**RS ADMIN PANEL**

The admin panel is the core of the site and is where I manage all the functions relating to clients and the surveys they wish to have completed.

I’ve created a table below which hopefully gives clarity to what I am wanting to be able to achieve through the admin panel

This document aims to expand on the document “redscribble – reqs.docx” I sent you approx. 1 month ago

I’m not entirely sure how best to present this information in a meaningful way for you, so please ask any questions and if you can think of better / more efficient ways of achieving the functionality I want, then I am happy to hear what this is:

**OVERVIEW**

I see the admin panel being broken into 4 specific categories:

1. Administration

This is for me to add / delete / edit users who will have access to the admin panel. And for me to add / delete / edit the master surveys

1. Client Management

Client management is where I can manage the clients I have and the details I hold about them. I see this as just about setting up the client – not for organising what survey, or when surveys will be sent etc. Functions I imagine in this space

1. Survey Management

Survey management is where I can manage what surveys the client will answer and also personalise the survey questions if required. Functions I’d imagine necessary in this space

1. Response Management

Response management is about how I manage the responses received after respondents have completed the surveys sent to them.

**DETAIL**

For each of the above 4 categories, I’ve detailed below what functions I think I need and a brief explanation of what the function is for and where appropriate, an additional note that explains how this may link to other parts of the admin panel.

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| CATEGORY | FUNCTION | SUB-FUNCTION(S) | EXPLANATION | ADDITIONAL NOTES |
| Administration | User Access | View  Add  Remove  Edit | Where I manage the staff I give access to the admin panel so they can manage clients, surveys and responses  Users I create have full access to the admin panel  Users I create cannot view / add / remove / edit user access |  |
| General Survey Master | View  Add  Remove  Edit | The complete General Survey is added here. I can view / add / remove / edit all aspects of the master survey here also.  I can also add additional general master surveys if required | The master survey is used when setting up a new client. In that part of the admin panel, I select from the “master list” what surveys will be loaded against a client  Survey format show later in this doc. |
| Targeted Survey Master | View  Add  Remove  Edit | The complete list of Targeted Surveys are added here. I can view / add / remove / edit all aspects of these master surveys here also.  I can also add additional targeted master surveys if required | The master survey is used when setting up a new client. In that part of the admin panel, I select from the “master list” what surveys will be loaded against a client  Survey format show later in this doc. |

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| CATEGORY | FUNCTION | SUB-FUNCTION(S) | EXPLANATION | ADDITIONAL NOTES |
| Client Management | View Clients |  | Just an ability to list all clients in alphabetical order.  Selecting a client from the view list will give me the ability to edit or remove  Removing a client | Removing a client can only be done by me. Not by any staff I give user access to. So requires my user login to be able to remove |
| Add New | Client – Single Location  Client – Multiple Locations | There will be two client types. Those that just have a single location, or those that have a head office and multiple branches / locations.  For ‘Client – Single Location’ and ‘Client – Multiple Locations’ , I want to be able to capture the following:  Client Name  Client Physical Address  Client Billing Address  Client Head Office Phone  Client website address  Client Type  Client Key Contact Name  Client Key Contact DDI  Client Key Contact Email  Client Key Contact Postal Address  For ‘Client – Multiple Locations’ , I want to be able to capture the following extra information:  Number of locations (excluding head office)  Location 1 physical address  Location 1 office phone  Location 1 website address  Location 1 key contact name  Location 1 key contact DDI  Location 1 key contact email  Location 1 key contact postal address | “Client Type” is a dropdown list which will include:  Central Government  Local Government  Private Sector  The location details to capture repeats for the number of locations identified. E.g. if there are 2 locations, then I would capture all the location details for each of the two locations  If 15 locations, then I would need to capture the location details for all 15 locations.  So all new clients are a “client – single location” (this is like the main grouping for a client) – Some just have remote locations that I can add |
| Edit Client |  | Just a different way of finding a client and / or their locations to view and edit their details. I see this mainly being used if key contacts / phone numbers etc. change. |  |
| Client Documents | View  Add  Remove | The ability to select a client and save documents against that client. Documents would include things such as contracts, communications, invoices etc.  So some way of identifying a client, selecting them, and then being able to view, add or remove documents I want to save against that client, or have already saved against that client | Removing documentation saved against a client can only be done by me. Not by any staff I give user access to. So requires my user login to be able to remove documents  View and Add can be by any staff I give admin panel user access to |
| General Survey | Add  Remove  Edit | Add a general survey will allow me to select from the “master list” of general surveys (that were created under “administration”)  Selecting the appropriate master survey to attach to a specific client will attach a full copy of the master survey selected to the specific client  Once a survey has been copied across to a specific client, it can then be edited to personalise for the specific client. All of the rows / columns of the survey copied across can be edited  A survey can only be removed from a client if no survey has been sent and responded to | Master surveys copied to a client can be edited and altered under a client specifically and this will not change master survey saved under the “administration” tab |
| Targeted Survey | Add  Remove  Edit | Add a targeted survey will allow me to select from the full “master list” of targeted surveys (that were created under “administration”)  Selecting the appropriate master targeted surveys to attach to a specific client will attach a full copy of the master survey selected to the specific client  Once a survey(s) has been copied across to a specific client, it can then be edited to personalise for the specific client. All of the rows / columns of the survey copied across can be edited  A survey can only be removed from a client if no survey has been sent and responded to | Master surveys copied to a client can be edited and altered under a client specifically and this will not change master survey saved under the “administration” tab |

This is where the detail of the admin panel resides, so I will give a bit more detail for each function / sub-function. As such the table will follow a slightly different format.

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| CATEGORY | FUNCTION | SUB-FUNCTION(S) | EXPLANATION | ADDITIONAL NOTES |
| Survey Management | Manage Client | Select Client | Selecting from the list of clients when wanting to setup and organise the distribution of surveys |  |
| Manage Client | Survey Scheduling | Shows a view of the client and what general / targeted surveys they have. This is where I can select the days that each survey will be sent. It will need to include:  Number of times survey to be sent  Date each survey to be sent  The above options are for each survey in the clients account. E.g. if a client has 1 general survey and 2 targeted surveys, then I would get asked the above (number / date) question for each of the surveys  Also includes scheduling dates for when each survey is closed and no responses will be accepted.  And reminder emails can be scheduled. System asks me for how many days before survey close shall the reminder be sent. The reminder would resend the initial links to the key contacts. If a general survey, then the reminder goes to just the key contacts.  If a targeted survey, the reminder goes to all those who have not completed a survey only. Those who have completed the survey, do not get a reminder | If a survey has more than 1 time to be sent selected. (e.g. if the user inputs 6 times) .. then for each survey, it will ask for the 6 dates to be inputted |
| Manage Client | Upload Recipient Details  (General Survey) | Client – Single Location  For a general survey,(where it is a client with a single location) one email is sent to the key contact for the client. It has a single link to the survey. The key contact will forward the email to everyone in their organisation to answer. So the recipient detail is just the key contact.  Client – Multiple Locations  For a general survey,(where it is a client with multiple locations) one email is sent to the key contact for the client head office and the key contact for each of the individual locations.  The survey links generated however need to be linked so that responses received can be grouped and analysed by client. But also individually assessed by location.  Another way of looking at it .. I want to keep all the location responses grouped to their individual location, but under the “umbrella” of the overall client so I can view responses at a higher client level as well  So maybe a client level code for the survey link .. and each location gets the client code + a location identifier code |  |
| Manage Client | Upload Recipient Details  (Targeted Survey) | Client – Single Location  For a targeted survey,(where it is a client with a single location) We need to be able to upload names / email addresses into 4 respondent types. These types are:  Level 1 – Tier 1 & 2 (Executive Management)  Level 2 – Tier 3 & 4 (Senior Management)  Level 3 – Tier 5 & below (Mid Management to Frontline)  Level 4 - Customers  So if a client requests two targeted surveys. 1 for risk and the other for audit. I would request a list of Level 1 to 4 names and email address that relate to each of the 2 targeted audits.  For each targeted audit, I want to be able to upload the provided list of names specific to the targeted audit.  Client – Multiple Locations  As above for single locations. Just where ever a targeted survey is requested, I need to be able to upload a list of names and email addresses |  |
| Manage Client | Add / Remove / Edit Recipients | For any survey (general or targeted) I want to be able to add / remove or edit details of names / email addresses.  A nice option would be able to search by a respondent name which would show all the surveys they are listed against and I can edit / remove in one location that applies to all the surveys they are listed against |  |
| Manage Client | Send Survey | Allows me to select a client and view their loaded surveys. If I click “send” it overrides the pre-set scheduled dates. Otherwise, surveys just automatically send on the scheduled day.  All surveys sent are bcc’d to “sentsurveys@redscribble.com” |  |
| Track Surveys | Select Client | Allows me to select a client and see a progress of a survey for each of the scheduled dates to send.  So would see a list of the general and targeted surveys, and the dates each are scheduled to be sent. Under each I would be able to see if the survey is “yet to be sent” or “sent” or “In progress” or “complete: |  |
| Track Surveys | Bounced Emails | A list of bounced emails for each survey sent. Displayed by client so I know what client to contact to find out why this happened |  |

No Analysis of the survey results happens in the system. This is all managed off-line and unrelated to the website / admin panel. Although completed reports, in PDF format, would be uploaded to the clients account as a record of completion

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| CATEGORY | FUNCTION | SUB-FUNCTION(S) | EXPLANATION | ADDITIONAL NOTES |
| Response Management | Manage Client | Select Client | Selecting from the list of clients when I want to view the responses to surveys |  |
|  | Select Survey | Once the client is selected, then I can select the specific survey I want to view on-screen | If a client will be answering the survey more than once, e.g. in survey management, we state that the client is to answer the survey 4 times, then results need to be grouped by some appropriate grouping to show these are all the results for survey 3 of 4 (for example) |
|  | Download Survey | I can select one or more surveys from a specific client and download these as .xlsx files or .csv files |  |