task Name**
            - Type : Text
            - Mandatory : Yes
        - **Task Status** :
            - Values
                - In Tendering(Before Contract is signed)
                    - This is the Default value
                - On Track (After Contract is signed),
                - **In Delay**
                - **Completed**
        - **Task Type**
            - Type : Dropdown
            - Mandatory : Yes
            - Values
                - Inspection Request
                - Invoice Payment
                - Client Approval Request
                - Custom Request
                - Quality Concern
                - Variation Order - Adding Scope
                - Variation Order - Removal Scope
                - Contractor Claim
        - **Task Instruction**
            - Type : Long Text
            - Mandatory : Yes
        - **Task Creator**
            - Auto populated after the task is created.
            - Values
                - By System - If the task is imported / copied from an existing template.
                - By User - If the task is customly created by Admin.
        - **Assignee**
            - Type: Dropdown
            - Mandatory : Yes
            - Values:
                - Contractor
                - Client
                - Consultant
- Admin can also use a predefined template for stage creation where on choosing the saved template, the stages along with tasks are automatically populated in the project info.
- **Save As a template** feature will be there.

Save Project Stage Configuration as Templates		On clicking on “**Save as a template”, the present stage-task configuration will be stored as a template.** A pop up will be shown asking the user to fill up the following sections : • Template Name • There will be checking whether template with the same name already exists or not. • On Clicking Save the Template is saved.
Use Templates to populate stages in a project		• If admin chooses “**Import**” button to import from existing templates, the user will be shown the list of saved templates and creation date. • On selection, the stage-task saved in the template will be loaded into the project. • The user can then go ahead and make changes with the stage or task fields if needed. • They would also be able to add new stage after importing from template, if needed.
Approve and Decline the Project from the Project details		Admin will have the option to approve or reject the client project. On Rejection, the project status would be ‘Declined’ On Approval , the project status would be ‘Approved’.
Close a Project		Admin can close a project which is in draft stage for more than a month. In that case, status = ‘Closed’
Download Project Documents		Admin can download Project Documents for Projects with status = New, i.e once submitted by the users. The documents are uploaded by the client in the front-end application and once they submit the project for approval, the admin would be able to to download the project documents.
Approve and Decline the Project from the Project details		• Admin is able to **Decline** or **Approve** the Project from the Project details page as well as from the Project Listing page. • This is only applicable on the projects that have been submitted by the Clients. • Before the projects are submitted for approval, admin gets to see the project and only **close** it from **draft** status, if needed.
Review the list of Contracts		Admin is able to see the list of signed contracts (both Client and Contractors) with the below list of parameters: • Contract ID • Contract name - link to the Contract details • Project name the contract signed for • Client name - link to the Profile • Contractor name - link to the Profile • Date of last update • Actions: Approve Status: Active, Finished
Search the list of Contracts		Search panel is available for contracts management. Admin is able to enter the required parameters and see the search results.
Filter the list of Contracts		Admin can filter the list of contracts according to the below parameters: • Status (Active,Finished)
Sort the list of contracts		The sorting parameters are Username, Contract name and Last updated
View the details of the Contract		Admin is able to view the details of the contract including all the task, specifications, attachments.

User interaction and design

Open Questions

Question	Answer	Date Answered

Out of Scope