

## Table of Contents

<b>PL Data Management Tool (PL-DMT) Description</b>	<b>1</b>
<b>Design</b>	<b>2</b>
<b>PL-DMT Access &amp; Authentication</b>	<b>2</b>
<b>SE/SO Functionality</b>	<b>7</b>
<b>SO Functionality</b>	<b>11</b>
<b>RM Functionality</b>	<b>12</b>
<b>PL Admin Team Functionality</b>	<b>21</b>
<b>Go-Live Planning</b>	<b>29</b>
<b>Appendix</b>	<b>30</b>

## PL Data Management Tool (PL-DMT) Description

The PL Data Management Tool is built with the below key objectives.

1. Keep SE & SO data up to date for review and communication
2. Help RM monitor SE & SO data updates and mark attendance for work monitoring
3. Enable the Admin team to manage backend activities like new additions, removals and hierarchy mapping at a central place.

## Design

The tool is designed to work with the below key requirements

1. The tool should be easy to use on the mobile especially for the SE, SO and RMs
2. Admin functionality should be from desktop as the majority of the functions will require large data viewing & data uploads.
3. Exception reports with a view to error data for the backend Admin users to facilitate easy data uploads.

Keeping the above in perspective, PL-DMT is a responsive web application which enables access from different devices for SE, SO & RM. The Admin functionality will be enabled for desktop usage.

## PL-DMT Access & Authentication

The PL-DMT will be available on a standard secure URL (URL name to be decided during deployment) for access by employees.

PL-DMT will also be made available on the IPRO app

The access/authentication is an OTP-based mechanism which frees the employee from having to remember another user ID/password combination.

## Flow

- The employees clicks on the the secure ([https](https://)) URL link for PL-DMT from the IPRO application or any other source (like Bookmark, email, SMS)
- PL-DMT application will open in a new browser window
- PL-DMT login screen is displayed and employee needs to enter his/her employee ID
- An OTP is generated & sent to his registered mobile no
- Employee enters the OTP and on verification can log into PL-DMT tool
- OTP to be resent in case wrong entry is made
- A ‘Not able to login’ clickable link available on the login screen. If user is unable to login, he/she can click on this link which would open a pop-up with the following message & relevant input boxes – “Your mobile number is not updated with us, please enter your employee ID (validation-either 6 digit numeric or begins with C) and mobile number”

## Sample UI

PL-DMT Login page



OTP authentication page

15:45



## PL DMA

Employee ID  
276658

[Not Able to Login?](#)

Enter Login OTP

[Resend OTP](#)

**Login**



Post login page for RM

15:45



## PL DMA

Welcome, Anagh Tyagi.

Updated Team Info Helps Better Performance

**Manage Team**

Last Update - 2nd Apr 19

Your Approvals Rreqd - 3

**Mark Attendance**



Initial page after SE/SO login

15:45



## SE Details

Mahesh Patel  
SE



SAVE CHANGES

C-Code

C102165

Mobile No:



(Max 3 separated by commas)

7389358554



Branch SOL ID

(4 Digit Numeric Codes Separated by commas)

2341

BAN ID (should start with 'BAN')

NA

VSTS ID (should start with 'IPRO' or "CODE NA")

IPRO005079/PR/S1/S03785

Product

Sales



Level 1 Manager

Anagh Tyagi



Level 2 Manager

Ashwin Dube



## [SE/SO Functionality](#)

The SE & SOs are provided an easy-to-use mobile interface with the intention that it will help them to keep their information up to date easily.

### **SE View**

#### **Key functional points**

- SE can edit all the fields except C-Code & Level-2 Manager
- Mobile no: entry is validated by sending an OTP to be confirmed to ensure that mobile no is accurate.
- SE can save the changes once they are complete
- The change in the below fields will require RM approval. A notification SMS will go to the RM for action.
  - Level 1 Manager(RM). This will require an approval from the new RM selected.
  - Branch SOL ID

#### **Validations**

- Employee Code (C-Code) cannot be edited
- Mobile no: should be valid 10-digit no & confirmed by OTP verification
- Mobile no: entry is restricted to max of 3 numbers
- BAN ID should start with 'BAN'
- Branch SOL ID should be 4 digits numeric. Multiple can be submitted separated by commas
- VSTS ID should start with 'IPRO'
- Product dropdown should have only the below values
  - Sales
  - Education Loan
  - Alternate Channel
  - Co-ordinator
  - RIBG

## Sample UI

Initial UI before mobile no validation.

15:45

≡ SE Details

Mahesh Patel

SE

---

C-Code  
C102165

Mobile No: (Max 3 separated by commas)  
7389358554

---

Branch SOL ID (4 Digit Numeric Codes Sepaarted by commas)  
2341

---

BAN ID (should start with 'BAN')  
NA

---

VSTS ID (should start with 'IPRO' or "CODE NA")  
IPRO005079/PR/S1/S03785

---

Product

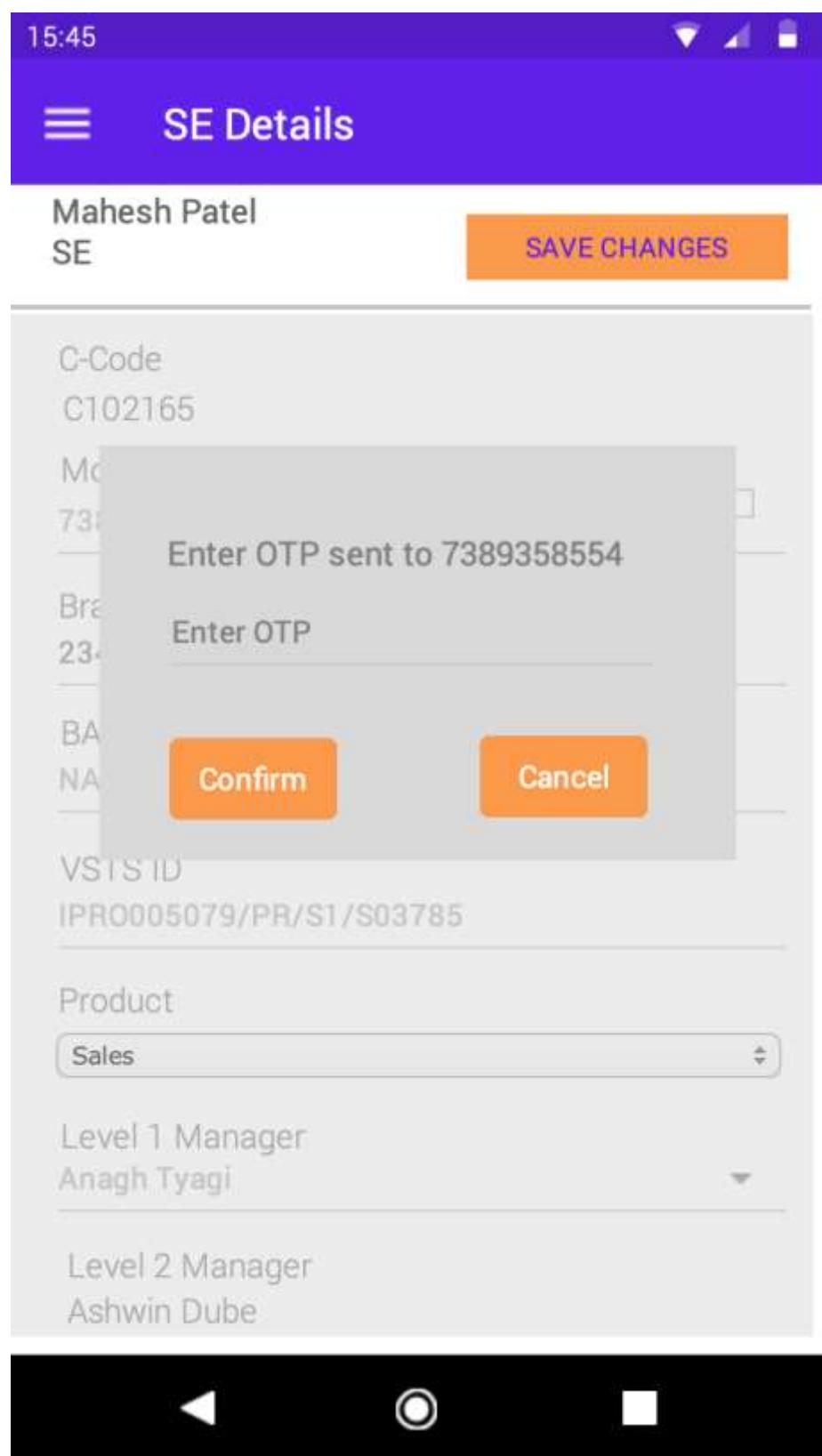
---

Level 1 Manager  
Anagh Tyagi

---

Level 2 Manager  
Ashwin Dube

UI with OTP entry



UI after mobile no validation

15:45

## SE Details

Mahesh Patel  
SE

SAVE CHANGES

C-Code  
C102165

Mobile No: + 7389358554 ✓

Branch SOL ID (4 Digit Numeric)  
2341

BAN ID (should start with 'BAN')  
NA

VSTS ID (should start with 'IPRO' or "CODE NA")  
IPRO005079/PR/S1/S03785

Product  
Sales

Level 1 Manager  
Anagh Tyagi

Level 2 Manager  
Ashwin Dube

## [SO Functionality](#)

SO functionality similar to SE but with the following limitations.

- SOs can edit only
  - Mobile Number
  - Branch SOL ID

### Key Functional Points

- If SO edits Branch SOL ID, RM will need to approve the change.
- If SO tries to change any other fields the below message should get displayed (“You are allowed to change only Mbl No and SOL ID, please make other changes in GAL”)

### Validations

- Only Mobile No & Branch SOL ID can be edited
- Mobile no: should be valid 10-digit no & confirmed by OTP verification
- Mobile no: entry is restricted to max of 3 numbers
- Branch SOL ID should be 4 digits numeric (multiple comma-separated entries possible)

### Sample UIs

The UI is similar to that of SEs but with edit allowed only for 2 fields

- Mobile No
- Branch SOL ID

## RM Functionality

The RMs are provided an easy to use mobile interface with the intention that it will help them to keep their team information up to date and mark attendance easily.

### RM View

#### Key Functional Points

##### *Manage Team Info*

- Info on last update date and number of changes (both new additions & changes requiring RM approval are displayed)
- RM can manage his team information
  - Edit & Save any changes in the SE/SO info
  - Approve/Save any changes done by SE/SO

##### *Remove SE/SO from Team*

- RM can remove any SE/SO from his team. He can return them to the common pool or transfer to another RM if he has the info. A notification SMS will go to the new RM if selected or to the SE to update his new RM
- If transferred to common pool the below message should be displayed  
“Request sent to Product team. Changes will be finalized post Product team approval”
- If transferred to another RM the below message should be displayed  
“Request sent to <new RM name>. Changes will be finalized post <new RM name> approval”

##### *Deactivate SE/SO from Team*

- Text for Deactivation to read ‘Deactivate (*in case of resignation/absconding/not joined*)’
- RM can deactivate any SE/SO from his team. The reasons he can assign are ‘Resigned’, ‘Absconding’ and ‘Not joined’
- The deactivation request requires approval from PL DMT backend team

##### *Mark Attendance*

- RM can mark weekly attendance for SEs. He can select the month & week for attendance marking for the team. The marking is color based and touch enabled & will cycle through the below values
  - P – Present
  - A – Unauthorized Absent
  - L – Leave
  - WO – Week Off
  - SOFF – Saturday Off
  - H – Holiday
  - NJ – Not joined
- On RM marking Leave for a SE, he will see a pop-up where he will be able to record the leave details as below.
  - Leave start date

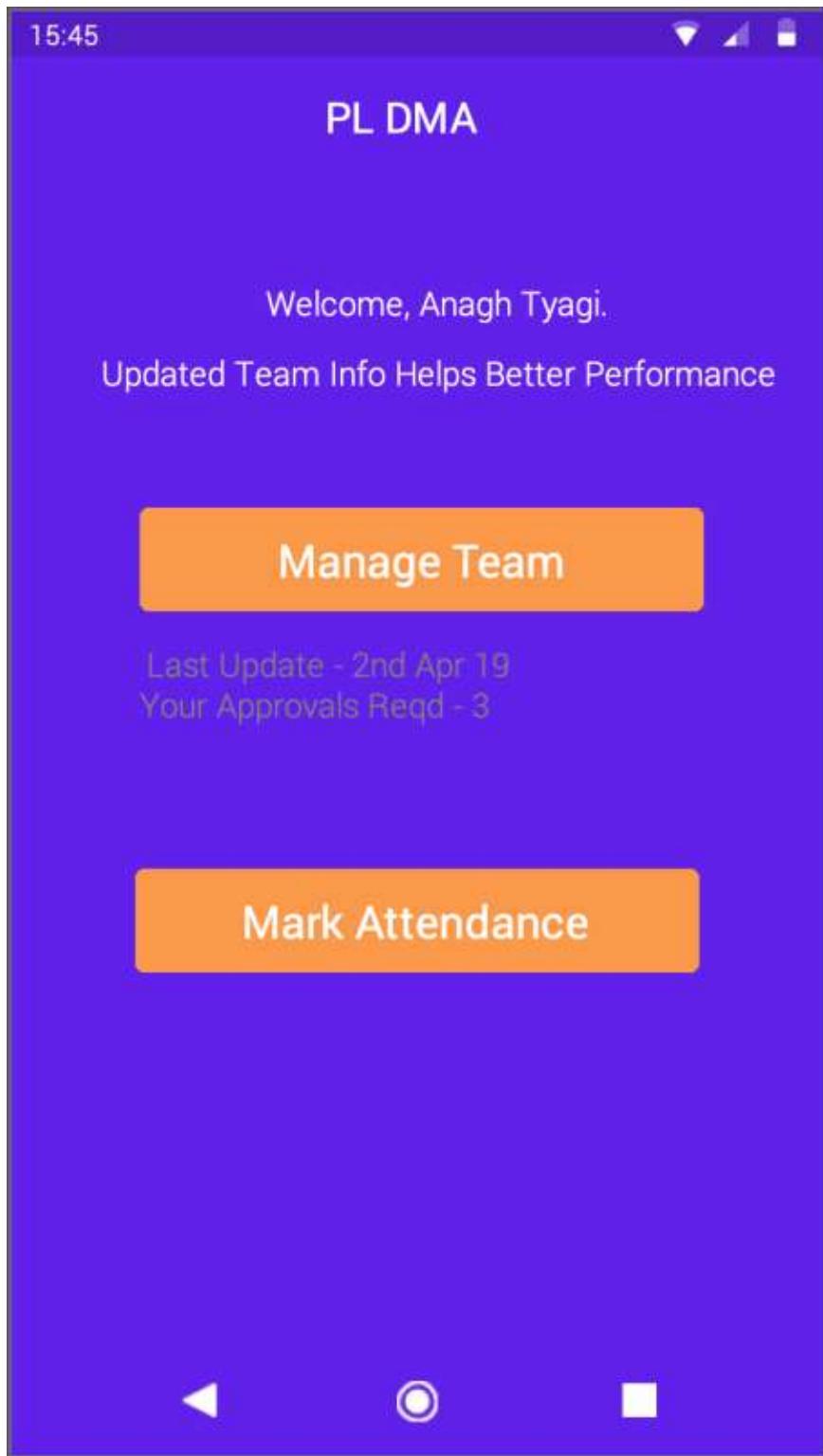
- Leave End Date
  - Mark reasons (Maternity, Long Leave etc)
- ‘On leave’ SE will be displayed as part of the team, but attendance cannot be marked during leave period. If the RM clicks on day already marked as on leave it will allow a edit option on the leave period from that day onwards.
- Post recording Leave for the SE, during any subsequent attendance marking for the same SE, the leave dates will be auto marked.

### Validations

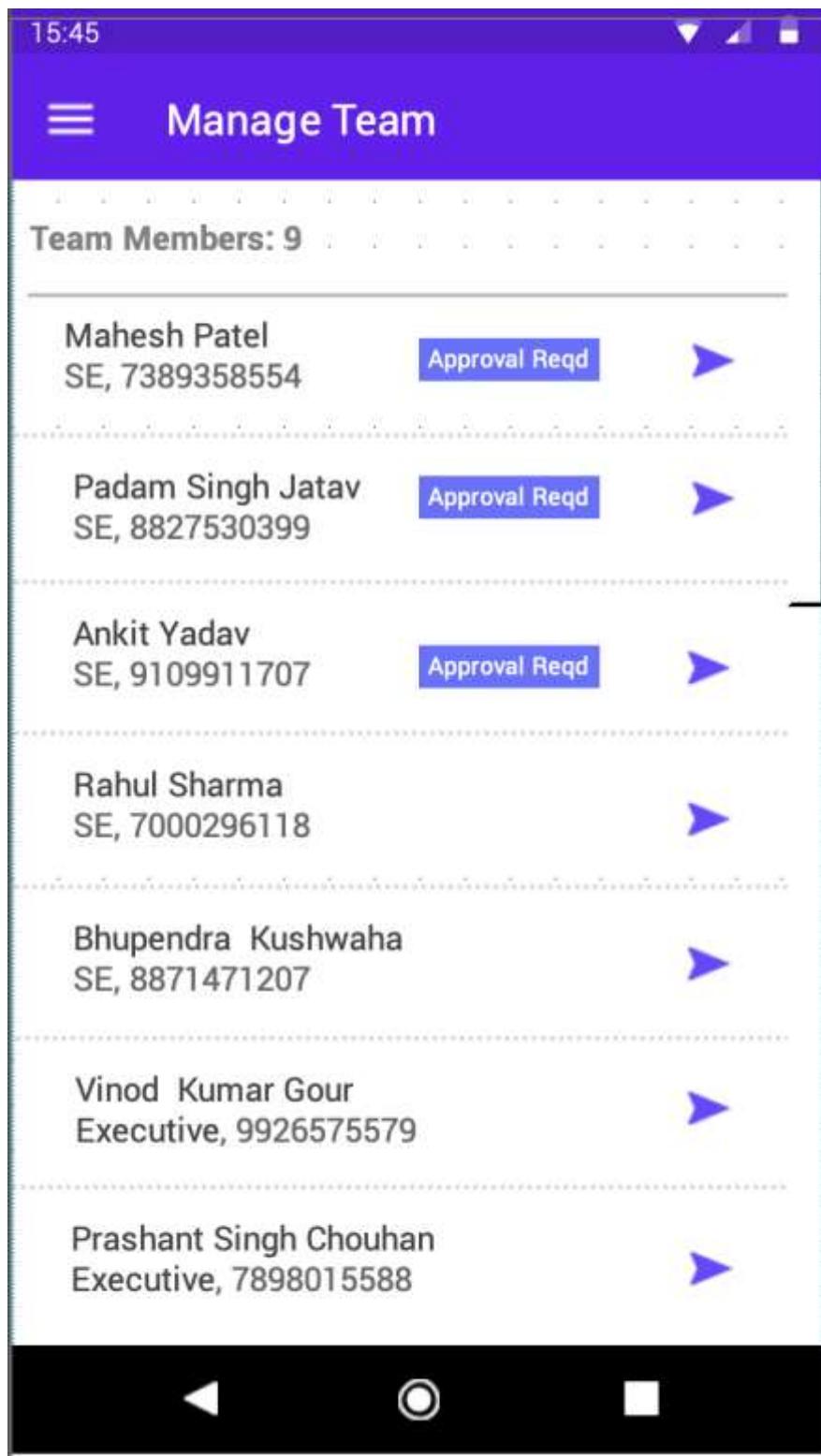
- RM can edit & save all fields for SE except employee code
- RM can edit & save only Mobile No & Branch SOL ID fields for SO
- RM can mark attendance for SE only, not SO.
- The leave marking colors will be defined for the below values.
  - P – Present
  - A – Unauthorized Absent
  - L – Leave
  - WO – Week Off
  - SOFF – Saturday Off
  - H – Holiday
  - NJ – Not joined
- Employee Code cannot be edited
- Mobile no: should be valid 10-digit no & confirmed by OTP verification
- Mobile no: entry is restricted to max of 3 numbers
- BAN ID should start with ‘BAN’
- Branch SOL ID should be 4 digits numeric
- Product dropdown should have only the below values
  - Sales
  - Education Loan
  - Alternate Channel
  - Co-ordinator
  - RIBG

## Sample UI

Initial screen UI after successful login



Manage team –list of team member's UI



Manage team – team member details UI

The screenshot shows a mobile application interface titled "Team Member Details". At the top, there is a navigation bar with three horizontal lines on the left and the title "Team Member Details" in the center. The main content area displays the following information:

- Name:** Mahesh Patel
- Role:** Level1 Manager
- Manager:** Anagh Tyagi

Below this, there are two orange action buttons:

- A large orange button labeled "DEACTIVATE" with the sub-instruction "If Resigned/Absconding/Not Joined)".
- A smaller orange button labeled "REMOVE FROM TEAM".

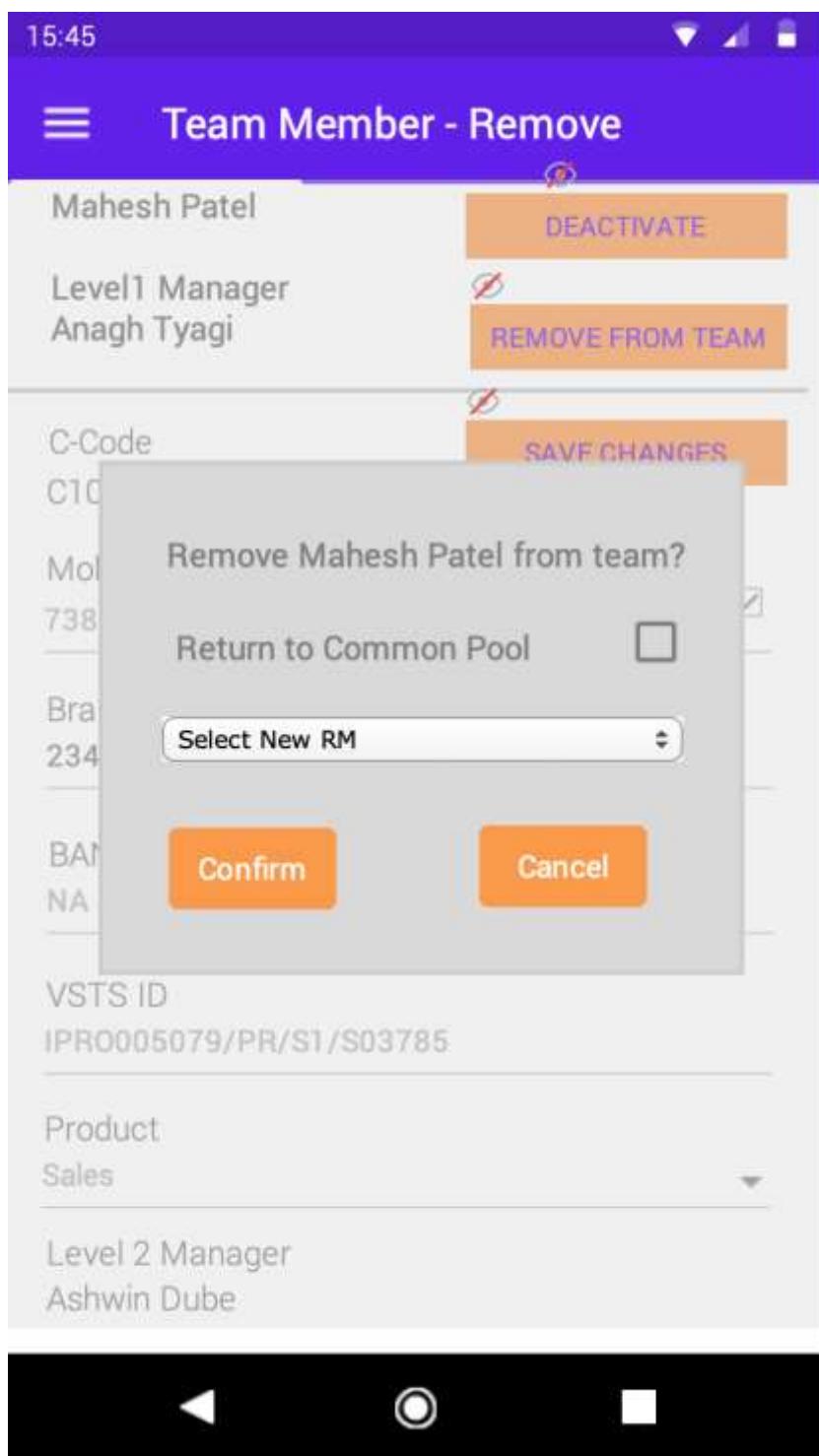
---

Below the names, there are input fields and buttons:

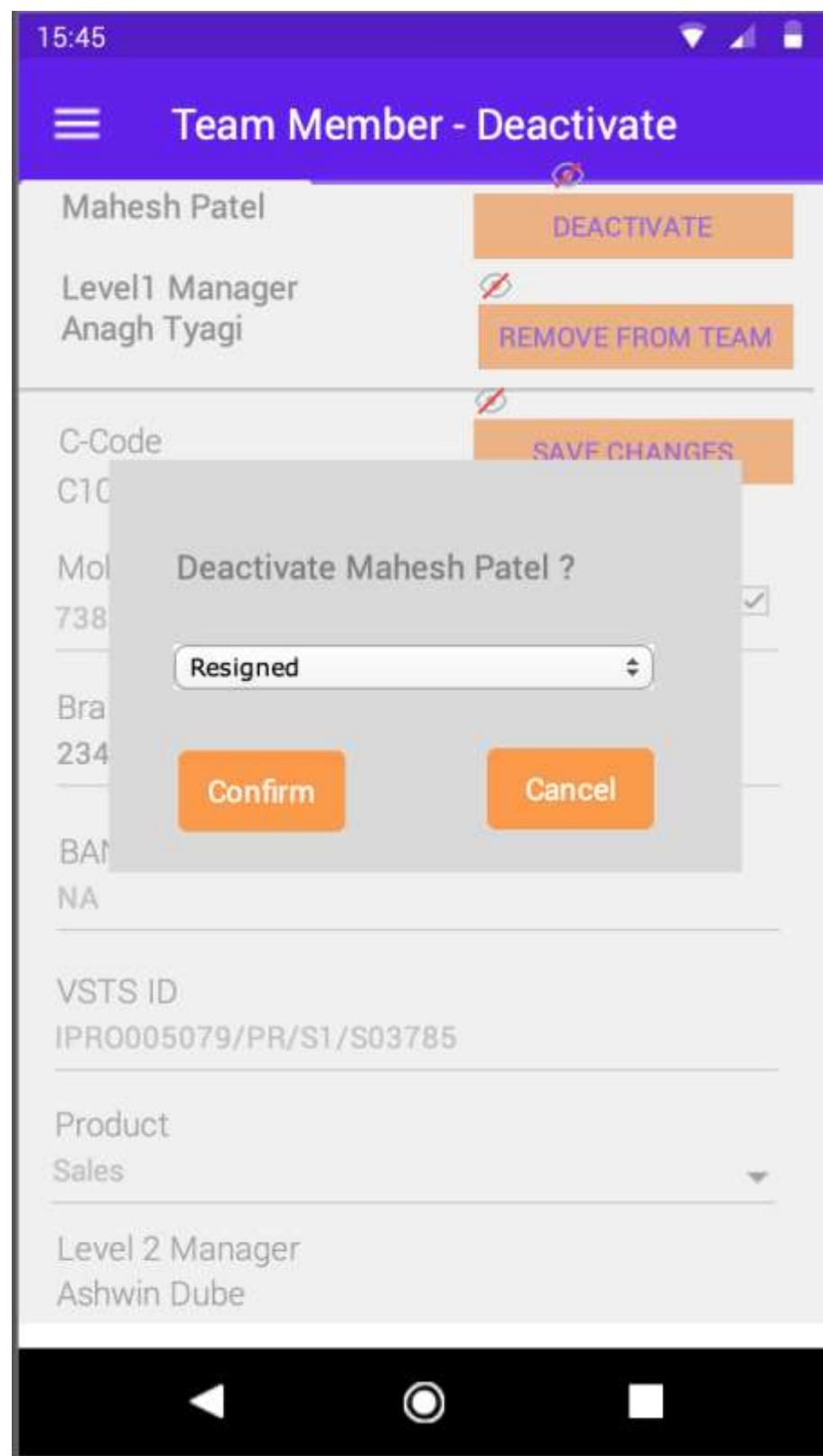
- C-Code:** C102165
- Mobile No:** 7389358554 (with a checked checkbox next to it)
- Branch SOL ID** (4 Digit Numeric): 2341
- BAN ID** (should start with 'BAN'): NA
- VSTS ID** (should start with 'IPRO' or "CODE NA"): IPRO005079/PR/S1/S03785
- Product:** A dropdown menu currently set to "Sales".
- Level 2 Manager:** Ashwin Dube

At the bottom of the screen, there is a black navigation bar with three white icons: a triangle pointing left, a circle, and a square.

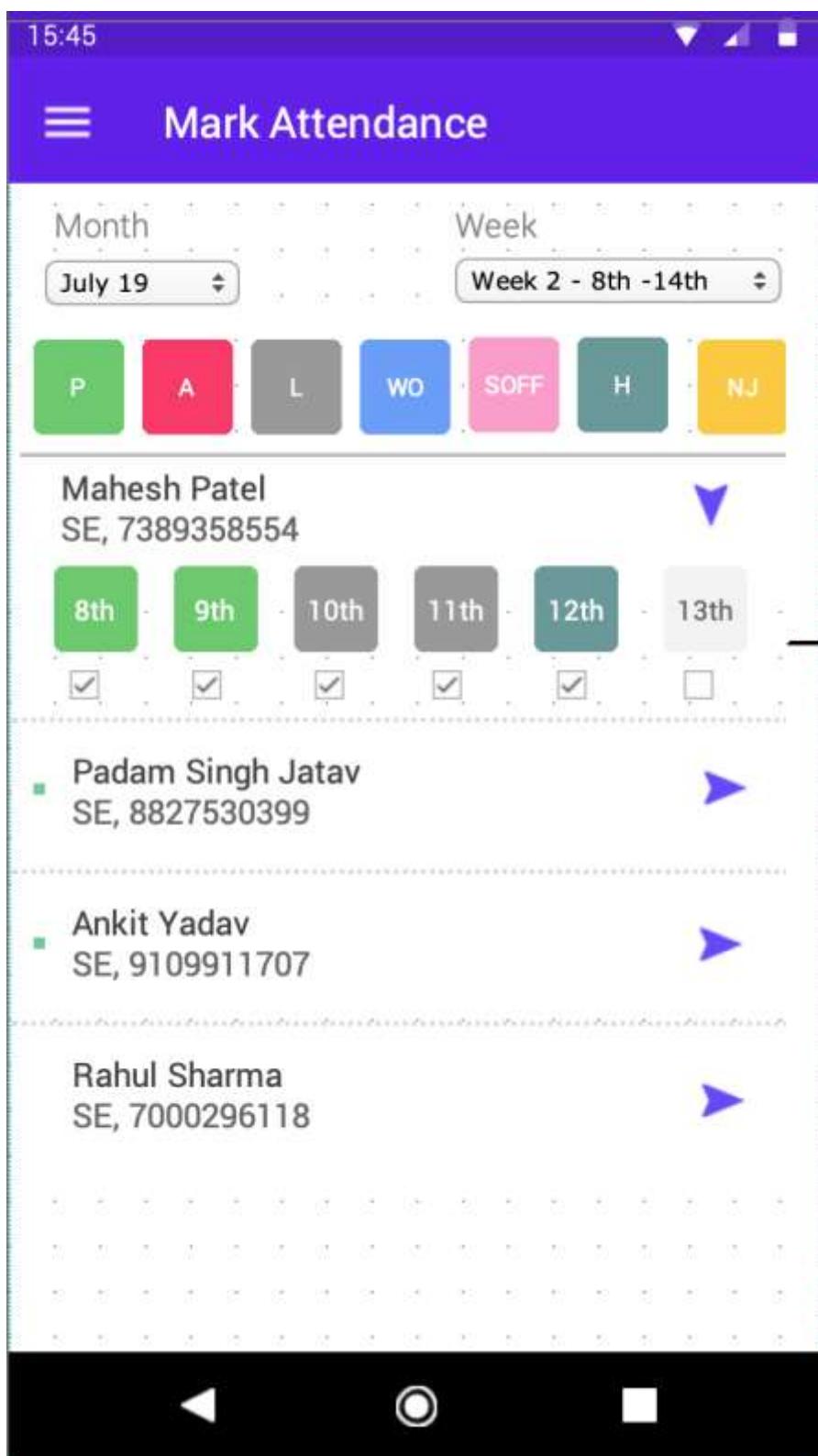
Manage team – team member remove UI



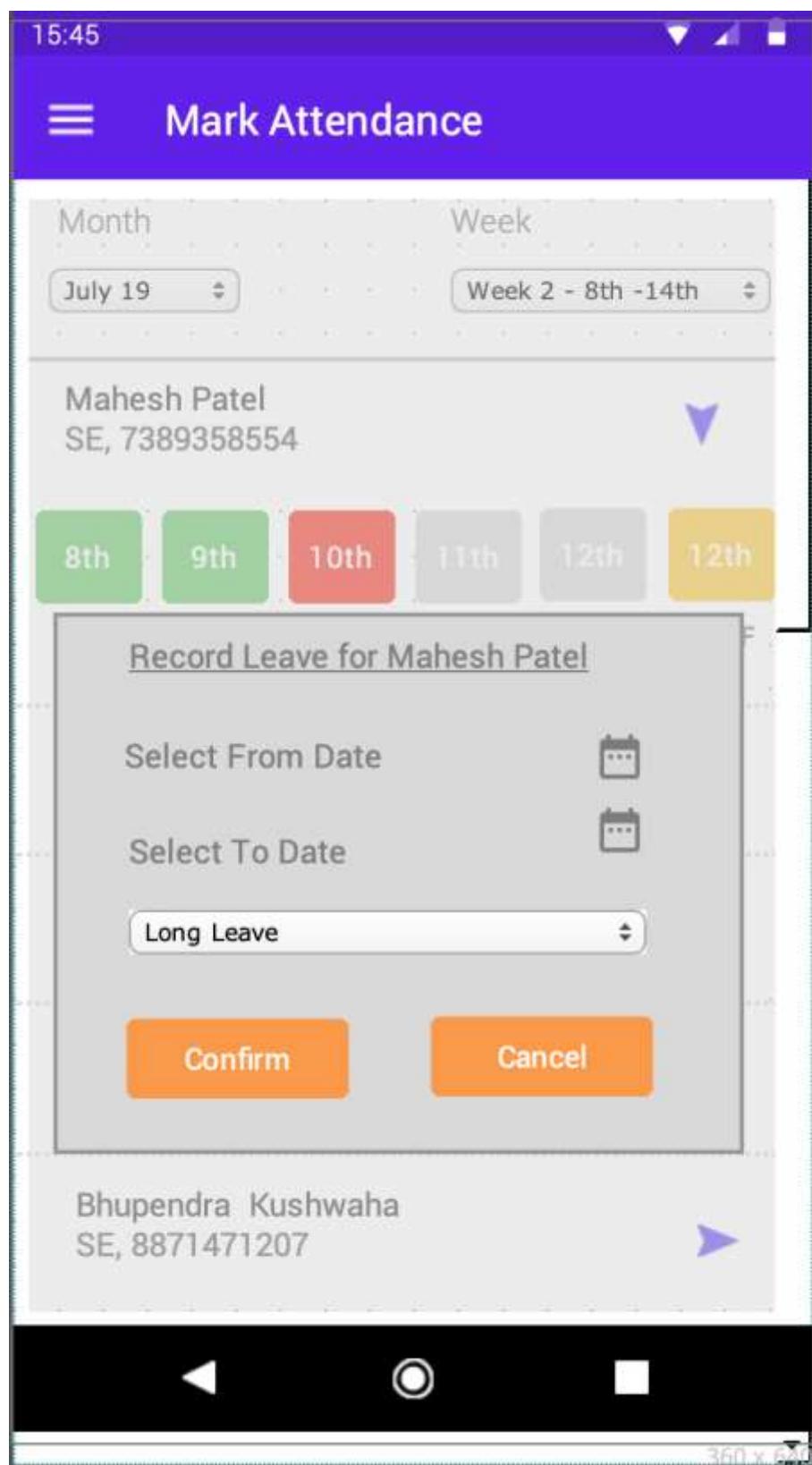
Manage team – team member deactivation UI



Mark attendance UI



Mark attendance – record leave UI



## PL Admin Team Functionality

The Admin interface enables the below functionality

- Approvals for Deactivation of SEs
- Manage data for
  - SE/SO data
  - RM data
  - RHS data
  - Product values
  - Hierarchy level values
  - Leave reasons values
  - Deactivation reasons values
- Reports
  - SE Exception Report for Missing RM
  - SE Changes Pending RM Approval Report
  - SE On Long Leave Report
  - Data Update Freshness Report (based on date range)
- Uploads  
Sample upload files to be available for reference) & upload functionality to add users who're currently missing plus update edited details
  - SE/SO list
  - RM list
- Downloads
  - SE/SO user master data dump
  - RM master data dump

All the reports can be viewed as well as downloaded as csv files.

The Downloads will be in the csv format.

Ability to view and download errors during data Uploads.

The Admin functionality can be accessed only from Desktop and not from mobile.

## Approvals for Deactivation SEs

### Key Functional Points

- Once a RM deactivates an SE (only SE can be deactivated, not SO), it must be approved by the PL Admin team
- Admin can also see more details from the SE record
- Admin can reject in which case the SE is mapped back to the RM

### Validations

- Only Deactivations by RM should appear on this screen
- The reasons for Deactivation should have the below values
  - Resigned
  - Absconding
  - Not joined
- Once Admin approves, the SE should not appear in the RM list

### Sample UI

The screenshot shows a web-based application titled "PL - DMT". The top navigation bar includes links for "APPROVE", "MANAGE", "REPORTS", "UPLOADS", "DOWNLOADS", and "SIGNOFF". A welcome message "Welcome, Ankita." is displayed on the right. Below the navigation, a header bar shows "Total Requests - 3". The main content area displays a table with three rows of data, each representing a request for approval. The columns are "Sno.", "Requested By", "Request Type", "Request Details", and three buttons: "More Details", "Approve", and "Reject".

Sno:	Requested By	Request Type	Request Details	More Details	Approve	Reject
1	Anagh Tyagi 776781646 6	Deactivation	C102165 - Mahesh Patel, SO Mobile No: 7389358554  Reason- Resigned	<a href="#">More Details</a>	<a href="#">Approve</a>	<a href="#">Reject</a>
2	Balaji 910846606 8	Deactivation	C117725 - Sujata Ashok Kore, SO Mobile No: 9535897890  Reason- Resigned	<a href="#">More Details</a>	<a href="#">Approve</a>	<a href="#">Reject</a>
3	Chetan 990416364 0	Deactivation	C88640 - Jigarkumar Shah, SO Mobile No: 9737069900  Reason- Resigned	<a href="#">More Details</a>	<a href="#">Approve</a>	<a href="#">Reject</a>

## Manage

### Key Functional Points

- Search on employee name or employee code to filter records
- Allows for edit of data from Admin side to handle any immediate requirements
- The record can be modified by clicking the Edit button

### Validations

- Employee code is not editable
- RM Name is only select.

### Sample UI

The screens below are to be seen as a general guideline that will be for the Manage section. We are providing an illustration for the SE/SO data management. The number of fields can vary based on exact data dump formats.

#### *Manage SE/SO Data*

The screenshot shows a web-based application interface for managing SE/SO data. At the top, there is a purple header bar with the text "PL - DMT" on the left and "Welcome, Ankita" on the right. Below the header, there is a navigation menu with links: APPROVE, MANAGE, REPORTS, UPLOADS, DOWNLOADS, and SIGNOFF. A search bar labeled "Enter text to search" is positioned above the main content area. The main content area is titled "SE/SO Data Management". It features a table with columns: Employee Code, Employee Name, Mobile No., Branch S/O ID, RM Name, and RM Code. There are six rows of data, each containing placeholder text ("Lorem ipsum") for the data fields. To the right of each row is an "Edit" button. At the bottom of the page, there is a navigation footer with icons for back, forward, and search.

Manage SE/SO Data

Enter text to search



## SE/SO Data Management

Employee Code	Employee Name	Mobile No	Branch SOL ID	LM Name	RM Code
---------------	---------------	-----------	---------------	---------	---------

Level 1 Manager	Designation SO	Employee Code C102165	Employee Name Mahesh Patel	Mobile No 7389358554	Branch SOL ID 2341	Product Sales	SAVE	CANCEL	Edit
Level 2 Manager	Level 1 Manager					Anagha Tyagi			Edit
Level 3 Manager	Level 2 Manager					Ashwin Dube			Edit
Level 4 Manager	BAN ID					CODE NA			Edit
Level 5 Manager	VSTB ID					IPRO0005079/PR/81/603785			Edit

&lt; 1 2 3 4 5 6 &gt;

## **Reports**

### Key Functional Points

- The below keys reports are present
  - SE Exception Report for Missing RM
  - SE Changes Pending RM Approval Report
  - SE On Long Leave Report
  - Data Update Freshness Report (based on date range)
- The report can be viewed and downloaded as a csv file also
- Send SMS functionality to be available in the applicable Reports to send the notification SMS to users in the report.

### Validations

- The report data should match the Manage data views

### Report Formats

- SE Exception Report for Missing RM – Report fields
  - S no
  - SE Name
  - SE Mobile No:
  - Employee Code
  - Designation
  - Branch SOL ID
  - Product
  - Date
- SE Changes Pending RM Approval Report – Report fields
  - Sno
  - RM Name
  - RM Mobile No:
  - Change Details -SE Name
  - Change Details -SE Mobile No:
  - Pending from date
- SE On Long Leave Report – Report fields
  - Sno
  - SE Name
  - SE Mobile No:
  - Employee Code
  - Designation
  - Branch SOL ID
  - Product

- RM Name
  - RM Mobile No:
  - Leave Start Date
  - Leave End Date
  - Reason for Leave
- Data Update Freshness Report (based on No: of Days - Report fields)  
This reports gives the list of user how have not updated their info in the input no: of days. This reports will help us keep the data fresh and put in a regular data validation cycle as required. (eg. Every 2/3 months)
    - Report input – No: of Days (eg. 30, 60, 90)
    - Employee Code
    - Employee Name
    - Designation
    - Employee Mobile No:
    - Immediate Manager Name
    - Immediate Manager Mobile No:
    - Data Last Update Date

## Uploads

### Key Functional Points

- The upload data formats will be detailed in the Appendix
- To make it easy for errors to be viewed and displayed, they can be downloaded after each upload.
- Total no: of records, Records without errors & Records with errors are provided as summary for each upload.
- A notification SMS will be sent to the respective SE/SO/RM post every data upload to verify the new data.
- All new user records in the upload data will be added.
- If user exists then the record info will be updated

### Validations

- Validations for each data upload will be as detailed in the Appendix.

### Sample UI

The UI below is a general guideline that will be followed for all the Uploads section.

The screenshot shows a web-based application interface for 'PL - DMT'. At the top, there's a purple header bar with the title 'PL - DMT' on the left and 'Welcome, Ankita' on the right. Below the header, a navigation menu includes links for APPROVE, MANAGE, REPORTS, UPLOADS (which is highlighted in blue), DOWNLOADS, and SIGNOFF. A sub-menu for 'SE/SO Data Upload' is open, showing options like 'Text input' and 'Browse'. Below this, there's a section titled 'Upload Run Summary' with the sub-instruction 'SE/SO Data Upload on 5th July 19 at 3:45pm'. This section contains three tables:

Total No: of Records	
Records Processed Without Errors	
Records Rejected With Errors	<input type="button" value="Download Error Records"/>

## Downloads

### Key Functional Points

- The current existing data for SE/SO can be downloaded

### Validations

- NA

### Sample UI

The screenshot shows a web-based application interface for 'PL - DMT'. At the top, there is a purple header bar with the text 'Welcome, Ankita' on the right and a logo on the left. Below the header, the main title 'PL - DMT' is displayed. A navigation menu bar contains links: APPROVE, MANAGE, REPORTS, UPLOADS, DOWNLOADS, and SIGNOFF. A sub-menu for 'User Master Data' is currently selected. The main content area features a form for selecting a save location, with fields for 'Select Save Location' and a 'Browse' button. Below this are two buttons: 'Download' and 'Clear'. A section titled 'Download Run Summary' displays the message 'User Master Data Download on 6th July 19 at 3:45pm'. A table below shows the total number of records: 'Total No: of Records' is listed as 5342.

Total No: of Records		5342
----------------------	--	------

## Go-Live Planning

### Data & Access Preparation

#### Data

- For the below uploads, data formats need to be available in the agreed formats
  - SE/SO Data
  - RM Data
- Reasons Master Values (Deactivation) will need to input into system
- Attendance Master Values need to be input system
- Hierarchy Data Values need to be input into the system
- First time RM Data to be prepared for upload
- First time SE/SO data to be prepared for upload

#### Access & Authentication

- Access will be through a secure URL
- Authentication is OTP based

### Go-Live

- Upload the first time RM Data
- Upload the first time SE/SO data
- Check the backend Admin functionality

### Post Go-Live - On-Going Operations

- Any new SE/SO users should be uploaded from the Admin by the backend team.
- New RM users should be uploaded from the Admin by the backend team.
- Data specific to SE/SO can be managed from the Admin by the backend team.
- Reports will help check adoption and monitoring of user actions required.

### Assumptions

- All the required data formats for SE/SO and RM will be provided by ICICI before development of the tool begins.
- The attendance marking will be weekly duration.
- The PL-DMT is a responsive web application.
- The PL-DMT Admin functionality will be available only from desktop browser.

## Appendix

### List of data formats