Digitizing the working of Self Help Groups

**User Stories:**

I. Login screen

**US 1:** As a field officer I should be able to login to the application

**Story** **Points**:

**Acceptance Criteria**:

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| **Component** | **Behavior** |
| Username – Login page | User should be able to enter Username (max 40 characters, A-Z, a-z, 0-9) |
| Password – Login page | User should be able to enter Password (max 30 chars, a-z, A-Z, 0-9, special characters like - @, #, $, . , &, \*, ! |
| Login button – Login page | Following should be performed on click of this button:   1. Validate that username and password fields are entered by the user. If not entered, give appropriate error message to user. 2. On correct combination of username-password, the user should be logged in and navigated to the homepage. 3. On incorrect combination of username-password. The user should be given an error message that the username/password entered is invalid. |
| Forgot password link – Login page | On the click of this button the user should be navigated to a ‘Security Question’ page which should present a security question. |
| Security question page | 1. The user should be presented with a security question and user should be able to submit the answer to this question. 2. On successful answer to the security question, the password should be displayed to the user, and he/she should be instructed to login again with this password. 3. This page should contain a link to go back to the login screen. 4. If the user incorrectly answers the security question for 3 times, they should be given a message to contact the admin. |

II. Home page

**US2**: As a field officer when I login to the application successfully, I should be navigated to the default landing page.

**Story** **Points**:

**Acceptance Criteria**:

Following tabs/menu options should be visible on the homepage/landing screen

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| **Component** | **Behavior** |
| Groups menu | Should be the default menu selected and should display the groups module page. On click of this menu from anywhere in the app, user should be navigated to the Groups Module page |
| Logout link | On click of this menu the user should be successfully logged off from the application and navigated back to the login screen |
| My profile menu | On click of this link the user should be navigated to ‘My Profile’ page. |

III. Groups Module

**US3:** As a Field Officer, I should be able to view groups under me on the Groups Module page.

**Story Points:**

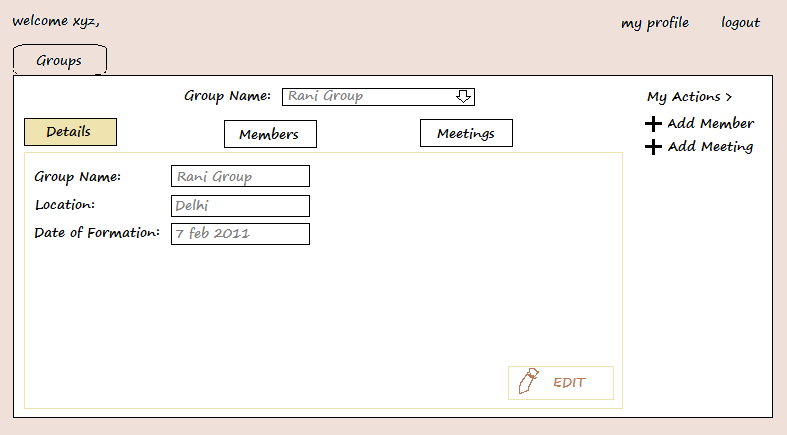
**Acceptance Criteria:**

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| **Component** | **Behavior** |
| Groups Grid | User should be able to view a group grid on the Groups Module page. This grid should contain list of all groups under the field officer. The grid should contain following columns:   1. Group name which should be a hyperlink 2. Number of active members in the group 3. Total savings of the group (TBD) 4. Outstanding loan amount of the group (TBD) |

**US4:** As a field officer when I click on the hyperlink of the group name in the groups page I should be navigated to the group view page

**Story Points:**

**Acceptance Criteria:**

The Group Details View page should look like below:

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| --- | --- |
| **Component** | **Behavior** |
| Group Name Dropdown | 1. Should have the hyperlink group name clicked on the Group module page as the default selection. 2. Should contain the list of groups under the field officer. |
| Group View page | 1. On clicking of the group name hyperlink, user should be navigated to the ‘Group view’ page. 2. This Page should contain 3 tabs as above, viz, Details, Members and Meetings. 3. The Details tab should be selected by default and should contain the ‘Group Details View’ page. |
| Group ‘Details View’ page | 1. On clicking of ‘Details’ tab, user should be able to view the ‘Group details view’ page. User should be able to see following details of the group in read only mode: 2. Name and location of SHG (auto populate - editable) 3. Total active members of SHG (auto populate) 4. Date of formation (auto populate – read only) 5. Name of field officer (auto populate – read only) 6. Supervisor monitoring the group (auto populate – read only) 7. Name of secretary (auto populate - editable) 8. Name of Treasurer of the group (auto populate - editable) 9. Name of President of the group (auto populate - editable) 10. Recurring individual deposit amount (auto populate - editable) 11. Frequency of deposit (Auto populate - Editable)(in a dropdown) 12. No of subgroups in the SHG (Editable) 13. Ensure the back button in the tablet leads back to the Groups module page |
| My Actions | User should be able to view the below list of actions under this section:   1. Add Member 2. Add Group Meeting |

**US5:** As a Field officer, I should be able to add a group member from the Group View page under my Actions sections.

**Story Points:**

**Acceptance Criteria:**

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| **Component** | **Behavior** |
| Add Member button | There should be an ADD MEMBER button on the Groups View page under the My Action section.  When clicked the user should be navigated to the ADD member page |
| Add Member Page | 1. Following fields should be shown on the Add member page: 2. Member name(mandatory) 3. Self-help group name (mandatory)(dropdown) 4. Pass book no (mandatory) 5. Father/husband name(mandatory) 6. Date of birth(mandatory) 7. Economic condition (need clarification) 8. Education qualification 9. members’ occupation 10. Annual Income 11. Physical Disability (drop down – yes/no) 12. Count of family members(mandatory) 13. Group joining date(mandatory) 14. Group Exit date 15. Group exit reason(mandatory when group exit date is selected) 16. Nominee name(mandatory) 17. A ‘SAVE’ button should be there on the screen clicking which should trigger field validations. 18. Appropriate error message should come up if a validation fails. 19. Member details should be saved if all validations are successful and should navigate to the Group Members View page which will reflect the new entry in the Members Grid. |

**US6:** As a field officer, I should be able to view group members when I click on the Members tab on the Group View page

**Story Points:**

**Acceptance Criteria:**

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| **Component** | **Behavior** |
| Group Members view page | This page should appear when user clicks on members tab. It should display the Members Grid. |
| Members Grid | User should be able to view a ‘members grid’. This grid should contain list of all members in that group whose hyperlink was clicked from the Groups grid. The grid should contain following columns:   1. Member name (hyperlink) 2. Group name the member belongs to (hyperlink to group) 3. Outstanding loan of the member 4. Total savings of the member |

**US7:** As a Field officer, I should be able to add new group meetings from the Group View page.

**Story Points:**

**Acceptance Criteria:**

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| **Component** | **Behavior** |
| Add Meeting button | 1. When user clicks this button, user should be navigated to the create group meeting page. |
| Create Group Meeting page | 1. This should contain the group name as the one present in the dropdown in Group View page in read only mode. 2. User should be to view the below section in that order in 3 tabs: 3. Saving and Loan Details section 4. Loan distribution section 5. Minutes of Meeting section 6. There should be a ‘NEXT’ button after each section – when clicked user should be allowed to move to the next section, and the changes/edits in this section should be temporarily saved. |
| Saving and Loan Details section | The Saving and Loan section should contain a grid having the following columns:   1. Member name( auto populate with group member names – read only) 2. Monthly fixed saving (auto populate – editable) 3. Optional saving (editable) 4. Total savings =monthly + option savings (auto populate – read only) 5. Principal (auto populate – editable) 6. Installment (auto populate – editable) 7. Fine (editable) 8. Outstanding Loan amount (auto populate) |
| Loan Distribution section | The Loan Distribution section should contain a grid having the following columns:   1. Member name( drop down) 2. Reason for loan (mandatory - editable) 3. Loan amount (mandatory - editable) 4. Interest rate (mandatory - editable) 5. Installment amount (auto – populate) 6. Fine (editable) 7. Guarantor (mandatory – editable) |
| Minutes of meeting section | 1. Minutes of meeting section should contain the following fields: 2. Sr. no. (auto populate) 3. Proceedings (editable) 4. At the end of this section there should be a SUBMIT button, which when clicked should perform validations for the 3 sections and display appropriate message if any validation fails. 5. On all validations being passed successfully, the user should be taken to a review screen which will have all the entered info in one page in read only mode and a CONFIRM and BACK button. 6. On Clicking of CONFIRM button the changes should be persisted to the database and user should be navigated to the Meetings tab in the Group View page. 7. On clicking of the BACK button the user should be taken back to the create group meeting page with the changes still visible but this time editable. |

**US8:** As a Field officer I should be able to view history of monthly group meetings for the SHGs under me when I click on the Meetings tab in the Group View page.

**Story Points:**

**Acceptance Criteria:**

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| **Component** | **Behavior** |
| Group Meetings view page | This page should appear when user clicks on meetings tab. It should display the Meetings Grid. |
| Meetings Grid | User should be able to view a ‘Meetings grid’. This grid should contain list of all the meetings that took place for the group selected in the dropdown for the past 6 months. The grid should contain following columns:   1. Meeting Date (hyperlink) 2. Number of members present during the meeting 3. Outstanding loan amount for that meeting 4. Total savings for that meeting. |

**US12:** As a field officer when I click on the hyperlink of the meeting date in the Meetings tab on Group view page I should be navigated to the Group Meeting details view page

**Story Points:**

**Acceptance Criteria:**

**US9:** As a field officer when I select a group from the dropdown, its details, members and meetings should get auto populated in the Details, Members and Meetings tabs respectively.

**Story Points:**

**Acceptance Criteria:**

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| **Component** | **Behavior** |
| Group Name Dropdown | 1. When user selects a group from this dropdown, he/she should be able to view the group’s details in the Details tab. 2. He/she should be able to view the group’s members in the Members tab. 3. He/she should be able to view the group’s past meetings in the Meetings tab. |

**US10:** As a field officer I should be able to edit the group details when I click on the EDIT button on the Group details view page.

**Story Points:**

**Acceptance Criteria:**

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| **Component** | **Behavior** |
| Group Details View page | User should be able to view EDIT button. When EDIT button is clicked, EDIT page should open. |
| Group details edit page | 1. All the above mentioned editable fields should be editable. 2. Read only fields should not be editable. 3. There should be a SAVE button – when clicked field level validations should be performed and on successful validations the user should be taken to a review screen. 4. There should be a ‘CANCEL’ button - when clicked no changes should be saved and redirected to the Group details view page. |
| Group Details Review page | 1. All the above fields must be visible on this page. 2. Changes made in edit page should be visible in the review screen. 3. A ‘CONFIRM’ button should be available on this screen which when clicked should save all the changes to the DB, user should be alerted when the save is successful and user should be navigated to the Group details view page. |

**US11:** As a field officer when I click on the hyperlink of the member name in the Group Members page I should be navigated to the member details view page

**Story Points:**

**Acceptance Criteria:**

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| **Component** | **Behavior** |
| Member details View page | 1. On clicking of the member name hyperlink, user should be navigated to the ‘Member details view’ page. User should be able to see following details of the member in read only mode: 2. Member name (mandatory) 3. Self-help group name (mandatory)(dropdown) 4. Pass book no (mandatory) 5. Father/husband name (mandatory) 6. Date of birth (mandatory) 7. Economic condition (mandatory) 8. Education qualification (mandatory) 9. members’ occupation (mandatory) 10. Annual Income (mandatory) 11. Physical Disability (dropdown – Yes/No) 12. Count of family members 13. Group joining date (mandatory) 14. Group Exit date 15. Group exit reason(mandatory when group exit date is selected) 16. Nominee name (mandatory) 17. User should be able to view EDIT button. When EDIT button is clicked, EDIT page should open. 18. User should be able to view BACK button – when clicked should return to the member view page. |
| Member details edit page | 1. All the above fields should be editable. 2. There should be a SAVE button – when clicked field level validations should be performed and on successful validations all changes should be saved and user should be navigated to the Group members view page. 3. There should be a ‘CANCEL’ button - when clicked no changes should be saved and redirected to the Member details view page. |

**US13:** Edit group meetings