Daily Checklist Management System – Requirements Document

1. Purpose

The Daily Checklist Management System is designed to ensure that clinic operational tasks are completed, tracked, and auditable on a daily basis. It enables staff to mark tasks as completed using toggle buttons, records timestamps in Indian Standard Time (IST), supports historical data review, auto-saves entries, and allows data export.

2. Scope

This module will be used by clinic staff to:

- View daily checklist tasks

- Mark task completion

- Record staff responsibility and time

- Review past checklist records

- Save and download checklist data

3. User Roles

3.1 Staff

- View assigned checklist tasks

- Mark tasks as completed

- Enter or auto-capture staff name

- View previous day records (read-only)

3.2 Admin (Optional/Future)

- View all checklist records

- Download reports

- Audit checklist completion

4. Functional Requirements

4.1 Checklist Display

- System shall display a **Daily Checklist** table with the following columns:

  - Task ID

  - Area

  - Task Name

  - Description

  - Status (Toggle: No / Yes)

  - Staff Name

  - Timestamp

4.2 Date Handling

- System shall display **current date by default** on page load.

- System shall allow users to select **previous dates**.

- When a previous date is selected:
  - Data for that date must be fetched and displayed.
  - Data must be **read-only** (no editing allowed).

4.3 Status Toggle Behavior

- Status shall be a **toggle button** with values:
  - No (default)
  - Yes
- When toggled to **Yes**:
  - Current timestamp must be captured in **Indian Standard Time (IST – UTC +05:30)**
  - Staff name must be captured
  - Data must be auto-saved
- When toggled from **Yes → No**:
  - Timestamp should be cleared or retained based on business rule (recommended: retain for audit)
  - Change must be auto-saved

4.4 Timestamp Requirements

- Timestamp must be:
  - Automatically generated by the system
  - Stored in IST or stored in UTC and converted to IST for display
- Timestamp must represent **exact time of toggle to "Yes"**
- Timestamp field must be **non-editable**

4.5 Staff Name Handling

- Staff name should be:
  - Auto-filled from logged-in user (recommended)
  - Editable only if auto-fill is not available
- Staff name must be mandatory when status = Yes
- Staff name field must be auto-saved

4.6 Auto-Save Functionality

- System must auto-save data when:
  - Toggle status changes
  - Staff name is entered or modified
- Auto-save should occur within **1–2 seconds (debounced)** to avoid excessive API calls
- Visual feedback should be shown:
  - "Saved ✓" or similar indicator

4.7 Save Button

- Save button must:
  - Manually save all checklist data for the selected date
  - Act as a fallback in case auto-save fails
- System must show success or failure message after save

4.8 Download Button

- Download button must export checklist data based on:
  - Selected date
  - Selected area filter (if applied)
- Supported formats (minimum requirement):
  - CSV
- Optional formats:
  - Excel (XLSX)
  - PDF

4.9 Filter by Area

- System shall allow filtering checklist by **Area**
- Default selection: **All Areas**
- Filter must apply to both:
  - Displayed data
  - Downloaded data

5. Non-Functional Requirements

5.1 Performance

- Checklist data must load within **2 seconds**
- Auto-save must not block UI interaction

5.2 Reliability

- Data must not be lost on:
  - Page refresh
  - Browser back/forward
- In case of network failure:
  - Auto-save retries must occur
  - User must be notified if save fails

5.3 Security

- Only authenticated users can access checklist
- Staff can only edit **current date's checklist**
- Past date data must be read-only

- All changes must be logged for audit

5.4 Audit & Logging

- System must store:

  o Created timestamp

  o Last modified timestamp

  o Modified by (staff name / user ID)

- Historical data must not be overwritten without audit trail

6. Data Validation Rules

- Status = Yes requires:

  o Valid staff name

  o Valid timestamp

- System must prevent:

  o Saving incomplete mandatory fields

  o Editing historical records

7. UI/UX Requirements

- Toggle button must clearly show Yes/No state

- Disabled fields for past dates must be visually distinct

- Save & Download buttons must be clearly visible

- Confirmation messages must be user-friendly