Dashboard Documentation

Dashboard is our main page view. Hovering over the four circled icons in the center right corner will reveal information about the application. Users can toggle between the sandbox view and the subsidiary view by clicking the exit sandbox button at the top of the page. Additionally, the top left menu button allows users to navigate to various modules.

Clicking the menu button will display options such as Structures, Feedback, Rewards, Learning, and More. Under the Structures option, users can access Seat Profiles, Kaizen Drive, Envelopes, Ops Chart, and Dashboard. Clicking any of these options will navigate the user to the respective module.

Under the Feedback option, users can access Checklist and Dashboard. Clicking any of these options will navigate the user to the respective module.

Under the Rewards option, users can access Paygrades and Dashboard. Clicking any of these options will navigate the user to the respective module.

Under the Learning option, users can access Learning, Compliance and Dashboard. Clicking any of these options will navigate the user to the respective module.

Under the More option, users can access Seats Stats and Organizations. Clicking any of these options will navigate the user to the respective module.

Seat Profile Module:

In any organization, multiple departments exist, and each department can encompass various seat profiles, which represent different job positions. Each seat profile is associated with several categories, and every category can have multiple seat descriptions. For instance, the IT department may include seat profiles such as junior developer, mid-level developer, and senior developer. The responsibilities of a specific seat profile, like a senior developer, include tasks like coding, code reviews, and deployments. These responsibilities are considered seat categories, and each category can have detailed descriptions outlining the specifics of that category. You can explore the complete use cases of seat profiles through the following link.
https://docs.google.com/document/d/1g-sw-a-WFI4ZJfOuVtnwczU17HXoLIITESiz40B48Hk/edit#heading=h.aansia1qiyuy

Kaizen Drive:

Kaizen Drive functions as a space where users can upload and store personal documents and other files. Essentially, Kaizen Drive allows users to upload various types of files, such as images, videos, DOCX files, Excel files, PDFs, and more. Users can also create, update, and save new Kaizen documents, as well as create new folders within the drive. For a comprehensive understanding of Kaizen Drive's use cases, you can refer to the following link.
https://docs.google.com/document/d/1g-sw-a-WFI4ZJfOuVtnwczU17HXoLIITESiz40B48Hk/edit#heading=h.o50y1x39cgrp

Envelopes:

Envelopes is a section where users can create template documents for their employees and assign these envelopes to specific employees. In this section, users can create new envelope templates, save them, and assign them to particular employees. Additionally, they can track the status of assigned envelopes to see if they have been filled out by the employees. An employer cannot assign an envelope to an employee if there are any fields in the envelope document that still need to be completed by the employer. Such envelopes will remain in the “drafts employee” tab. Once an employee fills out and returns an assigned envelope, it will move from the "waiting for employees" tab to the "filled by employee" tab. You can explore the complete use cases of envelopes through the following link.
https://docs.google.com/document/d/1g-sw-a-WFI4ZJfOuVtnwczU17HXoLIITESiz40B48Hk/edit#heading=h.1s8rml5thg71

Ops Chart:

In the operation chart, users can visualize the entire organizational hierarchy, including all departments and their respective seat functions, represented as nodes. When a new company is created, visionary and integrator nodes are automatically included in the operation chart. Users can add new team leads or team members by creating new nodes, which represent new seat functions. These seat functions can later be assigned specific seat profiles. Additionally, users can view the performance of each seat function, conduct audits, and delete seat functions as needed.

Dashboard:

By clicking on the dashboard option in the left side menu, users will be redirected to the main dashboard screen. From this dashboard, users can also navigate to other screens.

Checklist:

Checklist is the section where users can define tasks for employees within specific seat profiles. Users can create multiple checklists, each containing various checklist-tasks. Each checklist is associated with a particular seat profile, and each checklist-task is linked to a specific checklist. Additionally, users can set the frequency and select the days for each checklist-task.

Paygrades:

Paygrades is the section where users can assign pay rates to specific seat profiles. These pay rates can be either primary or ancillary. Primary paygrades are assigned for main tasks, while ancillary paygrades are designated for secondary tasks.

Seats Stats:

Organizations:

Organizations can be added by selecting the organization option from the main menu. In the sandbox, users can make changes and then push or publish these changes to all organizations. Users can switch to any organization to view the published changes.

Learning:

Learning is the section where admins can add training material for employees. This material is linked to a specific seat profile description and assigned to employees in that role. In this section, admins can add training videos, documents, and create quizzes. It is a comprehensive section for managing employee training. You can explore the complete use cases of LMS through the following link.
https://docs.google.com/document/d/1g-sw-a-WFI4ZJfOuVtnwczU17HXoLIITESiz40B48Hk/edit#heading=h.ipir9hw1rcja

Compliance:

Compliance is the section where users can assign training material to one or more seat profiles. Admins can assign learning compliance and document compliance to specific seats. This section provides comprehensive management and assignment of employee training.

Envelope Structure

In Sandbox, the visionary will be displayed the Basic Envelopes tab only, where all the envelopes made by the visionary (user) will be listed. User can create new envelope documents, edit or delete existing envelope documents. The use-cases for these are discussed below from UC01 to UC07.

In Subsidaries, the visionary will be displayed with additional three tabs. The tabs displayed will be Basic Envelopes, Draft Employee Envelopes, Waiting for Employees and Filled by Employees tab.

Basic Envelopes will be created by the visionary and will be assigned to a specific employee. After assigning the envelope to a specific employee, the user will be asked to fill all the kaizen documents and the system will restrict the user from sending any kaizen document if any of the document is not filled. The envelope will remain in the Draft Employee Envelopes till all the kaizen documents are filled and it is sent to the employee successfully. After filling the kaizen documents completely the user will be able to send the kaizen document to the employee. After the envelope is sent to the user, a notification email will be sent to the employee. The sent envelope will remain in the Waiting for Employees tab till the employee signs the documents. Visionary can also revoke an envelope and make the link invalid for the employee. If the user signs the envelope, the envelope will then be moved from the Waiting for Employees to the Filled by Employees tab. The use-cases for these are discussed below from UC01 to UC17.

Envelope-View Use Cases

[Use-cases common for Sanbox and Subsidaries]

UseCase ID: UC01

UseCase Name: View Envelope Section
Actors: User
Description: The user wants to view the envelope section
Preconditions: User is logged-in
Basic Flow:

- User selects the envelopes option from the menu in the dashboard
- System displays the document envelopes view and list of all documents which were created by the user before. The documents are displayed with their screen count and last change fields
- User can edit or delete any envelope document by clicking on the three-dots icon in the action field
- System will display a dropdown having options of edit and delete
- User can create a new envelope (refer UC02) by clicking on the Template button present on the top right corner
- System will open a new envelope document
- User can go back to the dashboard screen by clicking on dashboard option present in the breadcrumbs
- System will navigate the user to the dashboard screen

UseCase ID: UC02
UseCase Name: Create and Save New Envelope Document
Actors: User
Description: The user wants to create a new envelope document and save it
Preconditions: User is logged-in
Basic Flow:

- User clicks on the Template button present at the top right corner
- System will open a new envelope document
- User can add the name and description of the envelope
- System will display the name and description fields to the user so that the user can add them
- System will restrict the user from creating a new envelope if the name of the envelope is not present by disabling the Create Envelope button
- By default, there will be an Intro screen already added by the system and user can edit, save or delete this screen (refer UC05)
- User can add new screen flows by clicking on the Add Break button. User can add, edit, save or delete the new screen (refer UC06)
- User can also add documents to this envelope by clicking on the Add Document button (refer UC07)

- User can also remove the intro screen, the added screen flows or the added documents by clicking on the cross-icon present with them
- System will remove the specific intro screen, the added screen flows or the added documents
- After adding all the stuff to the envelope, the user clicks on the Create Envelope button to create the new envelope document
- System will navigate the user to the Update Envelope Template screen
- User can go back to the dashboard screen or list of document envelopes by clicking on path present in the breadcrumbs
- System will navigate the user to the selected path

UseCase ID: UC03
UseCase Name: Edit and Save Envelope Document
Actors: User
Description: The user wants to edit an envelope document and save it
Preconditions: User is logged-in
Basic Flow:

- User clicks on the three-dots icon present with the envelope document which user wants to edit
- System will show a dropdown to the user with the options of Edit and Delete
- User clicks on the edit option
- System will open the specific envelope document
- User can edit the name and description of the envelope
- System will restrict the user from saving envelope if there are no changes made to the specific envelope by disabling the Save Envelope button
- User can edit, save or delete the Intro screen if it is already present (refer UC05)
- User can add new screen flows by clicking on the Add Break button. User can add, edit, save or delete the new screen (refer UC06)
- User can also add documents to this envelope by clicking on the Add Document button (refer UC07)
- User can also remove the intro screen, the added screen flows or the added documents by clicking on the cross-icon present with them
- System will remove the specific intro screen, the added screen flows or the added documents
- After editing all the stuff in the envelope, the user clicks on the Save Envelope button to save the changes made
- System will remain on the same Update Envelope Template screen

- User can go back to the dashboard screen or list of document envelopes by clicking on path present in the breadcrumbs
- System will navigate the user to the selected path

UseCase ID: UC04
UseCase Name: Delete Specific Envelope Document
Actors: User
Description: The user wants to delete specific envelope
Preconditions: User is logged-in
Basic Flow:

- User clicks on the three-dots icon present with the envelope document which user wants to delete
- System will show a dropdown to the user with the options of Edit and Delete
- User clicks on the delete option
- System will delete the specific envelope document from the list and show an alert to the user that the envelope is deleted

UseCase ID: UC05
UseCase Name: View, Edit, Save or Delete Intro Screen
Actors: User
Description: The user wants to view, edit, save or delete the intro screen.
Preconditions: User is logged-in
Basic Flow:

- By default, there will be an Intro screen already added by the system
- User can use this intro screen and can add heading and description to this intro screen
- System will display the heading and description fields to the user and a preview will also be shown to user of the changes the user made to this screen
- User can also edit the heading and description fields in the intro screen
- User can save all the changes made using the done button at the end of the screen
- System will save the changes
- User can also delete this intro screen by clicking on the red-cross icon present on the bottom of the intro screen button
- System will delete the intro screen

UseCase ID: UC06
UseCase Name: Add, Edit, Save or Delete New Screen
Actors: User
Description: The user wants to add, edit, save or delete the new screen.
Preconditions: User is logged-in
Basic Flow:

- The user can add new screen flows by clicking on the Add Break button
- System will add a new screen flow
- User can view the screen and can add heading and description
- System will display the heading and description fields to the user and a preview will also be shown to user of the changes the user made to the screen
- User can also edit the heading and description fields
- User can save all the changes made using the done button at the end of the screen
- System will save the changes
- User can also remove any screen by clicking on the red-cross icon present on the bottom of the Break button
- System will delete the specific screen

UseCase ID: UC07
UseCase Name: Add and Preview Document
Actors: User
Description: The user wants to add and preview document
Preconditions: User is logged-in
Basic Flow:

- User can add new document by clicking on the Add Document button
- System will open a drive view on the right side of the screen
- User can add any file from the drive by clicking on the file
- System will add that document
- User can also upload new document in the drive by clicking on the Create New button
- System will navigate the user to the drive section in the other window tab
- User will upload the specific file in the drive first (refer Drive-View Use Cases)
- After uploading the file in the drive, user will switch to the previous tab where the envelope section was opened

- User will click on the refresh icon displayed with the create new button to refresh the drive
- System will display all the files and the recently uploaded file as well to the user
- User can now select the specific file to add it
- System will add the specific document to the envelope and close the drive section opened on the right side
- User can preview all the added documents, added screen flows as well as the intro screen using the preview Envelope button present on the top right corner
- System will open the preview the info section on the right side of the screen
- User can move the screen forward and backward using the arrow icons on the screen
- After previewing the screen the user will click on the Ok button present at the bottom of the preview screen
- System closes the preview screen

[Extended Use-Cases for Subsidaries]

UseCase ID: UC08
UseCase Name: View Envelope Section
Actors: User
Description: The user wants to view the envelope section
Preconditions: User is logged-in
Basic Flow:

- User selects the envelopes option from the menu in the dashboard
- System displays four tabs to the user here which are Basic Envelopes, Draft Employee Envelopes, Waiting for Employees and Filled by Employees tab.
- In the Basic Envelopes tab, the system displays the document envelopes view and list of all documents which were created by the user before. The documents are displayed with their screen count and last change fields
- User can use (refer UC13), edit (refer UC16) or delete (refer UC17) any envelope document by clicking on the three-dots icon in the action field
- System will display a dropdown having options of use, edit and delete
- In the Draft Employee Envelopes tab, user can only edit (refer UC16) or delete (refer UC17) any envelope
- In the Waiting for Employees and Filled by Employees tab, user can view (refer UC15) and revoke envelope (refer UC14)
- User can create a new envelope (refer UC02) by clicking on the Template button present on the top right corner
- System will open a new envelope document

- User can go back to the dashboard screen by clicking on dashboard option present in the breadcrumbs
- System will navigate the user to the dashboard screen

UseCase ID: UC09
UseCase Name: View Basic Envelopes Tab
Actors: User
Description: The user wants to view the basic envelopes tab and perform some action there
Preconditions: User is logged-in
Basic Flow:

- User selects the basic envelopes tab from the tabs present on the top of the screen
- System displays the document envelopes view and list of all documents which were created by the user before. The documents are displayed with their screen count and last change fields
- User can use (refer UC13), edit (refer UC03) or delete (refer UC04) any envelope document by clicking on the three-dots icon in the action field
- System will display a dropdown having options of use, edit and delete
- User can create a new envelope (refer UC02) by clicking on the Template button present on the top right corner
- System will open a new envelope document
- User can switch to any other tab as well
- System will display the list of the selected tab
- User can go back to the dashboard screen by clicking on dashboard option present in the breadcrumbs
- System will navigate the user to the dashboard screen

UseCase ID: UC10
UseCase Name: View Draft Employee Envelopes Tab
Actors: User
Description: The user wants to view the draft employee envelopes tab and perform some action there
Preconditions: User is logged-in
Basic Flow:

- User selects the draft employee envelopes tab from the tabs present on the top of the screen
- System displays the list of all documents which were assigned to a specific employee by the user but are not sent to the employee yet. The drafts are displayed with their assigned employee name and avatar, title of document, screen count and last change fields
- User can edit (refer UC16) or delete (refer UC17) any employee envelope document by clicking on the three-dots icon in the action field
- System will display a dropdown having options of edit and delete
- User can create a new envelope (refer UC02) by clicking on the Template button present on the top right corner
- System will open a new envelope document
- User can switch to any other tab as well
- System will display the list of the selected tab
- User can go back to the dashboard screen by clicking on dashboard option present in the breadcrumbs
- System will navigate the user to the dashboard screen

UseCase ID: UC11
UseCase Name: View Waiting for Employees Tab
Actors: User
Description: The user wants to view the waiting for employees tab and perform some action there
Preconditions: User is logged-in
Basic Flow:

- User selects the waiting for employees tab from the tabs present on the top of the screen
- System displays the list of all documents which were assigned and sent to a specific employee by the user but are not signed by the employee yet. The envelopes are displayed with their assigned employee name and avatar, title of document, screen count and last change fields
- User can view (refer UC15) or revoke envelope (refer UC14) any employee envelope document by clicking on the three-dots icon in the action field
- System will display a dropdown having options of view and revoke envelope
- User can create a new envelope (refer UC02) by clicking on the Template button present on the top right corner
- System will open a new envelope document
- User can switch to any other tab as well
- System will display the list of the selected tab

- User can go back to the dashboard screen by clicking on dashboard option present in the breadcrumbs
- System will navigate the user to the dashboard screen

UseCase ID: UC12
UseCase Name: View Filled by Employees Tab
Actors: User
Description: The user wants to view the filled by employees tab and perform some action there
Preconditions: User is logged-in
Basic Flow:

- User selects the filled by employees tab from the tabs present on the top of the screen
- System displays the list of all documents which were assigned and sent to a specific employee by the user and are also signed by the employee. The envelopes are displayed with their assigned employee name and avatar, title of document, screen count and last change fields
- User can view (refer UC15) or revoke envelope (refer UC14) any employee envelope document by clicking on the three-dots icon in the action field
- System will display a dropdown having options of view and revoke envelope
- User can create a new envelope (refer UC02) by clicking on the Template button present on the top right corner
- System will open a new envelope document
- User can switch to any other tab as well
- System will display the list of the selected tab
- User can go back to the dashboard screen by clicking on dashboard option present in the breadcrumbs
- System will navigate the user to the dashboard screen

UseCase ID: UC13
UseCase Name: Use and Send an Envelope Document
Actors: User
Description: The user wants to use an envelope document and send it
Preconditions: User is logged-in
Basic Flow:

- User clicks on the three-dots icon present with the envelope document which user wants to use
- System will show a dropdown to the user with the options of Use, Edit and Delete
- User clicks on the use option
- System will open a pop-up screen and ask the user to select an employee from the list
- User can also search for a specific employee by typing the employee name in the search field present on the pop-up screen. Then user will select a specific employee from the list
- System will assign that envelope to the selected employee
- User will be redirected to a new screen where he will be asked to fill all the kaizen documents before sending it to the employee. A not filled tag will be displayed on the documents which are not filled, and completed documents will be marked with the filled tag
- System will not allow the user to send the envelope to the employee if all the kaizen documents are not filled by the user and this specific envelope will remain in the Draft Employee Envelopes tab
- User can also preview the documents using the preview button present on the top right corner
- System will open a preview screen on the right side of the screen
- User can move the documents forward and backward by clicking the arrow icons
- User can close the preview screen by clicking on the bottom right corner on the preview screen
- System closes the preview screen
- After filling all the documents, user will be allowed to send it to employee by clicking the send to employee button
- System will send the envelope to the specific employee and redirect the user to another screen where the status of the sent envelope will be shown as pending till the employee signs the document
- This envelope will move from Draft Employee Envelopes tab to the Waiting for Employees tab

UseCase ID: UC14
UseCase Name: Revoke an Envelope Document
Actors: User
Description: The user wants to revoke an envelope document
Preconditions: User is logged-in
Basic Flow:

- User clicks on the three-dots icon present with the envelope document which user wants to revoke
- System will show a dropdown to the user with the options of View and Revoke Envelope
- User clicks on the Revoke Envelope option
- System will open a dialog that will inform the user that "Revoking this envelope will invalidate the link that is sent to the team member email."
- If the user clicks on cancel button, it will cancel the revoke
- If the user clicks on the proceed button, the envelope will be deleted and the link which was sent to the employee email will be made invalid
- System will show alert to the user that envelope is deleted

UseCase ID: UC15
UseCase Name: View Employee Envelope
Actors: User
Description: The user wants to view an employee envelope
Preconditions: User is logged-in
Basic Flow:

- User clicks on the three-dots icon present with the employee envelope which the user wants to view
- System will navigate the user to a new screen where the sent documents will be displayed
- User can also preview the documents using the preview button present on the top right corner
- System will open a preview screen on the right side of the screen
- User can move the documents forward and backward by clicking the arrow icons
- User can close the preview screen by clicking on the bottom right corner on the preview screen
- System closes the preview screen

UseCase ID: UC16
UseCase Name: Edit Employee Envelope
Actors: User
Description: The user wants to edit an employee envelope
Preconditions: User is logged-in
Basic Flow:

- User clicks on the three-dots icon present with the employee envelope which the user wants to view

- System will navigate the user to a new screen where the sent documents will be displayed
- User can also preview the documents using the preview button present on the top right corner
- System will open a preview screen on the right side of the screen
- User can move the documents forward and backward by clicking the arrow icons
- User can close the preview screen by clicking on the bottom right corner on the preview screen
- System closes the preview screen

UseCase ID: UC17
UseCase Name: Delete a Draft Employee Envelope
Actors: User
Description: The user wants to delete a draft employee envelope
Preconditions: User is logged-in
Basic Flow:

- User clicks on the three-dots icon present with the draft employee envelope which user wants to delete
- System will show a dropdown to the user with the options of Edit and Delete
- User clicks on the Delete option
- System will delete that envelope and show an alert to the user that the envelope is deleted. System will display the updated list to the user

LMS-View Use Cases

UseCase ID: UC18
UseCase Name: View LMS Section
Actors: User
Description: The user wants to view the LMS section
Preconditions: User is logged-in
Basic Flow:

- User selects the learning option from the menu in the dashboard
- System displays other three options to the user. The options include Learning, Compliance and Dashboard
- User clicks on the Learning option

- System will display all the training modules to the user. By default, the system will display the training modules of all departments and all seat categories
- User can select and switch to a particular department to view its training modules by changing the tabs
- System will display the training module of that selected department to the user
- User can click on a specific training module of a specific seat category
- System will redirect the user to that specific training module screen
- User can also filter the training modules by seat names
- System will display the training modules of the entered seat name only
- User can switch to the grid view, list view or details view by selecting any option from dropdown from the top right corner (by clicking on the [grid/list/details] view button)
- System will display the whole content in the form of the selected view type
- User can also create a new seat or select a specific seat by clicking on the create button
- System will open a pop-up for the user where there will be options of searching seat and creating new seat
- User can also search by category/description/lesson by entering the specific stuff in the field present on the left top side
- System will display the searched content to the user
- User can go back to the dashboard screen by clicking on dashboard option present in the breadcrumbs
- System will navigate the user to the dashboard screen

UseCase ID: UC19
UseCase Name: View LMS Section in Different View-Types
Actors: User
Description: The user wants to view the lms section using different view-types
Preconditions: User is logged-in
Basic Flow:

- User selects the learning option from the menu in the dashboard
- System displays other three options to the user. The options include Learning, Compliance and Dashboard
- User clicks on the Learning option
- System will display all the training modules to the user. By default, the system will display the training modules of all departments and all seat categories in grid view-type
- User can select and switch to a particular department to view its training modules by changing the tabs

- System will display the training module of that selected department to the user
- User can switch to the list view-type by clicking on the grid view button present on the top right corner
- System will display the whole content in the form of the list view-type
- User can edit a specific training module by clicking on it or by clicking the edit icon present with the seat category
- System will navigate the user to that training module edit screen
- User can also publish or unpublish the training module by clicking on the checkbox icon
- System will make the changes accordingly and show an alert message to the user
- User can also delete a specific training module by clicking on the delete icon present with the training module
- System will delete the specific training module, show the alert message to the user that the training module is deleted and show the updated list to the user
- User can expand/unexpand the categories and seats by clicking on the arrow icon present on the left side of the seat/category name
- System will update the list as requested by the user
- User can switch to the details view-type by clicking on the [grid/list/details] view button present on the top right corner
- System will display the whole content in the form of the details view-type
- User can edit a specific training module by clicking on it or by clicking the edit icon present with each seat category description
- System will navigate the user to that training module edit screen
- User can search for the training modules of a specific seat by selecting the seat name from the dropdown
- System will display the training modules of all categories and all descriptions of the selected seat
- User can now search for the training modules of a specific category by selecting the category name from the dropdown list
- System will display the training modules of all descriptions of the selected seat category
- User can now search for the training modules of a specific description by selecting the description name from the dropdown list
- System will display the training modules of the selected seat category description
- System will not allow the user to search for any category if he has not selected any seat yet. And similarly the user will not be allowed to search for any description if he has not selected any category yet. System will restrict the user by disabling the fields

UseCase ID: UC20
UseCase Name: View Training Module Section
Actors: User
Description: The user wants to view the training module section. User will be moved to this section whenever the user wants to create or edit any training module
Preconditions: User is logged-in
Basic Flow:

- User wants to create or edit any training module of a specific seat category description
- System displays the training module section to the user. There will be four tabs shown to the user namely Video, Document, Test and Compliance
- On the right side user will be shown the seat name whose training module he wants to create or edit. User can switch the categories of the seat by clicking on the category field
- System will display a dropdown to the user of all the categories of the seat which are present
- User will select the specific category from the dropdown
- System will display all the descriptions of the selected category with their training modules
- User can view this section in edit mode or view mode
- In view mode system will not allow the user to perform any action in this section. But in edit mode, user will be allowed to perform any action here

UseCase ID: UC21
UseCase Name: View Video Tab and Create New Training Module
Actors: User
Description: The user wants to view the video tab and the user wants to create a new training module
Preconditions: User is logged-in
Basic Flow:

- User selects the video tab from the tabs present on the top of the screen
- If there are no training modules initially present, system will display a message to the user that "click the plus button to create training module". Else if training modules are present then the first training module video will be displayed on the left side
- User will click on the plus button on the right side to create a new training module

- System will display a message that the training module is created and allow the user to upload video files
- User will click on the select file button to upload a file
- System will allow the user to upload only video files by disabling the other file types
- User will select a video and clicks on the open button
- System will display the uploaded percentage of the video to the user and system will open a dialog box for the user. Then user will be asked to enter the title, description and select thumbnail for the video
- User will enter the title, description and selects thumbnail for the video
- System also gives option to the user to upload a new thumbnail for the video
- User can click on the upload thumbnail button to upload a new thumbnail for the video
- System will allow the user to select any image of size less than 5MB. Other file type options will be disabled by the system
- User selects any image for the thumbnail and clicks the open button
- System sets the video thumbnail
- The done button will remain disabled for the user till the user enters the title, description and selects a thumbnail for the video. After that it will be enabled
- If the user clicks the cancel button instead of done button the video will not be uploaded
- System will display an alert that “video uploading canceled” and closes the dialog box
- Alternatively, if the user clicks on the done button and closes the linear progress bar dialog
- System will show the specific video on the screen
- User can play the video, zoom it, download it, change the playback speed and view it in picture-in-picture mode
- System will perform the specific action. System will also display the title and description with the video
- The created training module will be present on the right side and user can open it and view it whenever he wants
- User can edit, publish/unpublish or delete the training module by clicking on the three dots icon and selecting the specific option from the dropdown
- System will perform the specific action
- User can create more training module by clicking on the plus button present on the right side
- System will show all the created training modules of the description on the right side

UseCase ID: UC22
UseCase Name: Edit Training Module
Actors: User
Description: The user wants to edit a training module
Preconditions: User is logged-in
Basic Flow:

- User clicks on the edit icon from the list or details view tab. Else if he clicks on the edit button from the dropdown after clicking on the three dots icon
- System will open the training module in edit mode by opening a new dialog box.
- System will allow the user to add any other video or update the title or description of the video
- In case the user wants to edit the video and enter a new video, he will upload a new video and selects the thumbnail for it
- System will display an alert that the “Previous video deleted, uploading the new video”
- User can also update the title, description and thumbnail for the video and after making all the updates, user clicks on the done button
- System will update the training module with all the changes the user have made

UseCase ID: UC23
UseCase Name: View Document Tab and Create New Document
Actors: User
Description: The user wants to view document tab and create new kaizen document
Preconditions: User is logged-in
Basic Flow:

- User switches to the document tab from the list of tabs present at the top of the screen
- System will open the new kaizen document for the user
- User can enter information in the document whatever he wants to add. After adding all the content, user clicks on the save changes button present at the bottom right corner
- System will save all the changes made to the document

UseCase ID: UC24
UseCase Name: View Test Tab
Actors: User
Description: The user wants to view the test tab and perform some actions there
Preconditions: User is logged-in
Basic Flow:

- User switches to the test tab from the list of tabs present at the top of the screen
- System will open the test screen where the user can create MCQs.
- User can view this tab on full screen by clicking the full screen button
- System will open the test tab in full screen mode
- User can close the full screen mode by clicking the close button or the close icon present on this screen
- User clicks on the test tab dropdown icon
- System will display three options to the user of Edit, Results and Settings. By default, the system opens the test edit screen
- On the edit test screen, user can add questions by clicking on the add question button
- System will add a new question for the user
- On the results test screen, system will display the results of the test to the user
- On the settings test screen, user can update the settings for the test. User can allow the retake test option for the user, and can also specify the retake count and retake days
- System will make the changes accordingly

UseCase ID: UC25
UseCase Name: Add or Edit Test
Actors: User
Description: The user wants to add or edit the test
Preconditions: User is logged-in
Basic Flow:

- User clicks on the test tab dropdown icon on the test tab
- System will display three options to the user of Edit, Results and Settings
- User clicks on the edit option
- System opens the test edit screen
- User can add questions here by clicking on the add question button
- System will add a new question for the user
- User will add the question text and options text.

- System will restrict the user from saving the question until question text with two option texts, answer key and points are present there. System will display the alert to the user to fill all the fields first
- User can add maximum 5 options
- System will not allow user to add more than 5 options
- User can also delete any option by clicking the remove icon present with the option
- System will delete that option
- User can select the answer key by clicking the answer key field
- System will display a dropdown of answer keys to the user
- User will give points to a question
- System will not allow user to give more than 1000 points to any question. System will show an alert that points cannot be more than 1000
- User can add an image by clicking on the image icon
- System will allow user to add only images file types which are less than 5MB in size
- User can duplicate and delete the question by clicking on the duplicate and delete icons
- System will perform the specified action
- User clicks on the save button to save a question
- System saves the question
- User can update any question by editing the question and clicking on the update question button
- System will update the question

UseCase ID: UC26
UseCase Name: View Compliance Tab
Actors: User
Description: The user wants to view the compliance tab and perform some actions there
Preconditions: User is logged-in
Basic Flow:

- User switches to the compliance tab from the list of tabs present at the top of the screen
- System will open the compliance screen where the user can assign time interval for the completion of training modules of each description
- User can view all the categories and their descriptions for the selected seat by clicking on the specific category

- System will open the dropdown and display all descriptions of that specific category
- System will give option to the user to assign compliance interval to each description of the selected category by clicking on the “No Compilance Need” dropdown button. By default the selected option will be “No Compilance Need”
- User clicks on the “No Compilance Need” dropdown button
- System will display four options to the user which will be
    1) By End of Quarter 1
    2) By End of Quarter 2
    3) By End of Quarter 3
    4) By End of Quarter 4
- User can select any of the option to assign the compliance interval to a specific description of selected category
- System will make and save the changes accordingly

Seat Profile Use Cases

UseCase ID: UC27
UseCase Name: View Seat Profile Section
Actors: User
Description: The user wants to view the Seat Profile section
Preconditions: User is logged-in
Basic Flow:

- User clicks on the menu icon on the dashboard screen and selects the seat profile option
- System will display the list of all seat profiles. The seat profiles will be displayed with their seat profile name, total categories, total descriptions, has primary paygrades, has ancillary paygrades attributes
- User can also switch to specific department using the tabs at the top
- System will display all the seat profiles of that specific department
- User can search for a particular seat profile by entering the seat profile name in the search field present just below the tabs
- System will display the searched seat profile results from all the seat profiles present
- User can switch to the list and grid views by clicking on the list or grid icon at the top right corner
- System will display all the data according to the selected view
- User can also add department by clicking on the Add Department button present at the top right corner (refer UC28)

- System will display the new department added in the tabs but no seat profile will be displayed there till user adds a new seat profile there
- User can create a new seat profile by clicking on the Add Seat Profile button present at the top right corner (refer UC29)
- User can view all the details of a specific seat by clicking on that seat profile
- System will navigate the user to another screen where he can view the details of that specific seat profile
- User can go back to the dashboard screen by clicking on dashboard option present in the breadcrumbs
- System will navigate the user to the dashboard screen

UseCase ID: UC28
UseCase Name: Add New Department
Actors: User
Description: The user wants to add new department
Preconditions: User is logged-in
Basic Flow:

- User can add new department by clicking on the Add Department button
- System will open a dialog screen for the user and ask the user to enter new department title and select department color
- User will not be able to save the department till he enters the department title which is a required field
- System will disable the save button till the user enters the department title
- System will not add the department if the user clicks on the cancel button
- User clicks on the save button after entering all the required fields

UseCase ID: UC29
UseCase Name: Add New Seat Profile
Actors: User
Description: The user wants to add new seat profile
Preconditions: User is logged-in
Basic Flow:

- User clicks on the Add Seat Profile button present at the top right corner of the screen
- System will redirect the user to the create seat profile page
- User will enter the seat profile title and will select the department by clicking on the department field
- System will display the list of the present departments in the dropdown

- User can select any department from the list or can create a new department as well (refer UC28)
- User can also switch to table view or panel view by clicking on the view field
- System will display the content in the form of the selected view
- User can add seat category (refer UC30), edit or delete seat category (refer UC31)
- User can add or delete seat description (refer UC32)
- User clicks on the save button at the bottom of the screen after performing the above mentioned steps
- System will save the data and show an alert message to the user of seat created
- System will navigate the user to the view seat profile screen where he can view the details of the seat profile he have just created (refer UC34)

UseCase ID: UC30
UseCase Name: Add Seat Category
Actors: User
Description: The user wants to add new seat category
Preconditions: User is logged-in
Basic Flow:

- User clicks on the Add Seat Category button to add new seat category
- System will open a pop-up screen for the user and ask the user to enter seat category name and weight for this category
- System will inform the user that the sum of weights of all categories added should not exceed 100% and will not allow the user to add weights whose sum is greater than 100%
- User will fill all fields and click the save button
- System will close the pop-up screen and display a message at the bottom of the screen that you have some unsaved changes. System will also display a save button
- User clicks on the save button
- System will save all changes and show alert to the user of seat updated

UseCase ID: UC31
UseCase Name: Edit or Delete Seat Category
Actors: User
Description: The user wants to edit or delete a specific seat category
Preconditions: User is logged-in

Basic Flow:

- User hovers on the seat category which he wants to edit
- System will display the edit and delete icons with the seat category
- User clicks on the edit icon of the specific seat category which he wants to edit
- System will open a pop-up screen for the user and allow the user to edit seat category name and weight for this category
- System will inform the user that the sum of weights of all categories added should not exceed 100% and will not allow the user to add weights whose sum is greater than 100%
- User will edit the specific field and click the save button
- System will close the pop-up screen and display a message at the bottom of the screen that you have some unsaved changes. System will also display a save button
- User clicks on the save button
- System will save all changes and show alert to the user of seat updated
- User can delete the specific seat category by clicking on the remove icon present with that seat category
- System will display a dialog box to confirm that the user wants to delete the seat category. System will also display two buttons of yes and cancel. If cancel button is clicked, system will not delete the set category
- User clicks on the yes button
- System deletes the seat profile

UseCase ID: UC32
UseCase Name: Add or Delete Seat Description
Actors: User
Description: The user wants to add or delete seat description
Preconditions: User is logged-in
Basic Flow:

- User clicks on the Add Seat Description button to add new seat description
- System will add a new seat description with empty fields. Fields added will be seat description, seat specifics, milestone day, audit factor type, # audit touchpoints, audit touchpoints specifics. System will also display check icon to temporarily save the added data and a remove icon to delete the seat description
- Users will fill the fields. Seat description, seat specifics and audit touchpoints specifics will be text fields while the milestone day, audit factor type and # audit touchpoints will be dropdown field
- System will not allow the user to add seat description with empty seat description title as the seat description title is a required field

- User fills the fields and clicks on the check icon to temporarily save the data
- System will display a message at the bottom of the screen that you have some unsaved changes. System will also display a save button
- User clicks on the save button
- System will check if the seat descriptions added have empty title, then system will not save the changes and display an error message that “Cannot save. Seat description must be present”. Otherwise system will save all the changes
- User can edit any field by double clicking on that field
- System will allow the user to edit fields
- After editing the required field, user clicks on the save button
- System will save the changes made
- User can also delete any seat description by clicking on the remove icon present at the end of the specific seat description row
- System will display a dialog box to confirm that the user wants to delete the seat description. System will also display two buttons of delete and cancel. If cancel button is clicked, system will not delete the set description
- User clicks on the delete button
- System will delete the seat description

UseCase ID: UC33
UseCase Name: Edit or Delete Seat Description
Actors: User
Description: The user wants to edit or delete seat description
Preconditions: User is logged-in
Basic Flow:

- User clicks on the Edit Seat button present on the top right corner of the view seat profile screen
- System will navigate the user to the
- User clicks on the Add Seat Description button to add new seat description
- System will add a new seat description with empty fields. Fields added will be seat description, seat specifics, milestone day, audit factor type, # audit touchpoints, audit touchpoints specifics. System will also display check icon to temporarily save the added data and a remove icon to delete the seat description
- Users will fill the fields. Seat description, seat specifics and audit touchpoints specifics will be text fields while the milestone day, audit factor type and # audit touchpoints will be dropdown field
- System will not allow the user to add seat description with empty seat description title as the seat description title is a required field

- User fills the fields and clicks on the check icon to temporarily save the data
- System will display a message at the bottom of the screen that you have some unsaved changes. System will also display a save button
- User clicks on the save button
- System will check if the seat descriptions added have empty title, then system will not save the changes and display an error message that “Cannot save. Seat description must be present”. Otherwise system will save all the changes
- User can edit any field by double clicking on that field
- System will allow the user to edit fields
- After editing the required field, user clicks on the save button
- System will save the changes made
- User can also delete any seat description by clicking on the remove icon present at the end of the specific seat description row
- System will display a dialog box to confirm that the user wants to delete the seat description. System will also display two buttons of delete and cancel. If cancel button is clicked, system will not delete the set description
- User clicks on the delete button
- System will delete the seat description

UseCase ID: UC34
UseCase Name: View Specific Seat Profile
Actors: User
Description: The user wants to view the specific seat profile
Preconditions: User is logged-in
Basic Flow:

- User clicks on any specific seat profile which he wants to view OR After creating a new seat profile and saving data system will redirect the user to this view seat profile page
- System will display the seat profile name and all the data of this seat profile in this section
- On the left side, system will display a list to the user. The list contains the seat category, weight (0-100%), seat description, seat specifics, milestone(days) fields of the specific seat profile. System will also give option of update training with each seat description
- User can click on the arrow icon button present under the update training field to update the training module of the specific seat description
- System will navigate the user to the training module section (refer UC20)
- User can also view specific columns fields by clicking on the Show/Hide Columns button

- System will display a dropdown to the user in which all column names will be present
- User can check the columns to show them in the list and uncheck them to hide them from the list
- System will make the changes accordingly
- On the right side, system will display three cards for the user.
- First card will display the seat type, proficiency threshold, compliance time and department of the seat profile.
- Second and third card will display the primary and ancillary paygrades of this seat profile respectively. Paygrades will be displayed with their paygrade level and paygrade rate on this page
- User can view or edit paygrades by clicking on the view or edit icon (refer UC35)
- User can edit this seat by clicking on the edit seat icon (refer UC36)
- User can also download the pdf by clicking on the download pdf button present at top right corner of the page
- System will navigate the user to a new tab where he can view the complete pdf. System will allow the user to download or print pdf by clicking the icons on the top right corner
- User can add checklists by clicking on the checklists button (refer UC37)

UseCase ID: UC35
UseCase Name: View or Edit paygrades
Actors: User
Description: The user wants to view or edit paygrades
Preconditions: User is logged-in
Basic Flow:

- User clicks on the view or edit paygrade icon present on the primary or ancillary paygrade card
- System will redirect the user to the paygrade section
- User can switch to primary or ancillary paygrade by clicking on the paygrade type
- System will display the selected paygrade details on the right side of the page
- User can also switch to table view or panel view by clicking on the view field
- System will display the content in the form of the selected view
- A disabled save button will also be present. System will disable the button till any new changes have been made after that it will be enabled
- User can add new paygrade level by clicking on the Add Paygrade Level button
- System will add a new paygrade level with empty fields. Fields added will be paygrade level, paygrade name, pay rate, pay rate unit, paygrade specifics and

advancement requirements. System will also display check icon to temporarily save the added data and a remove icon to delete the seat description
- Users will fill the fields. Paygrade level will be added by the system. Paygrade name, pay rate, paygrade specifics and advancement requirements will be text fields while the pay rate unit will be dropdown field having options of hourly, yearly and commission
- System will not allow the user to add paygrade with empty paygrade name as the paygrade name is a required field
- System will not allow the user to add more than 1000 characters in paygrade specifics and advancement requirements fields. Moreover, system will not allow user to exceed 1000000 value in the pay rate field
- User fills the fields and clicks on the check icon to temporarily save the data
- User can also click on the remove icon to delete the paygrade level before saving the paygrade
- User clicks on the save button
- System will check if the paygrade level added have empty paygrade name, then system will not save the changes and display an error message that "Cannot save. Paygrade Name must be present". Otherwise system will save all the changes
- User can edit any field by double clicking on that field
- System will allow the user to edit fields
- After editing the required field, user clicks on the save button
- System will save the changes made
- User can also delete any paygrade level by clicking on the remove icon present at the start of the paygrade level
- User cannot add more than 7 paygrade levels
- System will disable the add paygrade level button after the user have added 7 paygrade levels

UseCase ID: UC36
UseCase Name: Edit Seat Profile
Actors: User
Description: The user wants to edit seat profile
Preconditions: User is logged-in
Basic Flow:
- User clicks on the Edit Seat button present at the top right corner of the screen
- System will redirect the user to the update seat profile page
- User can edit the seat profile title but cannot edit or change the department by clicking on the department field

- System will not allow user to change the department by disabling this field
- User can also switch to table view or panel view by clicking on the view field
- System will display the content in the form of the selected view
- User can add seat category (refer UC30), edit or delete seat category (refer UC31)
- User can add or delete seat description (refer UC32)
- User clicks on the save button at the bottom of the screen after performing the above mentioned steps
- System will save the data and show an alert message to the user of seat updated
- User can go back to the dashboard screen or any other screen by clicking on path present in the breadcrumbs
- System will navigate the user to the selected path
- User can delete the seat profile by clicking on the Delete Seat button present on the top right corner
- System will open a dialog for confirming the deletion from the user. System will inform the user that “This will remove everything from paygrades, to all compliances, to all checklists, to all LMS”
- User clicks on the delete button
- System will delete the seat and display an alert message to the user of seat deleted

UseCase ID: UC37
UseCase Name: Create Checklist
Actors: User
Description: The user wants to create checklist
Preconditions: User is logged-in
Basic Flow:

- User clicks on the Checklists button present at the top right corner of the screen
- System will redirect the user to the checklists page and by default one checklist will be added there with empty name
- User can add new checklist name in the provided field
- System will add columns to this checklist and show an alert message to the user that checklist added successfully. The columns added will be frequency, select day and actions
- User can add to-do by clicking on the Add To-Do button
- System will add a new field for adding the to-do details
- User will add the name/title for the to-do in the New To-do field
- System will give dropdown options for adding the frequency and selecting day
- User will click on the frequency field to add the frequency

- System will open the dropdown for user with daily, weekly, monthly and annual options
- System will give option for the select day according to the frequency option selected by the user. If the user selects daily, there will be no select day option. If the user selects weekly, there will be options to select any day of the week (multiple options will also be accepted). If the user selects monthly, there will be options to select any date of the month (from 1 to 30). If the user selects annual, there will be options to select any date of the year (selecting date from the calender option will be given to the user).
- User can add more to-dos by clicking on the add to-do button
- System will add new to-do fields
- User can also delete a to-do by clicking on the delete icon in the actions field
- System will delete the to-do
- User can also add a new checklist by clicking on the Add New Checklist button
- System will add a new checklist for the user
- User can go back to the dashboard screen or any other screen by clicking on path present in the breadcrumbs
- System will navigate the user to the selected path

Version Chart Structure

User makes some changes in his company and wants those changes to be reflected in all the branches/organizations of this company, for this purpose user can use the sandbox view. In Sandbox, user can make changes which he wants to push in all the organizations of that company. Sandbox here will behave as a parent organization. The changes will be published from the sandbox then they will be visible in all the organizations. The changes which are made in sandbox and pushed to the organizations can not be deleted by the organizations. The changes made in sandbox before publishing can be viewed in the Version Chart. In version chart, all modules with number of changes made in that module is listed. User can view the changes made in that module in detail by clicking the arrow icon present with that module in the version chart table. A dialog box will open which will display all the changes made in the selected module. The use-cases for these are discussed below from UC38 to UC43.

Version Chart Use Cases

UseCase ID: UC38
UseCase Name: View Version Chart Section

Actors: User
Description: The user wants to view the version chart section
Preconditions: User is logged-in
Basic Flow:

- User clicks on the publish button present on the below right side on the dashboard screen
- System will display the current released version with the last major release date and last minor release date.
- System will display a table in which the list of all modules having changes in them after they were last published will be displayed. The edit descriptions will also be displayed in this table with the count, which specifies the number of changes here
- User can view the changes in detail by clicking on the arrow icon present with the specific module
- System will open a dialog box where the changes made in that module will be displayed to the user
- User can also publish the changes by clicking on the publish changes button present on the top right side of the screen
- System will open a dropdown with options of Major changes and Minor changes
- User can select the type of changes he wants to publish by clicking on any one of the option
- System will publish those changes and show an alert message of “published successfully” to the user
- System will push all the published changes in the organizations

UseCase ID: UC39
UseCase Name: View Paygrade Module Changes
Actors: User
Description: The user wants to view changes made in paygrade module in detail
Preconditions: User is logged-in
Basic Flow:

- User clicks on the arrow icon present with the paygrade module in the table on the main version chart screen
- System will open a dialog box to display the changes made in the paygrade module
- System will display two sections to the user namely current version and proposed version. Initially both these sections will be empty. When the changes are present, the data will be displayed in these sections

- System will display the seats names with the number of changes in them at the left-most side. The seat names will be clickable so that the user can view the specific sections in which the changes are made
- User clicks on the specific seat name to view the changes in them
- System will then display three options of Additions, Deletions and Edits to the user with the count which will specify the number of additions, number of deletions and number of edits to the user
- User clicks on the additions to view the additions made in the paygrade module of the selected seat
- System will open the dropdown in which there will be timestamps with a radio button. System will display the newly added paygrades only in the proposed section if they exist
- User can check/uncheck any timestamp present on the left side in the additions
- System will highlight the paygrade against the checked timestamp with green color
- Similarly the edits will be highlighted in yellow color with the numbering and the deletion will be highlighted in red color
- The edits will be highlighted in the current and the proposed versions while the deletion will only be highlighted in the current version
- User can close this dialog box by clicking on the done button present at the top right corner of the dialog box
- System will close the dialog box

UseCase ID: UC40
UseCase Name: View Document-Type Module Changes
Actors: User
Description: The user wants to view changes made in document-type module in detail
Preconditions: User is logged-in
Basic Flow:

- User clicks on the arrow icon present with the document-type module in the table on the main version chart screen
- System will open a dialog box to display the changes made in the document-type module
- System will display two sections to the user namely current version and proposed version. Initially both these sections will be empty. When the changes are present, the data will be displayed in these sections
- System will display the main-module and the document-type names with the number of changes in them at the left-most side. The main-module and the document-type names will be clickable so that the user can view the specific sections in which the changes are made. The main module will only display the

names of the newly created document-type, edited document-type or deleted document-type
- User clicks on the specific document-type name or main-module to view the changes in them
- System will then display three options of Additions, Deletions and Edits to the user with the count which will specify the number of additions, number of deletions and number of edits to the user
- User clicks on the additions to view the additions made in the document-type module
- System will open the dropdown in which there will be timestamps with a radio button. System will display the newly added document-type only in the proposed section if they exist
- User can check/uncheck any timestamp present on the left side in the additions
- System will highlight the document-type against the checked timestamp with green color
- Similarly the edits will be highlighted in yellow color with the numbering and the deletion will be highlighted in red color
- The edits will be highlighted in the current and the proposed versions while the deletion will only be highlighted in the current version
- User can close this dialog box by clicking on the done button present at the top right corner of the dialog box
- System will close the dialog box

UseCase ID: UC41
UseCase Name: View Checklist Module Changes
Actors: User
Description: The user wants to view changes made in checklist module in detail
Preconditions: User is logged-in
Basic Flow:
- User clicks on the arrow icon present with the checklist module in the table on the main version chart screen
- System will open a dialog box to display the changes made in the checklist module
- System will display two sections to the user namely current version and proposed version. Initially both these sections will be empty. When the changes are present, the data will be displayed in these sections
- System will display the seats names with the number of changes in them at the left-most side. The seat names will be clickable so that the user can view the specific sections in which the changes are made
- User clicks on the specific seat name to view the changes in them

- System will then display three options of Additions, Deletions and Edits to the user with the count which will specify the number of additions, number of deletions and number of edits to the user
- User clicks on the additions to view the additions made in the checklist module of the selected seat
- System will open the dropdown in which there will be timestamps with a radio button. System will display the newly added checklist only in the proposed section if they exist
- User can check/uncheck any timestamp present on the left side in the additions
- System will highlight the checklist against the checked timestamp with green color. In case only a checklist task is added/deleted/edited against a checklist then only that specific checklist task will be highlighted
- Similarly the edits will be highlighted in yellow color with the numbering and the deletion will be highlighted in red color
- The edits will be highlighted in the current and the proposed versions while the deletion will only be highlighted in the current version
- User can close this dialog box by clicking on the done button present at the top right corner of the dialog box
- System will close the dialog box

UseCase ID: UC42
UseCase Name: View Seat Profile Module Changes
Actors: User
Description: The user wants to view changes made in seat profile module in detail
Preconditions: User is logged-in
Basic Flow:

- User clicks on the arrow icon present with the seat profile module in the table on the main version chart screen
- System will open a dialog box to display the changes made in the seat profile module
- System will display two sections to the user namely current version and proposed version. Initially both these sections will be empty. When the changes are present, the data will be displayed in these sections
- System will display the main-module and the seat names with the number of changes in them at the left-most side. The main-module and the seat names will be clickable so that the user can view the specific sections in which the changes are made. The main module will only display the names of the newly created seats, edited seats or deleted seats and highlight them according to the selected timestamp

- User clicks on the specific seat name or main-module to view the changes in them
- System will add the selected seat name in the above breadcrumb and the modules having changes in them with the number of changes will be listed at the leftmost side. If seat profiles have changes in them, system will also display it in the list
- User clicks on the Seat Profile module
- System will display the Seat Category and Seat Description with their number of changes at the leftmost side and the changes will be displayed in the current and proposed version without being highlighted if they exist
- User can click on the Seat Category or Seat Description to view the specific changes in highlighted form
- User clicks on the Seat Category
- System will then display three options of Additions, Deletions and Edits to the user with the count which will specify the number of additions, number of deletions and number of edits to the user
- User clicks on the additions to view the additions made in the seat category module
- System will open the dropdown in which there will be timestamps with a radio button. System will display the newly added seat category only in the proposed section if they exist
- User can check/uncheck any timestamp present on the left side in the additions
- System will highlight the seat category against the checked timestamp with green color. In case seat descriptions exist against that seat category it will also be highlight in case of additions and deletion
- Similarly the edits will be highlighted in yellow color with the numbering and the deletion will be highlighted in red color
- The edits will be highlighted in the current and the proposed versions while the deletion will only be highlighted in the current version
- User can also view the seat descriptions by clicking on the seat profiles in the breadcrumb
- System will navigate to the previous screen
- User can select the Seat Descriptions from here
- System will then display the changes made only in the seat descriptions similarly just as in the seat categories
- User can close this dialog box by clicking on the done button present at the top right corner of the dialog box
- System will close the dialog box

UseCase ID: UC43

UseCase Name: View Training Module Changes
Actors: User
Description: The user wants to view changes made in training module in detail
Preconditions: User is logged-in
Basic Flow:

- User clicks on the arrow icon present with the LMS Training Module in the table on the main version chart screen
- System will open a dialog box to display the changes made in the LMS training module
- System will display two sections to the user namely current version and proposed version. Initially both these sections will be empty. When the changes are present, the data will be displayed in these sections
- System will display the seat names having training module changes with the number of changes in them at the left-most side. The seat names will be clickable so that the user can view the specific sections in which the changes are made.
- User clicks on the specific seat name to view the training module changes in them
- System will then display all the seat categories against that seat profile name with the number of changes in it
- User selects a specific seat category
- System will then display all the seat descriptions against that seat category with the number of changes in it
- User selects a specific seat description
- System will then display all the training modules against that seat description with the number of changes in it
- User selects a specific training module
- System will display four options to the user namely training module overview, video, document and quiz with the number of changes in it. If there are no changes in any of the above option then system will not display it to the user
- User clicks on the training module overview
- System will display the training module name and description changes over here
- User navigates back and clicks on the video
- System will display the video thumbnail with the training module name and description changes over here
- User navigates back and clicks on the quiz
- System will display the quiz questions changes over here
- User navigates back and clicks on the document
- System will display the document changes over here

- In all above options, system will display three options of Additions, Deletions and Edits to the user with the count which will specify the number of additions, number of deletions and number of edits to the user
- User clicks on the additions to view the additions made in the module
- System will open the dropdown in which there will be timestamps with a radio button. System will display the newly added data only in the proposed section if they exist
- User can check/uncheck any timestamp present on the left side in the additions
- System will highlight the data against the checked timestamp with green color.
- Similarly the edits will be highlighted in yellow color with the numbering and the deletion will be highlighted in red color
- The edits will be highlighted in the current and the proposed versions while the deletion will only be highlighted in the current version
- User can close this dialog box by clicking on the done button present at the top right corner of the dialog box
- System will close the dialog box

Drive Structure

In Sandbox, when we register a new company, three folders will be made in the drive section namely Unassigned, Archived and Departments by default. In the unassigned folder there will be further two folders present ie. Unassigned Seat Profile and Unassigned Department. The user will not be allowed to make any action on these folders such as rename, move, duplicate or delete action.

When a new department is made and it is not published, it will remain in the Unassigned Department folder and as soon as it is published, it will move to the Departments folder.

Similarly, the new seat profile created in the department which is not published yet will remain in the Unassigned Seat Profile. As soon as this seat profile is published it will move to the Departments folder and will be present in the specific department in which it is made.

In the Archived folder there will be three folders as Archived Seat Profile, Archived Department and Archived Custom folder. All deleted files and folders will be present there. The deleted department will be present in the Archived Department folder and the deleted seat profile will be present in the Archived Seat Profile folder. All deleted files and folders will remain in the archive section for 30 days and after that they will be permanently deleted. Users will not be allowed to make a new folder, upload a file and create a kaizen document here.

Kaizen Drive Use Cases

UseCase ID: UC01
UseCase Name: View Drive
Actors: User
Description: The user wants to view the kaizen drive
Preconditions: User is logged-in
Basic Flow:

- User selects the kaizen drive option from the menu in the dashboard
- System displays the kaizen drive view and three folders will be there which are Unassigned, Archived and Departments
- User can switch to the grid view by clicking on the grid view icon
- System will display folders present there in the form of grid
- User can switch to the list view by clicking on the list view icon
- System will display folders present there in the form of list
- User can not perform any action on these folders such as renaming, moving, duplicating or deleting folder
- User can select specific folder to view its contents
- System will open the specific folder
- User can go back to the dashboard screen by clicking on dashboard present in the breadcrumbs
- System will display the dashboard screen to the user

UseCase ID: UC02
UseCase Name: Open Unassigned Folder
Actors: User
Description: The user wants to open Unassigned folder, view its contents and perform some action there
Preconditions: User is logged-in
Basic Flow:

- User clicks on the Unassigned folder to open it

- System opens the Unassigned folder and two folders will be present there namely Unassigned Seat Profile and Unassigned Department
- User can not perform any action on Unassigned Seat Profile and Unassigned Department folders such as renaming, moving, duplicating or deleting folder
- User can make a new folder (refer UC03), upload any file (refer UC04), create a new kaizen document (refer UC05)
- User can view / create built-in kaizen field (refer UC06), update built-in kaizen field (refer UC07), delete built-in kaizen field (refer UC08)
- User can view, rename, move (refer UC09), duplicate and delete any folder except Unassigned Seat Profile and Unassigned Department folders
- User can view, edit, rename, move (refer UC09), duplicate, download and delete any kaizen document
- User can preview, rename, move (refer UC09), duplicate, download and delete any uploaded file
- User can switch to the grid view by clicking on the grid view icon
- System will display the files and folders present there in the form of grid
- User can switch to the list view by clicking on the list view icon
- System will display the files and folders present there in the form of list
- User can go back to the dashboard screen or any other folder by clicking on path present in the breadcrumbs
- System will navigate the user to the selected path

UseCase ID: UC03
UseCase Name: Make New Folder
Actors: User
Description: The user wants to make a new folder inside any folder
Preconditions: User is logged-in
Basic Flow:

- User clicks on the NEW button present at the top right corner
- System will show a dropdown to user with different options
- User clicks on the Folder option from the dropdown
- System prompts the user to enter the name of the new folder
- User will enter the name of the folder and clicks the create button
- System will display this new folder in the list

Alternative Flow:

- User clicks on the NEW button present at the top right corner
- System will show a dropdown to user with different options
- User clicks on the Folder option from the dropdown

- System prompts the user to enter the name of the new folder
- User clicks on the cancel button
- System will not create any new folder

UseCase ID: UC04
UseCase Name: Upload New File
Actors: User
Description: The user wants to upload a new file inside any folder. The file can be of any type eg. image, video, audio, word document, excel file, html file, etc
Preconditions: User is logged-in
Basic Flow:

- User clicks on the NEW button present at the top right corner
- System will show a dropdown to user with different options
- User clicks on the File Upload option from the dropdown
- System will allow the user to select any file present in their PC's
- User selects a file and clicks the open button
- System will display a dialog to the user that their file is uploading. And a linear progress bar will also be displayed to the user which shows how much content is uploaded
- When the linear progress bar is completed, the file will be uploaded and the system will display it in the list
- User closes the dialog of the linear progress bar

Alternative Flow:

- User clicks on the NEW button present at the top right corner
- System will show a dropdown to user with different options
- User clicks on the File Upload option from the dropdown
- System will allow the user to select any file present in their PC's
- User clicks the cancel button
- System will not upload any new file

UseCase ID: UC05
UseCase Name: Create New Kaizen Document
Actors: User
Description: The user wants to create a new kaizen document inside any folder
Preconditions: User is logged-in
Basic Flow:

- User clicks on the NEW button present at the top right corner
- System will show a dropdown to user with different options
- User clicks on the Kaizen Doc option from the dropdown
- System will open a new kaizen document
- User can save changes and go back to the folder in which this new kaizen document was created by clicking on the folder name present at the top right corner
- System will display this new kaizen document in the list

UseCase ID: UC06
UseCase Name: View and Create Built-in Kaizen Field
Actors: User
Description: The user wants to view and create built-in kaizen field
Preconditions: User is logged-in
Basic Flow:

- User clicks on the BuiltIn Fields button present at the top right corner
- System will show a dialog to the user with all built-in fields list
- User clicks on the + icon present at the bottom of the built-in field list to create a new built-in field
- System will ask the user to enter the field name and field title
- User will enter the field name and field title and then clicks on the tick icon to save it
- System adds this new built-in field in the list andl update the list. And display it to the user
- User closes the dialog using the close icon

UseCase ID: UC07
UseCase Name: Update Built-in Kaizen Field
Actors: User
Description: The user wants to update a built-in kaizen field
Preconditions: User is logged-in
Basic Flow:

- User clicks on the BuiltIn Fields button present at the top right corner
- System will show a dialog to the user with all built-in fields list
- User clicks on the three-dots icon present with the built-in field which the user wants to update

- System will show options to the user to edit or delete field
- User clicks on edit button
- System will allow user to update the field name, field title or both
- User clicks on the tick icon to save it
- System will update this built-in field in the list. And display it to the user
- User closes the dialog using the close icon

UseCase ID: UC08
UseCase Name: Delete Built-in Kaizen Field
Actors: User
Description: The user wants to delete a built-in kaizen field
Preconditions: User is logged-in
Basic Flow:

- User clicks on the BuiltIn Fields button present at the top right corner
- System will show a dialog to the user with all built-in fields list
- User clicks on the three-dots icon present with the built-in field which the user wants to delete
- System will show options to the user to edit or delete field
- User clicks on delete button
- System will delete the built-in field in the list. And display remaining list to the user
- User closes the dialog using the close icon

UseCase ID: UC09
UseCase Name: Move File/Folder to any other Folder
Actors: User
Description: The user wants to move file or folder to any other folder
Preconditions: User is logged-in
Basic Flow:

- User clicks on the three-dots icon present with the file or folder which is to be moved
- System will show a dropdown to user with different options
- User clicks on the move option from the dropdown
- System will display a guide dialog to the user to go to the folder where you want to move the file. System will restrict the user from moving the file or folder in the same folder by disabling the Paste button

- User clicks on OK button and go to the folder where user wants to move the file or folder
- System will display a dialog to the user and allow the user to paste the file and folder there
- User clicks on paste button
- System will move the file or folder to the specified folder

UseCase ID: UC10
UseCase Name: Open Unassigned Seat Profile Folder
Actors: User
Description: The user wants to open Unassigned Seat Profile folder, view its contents and perform some action there
Preconditions: User is logged-in
Basic Flow:

- User clicks on the Unassigned Seat Profile folder from Unassigned folder to open it
- System opens the Unassigned Seat Profile folder and displays the unpublished seat profiles
- User can not perform any action on the unpublished seat profile folders such as renaming, moving, duplicating or deleting folder
- User can make a new folder (refer UC03), upload any file (refer UC04), create a new kaizen document (refer UC05)
- User can view / create built-in kaizen field (refer UC06), update built-in kaizen field (refer UC07), delete built-in kaizen field (refer UC08)
- User can view, rename, move (refer UC09), duplicate and delete any folder except the seat profile folders
- User can view, edit, rename, move (refer UC09), duplicate, download and delete any kaizen document
- User can preview, rename, move (refer UC09), duplicate, download and delete any uploaded file
- User can switch to the grid or list view by clicking on the grid view icon or list view icon
- System will display the files and folders present there in the form of grid or list
- User can go back to the dashboard screen or any other folder by clicking on path present in the breadcrumbs
- System will navigate the user to the selected path

UseCase ID: UC11
UseCase Name: Open Unassigned Department Folder
Actors: User
Description: The user wants to open Unassigned Department folder, view its contents and perform some action there
Preconditions: User is logged-in
Basic Flow:

- User clicks on the Unassigned Department folder from Unassigned folder to open it
- System opens the Unassigned Department folder and displays the unpublished departments
- User can not perform any action on the unpublished departments folders such as renaming, moving, duplicating or deleting folder
- User can make a new folder (refer UC03), upload any file (refer UC04), create a new kaizen document (refer UC05)
- User can view / create built-in kaizen field (refer UC06), update built-in kaizen field (refer UC07), delete built-in kaizen field (refer UC08)
- User can view, rename, move (refer UC09), duplicate and delete any folder except the unpublished departments folders
- User can view, edit, rename, move (refer UC09), duplicate, download and delete any kaizen document
- User can preview, rename, move (refer UC09), duplicate, download and delete any uploaded file
- User can switch to the grid or list view by clicking on the grid view icon or list view icon
- System will display the files and folders present there in the form of grid or list
- User can go back to the dashboard screen or any other folder by clicking on path present in the breadcrumbs
- System will navigate the user to the selected path

UseCase ID: UC12
UseCase Name: Open Departments Folder
Actors: User
Description: The user wants to open Departments folder, view its contents and perform some action there
Preconditions: User is logged-in

Basic Flow:
- User clicks on the Departments folder to open it
- System opens the Departments folder and displays the published departments
- User can not perform any action on the published departments folders such as renaming, moving, duplicating or deleting folder
- User can make a new folder (refer UC03), upload any file (refer UC04), create a new kaizen document (refer UC05)
- User can view / create built-in kaizen field (refer UC06), update built-in kaizen field (refer UC07), delete built-in kaizen field (refer UC08)
- User can view, rename, move (refer UC09), duplicate and delete any folder except the departments folders
- User can view, edit, rename, move (refer UC09), duplicate, download and delete any kaizen document
- User can preview, rename, move (refer UC09), duplicate, download and delete any uploaded file
- User can switch to the grid or list view by clicking on the grid view icon or list view icon
- System will display the files and folders present there in the form of grid or list
- User can go back to the dashboard screen or any other folder by clicking on path present in the breadcrumbs
- System will navigate the user to the selected path

UseCase ID: UC13
UseCase Name: Open Archived Folder
Actors: User
Description: The user wants to open Archived folder, view its contents and perform some action there
Preconditions: User is logged-in
Basic Flow:
- User clicks on the Archived folder to open it
- System opens the Archived folder and three folders which are Archived Seat Profile, Archived Department and Archived Custom Folder will already exist there, alongwith the other files and folders which are deleted.
- User can not perform some actions on the files and folders such as renaming, duplicating or deleting folder
- User can only view and move (refer UC09) any folder
- User can only view, move (refer UC09) and download any file
- User cannot make a new folder, upload any file and create a new kaizen document in Archived folder

- User can switch to the grid or list view by clicking on the grid view icon or list view icon
- System will display the files and folders present there in the form of grid or list
- User can go back to the dashboard screen or any other folder by clicking on path present in the breadcrumbs
- System will navigate the user to the selected path

UseCase ID: UC14
UseCase Name: Open Archived Seat Profile Folder
Actors: User
Description: The user wants to open Archived Seat Profile folder, view its contents and perform some action there
Preconditions: User is logged-in
Basic Flow:

- User clicks on the Archived Seat Profile folder to open it
- System opens the Archived Seat Profile folder and all deleted seat profiles folders will be displayed to the user
- User can not perform some actions on the files and folders such as renaming, duplicating or deleting folder
- User can only view and move (refer UC09) any folder
- User can only view, move (refer UC09) and download any file
- User cannot make a new folder, upload any file and create a new kaizen document in Archived Seat Profile folder
- User can switch to the grid or list view by clicking on the grid view icon or list view icon
- System will display the files and folders present there in the form of grid or list
- User can go back to the dashboard screen or any other folder by clicking on path present in the breadcrumbs
- System will navigate the user to the selected path

UseCase ID: UC15
UseCase Name: Open Archived Department Folder
Actors: User
Description: The user wants to open Archived Department folder, view its contents and perform some action there

Preconditions: User is logged-in
Basic Flow:

- User clicks on the Archived Department folder to open it
- System opens the Archived Department folder and all deleted department folders will be displayed to the user
- User can not perform some actions on the files and folders such as renaming, duplicating or deleting folder
- User can only view and move (refer UC09) any folder
- User can only view, move (refer UC09) and download any file
- User cannot make a new folder, upload any file and create a new kaizen document in Archived Department folder
- User can switch to the grid or list view by clicking on the grid view icon or list view icon
- System will display the files and folders present there in the form of grid or list
- User can go back to the dashboard screen or any other folder by clicking on path present in the breadcrumbs
- System will navigate the user to the selected path

UseCase ID: UC16
UseCase Name: Open Archived Custom Folder
Actors: User
Description: The user wants to open Archived Custom folder, view its contents and perform some action there
Preconditions: User is logged-in
Basic Flow:

- User clicks on the Archived Custom folder to open it
- System opens the Archived Custom folder and all deleted files and folders will be displayed to the user
- User can not perform some actions on the files and folders such as renaming, duplicating or deleting folder
- User can only view and move (refer UC09) any folder
- User can only view, move (refer UC09) and download any file
- User cannot make a new folder, upload any file and create a new kaizen document in Archived Custom folder
- User can switch to the grid or list view by clicking on the grid view icon or list view icon
- System will display the files and folders present there in the form of grid or list

- User can go back to the dashboard screen or any other folder by clicking on path present in the breadcrumbs
- System will navigate the user to the selected path