**Hypereon**

**tALENTPOOL MANAGEMENT SYSTEM**

**[Requirement Gathering]**

**User Roles and Permissions**

1. **AM (Account Manager)**:
   * **Create SO** (Service Order)
   * **View SO**
   * **Edit SO**
   * **Cancel SO**
   * **Reject Edit Request for SO**
   * **Reject Cancel Request for SO**
   * **Cancel RR**
   * **Reassign SO among HM**
   * **Reassign SO among AM**
   * **Edit RR**
2. **HM (Hiring Manager)**:
   * **Create SO** (Service Order)
   * **View SO**
   * **Edit SO**
   * **Cancel SO**
   * **Reject Edit Request for SO**
   * **Reject Cancel Request for SO**
   * **Cancel RR**
   * **Reassign SO among HM**
3. **WFM (Work Force Manager)**:
   * **Providing the supply for each RR based on the matching skills.**
4. **ADMIN**
   * **User Management.**
5. **BFM (Business Finance Manager)**:
   * **View SO**
   * **Approve SO**
   * **Reject SO**
   * **Request for SO edits.**

**Service Order Details**

1. **Requester Information**:
   * Name
   * Contact Details (Phone, Email)
   * Department
   * Role (AM, HM, WFM, Admin, BFM)
2. **Service Order Type**:
   * + **Replacement:** If this SO is for converting a contractor to employee or vice-versa.
     + **New Project:** If this SO is for a new resource on a new project.
     + **Existing Project:** If this SO is for a new resource on an existing project.
     + **Attrition:** If this SO is for backfilling a resource who has resigned
3. **Priority and Due Date**:

Priority is an indicator of the quality of demand & thereby ensuring Workforce Management Executives (WFM) are given a rich enough demand before fulfilment. In absence of which, the SLAs are set such that WFM is not penalized for low quality of SO

* There are 4 level of priority – P1, P2, P3, P4. (P1 – highest & P4 – lowest)
* A SO with highest priority indicates:

a. WFM is given a good lead time to fill the SO.

b. All the necessary information required for fulfilment are provide.

* A SO with lowest priority indicates that:

a. The lead time given to WFM is less.

b. The SO lacks key information necessary for fulfilment

1. **Location and Asset Information**:
   * Location Details (if applicable)
   * Asset or Equipment Information (if applicable)
2. **Description of Service Order**:
   * A SO is a combination of one or more RRs/positions to be filled. Each RR in the SO is supposed to share the same basic attributes as Account, Project, Role, start & end dates.
3. **Attachments and Documentation**:



1. **Workflow and Approval Process**:
   * Status (e.g., Submitted, In Review, Approved, Rejected, In Progress, Completed, Cancelled)
   * Approval History (with date, approver's name, and status)
2. **Notification and Alerts**:
   * System-generated notifications and alerts to inform stakeholders about status changes.
3. **Edit Request for SO**:
   * A field indicating the reason for the edit request.
4. **Cancel Request for SO:**

|  |  |  |  |
| --- | --- | --- | --- |
| Fields | Field type in Edge UI | Business Rules | Comments |
| Search |  |  |  |
| Show | Dropdown                                                                      Values: All RRs, Approved RRs, Cancelled RRs, Closed RRs |  |  |
| Workflow status RR | Dropdown |  |  |
| RR Details | Dropdown button  Values: Show RR Details, RR Edit Request, Request RR Cancellation, View Edit Request, Request RR Skills |  |  |
| Request Cancel in RR | Pop up box                          Values: Select All (checkbox) RR ID (Autofill) Status (autofill)                 External(autofill)    Total offered count against RH in SO(autofill)              Total Hired count against RH in SO(autofill) |  | The four types of cancellation are                                                                        1) Internal RR’s 2 months past start date still remaining open with no internal activity last 2 months (60 days ) will be automatically cancelled.                                                            2)External Tagged RRs 6 months past start date still remaining open with no internal activity last 2 month (60 days) and no active offers  is automatically cancelled.                                                                                         3) WFM Edit Requested SO -An SO which is edit requested cannot be cancel requested.                                                                                                                4)WFM Cancel Requested SO-   An SO which is cancel requested can be cancelled in Originate. |
|  |  |  |  |
|  |  | If an RR is Awaiting Validation- ORC/Beeline, then User won't be able to raise Cancel Request for the RR. |  |
|  |  |  |  |
|  |  | If an RR is in Advanced Stage of Fulfillment, then It can be Cancel Requested, but can’t be Cancelled in Originate. |  |
|  |  |  |  |
|  |  |  |  |
|  |  | If all the RRs in an SO has been cancel requested, then the Edit and Cancel Request button will be disabled. |  |
|  |  | If one RR is Cancel Requested, then It Can't be Edit Requested as well as the other RRs in the same SO can't be Edit Requested. |  |
|  |  |  |  |
|  |  | If one RR is Edit Requested, then It can't be Cancel Requested. |  |
| If one RR is Edit Requested, then It can't be Cancel Requested. | Button | You cannot Cancel all the RRs for a SO. The system validates for at least 1 active RR to be present. In such a case, the RRs which does not have active offers can be cancelled, but the entire SO cannot be cancelled. |  |
| Cancel RR | Button |  |  |

1. **Resign Request (for HM)**:
   * A field for providing the reason for the resign request.
2. **Approval Actions for BFM**:
   * Approve SO
   * Reject SO
   * Cancel RR
3. **Pre-Approval Request for SO Edit** (for BFM)

|  |  |  |  |
| --- | --- | --- | --- |
| **c** | **Field type in Edge UI** | **Business Rules** | **Comments** |
| Search |  |  |  |
| Show | Dropdown |  |  |
| Workflow status RR | Dropdown |  |  |
| RR Details | Dropdown button  Values: Show RR Details,RR Edit Request,Request RR Cancellation,View Edit Request , Request RR Skills |  |  |
| Request Edit in RR | Pop up box  Values:Please specify here the request (textbox) min 15 characters  Submit Button | 1.    Not only the RR for which the request has been raised but all RRs tied to the corresponding SO will have a tag 'Edits Requested' on RR Card.                                                                                                          2. All associated RRs are frozen till the edit request is actioned (Approved/Rejected)                                                                              3.  If any RR tagged with the same SO has at least 1 employee in advanced stages (Customer Interview or beyond). An error message is thrown in such a case. (Different statuses for RR and SO)                                                                                                              4. If an RR is Cancel Requested then it can't be edit requested.                                                                               5.  If an RR is having active offers those RRs can be edited but  (Mandatory Skills | SO statuses :    1) Awaiting approval (For non billable SOs BFM approval is required).                                                                                      2)Rejected(SOs Rejected by BFM)                                                                                          3)Edit Requested(Total SOs tied with the AM/HM for which BFM has requested for some edits before approving )  4)Approved (All approved SOs either auto approved or approved By BFM)  5)WFM Edit requested (SOs Edit requested by HM\WFM from Operate -I)                                                                                                  6)Cancel requested (SOs cancel requested)                                                                                    RRstatuses:                                                                                            1)Cancelled                                                                                             2)Closed                                                                                                                                                                                             3)Approved                                                                                            RR Stages                                                                                                Internal Fulfilllment Stages (HM Check> Internal Interview>Customer Interview>Accept>Allocate/Not allocate)                    Note: Once the candidate enters interview or accept stage edit or cancel request actions cannot be performed.                 External Fulfillment stage (Awaiting Validation from RH>Sent to RH)                                                                                                 If the RR is in Awaiting validation stage it cannot be cancel requested. |
|  |  | Optional Skills,UST Role and JD, Additional Comments,Client JD |  |
|  |  | Location (Country, State, City, Work Location fields)- Cannot be Edited)                                                                                               6.An RR that is tagged to ORC can be edited. (Mandatory Skills |  |
|  |  | Optional Skills,UST Role and JD, Additional Comments,Client JD |  |
|  |  | Location (Country, State, City, Work Location fields)- Cannot be Edited) |  |
|  | Location (Country, State, City, Work Location fields)- Cannot be Edited) | Button | The Hiring Manager in response to your request can either edit only the RR (for which edit request was raised) or the entire SO. |
|  |  |  |  |
|  |  |  | -If the SO is edited, the changes will reflect in all the RRs tied to the SO |

**Functional Requirements:**

**1. SO Creation**

**Description:**

Users with appropriate permissions (AM, HM, WFM) should be able to create new Service Orders.

**Acceptance Criteria:**     - Users can access the "Create Service Order" interface.  
     - Required fields include-Requester Information, Service Type, Priority, Description, Location, and Asset Information (if applicable).  
     - Users can submit the SO for further processing.

**2. SO Editing**

**Description:**

  Users should be able to edit existing Service Orders.

**Acceptance Criteria:**

     - Users with appropriate permissions can access the "Edit Service Order" interface.  
     - Users can modify fields like Description, Priority, Due Date, Location, and Asset Information.  
     - Changes are logged for auditing purposes.

**3. SO Cancellation**

**Description**:

Users should be able to cancel a Service Order if necessary.

**Acceptance Criteria:**  
     - Users with appropriate permissions can initiate the cancellation of a Service Order.  
     - Cancellation should prompt for a reason, which is logged for auditing.  
     - Once cancelled, the SO status is updated accordingly.

**4. SO Viewing**

**Description:**

  Users should be able to view details of existing Service Orders.

**Acceptance Criteria:**  
     - Users can search for and access specific Service Orders.  
     - Details displayed include Requester Information, Service Type, Priority, Description, Location, Asset Information, and Status.  
     - Viewing rights are based on user permissions.

**Non-Functional Requirements:**

**1. Usability**

   - The user interface for creating, editing, cancelling, and viewing Service Orders should be intuitive and user-friendly.

**2. Performance**

   - The system should respond to user interactions with Service Orders in a timely manner, even under peak load conditions.

**3. Security**

   - User authentication and authorization mechanisms should be in place to ensure that only authorized personnel can access and modify Service Orders.

**4. Audit Trail**

   - All actions related to Service Orders (creation, editing, cancellation) should be logged for auditing and accountability purposes.

**5. Data Integrity**

   - Service Order data should be stored securely and should not be prone to unauthorized modification or corruption.

**6. Accessibility**

   - The system should be accessible to users with disabilities, following accessibility standards and guidelines.

**7. Error Handling**

   - The system should provide clear and informative error messages in case of any issues during SO creation, editing, cancellation, or viewing.

**8. Compliance**

   - The system should comply with relevant industry standards and regulations regarding workforce management and data privacy.

**9. Scalability**

   - The system should be designed to handle an increasing number of Service Orders and users without significant degradation in performance.

**10. Documentation and Training**

- Comprehensive documentation and training resources should be provided to users to ensure effective utilization of the Service Order functionality.

**Use case document**

1. **Create SO**

**Use Case:** Creating a SO

**Brief Description:** Managing Workforce Resources in a Tech Corporate as Account Manager (AM) and Hiring Manager (HM) for Creating Service Orders (SO) with Multiple Resource Requests (RR)

**Actors:** AM, HM

**Preconditions:** The user should have access to the talent pool management system with AM/HM permissions and must be logged into the system**.**

**Basic Flow:**

**1.** The AM/HM selects the "Create SO" option.

**2.** The user provides the necessary details such

- SO type

- Employee Id (Attrition)

- Project Name.

-WFM Name

- FTE

- Number of RRs

- Resource Role

- Client Job Title

- Mandatory Skills

- Actual Work Location

- Start and end dates for the project.

**3.** User can review the summary and edit them before finalizing the SO.

**4.** Once the SO is finalized, user can submit it for approval, allowing BFM to review and approve the SO.

**Alternate Flows:**

- SO type (Attrition)

- Project Name.

-WFM Name

- FTE

- Number of RRs

- Resource Role

- Client Job Title

- Mandatory Skills

- Actual Work Location

- Start and end dates for the project.

**Post Conditions:** The new SO is created successfully.

**2.View SO**

**Use Case:** View a SO

**Brief Description:** Viewing Service Orders (SO) in the Workforce Management System

**Actors:** AM, HM, BFM

**Preconditions:** The user should have access to the talent pool management system with AM/HM/BFM permissions and must be logged into the system

**Basic Flow:**

1. The AM, HM, BFM have the option to search for specific SOs based on various parameters.

2. The system retrieves and displays the list of all SO in the application.

3. The system presents the complete details of the selected SO, including any comments or updates related to the SO.

**Alternate Flows:** None

**Post Conditions:** The AM, HM, BFM successfully views the complete details of the selected SO.

**3.Edit SO**

**Use Case:** Edit a SO

**Brief Description:** Editing Service Orders (SO) by Account Managers (AM) and Hiring Managers (HM) in the Workforce Management System

**Actors:** AM, HM

**Preconditions:** The user should have access to the talent pool management system with AM/HM permissions and must be logged into the system**.**

**Basic Flow:**

1. The AM/HM selects the "Edit SO" option.

2. The AM/HM can edit the necessary details such as

-Service Line, BF Manager, Primary Manager

- Role, Mandatory Skill, Location

- Expected Extension.

- Number of resources required for the project.

- Any additional comments or notes related to the SO.

3. Once satisfied with the changes, user can submit the edited SO for approval.

4. User can track the status of the edited SO and its associated RR, including whether they are awaiting approval, approved, or fulfilled.

**Alternate Flows:** None

**Post Conditions:** The SO get updated with the edited details.

**4.Cancel SO**

**Use Case:** Cancel a SO

**Brief Description:** Canceling a Service Order (SO) for Account Managers (AM) and Hiring Managers (HM)

**Actors:** AM, HM

**Preconditions:** The user should have access to the talent pool management system with AM/HM permissions and must be logged into the system**.**

**Basic Flow:**

1. The AM/HM selects the "Cancel SO" option.

2. The user select a specific SO to be cancelled.

3. The user provide a reason for the cancellation.

4. The user confirm the cancellation action to prevent accidental cancellations.

5. Canceled SOs should still be accessible in the system for historical record-keeping and reporting purposes

**Alternate Flows:** None

**Post Conditions:** An SO is cancelled.

**5.Authenticate SO**

**Use Case:** Authenticate a SO

**Brief Description:** Authorizing Service Orders (SO) as a Business Finance Manager (BFM)

**Actors:** BFM

**Preconditions:** The user should have access to the talent pool management system with BFM permissions and must be logged into the system**.**

**Basic Flow:**

1. The BFM selects the "Authenticate SO" option.

2. BFM can select a specific SO and the system present clear and accessible options for the BFM to either authorize or deny financial allocation for the SO.

3. The BFM can request edits to an SO and the system to send notifications to AM and HM.

4. BFM authorize the SO and proceed to the next stages of resource allocation and project execution.

5.If denied, the SO should be flagged for further review, adjustments, or possible cancellation.

**Alternate Flows:** The SO waiting for approval is automatically approved if no action is taken within 2 working days.

**Post Conditions:** An SO is Approved or Rejected.

**USER STORY**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Epic** | **User Story ID** | **User Story Title** | **User Story** | **Acceptance Criteria** |
| **SO creation** | **1.1** | Create SO | As an Account Manager (AM) or Hiring Manager (HM) in a tech corporate, I want to create Service Orders (SO) in our talent pool management system, each containing multiple Resource Requests (RR) of the same type to efficiently allocate the required talent and resources for our projects. | 1. As an AM or HM, I should be able to access the talent pool management system with appropriate user permissions.    2. Upon logging into the system, I should have the option to create a new Service Order (SO) for a specific project or client engagement.  3. When creating an SO, I should provide the following information:  - Select SO type  - Employee Id (Attrition)  - Project Name.  -WFM Name  - FTE  - Number of RRs  - Resource Role  - Client Job Title  - Mandatory Skills  - Actual Work Location  - Start and end dates for the project.  5. Each RR entry should include:  - Resource type (previously selected in the SO).  - The specific skills or qualifications required for the resource.  - Any additional comments or notes related to this RR.  6. I should be able to review the summary and edit them before finalizing the SO.  7. Once the SO is finalized, I should be able to submit it for approval within the talent pool management system.  8. The system should have an approval workflow, allowing BFM to review and approve the SO.  9. Upon approval, the system should automatically trigger the resource allocation process to fulfill the RR within the specified project timeline. |
| **SO creation** | **1.2** | View SO | As an Account Manager (AM) or Hiring(HM) or Business Finance Manager(BFM) , I want to be able to view Service Orders (SO) within the Talent management system so that I can access essential information about ongoing projects and resource allocation. | 1. As a user with appropriate permissions, I should be able to access the Talent pool management system.  2. Once logged in, I should see a user-friendly dashboard or interface that provides an overview of SO as per the specific user  3. I should have the option to search for specific SOs based on various parameters, such as project name, client, or status.    4. Upon selecting a specific SO, I should be presented with detailed information including:  - Project or client name and ID.  - Project description and requirements.  - Start and end dates for the project.  - Resource type (e.g., software developer).  - Number of resources required for the project.  - The status of the SO (e.g., pending approval, approved, fulfilled).  6. I should also be able to view any comments or updates related to the SO, such as approval notes or progress reports.    7. The system should provide the ability to filter or sort the list of SOs based on criteria like project name, client, or SO status, making it easier to find specific information. |
| **SO creation** | **1.3** | Edit SO | As an Account Manager (AM) or Hiring Manager (HM) in a tech corporate, I want the ability to edit Service Orders (SO) in the workforce management system to make necessary modifications when project requirements change or evolve. | 1. As an AM or HM, I should have appropriate user permissions to access and edit Service Orders in the talent pool management system.  2. Upon logging into the system, I should be able to view a list of Service Orders that I have created or are responsible for.  3. I should have the option to select a specific SO for editing.  4. When editing an SO, I should be able to make changes to the following information:  - Service Line, BF Manager, Primary Manager  - Role, Mandatory Skill, Location  - Expected Extension.  - Number of resources required for the project.  - Any additional comments or notes related to the SO.    5. After making changes to the SO, I should have the option to save the edits as a draft without finalizing them immediately.    6. Once I am satisfied with the changes, I should be able to submit the edited SO for approval within the system.  7. The system should have an approval workflow, allowing relevant stakeholders to review and approve the edited SO.  8. If any changes to the SO lead to additional or different resource requirements, the system should automatically adjust the resource allocation process accordingly.    9. I should be able to track the status of the edited SO and its associated RR, including whether they are awaiting approval, approved, or fulfilled.  10. The system should provide notifications and updates on the progress of the edited SO and RR, including any delays or issues in resource allocation. |
| **SO creation** | **1.4** | Cancel SO | As an Account Manager (AM) or Hiring Manager (HM) in a tech corporate, I want to have the ability to cancel a Service Order (SO) within the talentpool management system when a project or client engagement is no longer needed or when circumstances change. | 1. As an AM or HM with appropriate permissions, I should be able to log in to the talentpool management system.  2. Upon logging in, I should have access to a list of Service Orders (SOs) that I am responsible for or authorized to manage.  3. I should be able to select a specific SO that I want to cancel.  4. When attempting to cancel the SO, the system should prompt me to provide a reason for the cancellation. This reason should help explain why the SO is being canceled, which can be useful for future reference and reporting.  5. Once I provide the cancellation reason, I should confirm the cancellation action to prevent accidental cancellations.  6. After confirming the cancellation, the system should automatically update the status of the SO to "Canceled" or a similar status, clearly indicating that it is no longer active or in progress.  7. The system should generate a notification to inform relevant stakeholders, including those responsible for resource allocation and approval, that the SO has been canceled.  8. Canceled SOs should still be accessible in the system for historical record-keeping and reporting purposes.  9. Canceled SOs should not be included in active project or resource allocation lists to avoid any confusion or errors in the workforce management process.  10. I should be able to search and filter SOs, including canceled ones, based on various parameters like project name, client, or status. |
| **SO creation** | **1.5** | Authenticate SO | As a Business Finance Manager (BFM) in a tech corporate, I want the  capability to authorize the allocation of financial resources for Service  Orders (SO) within the talentpool management system, ensuring that projects are within budgetary  constraints and align with financial planning. | 1. As a Business Finance Manager (BFM), I should have appropriate user permissions to access the talentpool management system.  2. Upon logging into the system, I should be able to view a list of Service Orders (SOs) that are pending financial authorization.  3. Each SO listed should provide essential information, including project or client name, resource type, number of resources, and the total estimated cost for the project.  4. I should be able to select a specific SO to review detailed financial information, including the breakdown of costs and expenses associated with the project.  5. The system should present clear and accessible options for me to either authorize or deny financial allocation for the SO. These options should be prominently labeled within the SO details.  6.I want to have the ability to request edits to an SO and for the system to send notifications to AM and HM, notifying them that the SO needs to be edited, So that any necessary adjustments can be made.    7. If I choose to deny financial authorization, the system should prompt me to provide a reason or explanation for the denial. This reason should be recorded and available for reference.  8. Upon authorizing or denying the SO, the system should update the SO's status accordingly. It should also generate notifications to inform relevant stakeholders, such as Account Managers (AM), Hiring Managers (HM), of the decision.  9. If I authorize the SO, it should proceed to the next stages of resource allocation and project execution. If denied, the SO should be flagged for further review, adjustments, or possible cancellation.  10. I should have the ability to search and filter SOs based on various parameters, including project name, client, SO status, and the date of authorization. |

**WORKFLOW**

**A screenshot of a computer screen

Description automatically generated**

**SO Authorization**

**A diagram of a flowchart

Description automatically generated**