**Diversity Manager User Stories**

**User Story 1:**

**Description:**

As a user, I should be able to open the Diversity Manager application and should be able to upload the excel sheet document with company information like name, address.

**Acceptance Criteria:**

* When user arrives on Dashboard screen, they should see an Upload button.
* User should be able to click on Upload File button and upload the excel sheet.

**Technical Notes:**

Reactjs is used to build the dashboard screen. Apache POI library is used for excel operations.

**Testing Notes:**

Application should open and dashboard screen should be displayed.

**Assumptions:**

Use the excel sheet provided in the Hackathon Challenge as data source for companies.

**User Story 2:**

**Description:**

As a Diversity Manager, I need to execute an automated search to find diverse businesses relevant to Commercial Banking Interest.

**Acceptance Criteria:**

* Diversity tool should read the company name from the uploaded excel sheet.
* Tool should find the company’s website by searching with company name using any search engine.

**Technical Notes:**

Web Crawling and scraping mechanisms need to be used to identify the company’s website information.

**Testing Notes:**

Search the company name in any search engine and find the company website. This should match with the site information found by the tool.

**Assumptions:**

Assuming the first site in search engine results is the company’s website.

**User Story 3:**

**Description:**

As a Diversity Manager, I need to identify the company is women owned and update the excel sheet with relevant information.

**Acceptance Criteria:**

* Tool should read the information from the company’s website.
* Tool should find out if the company is women owned.
* If the company is women owned, IsWomanOwned (K column) in the excel sheet needs to be updated with Yes.
* If the company is not women owned, IsWomanOwned (K column) in the excel sheet needs to be updated with No.
* If the ownership is not determined, search needs to be continued.

**Technical Notes:**

Web Crawling and scraping mechanisms need to be used to identify if the company is women owned.

**Testing Notes:**

Manually search and explore company website (about us, our story etc) and identify if the company is women owned. This should match with the information found by the tool.

**Assumptions:**

If any certifications like WBENC, NGLCC, LGBTBE, NMSDC are found in company website, those are considered as Women Owned.

**User Story 4:**

**Description:**

As a Diversity Manager, I need to identify the company is minority owned and update the excel sheet with relevant information.

**Acceptance Criteria:**

* Tool should read the information from the company’s website.
* Tool should find out if the company is minority owned.
* If the company is minority owned, Minority Owned (L column) in the excel sheet needs to be updated with diverse segment information.
* The Diverse segments to identify the minority owned are
  + Black or African American
  + Hispanic or Latino
  + Native American or Indigenous
  + Asian – Pacific Americans
  + LGBTQIA+
  + Veterans
* If the ownership is not determined, search needs to be continued.

**Technical Notes:**

Web Crawling and scraping mechanisms need to be used to identify if the company is minority owned.

**Testing Notes:**

Manually search and explore company website (about us, our story etc) and identify if the company is minority owned. This should match with the information found by the tool.

**Assumptions:**

Company is considered as minority owned if owned by person with any diverse segments at least for 5 to 10 years.

**User Story 5:**

**Description:**

As a Diversity Manager, I need to continue the search and identify the company is women owned/ led if the information is not found on company’s website and update the excel sheet with relevant information.

**Acceptance Criteria:**

* If the ownership information is not found in company’s website, tool should continue the search.
* Tool should identify the owners/CEO/CFO/COO information like name from company’s website.
* Tools should search their professional profiles in social media like LinkedIn and identify the women owned/led information.
* Tools should update IsWomanOwned (K column) in the excel sheet with Yes or No.

**Technical Notes:**

Web Crawling and scraping mechanisms need to be used to identify if the company is women owned/ led.

**Testing Notes:**

Manually search and explore company website (about us, our story etc) and identify if the owner/CEO/CFO/COO information like name. Search for their profiles in social media like LinkedIn and find out the information. This should match with the information found by the tool.

**Assumptions:**

Assuming the owner/leaders professional profiles are found in LinkedIn.

**User Story 6:**

**Description:**

As a Diversity Manager, I need to continue the search and identify the company is minority owned/ led if the information is not found on company’s website and update the excel sheet with relevant information

**Acceptance Criteria:**

* If the ownership information is not found in company’s website, tool should continue the search.
* Tool should identify the owners/CEO/CFO/COO information like name from company’s website.
* Tools should search their professional profiles in social media like LinkedIn and identify the diverse owned/led information.
* Tools should update Minority Owned (L column) in the excel sheet with diverse segments.
* The Diverse segments to identify the minority owned/led are
  + Black or African American
  + Hispanic or Latino
  + Native American or Indigenous
  + Asian – Pacific Americans
  + LGBTQIA+
  + Veterans

**Technical Notes:**

Web Crawling and scraping mechanisms need to be used to identify if the company is minority owned/ led.

**Testing Notes:**

Manually search and explore company website (about us, our story etc) and identify if the owner/CEO/CFO/COO information like name. Search for their profiles in social media like LinkedIn and find out the information. This should match with the information found by the tool.

**Assumptions:**

Assuming the owner/leaders professional profiles are found in LinkedIn.

**User Story 7:**

**Description:**

As a user, I should see the report with the statistics of diverse owned vs diverse led Business information.

**Acceptance Criteria:**

* On the Dashboard screen, report should display the statistics of diverse owned vs diverse led business in the form of Pie chart.

**Technical Notes:**

Chart js is used to display the report.

**Testing Notes:**

Statistics in the displayed report should match with the updated excel information.

**User Story 8:**

**Description:**

As a user, I should see a report with the statistics of Women, Veteran, Black African/American, Hispanic, Native American percentages across Commercial Banking products.

**Acceptance Criteria:**

* On the Dashboard screen, report should display the statistics of Women, Veteran, Black African/American, Hispanic, Native American percentages across Commercial Banking products.
* Commercial products include Cards, Home Loans, Commercial Loans, Accounts, Auto Mobile Financing, HELOC.
* Report should be displayed in Bar chart.

**Technical Notes:**

Chart js is used to display the report.

**Testing Notes:**

Statistics in the displayed report should match with the updated excel information.

**User Story 9:**

**Description:**

As a user, I should see a Download/Export to Excel button to download the updated excel sheet with diverse owned/led information.

**Acceptance Criteria:**

* On the Dashboard screen, Download Diversity Report button should be displayed.
* On click of the button, excel sheet should be downloaded with all updated diverse information.
* IsWomanOwned and MinorityOwnedDesc (K and L) columns in the downloaded sheet should have relevant information.

**Technical Notes:**

Apache POI library is used for excel operations.

**Testing Notes:**

Information in the downloaded sheet should be relevant.