

Magenic Badge System Requirements

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# Revision History

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| Date | Revised By | Description |
| 07/26/2013 | Kevin Ford | Initial document creation |
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# Overview

The Magenic Badge program is designed to incentivize Magenic’s employees and make a fun and entertaining work environment while also encouraging activities that make our organization successful.

Badges are awarded to consultants and other employees based on completing certain activities. These activities are self-reported by the employees and may need approval from their manager to receive the badges. Some badges have multiple levels; that is they may be awarded multiple times and in so doing may award a higher level badge. For example, an employee may receive a badge for speaking and a five speaker badge if they meet the requirements for completing the speaking badge five times.

There will be two levels of badges, corporate and community. Corporate badges are approved and sponsored at the corporate level and apply to any consultant. These badges go through a formal approval process. Community badges, on the other hand, are created by different groups within the Magenic community with their own specified actions needed for awards. They must follow the corporate badge design template and the final badge design will need to be approved by Marketing/HR. A community badge can be converted to a corporate badge if it goes through the approval process.

Some corporate badges will have points associated with them. Community badges, on the other hand, will never have points associated with them. In the US, each point will convert into a monetary amount for rewards. Monetary rewards will be awarded on a monthly basis when a defined point maximum threshold had been reached. When this occurs, all the person’s points will be paid out, leaving them with a zero balance. However, the history of point accumulation will still be available.

# Definitions

Corporate User – A system user that is defined as being part of the corporate security group.

Corporate Badge – A badge that is created and maintained on the corporate level. These badges may or may not have point awards associated with them.

Community Badge – A badge that is created and maintained by the community. These badges have to have their graphics approved by a corporate user.

Activity – An action that can be performed to potentially receive one or more badges.

Badge – An award that can be received with a corresponding graphic.

Activity Submission – An employee’s submission to take credit for performing an activity.

User Badge – A badge awarded to a particular user that may or may not have a points value associated with it.

# User Stories

## BPUS-1: As a System user I want to be able to submit an activity into the system that can be used for credit towards a badge

Badges are awarded for completing certain activities. In order to create a badge the user of the system has to define the activity that needs to be accomplished. Activities can be entered by anyone who is a Magenic employee. Some activities used to receive corporate badges need to be approved by the employee’s manager. Only activities that are created by corporate users can be set as needing manager’s approval.

The following pieces of information will be entered when creating a new activity in the system:

The title of the activity

A long description of the activity

If the task completion needs to be approved by a manager

## BPUS- 2: As a corporate system user I want to be able to submit/edit a badge in the system

This action should only be allowed to be performed by corporate users. Some badges can only be awarded once, or if they can be awarded multiple times, only appear once. Corporate badges may have points associated with receiving them.

The following pieces of information will need to be entered when creating a new badge in the system:

Title of the badge

Quip or funny saying about the badge

Description including why/how it is awarded

A graphic of the badge

A reference to the activity that must be performed to receive the badge

A number indicating the amount of times the specified activity must be performed to receive the badge

An optional reference to a predecessor badge if this badge is a higher ranking of an existing badge (for example a badge for speaking five times might list a badge for speaking once as a predecessor)

A logical indication if this badge can be awarded multiple times

A logical indication if this badge will only appear once on any badge display screens (only valid if it can be awarded multiple times)

A start effective date of the badge (if left blank it is effective immediately)

An end effective date of the badge (if left blank it is effective forever after the start effective date)

The creation date of the badge (set by the system)

The number of points given for receiving this badge (may be 0/blank)

Priority of the badge

Only acts that occur after the creation date of the badge and between the start effective date and end effective date will be considered for awarding a badge.

## BPUS-3: As a system user I want to be able to submit/edit a community badge into the system

This story is the same as BPUS-2 with the following exceptions:

* There will never be any points awarded for community badges
* Any user can enter/edit a community badge
* A community badge is not available to be awarded until it has been approved by a corporate system user
* Changes to an existing badge will automatically be routed to corporate system users for approval.

## BPUS-4: As a corporate user I want to approve any community badges that have been submitted for approval

Corporate users should be able to go into the system and view any community badges that have been submitted for approval. If they approve the badge, it will become available for the system to award following the normal process. If they do not approve the badge, the badge should reflect that it was not approved for anyone viewing it. Badges may always be changed and resubmitted for approval (see BPUS-3).

## BPUS-5: As a Magenic employee, I want to be able to submit activities I have completed

Magenic employees should be able to go into the system and enter information about activities that they have completed. To do this they would select the activity they would like to say they have completed and enter any pertinent information about the activity. If the activity in question requires manager approval, it will be routed to them (see BPUS-6).

The following pieces of information will be captured about an activity submission

* The activity being submitted
* The date the activity occurred
* Who performed the activity
* Any accompanying notes
* If the activity submission is approved, un-approved or pending approval. Activity Submissions that reference Activities that do not require manager approval will automatically be marked as approved otherwise they will default to pending approval.

## BPUS-6: As an employee’s manager, I want to be able to approve any activity submissions that require approval

Consulting Manager’s and GM’s need to approve certain activity submissions in the system before badges are awarded. A manager should be able to view all activity submissions that are pending approval for his employees. A user is considered a manager for a given employee’s request if he is listed as a level 1 or 2 manager in active directory (note, we may want to scale this back for Code Mastery).

If a manager approves an activity submission, it will be marked as approved and any possible badges based on that activity will be awarded (see BPUS-7). If it is marked as unapproved, then no further action may be taken.

## BPUS-7: As a system user I want to be awarded my badges based on activity submissions that are approved.

When a user enters an activity submission that is approved, either at the time it is entered or when a manager marks it as approved the system should automatically record any badges that are awarded. Badges are awarded based on the following criteria:

* The activity submission’s activity matches the activity for the badge.
* The user has approved activity submissions that match the badge’s number of times the activity is required to receive it
* The date of the activity submission is after the creation date of the badge and also between the effective start and end dates if specified.
* The badge allows for it to be awarded multiple times or this was the first time awarded

When a user is awarded a badge, a new user badge will be created and the following information recorded.

* The user that the badge is awarded to
* The badge that was awarded
* The date the badge was awarded
* The number of points that were awarded with the badge (if any)
* If the points have been paid out

## BPUS-8: As a system user I want any user badges I am awarded to be published on the corporate yammer feed

When a new user badge is awarded, it will be displayed on the corporate yammer feed. This should be done in such a way that potentially multiple destinations could receive information about new badges that are awarded.

Inside yammer under the Recent Activity feed a message should be displayed that shows who the user badge was awarded to, the badge awarded and if possible the graphic of the badge.

## BPUS-9: As a system user I would like to see the user badges I have received in my yammer profile

If possible add a badge display to the person’s yammer profile that displays with the following conditions:

* User badges should display in priority order
* The user badge’s badge graphic should display
* Under the badge graphic should be the title.
* If you hover over the badge the quip should be displayed

## BPUS-10: As a system user I would like to see all the badges I have earned and can earn

This display will be in the application portal and be similar to BPUS-9 with all earned badges displaying first followed by all badges that are active that the person hasn’t earned in priority order. The following additional logic should be in place:

* Active badges are approved badges where the current date is between the badge’s effective start and end dates if specified
* If the user clicks on a badge a popup will be displayed with the badge picture, title and description. If the user hovers the mouse over the badge, the quip will be displayed as normal. (This may need to be modified for touch enabled applications). Additionally there will be a listing of the predecessor badge (if set up) with a link to that badge’s information page. Similarly, if there is a successor badge it too will be displayed.

## BPUS-11: As a system user I would like to be able to see my badges in other systems

A service should be written to allow authorized users to be able to pull information about what user badges they have earned and all badges that are currently active in the system and potentially set their points threshold.

## BPUS-12: As a system user I would like to be able to set my points payout threshold

A system user can set their own payout points thresholds in the system. The threshold must be greater than or equal to 50 points and less than or equal to 500 points in 50 point increments. The default is 50.

## BPUS-13: As a corporate user I would like to be able to pull a report that shows what users have passed their points threshold and zero out their points balances

Monthly a corporate user will go into the system to run a report that shows what points need to be awarded. This report will display the name and points total of any user who’s current points are more than the payout threshold they have set. Current points for a user are calculated by summing the points values for all User Badge records that are marked as not being paid out.

Once the report is run the user is asked if they would like to payout based on the report. If the corporate user confirms, all user badge records that went into creating the points totals for the report will be marked as paid out.

## BPUS-14: As a user I would like to view my user badge history

This page in the application will display all user badges for a user in a tabular format. It should display the following columns:

* Badge Earned
* Date Earned
* Corporate or Community
* Points Awarded
* Paid Out

In the total section of the report should be three totals: the lifetime points earned, points paid out and points not yet paid out.

## BPUS-15: As a user I would like to view information about badges I have been awarded, badges that are available and my badge history on a mobile device

Users would like to have the same functionality delivered by BPUS-10 and BPUS-14 using the API developed in user story BPUS-11. Additionally they may want to set their points threshold as per user story BPUS-12.

# Technical Implementation

Web Technology - ? ASP.Net, ASP MVC, HTML 5

Data Technology - ? Potentially SQL Azure or possibly Azure mobile services, other?

Mobile Technology – ? WP 8, Xamarin Android

Frameworks - ?

Social Networking integration – Yammer, possible other such as Facebook

# Application Layout

System Users

Corporate Users

Web Badge Application

# Data Model

# Sample Badge Graphics

