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**Reminder 365  
Use Cases (UCS)**

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# 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 and PSA’s User Account and Access Management Policy

b. Enter Valid PSA username

#### **Special Requirements**

* There will be a “FORGET PASSWORD?” link in R365 login page. Popup message “Please contact Helpdesk @ 62795459 or email helpdesk\_psa@globalpsa.com for help.” will be shown if user clicks “FORGET PASSWORD?”

#### **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 minutes, 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**

Provide option for system administrator to define the session length to keep the user logged in for a period of time

#### **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 be logged in the application log and database

## Manage User

### Create users

#### Description

This use case describes, how Overall administrator will be able to create users in R365

#### Actors

Overall Administrators, HR Admin

#### Flow of Events

**Pre-Condition**

NA

**Basic Flow**

1. User navigates to the Manage ‘User’ Module
2. There will be an ‘Users’ for creating users.
3. User clicks on the tab and lands on view page.
4. User clicks on the button on top right hand side ‘Add users’ to open pop up for the user
5. User Needs to enter following details:-

|  |  |
| --- | --- |
| **Fields** | **Remarks** |
| User ID\* | Text |
| User Name\* | Text, retrieve from Windows AD and editable. |
| Email\* | Valid Email ID, retrieve from Windows AD and editable. |
| Phone Number | +65-XXXX-XXXX, retrieve from Windows AD and editable. |
| Overall User Admin | Yes / No (default), checkbox.  If “Overall User Admin” is selected, this user will be able to manage users in R365. |
| Overall Group Admin | Yes / No (default), checkbox.  If “Overall Group Admin” is selected, this user will be able to manage groups in R365. |
| Remarks | Text |

\*Mandatory Fields

1. After user enters the mandatory details and clicks on Submit button, R365 will pop up a confirmation dialogue asking user to confirm his action.
2. User confirms his action, then new user will be created in R365.
3. Current user will be redirected back to user list.
4. A successful message mentioning User ID will be shown above user list.

#### **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**

g.a) User doesn’t confirm his action, confirmation dialogue will be dismissed.

i.a) User is add unsuccessfully (e.g. due technical issue), a unsuccessful message will be shown above user list.

Validations

1. The system will check if all Mandatory Data has been filled during the click of submit button.
2. Enter valid Email ID
3. Enter valid phone number format
4. The system will check if all fields fulfill length limit
5. User ID is unique in R365

#### **Special Requirements**

* There will be a retrieve login id button beside login id which should interact with the database to retrieve the login id present in PSA’s system
* Access rights of Overall User Administrator and Overall Group Administrator will be configurable in database

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Role / Access | View User | Create User | Update User | Delete User | View Group | Create Group | Update Group | Delete Group |
| Overall Group Administrator | X | X | X | X |  |  |  |  |
| Overall User Administrator |  |  |  |  | X | X | X | X |

#### **Post-Conditions**

User should be successfully created

### View users

#### Description

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

#### Actors

Overall Administrators, HR Admin

#### Flow of Events

**Pre-Condition**

Users already exists in the system

**Basic Flow**

1. User navigates to the ‘User Module’
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 after clicking view icon:-

|  |  |
| --- | --- |
| **Fields** | **Remarks** |
| User ID | Text |
| User Name | Text |
| Email | Text |
| Phone Number | Text |
| Overall User Admin | If is “Overall User Admin”, display “Yes”. Else, hide this field. |
| Overall Group Admin | If is “Overall Group Admin”, display “Yes”. Else, hide this field. |
| Remarks | Text |
| Created By | Text |
| Created Date | DD/MM/YYYY HH:MM:SS |
| Last Modified | Text |
| Last Modified Date | DD/MM/YYYY HH:MM:SS |

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 groups and its related information

### Edit/Update users

#### Description

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

#### Actors

Overall Administrators, HR Admin

#### Flow of Events

**Pre-Condition**

User already exists in the system

**Basic Flow**

1. User navigates to the ‘User Module’
2. User lands on the user view page, and will be able to view snapshot of list of users 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 column
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** | **Editable** | **Remarks** |
| User ID\* | Y | Text |
| User Name\* | Y | Text, retrieve from Windows AD and editable. |
| Email\* | Y | Valid Email ID, retrieve from Windows AD and editable. |
| Phone Number | Y | +65-XXXX-XXXX, retrieve from Windows AD and editable. |
| Overall User Admin | Y | Yes / No, checkbox. |
| Overall Group Admin | Y | Yes / No, checkbox. |
| Remarks | Y | Text |
| Created By | N | Text |
| Created Date | N | DD/MM/YYYY HH:MM:SS |
| Last Modified | N | Text |
| Last Modified Date | N | DD/MM/YYYY HH:MM:SS |

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

#### **Sub Flow**

**NA**

**Alternative Flows**

NA

Validation

**Special Requirements**

NA

#### **Post-Conditions**

1. User details should be updated

### Remove/Delete user

#### Description

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

#### Actors

Overall Administrators and HR admin

#### 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 group 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

## Manage User Group and Role

### Create user groups and roles

#### Description

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

#### Actors

Overall Group Administrators

#### Flow of Events

**Pre-Condition**

NA

**Basic Flow**

1. User navigates to the ‘User Group’ Module tab from users from left menu
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 |
| Group Description | Text Area |
| Role(s)\* | Grid   |  |  | | --- | --- | | Role\* | Text | | Add Reminder | Checkbox | | View Reminder | Checkbox | | Update Reminder | Checkbox | | Delete Reminder | Checkbox | | Verify Reminder | Checkbox  Verify checkbox is enabled only when contract reminder module is selected. | | Notification TO | Checkbox | | Notification CC | Checkbox | | Action | Add button, Delete button |   Add/View/Update/Delete: Any one value should be selected mandatory |
| Group Administrator | Assign one or two users as Group Administrator |
| Active\* | Dropdown (Yes/No) |
| Users (Login ID, user name) | Grid with checkbox |

\*Mandatory Fields

Access Matrix Example:-

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Role / Access | Add Reminder | View Reminder | Update Reminder | Delete Reminder | Approve Reminder | Notification TO | Notification CC |
| Group Administrator | X | X | X | X | X | X |  |
| Officer in Charge | X | X | X | X | X | X |  |
| Read-only User |  | X |  |  |  |  | X |
| User | X | X | X | X | X |  | X |

1. By Default, Role ‘Group Administrator’ will be created with the access checkbox selected as per above image
2. To assign a user as Group Administrator, Overall Group Admin will firstly search the user, and then assign him / her as Group Administrator. Search as you type feature is required for searching user
3. 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.

#### **Validation**

#### **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:-

|  |  |
| --- | --- |
| **Fields** | **Remarks** |
| Reminder Module | Text |
| Group Name | Text |
| Role(s) | Text |
| Access | Text |
| Status | Active / Inactive |

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 groups and its related information

### Edit/Update 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 groups 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 column
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** | **Editable** | **Remarks** |
| Reminder Module | N | Text |
| Group Name\* | Y | Text |
| Group Description | Y | Text |
| Role(s) | Y | Grid   |  |  | | --- | --- | | Role | Text | | Add | Checkbox | | View | Checkbox | | Update | Checkbox | | Delete | Checkbox | | Verify | Checkbox | | Notification TO | Checkbox | | Notification CC | Checkbox | |
| Group Administrator\* | Y | Text |
| Active | Y | Yes / No |
| Created By | N | Text |
| Created Date | N | DD/MM/YYYY HH:MM:SS |
| Last Modified | N | Text |
| Last Modified Date | N | DD/MM/YYYY HH:MM:SS |

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 updating 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 Group/Role Assignment

### View group details

#### Description

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

#### Actors

Group Administrators

#### Flow of Events

**Pre-Condition**

User Group already exists in the system

**Basic Flow**

1. User navigates to the ‘User Group’ Module
2. User lands on the user group 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:-

|  |  |
| --- | --- |
| **Fields** | **Remarks** |
| User Group | Dropdown list |
| Group Description | Text |
| Reminder Module | Text |
| Users, Roles, Role Access Rights | A list of users in the group, corresponding user roles and role access rights. |
| Created By | Text |
| Created Date | DD/MM/YYYY HH:MM:SS |
| Last Modified | Text |
| Last Modified Date | DD/MM/YYYY HH:MM:SS |

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”
5. Delete Role: Additional there will be a delete role button for deleting the mapping. User can select the checkbox for selecting the mapping and then on click, will delete the selected records

#### **Sub Flow**

NA

**Alternative Flows**

NA

**Special Requirements**

NA

#### **Post-Conditions**

User can view the snapshot of the user groups and its related information

### Assign user groups and roles

#### Description

This use case describes, how user will be able to assign users to groups and add their role

#### Actors

Group Administrators

#### Flow of Events

**Pre-Condition**

Users, user Group and already already exists in the system

**Basic Flow**

User navigates to the ‘User Group/Role Assignment’ Module from settings

1. 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.
2. On click of assign roles, user will be navigated to other screens and user can select the following fields:-

|  |  |  |
| --- | --- | --- |
| **Fields** | **Editable** | **Remarks** |
| User Group | N | Dropdown list  Other fields will be auto populated according to selected User Group |
| Group Description | N | Text |
| Reminder Module | N | Text |
| Users | Y | Group Administrator can search and add user to the list, assign user role, search should be by “Search as you type” feature. |

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

#### **Sub Flow**

NA

**Alternative Flows**

NA

**Special Requirements**

View Grid should Fit Screen

#### **Post-Conditions**

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

### Edit/Update 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 groups 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 column
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** | **Editable** | **Remarks** |
| User Group | N | Dropdown list  Other fields will be auto populated according to selected User Group |
| Group Description | N | Text |
| Reminder Module | N | Text |
| Users, Roles, Role Access Rights | Y | Group Administrator can search and add user to the list, assign user role, change user role, or remove user from the list. Search of user shall be enhanced by “Search as you type” feature. |
| Created By | N | Text |
| Created Date | N | DD/MM/YYYY HH:MM:SS |
| Last Modified | N | Text |
| Last Modified Date | N | DD/MM/YYYY HH:MM:SS |

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

#### **Sub Flow**

NA

**Alternative Flows**

NA

**Special Requirements**

View Grid should Fit Screen

#### **Post-Conditions**

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

### 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)

# Contracts

## Contract Creation

### To Create a New Contract: Maker

#### 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 | |
| User Group | Dropdown List  Group description will be auto populated according to selected User Group and displayed next to User Group field |
| Contract Title\* | Text area |
| Contract Reference Number\* | Text |
| BA / PO number\* | Number (0 decimal place) |
| Supplier\* | Text |
| Contract Value Currency\* | Text (3 letters) |
| Contract Value\* | Number (2 decimal place) |
| Performance Bond submission\* | Format: Y / N / N.A |
| Start Date\* | Format: DD/MM/YYYY |
| Expiry Date\* | Format: DD/MM/YYYY |
| Reminder Status | Active(default)/Inactive |
| First Reminder Date\* | Format: DD/MM/YYYY  Auto populated according to default set up in administrative module and editable |
| Second Reminder Date | Format: DD/MM/YYYY Auto populated according to default set up in administrative module and editable |
| Third Reminder Date | Format: DD/MM/YYYY  Auto populated according to default set up in administrative module and editable |
| Officer in Charge\* | Dropdown list.  Select officer in charge from the users within the group |
| Cc list | Text, email(s) separated by semicolon |
| Reviewer List\* | Dropdown list.  Select update to two reviewers from the users within the group |
| 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 with Reminder ID is created and can be viewed in ‘Contract Review List’ screen

#### **Sub Flow**

Premature exit

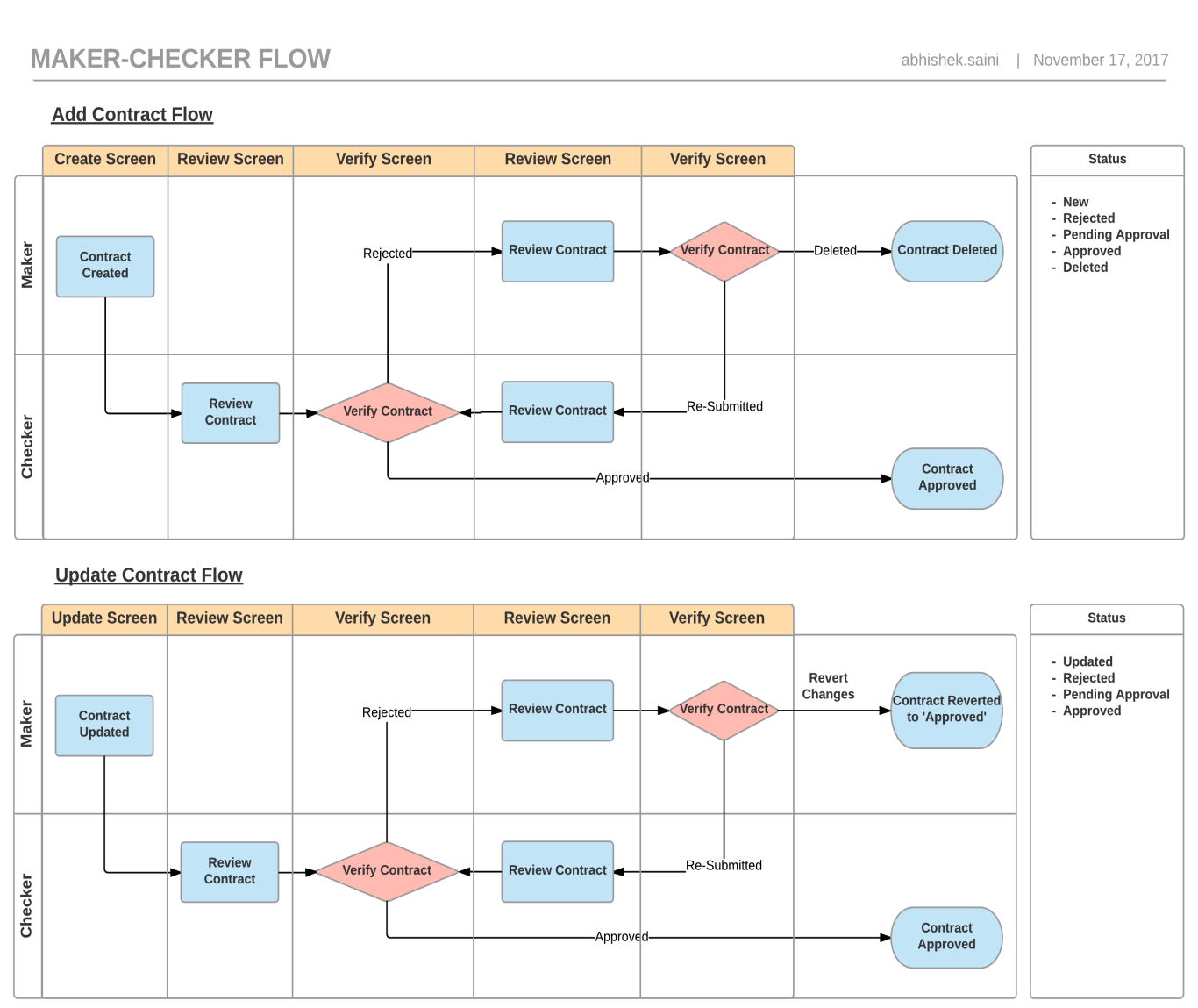
1. User can cancel and exit the contract creation screen prematurely, for example: Click on any of the action button present on left navigation menu and also, breadcrumbs at the top of the page. An alert will be displayed in a pop up, when user tries to exit the screen without completing the form or 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

**Flow Diagram:-**



#### **Special Requirements**

NA

#### **Post-Conditions**

a. A new contract will be created in status ‘New’

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

### View Contracts in ‘New’: Checker

#### Description

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

#### Actors

FMD, Procurement and IT

#### Flow of Events

**Pre-Condition**

Contracts should exist in system to be Verifyed by the user

**Basic Flow**

1. Two ways to land on the verify page:-
2. When user creates the contract and clicks on ‘Submit’, user will be navigated to the ‘Contracts Review List’ page
3. User Clicks on the Contract Module in the Left Panel.

* 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 Need Verification’, clicking on tile would navigate the user to the ‘contract Verify list’ page

1. Navigation: Dashboard > Contract Reminder > Contract Reveiw List
2. 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/Verify) |
| Action | N | Edit/View icon |

d. Latest expiring 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 20 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 Verification: User can view the count of contracts under login user’s group(s) 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 contract’s in ‘New’ and ‘Rejected’ status and its related information

### Verify Contracts in ‘New’: Checker

#### Description

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

#### Actors

FMD, Procurement and IT

#### Flow of Events

**Pre-Condition**

Contracts in ‘New’ status in the system

**Basic Flow**

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

|  |  |  |
| --- | --- | --- |
| **Fields** | **Editable** | **Remarks** |
| Contract Details |  |  |
| User Group | N | Group description will be auto populated according to selected User Group and displayed next to User Group field |
| Contract Title\* | Y | Text area |
| Contract Reference Number\* | Y | Text |
| BA / PO number\* | Y | Number (0 decimal place) |
| Supplier\* | Y | Text |
| Contract Value Currency\* | Y | Text (3 letters) |
| Contract Value\* | Y | Number (2 decimal place) |
| Performance Bond submission\* | Y | Format: Y / N / N.A |
| Start Date\* | Y | Format: DD/MM/YYYY |
| Expiry Date\* | Y | Format: DD/MM/YYYY |
| Reminder Status | Y | Active(default)/Inactive |
| First Reminder Date\* | Y | Format: DD/MM/YYYY  Auto populated according to default set up in administrative module and editable |
| Second Reminder Date | Y | Format: DD/MM/YYYY Auto populated according to default set up in administrative module and editable |
| Third Reminder Date | Y | Format: DD/MM/YYYY  Auto populated according to default set up in administrative module and editable |
| Officer in Charge\* | Y | Dropdown list.  Select officer in charge from the users within the group |
| Cc list | Y | Text, email(s) separated by semicolon |
| Reviewer List\* | Y | Dropdown list.  Select update to two reviewers from the users within the group |
| Option year |  |  |
| Option year exercise date | Y | Format: DD/MM/YYYY  Default value: NIL |
| Insurance |  |  |
| Public Liability policy expiry date | Y | Format: DD/MM/YYYY  Default value: NIL |
| Workman Compensation policy expiry date | Y | Format: DD/MM/YYYY  Default value: NIL |
| Hull & Marine expiry date | Y | Format: DD/MM/YYYY  Default value: NIL |
| Savings |  |  |
| Savings currency | Y | Text (3 letters) |
| Savings | Y | Number (2 decimal place) |
| Created By | N | Text |
| Created Date | N | DD/MM/YYYY HH:MM:SS |
| Last Modified | N | Text |
| Last Modified Date | N | DD/MM/YYYY HH:MM:SS |

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

#### **Sub Flow**

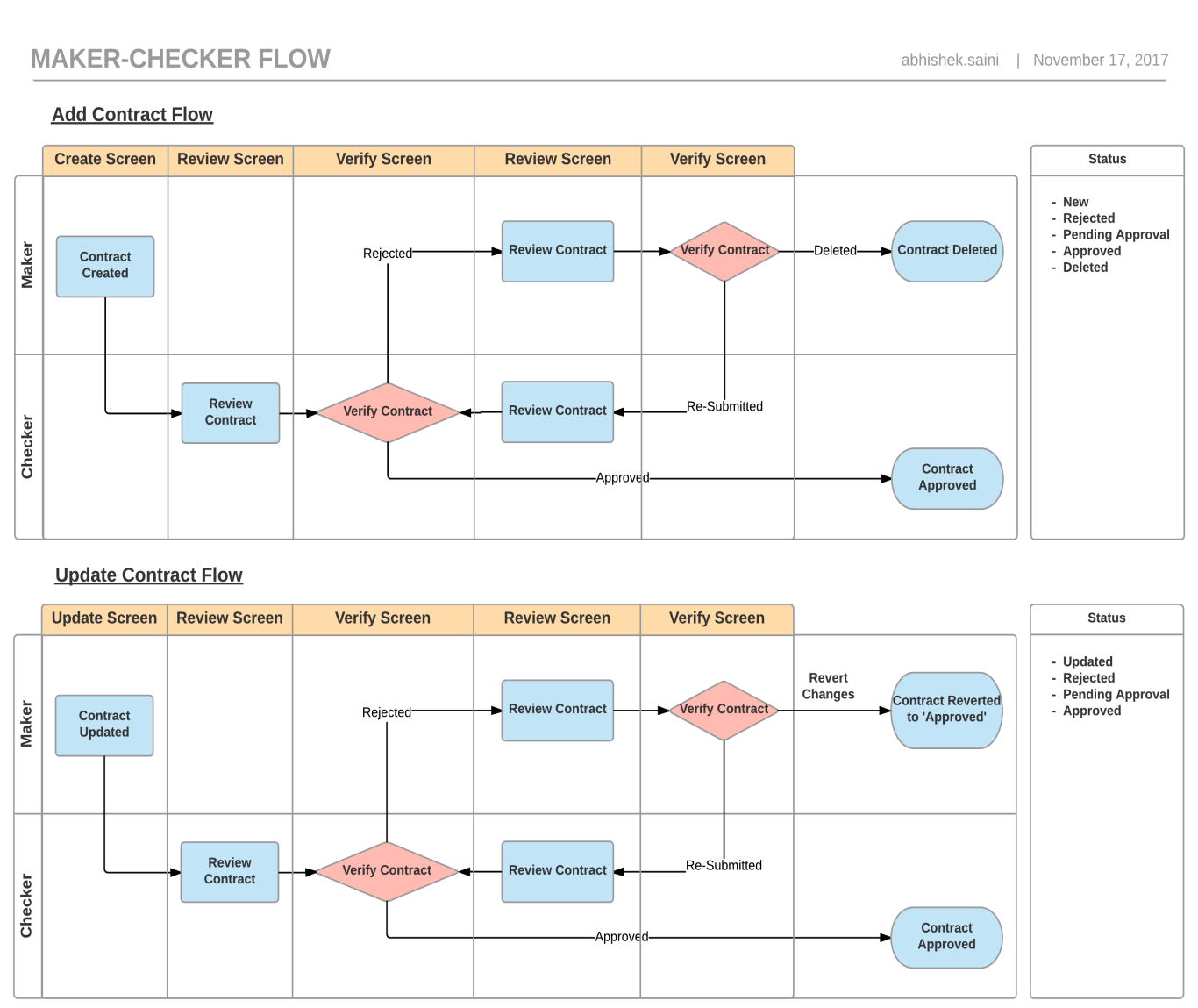
Premature exit

1. User can cancel and exit the contract Verify 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 list 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
9. Flow Diagram:-



**Special Requirements**

NA

#### **Post-Conditions**

a. Contract will be updated to ‘Approved’ 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 ‘New’: Checker

#### Description

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

#### Actors

FMD, Procurement and IT

#### Flow of Events

**Pre-Condition**

Contracts in ‘New’ status in the system

**Basic Flow**

1. Navigation to this page: Dashboard > Contract Reminder > Contract Reveiw List > Review Contract
2. In the ‘Contract Verify List’ page, user will able to view all the records which are in status ‘Verify’
3. Once user clicks on the icon on the contract Verify list page, it navigates the page to contract Verify page, with data prepopulated in the page with contract information
4. 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.
5. ‘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 ‘Rejected’
2. Rejected contract will also be visible in the ‘Contract Review List’ page and the status will be ‘Rejected’ for the contract

#### **Sub Flow**

Premature exit

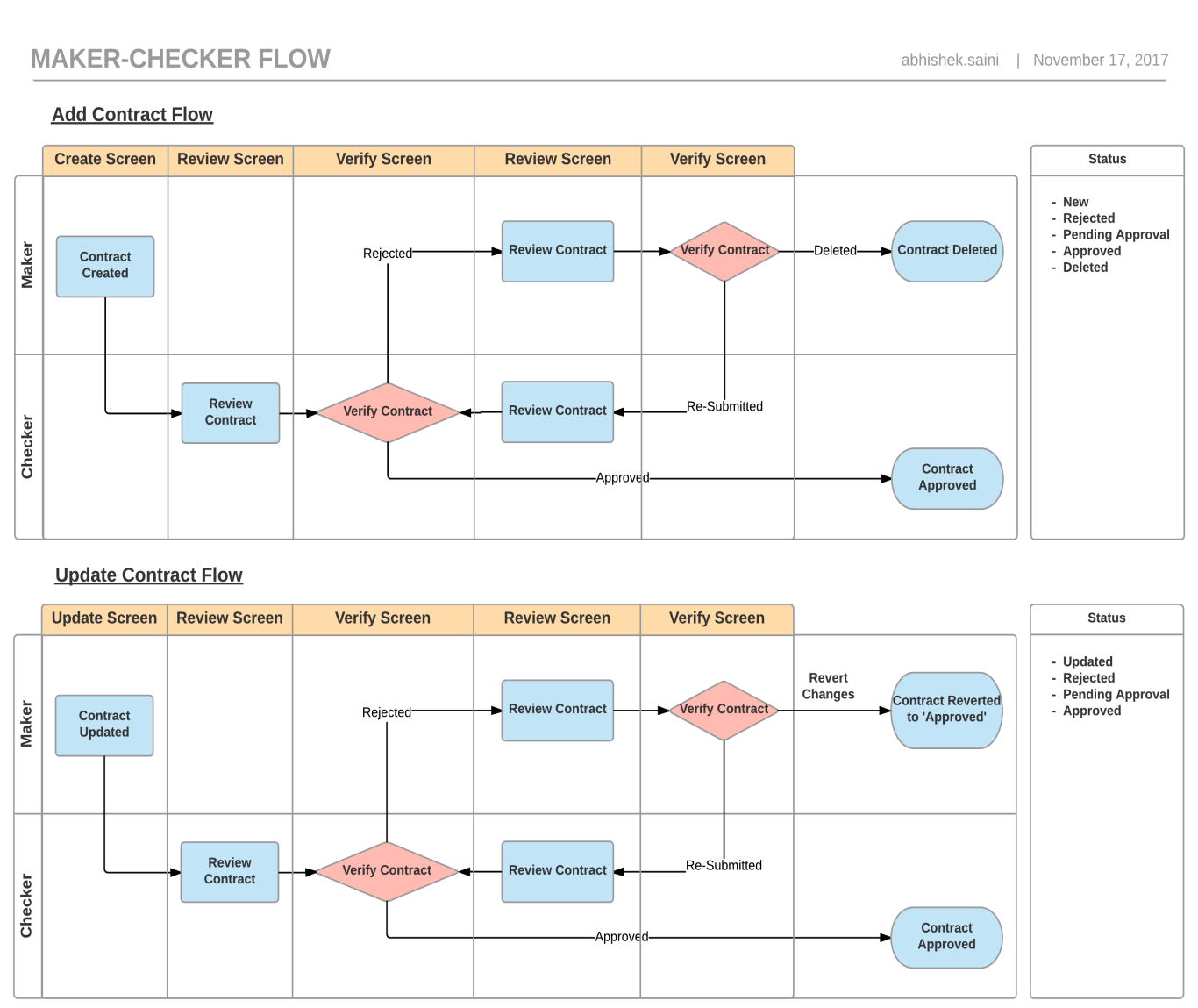
1. User can cancel and exit the contract Verify screen prematurely, for example: Click on any of the action button present on left navigation menu and also, breadcrumbs at the top of the page. An alert will be displayed in a pop up, when user tries to exit the screen without completing the form or clicks 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 Verify 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

Flow Diagram:-



**Special Requirements**

NA

#### **Post-Conditions**

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

b. Email should trigger to the respective user

### Delete/Re-Submit/Revert Contracts in ‘Rejected’: Maker

#### Description

This use case describes, how user can delete or ‘Re-Submit’ contracts which are in ‘Rejected’ status

#### Actors

FMD, Procurement and IT

#### Flow of Events

**Pre-Condition**

Contracts should exist in system in status ‘Rejected’ by the user

**Basic Flow**

1. Two ways to land on the verify page:-
2. When user creates the contract and clicks on ‘Submit’, user will be navigated to the ‘Contracts Review List’ page
3. User Clicks on the Contract Module in the Left Panel.

* 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 Need Verification’, clicking on tile would navigate the user to the ‘contract review list’ page

1. Navigation: Dashboard > Contract Reminder > Contract Reveiw List > Review Contract
2. User can edit the following fields in the edit page:-

|  |  |  |
| --- | --- | --- |
| **Fields** | **Editable** | **Remarks** |
| Contract Details |  |  |
| User Group | N | Group description will be auto populated according to selected User Group and displayed next to User Group field |
| Contract Title\* | Y | Text area |
| Contract Reference Number\* | Y | Text |
| BA / PO number\* | Y | Number (0 decimal place) |
| Supplier\* | Y | Text |
| Contract Value Currency\* | Y | Text (3 letters) |
| Contract Value\* | Y | Number (2 decimal place) |
| Performance Bond submission\* | Y | Format: Y / N / N.A |
| Start Date\* | Y | Format: DD/MM/YYYY |
| Expiry Date\* | Y | Format: DD/MM/YYYY |
| Reminder Status | Y | Active(default)/Inactive |
| First Reminder Date\* | Y | Format: DD/MM/YYYY  Auto populated according to default set up in administrative module and editable |
| Second Reminder Date | Y | Format: DD/MM/YYYY Auto populated according to default set up in administrative module and editable |
| Third Reminder Date | Y | Format: DD/MM/YYYY  Auto populated according to default set up in administrative module and editable |
| Officer in Charge\* | Y | Dropdown list.  Select officer in charge from the users within the group |
| Cc list | Y | Text, email(s) separated by semicolon |
| Reviewer List\* | Y | Dropdown list.  Select update to two reviewers from the users within the group |
| Option year |  |  |
| Option year exercise date | Y | Format: DD/MM/YYYY  Default value: NIL |
| Insurance |  |  |
| Public Liability policy expiry date | Y | Format: DD/MM/YYYY  Default value: NIL |
| Workman Compensation policy expiry date | Y | Format: DD/MM/YYYY  Default value: NIL |
| Hull & Marine expiry date | Y | Format: DD/MM/YYYY  Default value: NIL |
| Savings |  |  |
| Savings currency | Y | Text (3 letters) |
| Savings | Y | Number (2 decimal place) |
| Created By | N | Text |
| Created Date | N | DD/MM/YYYY HH:MM:SS |
| Last Modified | N | Text |
| Last Modified Date | N | DD/MM/YYYY HH:MM:SS |

1. User can modify the details, after which user can click on ‘Re-Submit’ button which will redirect the user to the Contract Review List page and status will change to ‘New’ or ‘Re-Submitted’
2. Else, user can click on ‘Delete’ button which will delete the contract from the system.

#### **Sub Flow**

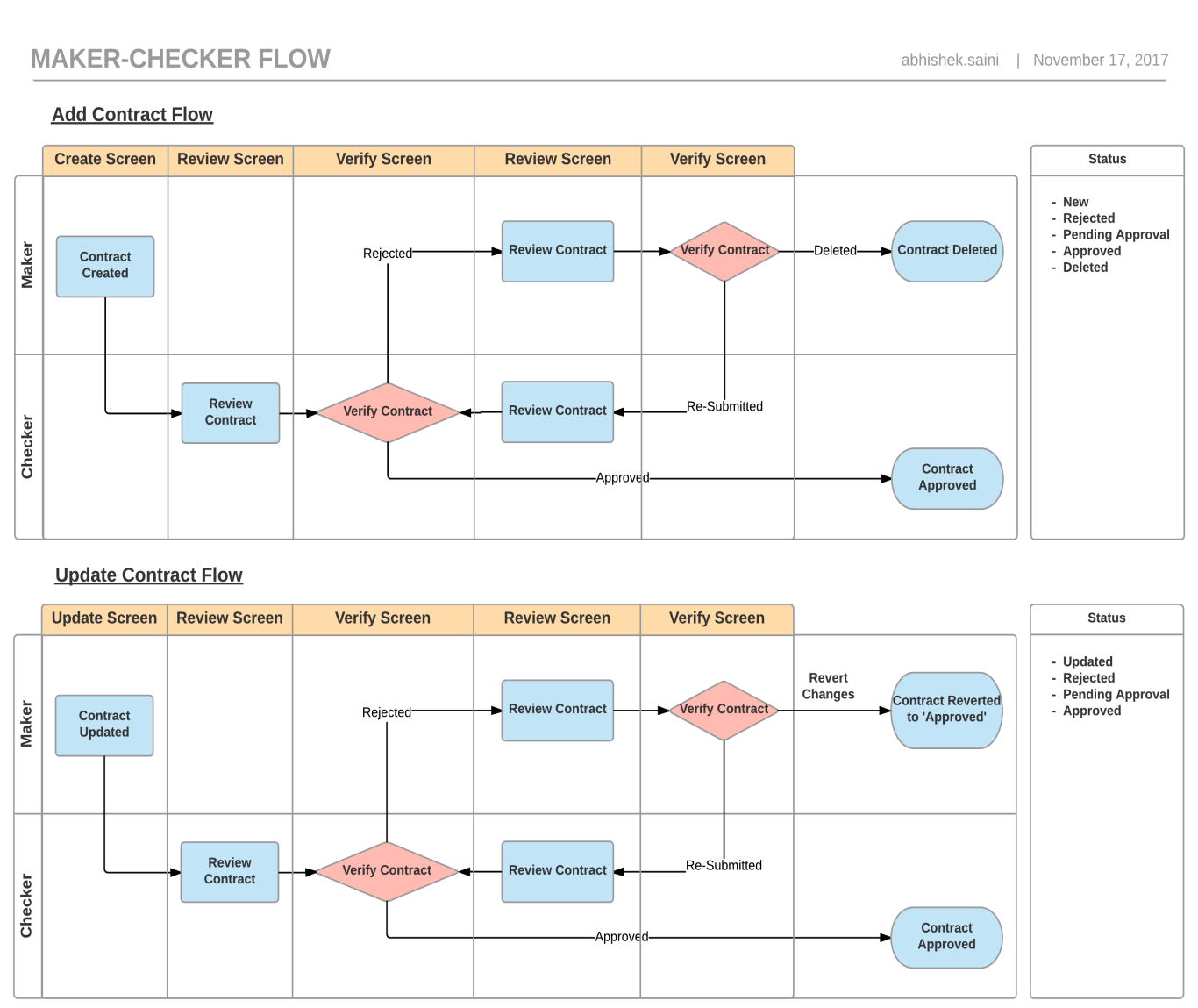
Premature exit

1. User can cancel and exit the contract Verify 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 list 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. If user clicks on delete, then there should be a pop-up message for the user to confirm the action. If yes, it will delete contract and if no then there is no change, user stays as it is on the last action.
9. Flow Diagram:-



**Special Requirements**

If the contract is in ‘Rejected’ Status and was an updated contract and not a new contract, in that case, the ‘Review Contract’ screen will have another option on the screen:-

* There will be 2 buttons: ‘Re-Submit’ and ‘Revert Changes’
* Re-Submit will follow the earlier process and change the status to ‘New/Updated’ and will be submitted for checker to review
* Revert Changes: On Click of this button, the contract will revert to the last change which were submitted before ‘Rejected’ status i.e. to the state before submission to checker. There will be user intervention via pop-up to confirm the action

#### **Post-Conditions**

User can either ‘Re-Submit’ or ‘Revert changes’ of the contract or can delete the contract completely.

### View created Contracts

#### Description

This use case describes, how user can view created contracts in the system and status is ‘Approved’

#### 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 20 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 20 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** | **Editable** | **Remarks** |
| Contract Details |  |  |
| User Group | N | Group description will be auto populated according to selected User Group and displayed next to User Group field |
| Contract Title\* | Y | Text area |
| Contract Reference Number\* | Y | Text |
| BA / PO number\* | Y | Number (0 decimal place) |
| Supplier\* | Y | Text |
| Contract Value Currency\* | Y | Text (3 letters) |
| Contract Value\* | Y | Number (2 decimal place) |
| Performance Bond submission\* | Y | Format: Y / N / N.A |
| Start Date\* | Y | Format: DD/MM/YYYY |
| Expiry Date\* | Y | Format: DD/MM/YYYY |
| Reminder Status | Y | Active(default)/Inactive |
| First Reminder Date\* | Y | Format: DD/MM/YYYY  Auto populated according to default set up in administrative module and editable |
| Second Reminder Date | Y | Format: DD/MM/YYYY Auto populated according to default set up in administrative module and editable |
| Third Reminder Date | Y | Format: DD/MM/YYYY  Auto populated according to default set up in administrative module and editable |
| Officer in Charge\* | Y | Dropdown list.  Select officer in charge from the users within the group |
| Cc list | Y | Text, email(s) separated by semicolon |
| Reviewer List\* | Y | Dropdown list.  Select update to two reviewers from the users within the group |
| Option year |  |  |
| Option year exercise date | Y | Format: DD/MM/YYYY  Default value: NIL |
| Insurance |  |  |
| Public Liability policy expiry date | Y | Format: DD/MM/YYYY  Default value: NIL |
| Workman Compensation policy expiry date | Y | Format: DD/MM/YYYY  Default value: NIL |
| Hull & Marine expiry date | Y | Format: DD/MM/YYYY  Default value: NIL |
| Savings |  |  |
| Savings currency | Y | Text (3 letters) |
| Savings | Y | Number (2 decimal place) |
| Created By | N | Text |
| Created Date | N | DD/MM/YYYY HH:MM:SS |
| Last Modified | N | Text |
| Last Modified Date | N | DD/MM/YYYY HH:MM:SS |

1. After the details are updated, user can click on ‘Submit’ button which will redirect the user checker flow again and will be submitted for checker to review again

#### **Sub Flow**

Premature exit

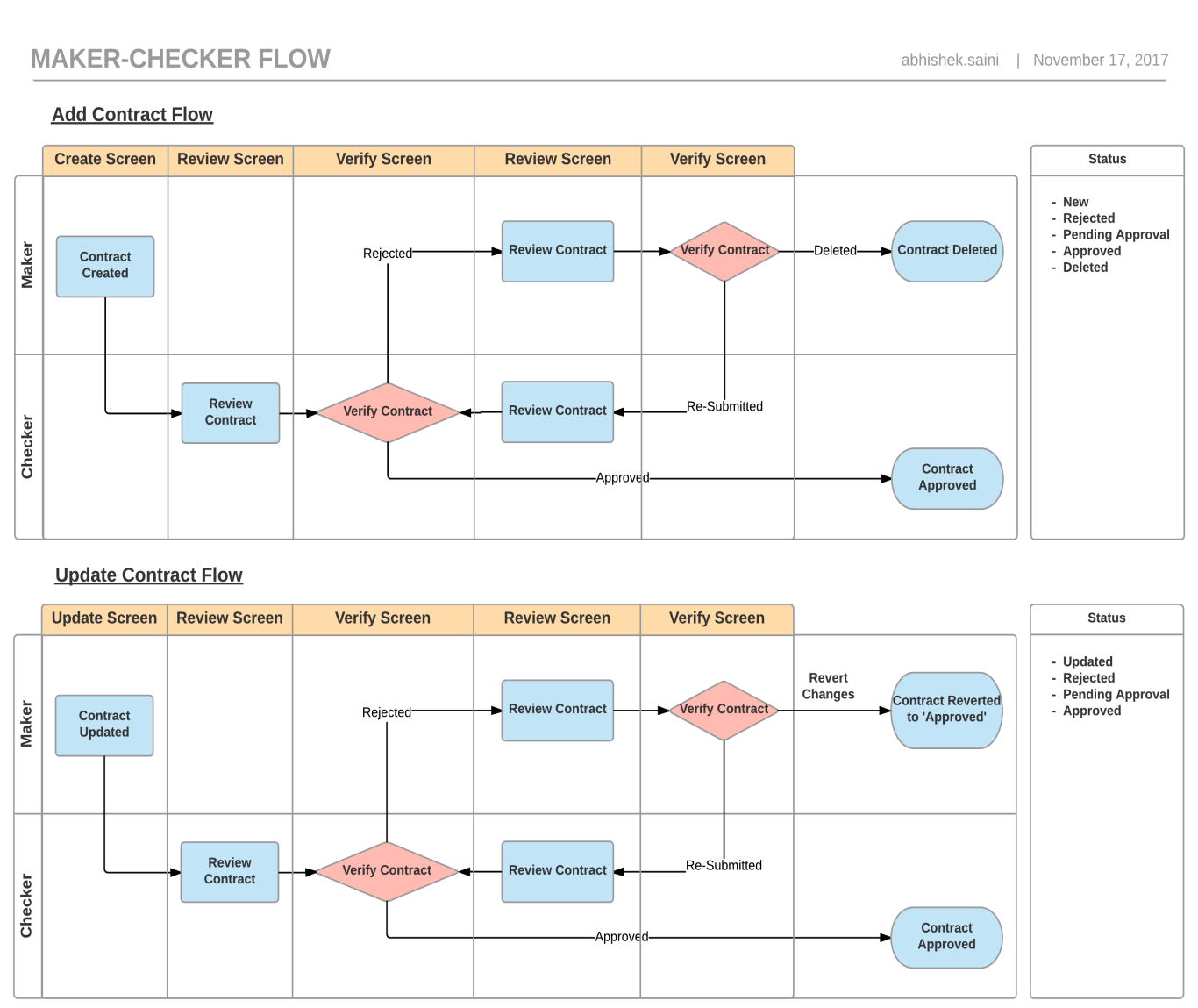
1. User can cancel and exit the contract updation screen prematurely, for example: Click on any of the action button present on left navigation menu and also, breadcrumbs at the top of the page. An alert will be displayed in a pop up, when user tries to exit the screen without completing the form or 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

Flow Diagram:-



**Special Requirements**

View Grid should Fit Screen

#### **Post-Conditions**

a. Contract will be updated and would go through the maker-checker flow again

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

### View Contracts in Reject: Maker-checker

#### 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 Verify process’, on click of which user would be navigated to the ‘contract Verify list’ page
3. Navigation: Dashboard > Contract Reminder > Contract Verify 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/Verify) |
| 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 20 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 Verify: User can view the count of contracts 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 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 Verify List
2. In the ‘Contract Verify List’ page, user will able to view all the records which are in status ‘Rejected’ or ‘Verify’
3. User can select the record where the status is ‘Rejected’ and by clicking on icon, they will be navigated to the ‘Verify 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 Verify List’ page and the status will change to ‘Verify’

#### **Sub Flow**

Premature exit

1. User can cancel and exit the contract Verify 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 Verify 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 ‘Verify’ and viewable in the Contracts Verify 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**

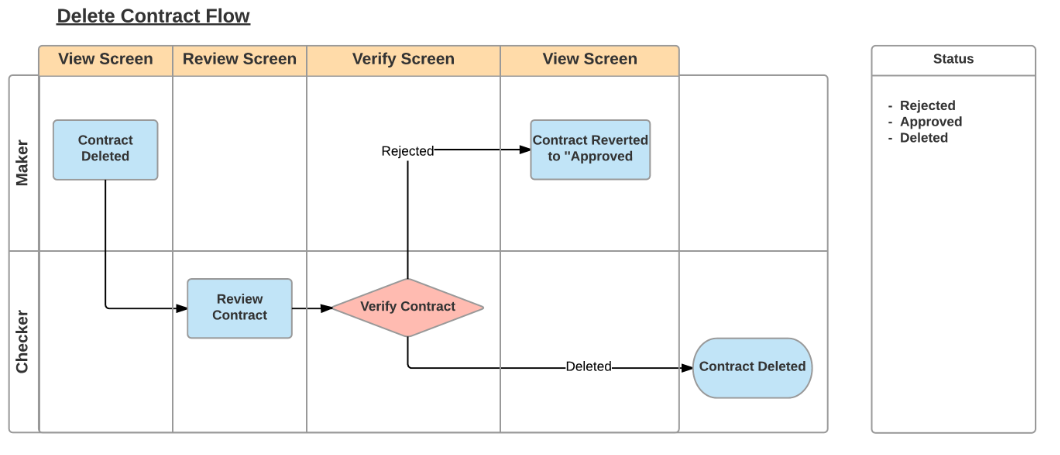
Contracts should exist in the system

**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. When user tries to delete the contract then it goes maker-checker flow too. Delete contract goes to review screen with status as ‘Deleted’, checker comes and verify the state
5. If checker finds the contract can be deleted then checker deletes the contract and it is not visible in the system. And in case, checker feels the contract is fine and shouldn’t be deleted then the user clicks on reject and the contract goes back to the previous status of ‘Approved’ and will show up in view screen

#### **Sub Flow**

Flow Diagram:-



**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 copied from original contracts** |
| Contract Details |
| User Group |
| Contract Title |
| BA / PO number |
| Supplier |
| Contract Value Currency |
| Contract Value |
| Performance Bond submission |
| Reminder Status |
| Officer in Charge |
| Cc list |
| Reviewer List |
| Option year |
| Option year exercise date |
| Insurance |
| Public Liability policy expiry date |
| Workman Compensation policy expiry date |
| Hull & Marine expiry date |
| Savings |
| Savings currency |
| Savings |

\*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

#### **Special Requirements**

NA

#### **Post-Conditions**

a. A new contract will be created

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. There will be up to 3 reminders set for every contract as First Reminder Date, Second Reminder Date and Third Reminder Date as no. of days based on which the reminder should be triggered. For example,
3. First Reminder = 30 days (Trigger the reminder 30 days before the expiry date)
4. Second Reminder = 15 days (Trigger the reminder 15 days before the expiry date)
5. Third Reminder = 7 days (Trigger the reminder 7 days before the expiry date)
6. Note: - These reminder days are specific to respective modules and user groups and will be configured from the settings section.
7. On the respective first, second and third reminder date, notification email will be sent with following recipients:

TO List:

1. Officer in Charge of this contract
2. Users in the Group who have “Notification TO” access right

CC List

1. Emails configured in contract CC List
2. Users in the group who have “Notification CC” access right
3. User will be able to view the reminders status from the view contract screen as a quick snapshot. 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.

Note: - Reminder Format will be DD/MM/YYYY

#### **Sub Flow**

There will be 3 reminders set for every contract as First Reminder Date, Second Reminder Date and Third Reminder Date as no.of days based on which the reminder should be trigged. For example,

* First Reminder = 30 days (Trigger the reminder 30 days before the expiry date)

1. Second Reminder = 15 days (Trigger the reminder 15 days before the expiry date)
2. Third Reminder = 7 days (Trigger the reminder 7 days before the expiry date)

Note:- These reminder days are specific to respective modules and will be configured from the settings section.

#### **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:-
   * Contract is Active, Expiry Reminder is not sent and Expiry Date <= Current Date, or
   * Contract is Active, 3rd Reminder is not sent and 3rd Reminder Date <= Current Date, or
   * Contract is Active, 2rd Reminder is not sent and 2rd Reminder Date <= Current Date, or
   * Contract is Active, 1rd Reminder is not sent and 1rd Reminder Date <= Current Date, or
3. Once the condition matches, the email will be sent

#### **Sub Flow**

NA

#### **Alternative Flows**

Validations:-

* + Contract is Active, Expiry Reminder is not sent and Expiry Date <= Current Date, or
  + Contract is Active, 3rd Reminder is not sent and 3rd Reminder Date <= Current Date, or
  + Contract is Active, 2rd Reminder is not sent and 2rd Reminder Date <= Current Date, or
  + Contract is Active, 1rd Reminder is not sent and 1rd Reminder Date <= Current Date, or

#### **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. All transactions changing database records (eg. Contract reminder, user, group, role details, notification records, etc.) Shall be logged in application log and database.
3. If someone manually updates records from R365 database, such action must also be logged in database audit table.
4. 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