**​For testing:**

1. Connect to the site [https://test-kumo-eip0001.azurewebsites.net/](https://test-kumo-eip0001.azurewebsites.net/" \t "_blank)​ or [https://dev-kumo-eip0001.kumo-eip.com](https://dev-kumo-eip0001.kumo-eip.com/" \t "_blank) with

Admin account

* E-mail address: [alice.huynh@kumo-eip.com](mailto:alice.huynh@kumo-eip.com)
* Password: @AliceHuynh1

5 end user accounts

|  |  |  |  |
| --- | --- | --- | --- |
| ​**First Name** | **​Last Name** | **​E-mail Address** | **​Password** |
| Charlotte | ​Tang | ​[charlotte.tang@kumo-eip.com](mailto:charlotte.tang@kumo-eip.com) | ​4k%SP6q+o(5 |
| KUMO | ​Product Delivery Team | ​[kumoproductde](mailto:kumoproductdeliveryteam@successoutsourcing.com)liveryteam@successoutsourcing.com | ​​iX/1Z"5b6 |
| ​James | ​Tan | ​[executive1senior@gmail.com](mailto:executive1senior@gmail.com) | ​​S'i3c9(E!zA9 |
| ​Jo | ​Yu Lee | ​[chuckjoyulee@gmail.com](mailto:chuckjoyulee@gmail.com) | ​​bG=7S"0is26 |
| ​Bob | ​Park | ​[bobhorizons@gmail.com](mailto:bobhorizons@gmail.com) | ​​k]8BC7j{58 |

2. Source code is checked in at [https://test-kumo-eip.visualstudio.com/DefaultCollection/Kumo/\_versionControl#path=%24%2FKumo%2FDev%2Ftest-kumo-eip0001&\_a=contents](https://test-kumo-eip.visualstudio.com/DefaultCollection/Kumo/_versionControl" \l "path=$/Kumo/Dev/test-kumo-eip0001&_a=contents" \t "_blank) with accounts :

* alice.huynh@kumo-eip.com
* [charlotte.tang@kumo-eip.com](mailto:charlotte.tang@kumo-eip.com)
* [sri.shaila@kumo-eip.com](mailto:sri.shaila@kumo-eip.com)

**Instructions:**  
Deploy KUMO 2.0 Beta in the **same environment of KUMO 2.0 Blank Canvas**

**Must have KUMO log on page and KUMO Blank Canvas**

1. Create a very simple version of

|  |  |  |
| --- | --- | --- |
| **​No.** | **Deliverable​s** | **​Details** |
| ​1 | ​KUMO Login Mechanism | ​KUMO Log on Screen (KUMO 2.0 Blank Canvas) and Functionalities for User Management and Log on   1. Login check    * Correct e-mail address    * Correct password 2. User Management    * First Name    * Last Name    * E-mail Address    * Password = Auto-generated password following these rules      + **Password policy:**        - Use 8 to 16 characters        - Lowercase letters        - Uppercase letters        - Numbers (0-9)        - Symbols, including: ! @ # $ % ^ & \* - \_ + = [ ] { } | \ : ' , . ? / ` ~ " < > ( ) ;    * Upon creating a user account, an auto-generated e-mail will be sent to each user's e-mail address      + From: [admin@kumo-eip.com](mailto:admin@kumo-eip.com)      + E-mail title: Your Log on Credentials to KUMO Environment      + [E-mail template](https://kumoeip0001.sharepoint.com/sites/kumo/clc/KnowledgeBank/ED/Your%20Log%20on%20Credentials%20to%20KUMO%20Environment%20E-mail%20Template.aspx) 3. User Log on    * When they log on for the first time, force them to change password 4. Username Rule = e-mail address    * Logic check 5. Password Rule    * Logic check following password policy 6. Password Encryption 7. Password Reset    * If they want to change their password for security reason, let them reset password by asking them to fill in their username      + Logic check to make sure the username exists in the system      + If they enter a wrong username, display: We couldn't find this username in our records.    * Reset Your Password   Enter your username and we'll send you a link to reset your password.   * + Send a reset password link to their e-mail address     - Please check your e-mail. We have just sent you an email with a link to setup your new password.     - From: [admin@kumo-eip.com](mailto:admin@kumo-eip.com)     - E-mail title: Reset Your KUMO Password     - [E-mail template](https://kumoeip0001.sharepoint.com/sites/kumo/clc/KnowledgeBank/ED/Reset%20Your%20KUMO%20Password%20Email%20Template.aspx) |
| ​2 | ​KUMO EIP (a.k.a. Blank Canvas) | ​KUMO Blank Canvas  (KUMO 2.0 Blank Canvas): center KUMO Watermark |
| ​3 | ​Human Resource (HR) InterBlock | ​Human Resource (HR) Component |
| ​4 | ​Customer Relationship Management (CRM) InterBlock | ​Customer Relationship Management (CRM) Component |

1. Objective:
   * ​To demonstrate how HR Component is interacting with CRM Component
   * We would like to show that the HR department can associate the employees they store in HR Component to the sales persons who make the sales with Customer A.
   * Demonstrate CRM can pull information from HR
   * Deliver a single database to multiple systems.
2. Database Back End Architecture
   * Query HR and CRM tables
   * Show joint between the 2 tables
   * Use EID
   * Associate EID with CID
   * Employee Table in HR Component

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| ​EID (system use - do not display to end users) | Employee ID​​ (display to end users) | ​First Name | ​Last Name | ​Phone Number | Address |
| ​ | ​ | ​ | ​ | ​ | ​ |
| ​ | ​ | ​ | ​ | ​ | ​ |
| ​ | ​ | ​ | ​ | ​ | ​ |

* + CRM Table​

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| ​CID (system use - do not display to end users) | Customer ID  (display to end users) | ​Employee | ​First Name | ​Last Name | ​Phone Number | Address |
| ​ | ​ | ​ | ​ | ​ | ​ | ​ |
| ​ | ​ | ​ | ​ | ​ | ​ | ​ |
| ​ | ​ | ​ | ​ | ​ | ​ | ​ |
| ​ | ​ | ​ | ​ | ​ | ​ | ​ |

1. HR Component Features​​
   * HR Dashboard
     + Left Navigation
       - Add
       - View
     + Search box
   * ​1 form for end users to fill up (add a hidden EID to each entry created from the form)
     + Employee ID = Eyyyymmddhhmmss of the item creation date and time
     + First Name
     + Last Name
     + Phone Number
     + Address
   * Add
   * View: 1 page to read the data entered into the form
   * Edit: 1 page to edit the data entered into the form
   * Search
2. CRM Component Features
   * ​Do exactly the same as HR
   * Instead of Employee, replace with Customer
   * Rename HR to CRM
   * Instead of Employee ID , put Customer ID
   * 1 form for end users to fill up (add a hidden CID to each entry created from the form)
     + Customer ID = Cyyyymmddhhmmss of the item creation date and time
     + Employee
     + First Name
     + Last Name
     + Phone Number
     + Address
3. [admin@kumo-eip.com](mailto:admin@kumo-eip.com)
   * SMTP server address: gator4123.hostgator.com
   * Port: 587
   * Username: [admin@kumo-eip.com](mailto:admin@kumo-eip.com)
   * Password: !Admin20150420
4. Layout Reference:
   * ​URL: <https://kumoeip0012.sharepoint.com/>
   * Username: [FinnovationAdmin@kumoeip0012.onmicrosoft.com](mailto:FinnovationAdmin@kumoeip0012.onmicrosoft.com)
   * Password: Yopo4338

**Comments After 1st Review on April 25, 2015**

|  |  |  |  |
| --- | --- | --- | --- |
| **No.** | **​Scope** | **​Comment** | **​Status (Updated by Alice)** |
| ​1 | ​KUMO Sign in Page | ​1. Forgot Password feature has not been implemented  2. Spelling in error message   * Email   3. Display Email Address instead of Username in the first box and error messages  4. Do not display error message below the password box as you have displayed it on the right side  6. Display Email Address instead of Username in the first box | ​Completed  Completed    Completed   Completed     Completed |
| ​2 | ​KUMO Blank Canvas | ​1. Use this [KUMO Logo](https://kumoeip0001.sharepoint.com/sites/kumo/SiteAssets/KUMOLogo.jpg)  2. Put CRM box next to HR box  3. Remove User management, Employee, Customer from the top navigation bar  4. Hello [First Name] [Last Name]  5. **Only admin can get access to User Management, end users will not have access to User management at all**  **6. Admin gets access to User Management through a separate environment**   * [**https://test-kumo-eip0001.azurewebsites.net/usermanagement**](https://test-kumo-eip0001.azurewebsites.net/usermanagement) * **KUMO log on screen is mandatory** * **Admin enters E-mail and password** * **User Management will not be integrated with KUMO environment** * Fields in Add User form   + First Name   + Last Name   + Email Address | ​Completed  Completed  Completed    Completed  Completed  KUMO 2.0 Final Release |
| ​3 | ​HR Component | ​ 1. Replace User management, Employee, Customer on the top navigation bar with KUMO    HR    CRM (space them out nicely, when you hover, display a white background instead of the current color). Align it with KUMO Logo. Embed link to navigate back to KUMO, HR, and CRM.   * KUMO: [https://test-kumo-eip0001.azurewebsites.net](https://test-kumo-eip0001.azurewebsites.net/) * HR: [https://test-kumo-eip0001.azurewebsites.net](https://test-kumo-eip0001.azurewebsites.net/hr)/hr * CRM: [https://test-kumo-eip0001.azurewebsites.net](https://test-kumo-eip0001.azurewebsites.net/crm)/crm   2. Spelling mistakes   * First Name * Last Name * Phone Number * Address   3. Display Employee ID as we have discussed  4. Add new employee form   * The field order has to be consistent with that in the list display * Logic check for each required field, display proper error message. Make sure error messages' color and spelling are consistent throughout * Replace Create with Add * Add new employee (not Add a new employee.)   + Employee ID   + First Name   + Last Name   + Phone Number   + Address   5. Embed a hyperlink to go back to HR [https://test-kumo-eip0001.azurewebsites.net](https://test-kumo-eip0001.azurewebsites.net/hr)/hr in HR logo  6. Remove all test data so that we can add proper sample data | ​Completed            Completed      In Progress  Completed  Completed              Completed  Completed |
| ​4 | ​​CRM Component | ​  ​ 1. Replace User management, Employee, Customer on the top navigation bar with KUMO    HR    CRM (space them out nicely, when you hover, display a white background instead of the current color). Align it with KUMO Logo. Embed link to navigate back to KUMO, HR, and CRM.   * KUMO: [https://test-kumo-eip0001.azurewebsites.net](https://test-kumo-eip0001.azurewebsites.net/) * HR: [https://test-kumo-eip0001.azurewebsites.net](https://test-kumo-eip0001.azurewebsites.net/hr)/hr * CRM: [https://test-kumo-eip0001.azurewebsites.net](https://test-kumo-eip0001.azurewebsites.net/crm)/crm   2. Spelling mistakes   * First Name * Last Name * Phone Number * Address   3. Display Customer ID as we have discussed  4. Add a new customer form   * The field order has to be consistent with that in the list display * Logic check for each required field, display proper error message. Make sure error messages' color and spelling are consistent throughout * Replace Create with Add * Add new customer (not Add a new customer.)   + Customer ID   + Employee   + First Name   + Last Name   + Phone Number   + Address   5. Embed a hyperlink to go back to CRM [https://test-kumo-eip0001.azurewebsites.net](https://test-kumo-eip0001.azurewebsites.net/crm)/crm in CRM logo  6. Remove all test data so that we can add proper sample data | ​Completed          Completed      Completed​    Completed      Completed​  Completed |

**Comments After 2nd Review on April 26, 2015**

**Naming Convention for KUMO**

1. Sign in
2. Sign out
3. Email
4. KUMO is all in CAPS
5. Page title: capitalize each letter for each important word (not and, in, to (those unimportant words))
   * For example:
     + Sign in to KUMO
     + Reset Password Confirmation
6. URL in small letters
   * For example:
     + https://customera.kumo-eip.com/hr
7. Sub page URL follows the action item button
   * For example:
     + Add: <https://customera.kumo-eip.com/hr/add>

**Test Plan**

1. Browser compatibility
2. Test on the 3 latest versions of IE, Chrome, Firefox

|  |  |  |  |
| --- | --- | --- | --- |
| **No.** | **​Scope** | **​Comment** | **​Status (Updated by Alice)** |
| ​1 | ​KUMO Sign in Page | ​1. Page title: Sign in to KUMO  2. Replace Forgot your password with Forgot Password?  3. Space Forgot Password? equally below Sign in button (the spacing has to be consistent with the spacing between the email box and password box and sign in button)  4. Display Email Address instead of E-mail in the first box  5. Allign left small KUMO logo and the text Sign in to KUMO with the Email Address and Password boxes  6. When end user enters their email address, can the system validates the email address immediately and put a tick if the email address exists in the system? (If it is not complicated, we will implement it in KUMO 2.0 final, not in Beta)  7. Error message for wrong email address or password: The email address or password provided is incorrect. | Completed  Completed  Completed  Completed    Completed  To be Investigated  Completed |
| ​2 | ​User | ​1. Replace Log off with Sign out | ​Completed |
| ​3 | ​HR Component | 1. URL: <https://test-kumo-eip0001.azurewebsites.net/hr> (not/employee)  2. Phone Number:   * Make it work for all countries so we will let people enter a string of number we will display in a nice and proper format +country code  xx xxxx xxxx (meaning group 4 digits by 4 digits from the right, leave whatever is left after country code   + For example: Let people enter +6597242640, display +65 9724 2640 (space between country code and the number, space between 4 digits by 4 digits)   + Enter: +86918245519, display +84 9 1824 5519   + Reference: <http://en.wikipedia.org/wiki/National_conventions_for_writing_telephone_numbers#Singapore> * Display the phone number format in the box: +country code phone number with a space between country code and phone number * Do not restrict the number of digits in phone number * Error message: Entered phone number format is not valid. Please enter +country code phone number with a space between country code and phone number   3. Employee ID   * Creation date and time should be local date and time of Singapore | ​Completed      In Progress                In Progress |
| ​4 | ​​CRM Component | ​1. URL: <https://test-kumo-eip0001.azurewebsites.net/crm> (not / customer)  2. Phone Number:   * Make it work for all countries so we will let people enter a string of number we will display in a nice and proper format +country code  xx xxxx xxxx (meaning group 4 digits by 4 digits from the right, leave whatever is left after country code   + For example: Let people enter +6597242640, display +65 9724 2640 (space between country code and the number, space between 4 digits by 4 digits)   + Enter: +86918245519, display +84 9 1824 5519   + Reference: <http://en.wikipedia.org/wiki/National_conventions_for_writing_telephone_numbers#Singapore> * Display the phone number format in the box: +country code phone number with a space between country code and phone number * Do not restrict the number of digits in phone number * Error message: Entered phone number format is not valid. Please enter +country code phone number with a space between country code and phone number   3. Customer ID   * Creation date and time should be local date and time of Singapore | ​Completed  In Progress                  In Progress |
| ​5 | ​User Management | ​1. Replace Create and Register with Add  2. Add a new account  3. Fields in this order   * First Name * Last Name * Email Address   4. Remove Company  5. All users   * First Name * Last Name * Email Address   6. Edit form  Edit account   * First Name * Last Name * Email Address   7. Delete form  Delete an account  Are you sure you want to delete this account?   * First Name * Last Name * Email Address | ​​Completed ​ Completed ​ Completed   ​  Completed  ​Completed     ​Completed       ​Completed |
| ​6 | ​Your Log on Credentials to KUMO Environment Email Template | ​1. Email title: Your KUMO Account Information  2. Hi [First Name]  3. Use this updated [Email template](https://kumoeip0001.sharepoint.com/sites/kumo/clc/KnowledgeBank/ED/Your%20KUMO%20Account%20Information%20Email%20Template.aspx) | ​​Completed ​ Completed ​ Completed |
| ​7 | ​Forgot your password? Page | ​1. Forgot Password?  2. Replace  Enter your email. with Enter your email address and we'll send you a link to reset your password  3. Email Address  4. If they enter a wrong email address, display the error message below the Email Address box: We couldn't find this email address in our records.  Still display the Email Address box there so that they can enter the email address again  5. After they hit Send, display this message instead of a blank box on Confirmation page: Please check your email. We have just sent you an email with a link to reset your KUMO password.  6. Layout: make the length of Email Address box smaller Reference <https://www.eventbrite.sg/login/> | ​​Completed  ​Completed  ​Completed ​ Completed  ​  Completed   ​Completed |
| ​8 | ​Reset Your KUMO Password Email Template | ​1. Hi [First Name]  2. Use this updated [email template](https://kumoeip0001.sharepoint.com/sites/kumo/clc/KnowledgeBank/ED/Reset%20Your%20KUMO%20Password%20Email%20Template.aspx) | ​​Completed  ​Completed |
| ​9 | ​Reset password page | ​1. Reset Password  2. Replace Reset your password with Enter your new password below  3. Fields   * Email Address * New Password * Confirm New Password   4. Reset button should be consistent (blue for all action buttons)  5. Layout: make the length of Email Address box smaller Reference <https://www.eventbrite.sg/login/> | ​​Completed  ​Completed  ​Completed    ​ Completed  ​Completed |
| ​10 | ​Reset password confirmation page | ​1. Reset Password Confirmation  2. Your password has been reset. Please click here to sign in.  3. Layout: make the length of Email Address box smaller Reference <https://www.eventbrite.sg/login/> | ​​Completed ​ Completed  ​Completed |
| ​11 | ​KUMO URL direction to https | ​1. Force http to https  2. Right now users can still get access to http, which is not secured | Completed |
| ​12 | ​Profile page | ​1. Profile (remove the . after Profile)  2. Fields order   * First Name * Last Name * Email Address   3. Remove Phone Number | ​​Completed ​ Completed      ​Completed​ |
| ​13 | Edit Feature for HR and CRM | ​1. Always shows Error | ​Completed |

**Comments After 3rd Review on April 27, 2015**

|  |  |  |  |
| --- | --- | --- | --- |
| **No.** | **​Scope** | **​Comment** | **​Status (Updated by Alice)** |
| ​1 | ​Dotted lines around all buttons in IE | ​1. Remove the dotted lines around all images and hyperlinks |  |
| ​2 | ​HR Component | ​1. Employee ID   * Creation date and time should be local date and time of Singapore |  |
| ​3 | ​CRM Component | ​1. Customer ID   * Creation date and time should be local date and time of Singapore | Completed |
| ​4 | Reset Password page | ​1. Layout: make the length of Email Address box smaller Reference <https://www.eventbrite.sg/login/> |  |
| ​5 | Your KUMO Account Information | 1. Add "Do not include common words or names." to Your KUMO Account Information E-mail Template.  New message will be "Strong password required. Enter 8-16 characters. Do not include common words or names. Combine uppercase letters, lowercase letters, numbers, and symbols." | ​ |
| ​6 | Favicon | ​1. Use [KUMOFavicon](https://kumoeip0001.sharepoint.com/sites/kumo/SiteAssets/KUMOFavicon.jpg) | ​Completed |