**Reminder - 365  
Use Cases**

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# Contracts

## Contract Creation

### To Create a New Contract

#### Description

This use case describes, how users will create a new contract

#### Actors

FMD, Procurement and IT

#### Flow of Events

**Pre-Condition**

NA

**Basic Flow**

1. User Clicks on the Contract Module in the Left Panel.
2. Once the Reminder Page opens, User clicks on the 'Add’ button
3. A new forms opens which will contain the fields to be filled by the user in order to create the Contract. List of the field to be filled are :-

|  |  |
| --- | --- |
| **Fields to be entered** | **Remarks** |
| Contract details | |
| Contract title\* | Text |
| Contract reference number\* | (System Generated, can be alphanumeric) |
| BA / PO number\* | Number (0 decimal place) |
| Contract Value Currency\* | Text (3 letters) |
| Contract Value\* | Number (2 decimal place) |
| Start date\* | Format: DD/MM/YYYY |
| Expiry date\* | Format: DD/MM/YYYY |
| Supplier\* | Text |
| Officer in charge\* | Text |
| Cc list\* | Text |
| Grouping\* | Text |
| First reminder date\* | Format: DD/MM/YYYY |
| Second reminder date\* | Format: DD/MM/YYYY |
| Third reminder date\* | Format: DD/MM/YYYY |
| Performance Bond submission\* | Format: Y / N / N.A |
| Option year | |
| Option year exercise date | Format: DD/MM/YYYY  Default value: NIL |
| Insurance |  |
| Public Liability policy expiry date | Format: DD/MM/YYYY  Default value: NIL |
| Workman Compensation policy expiry date | Format: DD/MM/YYYY  Default value: NIL |
| Hull & Marine expiry date | Format: DD/MM/YYYY  Default value: NIL |
| Savings | |
| Savings currency | Text (3 letters) |
| Savings | Number (2 decimal place) |

\*Mandatory field

1. After filling the mandatory details, user will click on 'Submit' button to create contract
2. A new Contract / Reference Number is created and a New Contract is created

#### **Sub Flow**

Premature exit

1. User can cancel and exit the contract creation screen prematurely, for example: Click on any of the action button present on left navigation menu and also, breadcrumbs at the top of the page. An alert will be displayed in a pop up, when user tries to exit the screen without completing the form or clicks on any other link. In alert, if user clicks yes, then it will exit and no record will be saved and if clicks on 'No' then, he would continue to add record.
2. On cancel, user returns to the view screen and no record will be saved.

#### **Alternative Flows**

Validations

1. The system will check if all Mandatory Data has been filled during the click of submit button.
2. Contract Expiry Date should be greater than Contract Start Date.
3. First, second and Third reminder date should be greater than start date
4. First < Second < Third reminder date sequence
5. Public Liability policy expiry date should be greater than start date
6. Workman Compensation policy expiry date should be greater than start date
7. Hull & Marine expiry date should be greater than start date
8. All dates entered has to be equal or greater than current date

#### **Special Requirements**

NA

#### **Post-Conditions**

a. A new contract will be created with a new Contract / Reference Number

b. Email should trigger to the user group of the contract

### View created Contracts

#### Description

This use case describes, how user can view created contracts in the system

#### Actors

FMD, Procurement and IT

#### Flow of Events

**Pre-Condition**

a. User should be logged in

b. Contracts should exist in system to be viewed by the user

**Basic Flow**

1. User Clicks on the Contract Module in the Left Panel.
2. User lands on the contract reminder view page, and will be able to view snapshot of list of contracts already created in the system at row level.
3. By default, user can view the following fields for each contract:-

|  |  |  |
| --- | --- | --- |
| **Field** | **Sortable** | **Values** |
| Contract Title | Y | Text |
| Start Date | Y | DD/MM/YYYY |
| Expiry Date | Y | DD/MM/YYYY |
| Status | Y |  |
| Reminder | Y | 3 reminder icons, icons color changes after every reminder is sent |
| Supplier | Y | Text |
| Officer in charge | Y | Text |
| Action | N | Edit/View, Renew and delete icons |

d. Latest created contract should show up first in the list

e. Sorting: User will be able to sort the view based on different fields for which sortable property is ‘Y’

f. Pagination: At one time, user can view 10 contracts in the view page and rest records will show up in the following pages by navigating to the page number or by clicking on ‘Next’ button at the bottom of the grid on the right hand side

g. Total Contracts: User can view the count of contracts present in the system below the grid in the following format “Showing 1 to 10 of 57 entries”

#### **Sub Flow**

NA

**Alternative Flows**

NA

**Special Requirements**

NA

#### **Post-Conditions**

User can view the snapshot of the contract’s and its related information

### Edit/Update created Contracts

#### Description

This use case describes, how user can edit/update created contracts in the system

#### Actors

FMD, Procurement and IT

#### Flow of Events

**Pre-Condition**

Approved contracts in the system

**Basic Flow**

1. User Clicks on the Contract Module in the Left Panel.
2. User lands on the contract reminder view page, and will be able to view snapshot of list of contracts already created in the system at row level.
3. User gets the option to edit the contract at row level, there will an edit icon in the action colum
4. After clicking on the edit action button, user is redirected to the edit page of the contract.
5. User can edit the following fields in the edit page:-

|  |  |
| --- | --- |
| **Fields to be entered** | **Editable** |
| Contract details | |
| Contract title\* | Y |
| Contract reference number\* | N |
| BA / PO number\* | Y |
| Contract Value Currency\* | Y |
| Contract Value\* | Y |
| Start date\* | N |
| Expiry date\* | N |
| Supplier\* | Y |
| Officer in charge\* | Y |
| Cc list\* | Y |
| Grouping\* | Y |
| First reminder date\* | Y |
| Second reminder date\* | Y |
| Third reminder date\* | Y |
| Performance Bond submission\* | Y |
| Option year | |
| Option year exercise date | Y |
| Insurance |  |
| Public Liability policy expiry date | Y |
| Workman Compensation policy expiry date | Y |
| Hull & Marine expiry date | Y |
| Savings | |
| Savings currency | Y |
| Savings | Y |

1. After the details are updated, user can click on ‘Submit’ button which will redirect the user to the view page

#### **Sub Flow**

Premature exit

1. User can cancel and exit the contract updation screen prematurely, for example: Click on any of the action button present on left navigation menu and also, breadcrumbs at the top of the page. An alert will be displayed in a pop up, when user tries to exit the screen without completing the form or clicks on any other link. In alert, if user clicks yes, then it will exit and no record will be saved and if clicks on 'No' then, he would continue to update record.
2. On cancel, user returns to the view screen and no record will be saved and updated.

**Alternative Flows**

Validations:-

1. The system will check if all Mandatory Data has been filled during the click of submit button.
2. Alert Message will be displayed when user would submit the form with mandatory fields not filled correctly
3. First, second and Third reminder date should be greater than start date
4. First < Second < Third reminder date sequence
5. Public Liability policy expiry date should be greater than start date
6. Workman Compensation policy expiry date should be greater than start date
7. Hull & Marine expiry date should be greater than start date
8. All dates entered has to be equal or greater than current date

**Special Requirements**

View Grid should Fit Screen

#### **Post-Conditions**

a. Contract will be updated and viewable in the Contracts Reminder View page

b. Email should trigger to the user group of the contract after the update

### View Contracts in ‘Review’

#### Description

This use case describes, how user can view contracts created and are in ‘Review’ status

#### Actors

FMD, Procurement and IT

#### Flow of Events

**Pre-Condition**

Contracts should exist in system to be reviewed by the user

**Basic Flow**

1. User Clicks on the Contract Module in the Left Panel.
2. User lands on the contract reminder view page. On the view page there would be a tile with the count and text as ‘No. of contracts in review process’, clicking on tile would navigate the user to the ‘contract review list’ page
3. Navigation: Dashboard > Contract Reminder > Contract Review List
4. By default, user can view the following fields for each contract:-

|  |  |  |
| --- | --- | --- |
| **Field** | **Sortable** | **Values** |
| Contract Title | Y | Text |
| Contract Reference Number | Y | Text |
| Start Date | Y | DD/MM/YYYY |
| Expiry Date | Y | DD/MM/YYYY |
| Supplier | Y | Text |
| Officer in charge | Y | Text |
| Status | Y | Text (Reject/Review) |
| Action | N | Edit/View icon |

d. Latest created contract should show up first in the list

e. Sorting: User will be able to sort the view based on different fields for which sortable property is ‘Y’

f. Pagination: At one time, user can view 10 contracts in the view page and rest records will show up in the following pages by navigating to the page number or by clicking on ‘Next’ button at the bottom of the grid on the right hand side

g. Total Contracts under review: User can view the count of contracts present in the system below the grid in the following format “Showing 1 to 10 of 57 entries”

#### **Sub Flow**

NA

**Alternative Flows**

NA

**Special Requirements**

NA

#### **Post-Conditions**

User can view the snapshot of the contract’s in review and its related information

### Approve Contracts in Review

#### Description

This use case describes, how user can Approve/Reject created contracts under ‘Review’ status in the system

#### Actors

FMD, Procurement and IT

#### Flow of Events

**Pre-Condition**

Contracts in ‘Review’ status in the system

**Basic Flow**

1. Navigation to this page: Dashboard > Contract Reminder > Contract Review List > Review Contract
2. Once user clicks on the icon on the contract in the Grid, it navigates to contract review page, with data prepopulated in the page with contract information
3. User can edit the following fields in the edit page:-

|  |  |
| --- | --- |
| **Fields to be entered** | **Editable** |
| Contract details | |
| Contract title\* | Y |
| Contract reference number\* | N |
| BA / PO number\* | Y |
| Contract Value Currency\* | Y |
| Contract Value\* | Y |
| Start date\* | Y |
| Expiry date\* | Y |
| Supplier\* | Y |
| Officer in charge\* | Y |
| Cc list\* | Y |
| Grouping\* | Y |
| First reminder date\* | Y |
| Second reminder date\* | Y |
| Third reminder date\* | Y |
| Performance Bond submission\* | Y |
| Option year | |
| Option year exercise date | Y |
| Insurance |  |
| Public Liability policy expiry date | Y |
| Workman Compensation policy expiry date | Y |
| Hull & Marine expiry date | Y |
| Savings | |
| Savings currency | Y |
| Savings | Y |

1. User can modify the details, after which user can click on ‘Approve’ button which will redirect the user to the Contract Reminder view page

#### **Sub Flow**

Premature exit

1. User can cancel and exit the contract review screen prematurely, for example: Click on any of the action button present on left navigation menu and also, breadcrumbs at the top of the page. An alert will be displayed in a pop up, when user tries to exit the screen without completing the form or clicks on any other link. In alert, if user clicks yes, then it will exit and no record will be saved and if clicks on 'No' then, he would continue to update record.
2. On cancel, user returns to the contract review view screen and no record will be saved and updated.

**Alternative Flows**

Validations:-

1. The system will check if all Mandatory Data has been filled during the click of submit button.
2. Contract Expiry Date should be greater than Contract Start Date.
3. First, second and Third reminder date should be greater than start date
4. First < Second < Third reminder date sequence
5. Public Liability policy expiry date should be greater than start date
6. Workman Compensation policy expiry date should be greater than start date
7. Hull & Marine expiry date should be greater than start date
8. All dates entered has to be equal or greater than current date

**Special Requirements**

NA

#### **Post-Conditions**

a. Contract will be updated to ‘Approve’ and viewable in the Contracts Reminder View page

b. Email should trigger to the user who has created the contract with ‘Status Approval’ content

### Reject Contracts in Review

#### Description

This use case describes, how user can Reject created contracts under ‘Review’ status in the system

#### Actors

FMD, Procurement and IT

#### Flow of Events

**Pre-Condition**

Contracts in ‘Reject’ status in the system

**Basic Flow**

1. Navigation to this page: Dashboard > Contract Reminder > Contract Review List > Review Contract
2. In the ‘Contract Review List’ page, user will able to view all the records which are in status ‘Review’
3. Once user clicks on the icon on the contract review list page, it navigates the page to contract review page, with data prepopulated in the page with contract information
4. User can then go ahead and edit/update following fields in the edit page:-

|  |  |
| --- | --- |
| **Fields to be entered** | **Editable** |
| Contract details | |
| Contract title\* | Y |
| Contract reference number\* | N |
| BA / PO number\* | Y |
| Contract Value Currency\* | Y |
| Contract Value\* | Y |
| Start date\* | Y |
| Expiry date\* | Y |
| Supplier\* | Y |
| Officer in charge\* | Y |
| Cc list\* | Y |
| Grouping\* | Y |
| First reminder date\* | Y |
| Second reminder date\* | Y |
| Third reminder date\* | Y |
| Performance Bond submission\* | Y |
| Option year | |
| Option year exercise date | Y |
| Insurance |  |
| Public Liability policy expiry date | Y |
| Workman Compensation policy expiry date | Y |
| Hull & Marine expiry date | Y |
| Savings | |
| Savings currency | Y |
| Savings | Y |

1. User can update/edit the form.
2. If user is not satisfied with all the inputs, user can reject the contract by clicking on Reject button on the left hand side beside cancel.
3. ‘Reject Message’ pop up will open up which contains the following information:-

* Contract Title: Pre-filled
* Contract Reference Number: Pre-filled
* Message to \* : Emailid of the user who created the contract
* Reason \*: Drop down
* Remarks: Long Text
* \*: Means Mandatory Field

1. Once, user fills all the mandatory details. On click of ‘Send Message’ button, it will send the email to the user and will update the status of contract as ‘Reject’
2. Rejected contract will also be visible in the ‘Contract Review List’ page and the status will be ‘Reject’ for the contract

#### **Sub Flow**

Premature exit

1. User can cancel and exit the contract review screen prematurely, for example: Click on any of the action button present on left navigation menu and also, breadcrumbs at the top of the page. An alert will be displayed in a pop up, when user tries to exit the screen without completing the form or clicks on any other link. In alert, if user clicks yes, then it will exit and no record will be saved and if clicks on 'No' then, he would continue to update record.
2. On cancel, user returns to the contract review view screen and no record will be saved and updated.

**Alternative Flows**

Validations:-

1. The system will check if all Mandatory Data has been filled during the click of Reject button.
2. Contract Expiry Date should be greater than Contract Start Date.
3. First, second and Third reminder date should be greater than start date
4. First < Second < Third reminder date sequence
5. Public Liability policy expiry date should be greater than start date
6. Workman Compensation policy expiry date should be greater than start date
7. Hull & Marine expiry date should be greater than start date
8. All dates entered has to be equal or greater than current date
9. Message to: Need to provide emailId and in correct format
10. Reason: Need to select the reason before sending the message

**Special Requirements**

NA

#### **Post-Conditions**

a. Contract will be updated to ‘Reject’ and viewable in the Contracts Review List page

b. Email should trigger to the respective user

### View Contracts in Reject

#### Description

This use case describes, how user can view the contracts under ‘Reject’ status in the system

#### Actors

FMD, Procurement and IT

#### Flow of Events

**Pre-Condition**

Contracts in ‘Reject’ status present in the system

**Basic Flow**

1. User Clicks on the Contract Module in the Left Panel.
2. User lands on the contract reminder view page. On the view page there would be a tile with the count and text as ‘No. of contracts in review process’, on click of which user would be navigated to the ‘contract review list’ page
3. Navigation: Dashboard > Contract Reminder > Contract Review List
4. By default, user can view the following fields for each contract:-

|  |  |  |
| --- | --- | --- |
| **Field** | **Sortable** | **Values** |
| Contract Title | Y | Text |
| Contract Reference Number | Y | Text |
| Start Date | Y | DD/MM/YYYY |
| Expiry Date | Y | DD/MM/YYYY |
| Supplier | Y | Text |
| Officer in charge | Y | Text |
| Status | Y | Text (Reject/Review) |
| Action | N | Edit/View icon |

e. Latest created contract should show up first in the list

f. User can view the contracts which are in Rejected status in View page, where the Status Column value is ‘Reject’

g. Sorting: User will be able to sort the view based on different fields for which sortable property is ‘Y’

h. Pagination: At one time, user can view 10 contracts in the view page and rest records will show up in the following pages by navigating to the page number or by clicking on ‘Next’ button at the bottom of the grid on the right hand side

i. Total Contracts under review: User can view the count of contracts present in the system below the grid in the following format “Showing 1 to 10 of 57 entries”

#### **Sub Flow**

NA

**Alternative Flows**

NA

**Special Requirements**

NA

#### **Post-Conditions**

User can view the snapshot of the contract’s in Reject status and its related information

### Re-Submit Contracts in ‘Reject’

#### Description

This use case describes, how user can re-submit the contract in ‘Reject’ status in the system

#### Actors

FMD, Procurement and IT

#### Flow of Events

**Pre-Condition**

Contracts in ‘Reject’ status present in the system

**Basic Flow**

1. Navigation to this page: Dashboard > Contract Reminder > Contract Review List
2. In the ‘Contract Review List’ page, user will able to view all the records which are in status ‘Rejected’ or ‘Review’
3. User can select the record where the status is ‘Rejected’ and by clicking on icon, they will be navigated to the ‘Review Contract’ page with data prepopulated in the page with contract information
4. User can then go ahead and edit/update following fields in the edit page:-

|  |  |
| --- | --- |
| **Fields to be entered** | **Editable** |
| Contract details | |
| Contract title\* | Y |
| Contract reference number\* | N |
| BA / PO number\* | Y |
| Contract Value Currency\* | Y |
| Contract Value\* | Y |
| Start date\* | Y |
| Expiry date\* | Y |
| Supplier\* | Y |
| Officer in charge\* | Y |
| Cc list\* | Y |
| Grouping\* | Y |
| First reminder date\* | Y |
| Second reminder date\* | Y |
| Third reminder date\* | Y |
| Performance Bond submission\* | Y |
| Option year | |
| Option year exercise date | Y |
| Insurance |  |
| Public Liability policy expiry date | Y |
| Workman Compensation policy expiry date | Y |
| Hull & Marine expiry date | Y |
| Savings | |
| Savings currency | Y |
| Savings | Y |

1. After user fills in all the required details, then the form can be submitted again and user will be redirected to the ‘Contract Review List’ page and the status will change to ‘Review’

#### **Sub Flow**

Premature exit

1. User can cancel and exit the contract review screen prematurely, for example: Click on any of the action button present on left navigation menu and also, breadcrumbs at the top of the page. An alert will be displayed in a pop up, when user tries to exit the screen without completing the form or clicks on any other link. In alert, if user clicks yes, then it will exit and no record will be saved and if clicks on 'No' then, he would continue to update record.
2. On cancel, user returns to the contract review view screen and no record will be saved and updated.

**Alternative Flows**

Validations:-

1. The system will check if all Mandatory Data has been filled during the click of submit button.
2. Contract Expiry Date should be greater than Contract Start Date.
3. First, second and Third reminder date should be greater than start date
4. First < Second < Third reminder date sequence
5. Public Liability policy expiry date should be greater than start date
6. Workman Compensation policy expiry date should be greater than start date
7. Hull & Marine expiry date should be greater than start date
8. All dates entered has to be equal or greater than current date

**Special Requirements**

NA

#### **Post-Conditions**

a. Contract will be updated to ‘Review’ and viewable in the Contracts Review page

b. Email should trigger to the respective user group

### Remove/Delete Contracts

#### Description

This use case describes, how user can delete the contracts already present in the system

#### Actors

FMD, Procurement and IT

#### Flow of Events

**Pre-Condition**

Contracts should exist in the system

**Basic Flow**

1. User navigates to the contract Reminder Module page from the left menu
2. In the view page, user can select any contract at row level and click on the delete icon to remove the record
3. Pop up comes up for confirmation to delete the contract from the system
4. After user confirms the deleting of record, the record will be deleted from the Contracts reminder view grid
5. Once deleted, there would be a message highlighting the confirmation of removal of contract from the system in the view page screen itself
6. Contract will no longer appear in the view grid

#### **Sub Flow**

NA

**Alternative Flows**

NA

**Special Requirements**

NA

#### **Post-Conditions**

Contract no longer exist in the records and viewable in contract reminder view page

### Search Contract

#### Description

This use case describes, how user can search the contracts in the system

#### Actors

FMD, Procurement and IT

#### Flow of Events

**Pre-Condition**

Contracts should be present in the system

**Basic Flow**

1. User navigates to contract reminder view page
2. Search box will be available on the top of the view grid on the right hand side
3. User can type in the keywords to search the contract in the view grid
4. Matching records with the keyword will start appearing in the grid after each key entered which is termed as "Search as you type"
5. User can continue to add the full text and click on search icon in the search box itself to view the matched records
6. Pagination will be refreshed based on the search results
7. After the search, matching records number should show up on the top of the grid

#### **Sub Flow**

NA

**Alternative Flows**

Validations:-

a. If no records found then show 'No Matching Records Found' for the text entered

**Special Requirements**

NA

#### **Post-Conditions**

Matching results should appear in the view Grid

### Renewing Contract

#### Description

This use case describes, how user can renew the contract and in turn create a new contract in the system

#### Actors

FMD, Procurement and IT

#### Flow of Events

**Pre-Condition**

Contracts should be present in the system

**Basic Flow**

1. User Clicks on the Contract Module in the Left Panel.
2. Once the Reminder Page opens, user will be able to view contracts in the existing system.
3. User can select any contract and there would be an action button against the contract, on click of which user will be navigated to renew contract page.
4. Form opens which will contain the fields with prepopulated values, user can update the fields in order to renew the Contract. List of the fields which are to be filled and can be edited are listed below :-

|  |  |
| --- | --- |
| **Fields to be entered** | **Remarks** |
| Contract details | |
| Contract title\* | Text |
| Contract reference number\* | (System Generated, can be alphanumeric) |
| BA / PO number\* | Number (0 decimal place) |
| Contract Value Currency\* | Text (3 letters) |
| Contract Value\* | Number (2 decimal place) |
| Start date\* | Format: DD/MM/YYYY |
| Expiry date\* | Format: DD/MM/YYYY |
| Supplier\* | Text |
| Officer in charge\* | Text |
| Cc list\* | Text |
| Grouping\* | Text |
| First reminder date\* | Format: DD/MM/YYYY |
| Second reminder date\* | Format: DD/MM/YYYY |
| Third reminder date\* | Format: DD/MM/YYYY |
| Performance Bond submission\* | Format: Y / N / N.A |
| Option year | |
| Option year exercise date | Format: DD/MM/YYYY  Default value: NIL |
| Insurance |  |
| Public Liability policy expiry date | Format: DD/MM/YYYY  Default value: NIL |
| Workman Compensation policy expiry date | Format: DD/MM/YYYY  Default value: NIL |
| Hull & Marine expiry date | Format: DD/MM/YYYY  Default value: NIL |
| Savings | |
| Savings currency | Text (3 letters) |
| Savings | Number (2 decimal place) |

\*Mandatory field

1. After filling the mandatory details, user will click on 'Submit' button to renew the contract
2. A new Contract / Reference Number is created and a new contract is created.

#### **Sub Flow**

Premature exit

1. User can cancel and exit the renew contract creation screen prematurely, for example: Click on any of the action button present on left navigation menu and also, breadcrumbs at the top of the page. An alert will be displayed in a pop up, when user tries to exit the screen without completing the form or clicks on any other link. In alert, if user clicks yes, then it will exit and no record will be saved and if clicks on 'No' then, he would continue to add record.
2. On cancel, user returns to the view screen and no record will be saved.

#### **Alternative Flows**

Validations

1. The system will check if all Mandatory Data has been filled during the click of submit button.
2. Contract Expiry Date should be greater than Contract Start Date.
3. First, second and Third reminder date should be greater than start date
4. First < Second < Third reminder date sequence
5. Public Liability policy expiry date should be greater than start date
6. Workman Compensation policy expiry date should be greater than start date
7. Hull & Marine expiry date should be greater than start date
8. All dates entered has to be equal or greater than current date

#### **Special Requirements**

NA

#### **Post-Conditions**

a. A new contract will be created with a new Contract / Reference Number

b. Email will be sent to the respective user group

### Reminder Calender

#### Description

This use case describes, how user can view reminders for contracts expiring in current month

#### Actors

FMD, Procurement and IT

#### Flow of Events

**Pre-Condition**

Reminders should be available for contracts in the system

**Basic Flow**

1. User navigates to contract from left menu panel
2. Reminder Calender is available on the top of the page above the tiles and view grid
3. Current month calendar will show up from first day till last day
4. There will be indicator for the current date on the calender
5. In the Calender UI, dates will be rounded off to red for the contracts expiring in the current month.

#### **Sub Flow**

NA

#### **Alternative Flows**

NA

#### **Special Requirements**

NA

#### **Post-Conditions**

View expiring contracts highlighted on the date’s in the calender

### Reminders View and Flow

#### Description

This use case describes, how reminders will viewed and applied for contracts

#### Actors

FMD, Procurement and IT

#### Flow of Events

**Pre-Condition**

For existing and new contracts in the system

**Basic Flow**

1. There will be 3 reminders set for every contract as First Reminder Date, Second Reminder Date and Third Reminder Date
2. Reminders date will be in DD/MM/YYY form
3. Datepicker will be used to select the reminder dates
4. Once the reminder date matches the current date, an email reminder will be sent to the user group
5. Reminders for each contract will be visible against each contract in the view contracts reminder page in the reminder column
6. There will be 3 icons to indicate the stage of the reminder. If only one icon is highlighted then it indicates first reminder is sent, for 2 icons it indicates second reminder is sent and for 3rd icon it indicates all 3 reminders are sent

#### **Sub Flow**

NA

#### **Alternative Flows**

Validations:-

1. All the dates will be in DD/MM/YYYY format
2. First, second and Third reminder date should be greater than start date
3. First < Second < Third reminder date sequence
4. All dates entered has to be equal or greater than current date

#### **Special Requirements**

NA

#### **Post-Conditions**

a. View Reminder Status for the contract

b. Send email after each reminder stage

### Email expiring Contracts

#### Description

This use case describes, sending email to expiring contracts

#### Actors

FMD, Procurement and IT

#### Flow of Events

**Pre-Condition**

Contracts should already be available in the system

**Basic Flow**

1. Trigger email to users i.e. Officer in Charge and also user group for a particular contract
2. Run the email engine everyday and trigger email when the following conditions are matched:-
3. First Reminder Date = Current Date
4. Second Reminder Date = Current Date
5. Third Reminder Date = Current Date
6. Expiry Date – Current Date <= 15 Days
7. Expiry Date – Current Date <= 5 Days
8. Expiry Date – Current Date <= 0 Days
9. Once the condition matches, the email will be sent

#### **Sub Flow**

NA

#### **Alternative Flows**

Validations:-

1. First Reminder Date = Current Date
2. Second Reminder Date = Current Date
3. Third Reminder Date = Current Date
4. Expiry Date – Current Date <= 15 Days
5. Expiry Date – Current Date <= 5 Days
6. Expiry Date – Current Date <= 0 Days

#### **Special Requirements**

NA

#### **Post-Conditions**

Send email to the respective contract user and the user group

### Transactional Log

#### Description

This use case describes, recording of transaction logs into the system

#### Actors

FMD, Procurement and IT

#### Flow of Events

**Pre-Condition**

NA

**Basic Flow**

1. Record the transactions into the log and database table
2. Following actions on the screen in our system requires logging:-

Contract Creation: Submit button

Contract View: Submit button

Contract View: Delete button

Contract Review Page: Approve Button

Contract Review: Reject Contract

1. Transactions will be saved in the database in the log tables

#### **Sub Flow**

NA

#### **Alternative Flows**

NA

#### **Special Requirements**

NA

#### **Post-Conditions**

Every transactional action shall will be logged in the application log and database

### Download Contracts

#### Description

This use case describes, downloading of contracts present in our system

#### Actors

FMD, Procurement and IT

#### Flow of Events

**Pre-Condition**

Contracts should be available in the system already

**Basic Flow**

1. User navigates to the contract reminder module from left panel
2. In the View Contract reminder page, in the UI there will be a download icon beside the search box in the screen
3. On the click, of download button icon an excel will be downloaded for all the contracts for the respective user group in the browser
4. Excel sheet contains all the details of contract at row level

#### **Sub Flow**

NA

#### **Alternative Flows**

NA

#### **Special Requirements**

NA

#### **Post-Conditions**

Download the excel sheet with all contracts in our system

# Authentication & Authorization Module

## Login and Logout

### Login

#### Description

This use case describes, how user can log into the system

#### Actors

FMD, Procurement and IT

#### Flow of Events

**Pre-Condition**

NA

**Basic Flow**

1. User enters the URL in the browser
2. For accessing the reminder application, user will be prompted for username and password on the login screen
3. User can enter the PSA user name and password and click on ‘Login’ to access the application
4. After successful login, user will be able to view the modules as per the access granted

#### **Sub Flow**

NA

#### **Alternative Flows**

Validations:-

a. Should match with PSA’s password policy

b. Enter Valid PSA username

#### **Special Requirements**

NA

#### **Post-Conditions**

Successfully login into the reminder application

### Logout

#### Description

This use case describes, how user can logout from the system

#### Actors

FMD, Procurement and IT

#### Flow of Events

**Pre-Condition**

User should be logged in the system

**Basic Flow**

1. Option will be provided on the UI, in the header section on the right hand side
2. On the click of the profile logo, user will have an option to click on ‘Logout’ button
3. On click of logout button, user will be logged off from the system and will be redirected to the login screen.

#### **Sub Flow**

1. Session Expiry: System will logout the user if there is no activity for a defined period example:- if there is no activity for 5 mins, user will be logged off.
2. Back Button: If user clicks on the back button of the browser, it will log off the user from the system and will be redirected to login page

#### **Alternative Flows**

NA

#### **Special Requirements**

NA

#### **Post-Conditions**

Successfully logs out from the system

### Transactional Log

#### Description

This use case describes, recording of transaction logs into the system

#### Actors

FMD, Procurement and IT

#### Flow of Events

**Pre-Condition**

NA

**Basic Flow**

1. Record the transactions into the log and database table
2. Following actions on the screen in our system requires logging:-

* Login Click
* Logout Click

1. Transactions will be saved in the database in the log tables

#### **Sub Flow**

NA

#### **Alternative Flows**

NA

#### **Special Requirements**

NA

#### **Post-Conditions**

Every transactional action shall will be logged in the application log and database

## User Group and Role Module

### Create user groups and roles

#### Description

This use case describes, how IT administrator will be able to create user groups for the particular module staff, equipment and contract.

#### Actors

IT Administrators

#### Flow of Events

**Pre-Condition**

NA

**Basic Flow**

1. User navigates to the ‘User Group’ Module from settings
2. There will be an add button ‘Add User Group’ present on the top half of the grid on the right hand side
3. User clicks on the button to land on the create form for the user group
4. User Needs to enter following details:-

|  |  |
| --- | --- |
| **Fields to be entered** | **Remarks** |
| Reminder Module\* | Dropdown (Contract, Equipment and Staff) |
| Group Name\* | Text |
| Role\* | Grid   |  |  | | --- | --- | | Role\* | Text | | Add | Checkbox | | View | Checkbox | | Update | Checkbox | | Delete | Checkbox | | Verify | Checkbox | | Action | Add button, Delete button |   Add/View/Update/Delete: Any one value should be selected mandatory |
| Active\* | Dropdown (Yes/No) |

\*Mandatory Fields

1. By Default, Role ‘Group Administrator’ will be created with all the access checkbox as selected
2. After user enters the mandatory details and clicks on Submit button, user group will be created and user will be redirected to the view user groups page with a successful message

#### **Sub Flow**

Premature exit

1. User can cancel and exit the user group creation screen prematurely, for example: Click on any of the action button present on left navigation menu and also, breadcrumbs at the top of the page. An alert will be displayed in a pop up, when user tries to exit the screen without completing the form or clicks on any other link. In alert, if user clicks yes, then it will exit and no record will be saved and if clicks on 'No' then, he would continue to add record.
2. On cancel, user returns to the view screen and no record will be saved.

#### **Alternative Flows**

Validations

1. The system will check if all Mandatory Data has been filled during the click of submit button.

#### **Special Requirements**

NA

#### **Post-Conditions**

User group should be successfully created

### View user groups

#### Description

This use case describes, how user will be able to view created groups

#### Actors

IT Administrators

#### Flow of Events

**Pre-Condition**

User Group already exists in the system

**Basic Flow**

1. User navigates to the ‘User Group’ Module from settings
2. User lands on the user group view page, and will be able to view snapshot of list of user groups already created in the system at row level.
3. By default, user can view the following fields:-

|  |  |  |
| --- | --- | --- |
| **Field** | **Sortable** | **Values** |
| Group Name\* | Y | Text |
| Reminder Module\* | Y | Text |
| Role\* | Y | Text |
| Active\* | Y | Text |

1. User group will be sorted in the alphabetic order
2. Sorting: User will be able to sort the view based on different fields for which sortable property is ‘Y’
3. Pagination: At one time, user can view 20 groups in the view page and rest records will show up in the following pages by navigating to the page number or by clicking on ‘Next’ button at the bottom of the grid on the right hand side
4. Total Groups: User can view the count of user group present in the system below the grid in the following format “Showing 1 to 20 of 57 entries”

#### **Sub Flow**

NA

**Alternative Flows**

NA

**Special Requirements**

NA

#### **Post-Conditions**

User can view the snapshot of the user group’s and its related information

### Edit user groups

#### Description

This use case describes, how user will be able to edit and already created group(s)

#### Actors

IT Administrators

#### Flow of Events

**Pre-Condition**

User Group already exists in the system

**Basic Flow**

1. User navigates to the ‘User Group’ Module from settings
2. User lands on the user group view page, and will be able to view snapshot of list of user group’s already created in the system at row level.
3. User gets the option to edit the group at row level, there will an edit icon in the action colum
4. After clicking on the edit action button, user is redirected to the edit page of the contract.
5. User can edit the following fields in the edit page:-

|  |  |
| --- | --- |
| **Fields to be entered** | **Editable** |
| Reminder Module\* | N |
| Group Name\* | N |
| Role\* | Grid   |  |  | | --- | --- | | Role\* | N | | Add | Y | | View | Y | | Update | Y | | Delete | Y | | Verify | Y | | Action | Add button, Delete button |   Add/View/Update/Delete: Any one value should be selected mandatory |
| Active\* | Y |

1. After the details are updated, user can click on ‘Submit’ button which will redirect the user to the view page

#### **Sub Flow**

Premature exit

1. User can cancel and exit the group updation screen prematurely, for example: Click on any of the action button present on left navigation menu and also, breadcrumbs at the top of the page. An alert will be displayed in a pop up, when user tries to exit the screen without completing the form or clicks on any other link. In alert, if user clicks yes, then it will exit and no record will be saved and if clicks on 'No' then, he would continue to update record.
2. On cancel, user returns to the view screen and no record will be saved and updated.

**Alternative Flows**

Validations:-

1. The system will check if all Mandatory Data has been filled during the click of submit button.

**Special Requirements**

View Grid should Fit Screen

#### **Post-Conditions**

User group will be updated and viewable in the user group’s view page

### Remove/Delete user group

#### Description

This use case describes, how user can delete the user group already present in the system

#### Actors

IT Administrators

#### Flow of Events

**Pre-Condition**

User group should exist in the system

**Basic Flow**

1. User navigates to the user group page from the left menu
2. In the view page, user can select any user group at row level and click on the delete icon to remove the record
3. Pop up comes up for confirmation to delete the user group from the system
4. After user confirms the deleting of record, the record will be deleted from the view grid
5. Once deleted, there would be a message highlighting the confirmation of removal of user group from the system in the view page screen itself
6. User group will no longer appear in the view grid

#### **Sub Flow**

NA

**Alternative Flows**

NA

**Special Requirements**

NA

#### **Post-Conditions**

1. User group no longer exist in the records and viewable in user group view page
2. User group associated to the users will be deleted and replaced by Null or NA (Not Assigned)

## Manage User Module

### Create users

#### Description

This use case describes, how Group administrator will be able to create users in the particular group

#### Actors

Group Administrators

#### Flow of Events

**Pre-Condition**

NA

**Basic Flow**

1. User navigates to the Manage ‘User’ Module from settings
2. There will be an add button ‘Add Users’ present on the top half of the grid on the right hand side
3. User clicks on the button to land on the create form for the user
4. User Needs to enter following details:-

|  |  |
| --- | --- |
| **Fields to be entered** | **Remarks** |
| User Login ID\* | Text |
| Role Management\* | Grid   |  |  | | --- | --- | | Reminder Module\* | Dropdown (Contracts, Equipments and staff) | | User Groups | Dropdown (Dynamically coming from User group module) | | Role | Dropdown (Dynamically populated based on user groups) | | Action | Add button, Delete button | |
| User Name\* | Text |
| EmailID\* | Valid EmailID |
| Phone Number\* | +65-XXXX-XXXX |
| Remarks | Text |
| Created By | Text |
| Created Date | MM/DD/YYYY |
| Last Modified | Text |
| Last Modified Date | MM/DD/YYYY |

\*Mandatory Fields

1. After user enters the mandatory details and clicks on Submit button, users will be created and user will be redirected to the view user groups page with a successful message

#### **Sub Flow**

Premature exit

1. User can cancel and exit the user creation screen prematurely, for example: Click on any of the action button present on left navigation menu and also, breadcrumbs at the top of the page. An alert will be displayed in a pop up, when user tries to exit the screen without completing the form or clicks on any other link. In alert, if user clicks yes, then it will exit and no record will be saved and if clicks on 'No' then, he would continue to add record.
2. On cancel, user returns to the view screen and no record will be saved.

#### **Alternative Flows**

Validations

1. The system will check if all Mandatory Data has been filled during the click of submit button.
2. Role Management: User can have access to multiple groups
3. Role Management: User cannot have same group which is already added with the role
4. Enter valid EmailID
5. Enter valid phone number format

#### **Special Requirements**

NA

#### **Post-Conditions**

User should be successfully created

### View users

#### Description

This use case describes, how user will be able to view created users

#### Actors

Group Administrators

#### Flow of Events

**Pre-Condition**

Users already exists in the system

**Basic Flow**

1. User navigates to the ‘User Module’ from settings
2. User lands on the users view page, and will be able to view snapshot of list of users already created in the system at row level.
3. By default, user can view the following fields:-

|  |  |  |
| --- | --- | --- |
| **Field** | **Sortable** | **Values** |
| User Login ID\* | Y | Text |
| Reminder Module\* | Y | Text |
| User Group | Y | Text |
| Role | Y | Text |
| User Name\* | Y | Text |
| EmailID\* | Y | Text |
| Created By | Y | Text |
| Created Date | Y | MM/DD/YYYY |

1. Users will be sorted in the alphabetic order
2. Sorting: User will be able to sort the view based on different fields for which sortable property is ‘Y’
3. Pagination: At one time, user can view 20 users in the view page and rest records will show up in the following pages by navigating to the page number or by clicking on ‘Next’ button at the bottom of the grid on the right hand side
4. Total Groups: User can view the count of user group present in the system below the grid in the following format “Showing 1 to 20 of 57 entries”

#### **Sub Flow**

NA

**Alternative Flows**

NA

**Special Requirements**

NA

#### **Post-Conditions**

User can view the snapshot of the user group’s and its related information

### Edit users

#### Description

This use case describes, how user will be able to edit an already created user

#### Actors

Group Administrators

#### Flow of Events

**Pre-Condition**

User already exists in the system

**Basic Flow**

1. User navigates to the ‘User Module’ from settings
2. User lands on the user view page, and will be able to view snapshot of list of user’s already created in the system at row level.
3. User gets the option to edit at row level, there will an edit icon in the action colum
4. After clicking on the edit action button, user is redirected to the edit page of the contract.
5. User can edit the following fields in the edit page:-

|  |  |
| --- | --- |
| **Fields to be entered** | **Editable** |
| User Login ID\* | N |
| Role Management\* | Grid   |  |  | | --- | --- | | Reminder Module\* | Y | | User Groups | Y | | Role | Y | |
| User Name\* | N |
| EmailID\* | N |
| Phone Number\* | Y |
| Remarks | Y |
| Created By | N |
| Created Date | N |
| Last Modified | N |
| Last Modified Date | N |

1. After the details are updated, user can click on ‘Submit’ button which will redirect the user to the view page

#### **Sub Flow**

Premature exit

1. User can cancel and exit the user updation screen prematurely, for example: Click on any of the action button present on left navigation menu and also, breadcrumbs at the top of the page. An alert will be displayed in a pop up, when user tries to exit the screen without completing the form or clicks on any other link. In alert, if user clicks yes, then it will exit and no record will be saved and if clicks on 'No' then, he would continue to update record.
2. On cancel, user returns to the view screen and no record will be saved and updated.

**Alternative Flows**

Validations:-

1. The system will check if all Mandatory Data has been filled during the click of submit button.

**Special Requirements**

View Grid should Fit Screen

#### **Post-Conditions**

Users will be updated and viewable in the user’s view page

### Remove/Delete user

#### Description

This use case describes, how user can delete the user’s

#### Actors

Group Administrators

#### Flow of Events

**Pre-Condition**

User should exist in the system

**Basic Flow**

1. User navigates to the user page
2. In the view page, user can select any user at row level and click on the delete icon to remove the record
3. Pop up comes up for confirmation to delete the user from the system
4. After user confirms the deleting of record, the record will be deleted from the view grid
5. Once deleted, there would be a message highlighting the confirmation of removal of user from the system in the view page screen itself
6. User will no longer appear in the view grid

#### **Sub Flow**

NA

**Alternative Flows**

NA

**Special Requirements**

NA

#### **Post-Conditions**

User no longer exist in the records and viewable in user view page