Admin App - PRD

Platform Commons

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Version 0.5

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Screen Design: <https://xd.adobe.com/view/c9bf42d5-de79-4374-bc18-51bfa4c1645b-9cec/>

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# **Introduction**

## **Purpose of the document**

This document outlines the feature list for the Saajha caller app. It briefly covers the user-personas and features within each portal.

The purpose of creating the app is to digitize the tracking, maintenance and growth of Saajha’s educational initiatives.

## **Project Summary**

| Project Name: | Saajha |
| --- | --- |
| Project Team: | Prashant - Project Lead  Utkarsha - Business Analyst  Aashish - Tech Architect  Amit - Design Lead |

## **User Personas**

| Persona | Who are these? | Needs | Expectations |
| --- | --- | --- | --- |
| Call Center Agent | Volunteers from team Saajha who will call the parents | Call parents usually with an agenda, educate them on their areas of interest, fill forms/notes, add new parent phone numbers(if any), view work done | Quick ways to make calls, find relevant information quickly before/during/after calls, easily view work done and what’s upcoming up |
| Project Manager | Project Managers who manage callers/ volunteers from team Saajha | Create parent roster for callers/volunteers to call, review work done, and assign upcoming work | Fast, reliable ways to create and assign work, dashboards to view work done/pending. (Not expected from the caller app ) |
| Admin | Leadership at Saajha / Leadership at Platform Commons | Provide access to the app to new callers/volunteers/project managers/parents, review work done and work pending, view reports such as parent outreach, expenditure overtime, etc | Easy ways to manage callers/volunteers/project managers/parents and track parent outreach and expenditure |

# **Functional Objectives**

| **Epic** | **Feature Name** | **User Story Name** |
| --- | --- | --- |
| Sign Up | Another admin registers the new admin | As an admin, I should be able to create an account for a new admin so that the new admin can login to the app. |
| New admin self registers | As a new admin, I should be able to create an account for myself so that I can login to the app. |
| Login | Login | As an admin, I should be able to login after an account is created on the app so that I can perform daily tasks |
| Workspace / Project | Workspace Hub | As an admin, when I login one or more workspaces mapped to the admin is shown. Admin chooses which workspace to login. |
| Edit Workspace (Workspace Owner) | As a workspace owner, I can edit a workspace name and be able to define call settings and other preferences for each workspace. |
| Delete Workspace (Workspace Owner) | As a workspace owner, I can delete a workspace. |
| Dashboard | Analytics | As an admin, I should be able to see different key metrics classified broadly into 3 groups (Efficiency, Activity, Quality) which can include:   * Call stats - Call handle time, Call volume trends * Parent satisfaction level graph * Call volume & duration * Caller(volunteer) status, live calls and service level |
| Real time call metrics | As an admin, I should have access to live call metrics - In Queue, In Conversation |
| Caller/Volunteer Leaderboard | The different parameters to classify volunteers could be:   * Status * # of Inbound, Outbound, Missed calls * Avg call duration * Total wrap-up time * Total idle time |
| Parent Index | View Parent List | As an admin, I will have access to a contact directory consisting of all the parent contacts till date which can be grouped via labels or any other method. |
| Delete/Archive Parent | As an admin, I should be able to delete or archive parents |
| Edit Parent | As an admin, I should be able to edit parents' information so that I can make changes on the behalf of the parents |
| Add Parent | As an admin, I should be able to add new parents manually or via CSV Import. |
| Assign Parent | As an admin, I should be able to assign a parent to a call center agent |
| Child Profile | View Child Profile | As an admin, I should be able to view the child profile tagged to each parent with different tabs like Basic Info, Interests, Educational Background etc |
|  | Edit Child Profile | As an admin, I should be able to edit all the information in the child profile. |
| Roster | Roster Algorithm |  |
| Upload parent roster | As an admin, I should be able to upload the parent roster so that the roster can be assigned to volunteers/callers.  The parent contacts are primarily added to the contact directory before adding them to the roster. |
| Import/Add Parent to Roster | The admin will have the ability to add a parent profile to the roster manually or by importing a CSV file |
| Assign parent phone numbers to volunteers/callers manually | As an admin, I should be able to assign parent phone numbers to volunteers/callers manually so that they can begin calling the parents |
| The system assigns parent phone numbers to volunteers/callers | As an admin, I should be able to see the parent phone numbers assigned by the system to the volunteers/callers so that I can change the volunteers assigned as necessary |
| As an admin, I should be able to change the parent phone numbers assigned by the system to the volunteers/callers so that I can ensure communication continuity between the parent and the volunteer/caller |
| See a caller’s availability and adjust roster accordingly | As an admin, I should be able to see whether a caller is working full-time/part-time/is on leave so that either I (when assigning roster manually) or the system (when assigning roster automatically) take the caller’s time availability into account |
| Parent Profile | As an Admin, I will be able to view and edit the parent profile which consists of Parent Info, Child Info, Forms, Notes, Call History, Topics of Interest and History Logs |
| *Forms* | Create forms | As an admin, I should be able to create forms so that the volunteers/callers can fill and save them during or after parent calls |
| Edit forms | As an admin, I should be able to edit forms so that corrections can be made as required |
| View filled forms | As an admin, I should be able to view filled forms so that I can read through the collected information |
| Archive forms | As an admin, I should be able to archive forms so that I avoid using them in future |
| *Notes* | Create notes | As an admin, I should be able to create notes so that I can capture notes on behalf of the volunteers/callers |
| Edit notes | As an admin, I should be able to edit notes so that corrections can be made as required |
| View filled notes | As an admin, I should be able to view notes so that I can read through the collected information |
| Activity/ Change Log | Track activity/changes | As an admin, I should be able to view the activity log of volunteers/callers and parents so that I know the app activity of the parents and changes made by volunteers/callers |
| My Profile | View my profile | As an admin, I should be able to view my profile so that I can ensure my information is up-to-date |
|  | Edit my profile | As an admin, I should be able to edit my profile so that I can make changes as required |
| Manage Users | View user list | As an admin, I should be able to view a list of call centre agents and their details so that I can manage their app access |
| Add user | As an admin, I should be able to add users so that the users can log in to the app |
| Edit user | As an admin, I should be able to edit users' information so that I can make changes on the behalf of the user |
| Manage user access | As an admin, I should be able to manage app access so that I’m able to restrict users from accessing certain information |
| Delete user | As an admin, I should be able to delete users so that they do not have access to the app |
| Manage Wiki  (Content - Videos / Scholarship links)  Linked to area of interest added by parent / caller | View Wiki | As an admin, I should be able to view a list of wikis (content) so that I can decide which wikis to publish to the parent app |
|  | Add wiki | As an admin, I should be able to add wikis so that the parents can view the content on the parent app |
|  | Edit wiki | As an admin, I should be able to edit the wikis so that I can post the latest content on the parent app |
|  | Publish wiki to the parent app | As an admin, I should be able to publish the wikis to the parent app so that the parents can see the latest content on the parent app |
|  | Delete wiki | As an admin, I should be able to delete the wikis so that it deletes the wiki from the parent app |
| Manage Community (Moderator) | Add answers | As an admin/moderator, I should be able to answer/comment on questions in the community forum so that I can guide the parents to the information |
| Delete questions/answers | As an admin/moderator, I should be able to delete t on questions/answers in the community forum so that duplicate information is not seen on the parent app. |
| Recordings | Inbound and Outbound Call Recordings | As an admin, I should have access to the call recordings between the call centre agent and parent, searchable by dates and by call center agents. |
| Surveys & Feedbacks *(out of scope, expecting the telephone app will have these features)* | Survey List | As an admin, I can see a list of surveys and feedback provided by the parents here which could be enhanced in terms of visuals or KPIs. |
|  | Configure Call Surveys | Admins can use this function to set relevant survey and feedback questions at the end of every call to be answered by parents. This could include a   * Welcome Message (before a call connects) * Busy/Disconnected Message * Rating the call (where 1 is lowest and 5 is highest) * Audio Feedback (which can be recorded and transcribed) * Thank You Message * Or messages for any other instance   Admins can record actual messages to be converted to speech in a text to speech field that is editable. |
| Notifications | Create notifications | As an admin, I should be able to create notifications so that the parents receive it via the parent app/SMS |
|  | Edit notifications | As an admin, I should be able to edit notifications so that I can make updates to existing notifications |
|  | Publish notifications | As an admin, I should be able to publish notifications so that they are ready to send to the parents via the parent app/SMS |
|  | Schedule notifications | As an admin, I should be able to schedule notifications for a specific date-time so that they get sent to the parents via the parent app/SMS |
|  | Delete notifications | As an admin, I should be able to delete notifications for so that they are not sent to the parents via the parent app/SMS |
|  | Ready Templates | As an admin, I should have access to a set of ready templates for all alert types and also be able to edit them. |
| Settings | Call Settings | As an admin, I should be able to define rules or preferences for each call made by the volunteer. I should also be able to assign an outcome to every call and enable volunteers to choose the available options from a list at the end of every call.  Admins can configure advanced settings such as automatic call recording, call centre ID, call waiting, etc. |
|  | Alerts *(out of scope, expecting the telephone app will have these features)* | The admin should be able to set alerts so he or she is notified when a certain action/event takes place.  A few examples are   * Notifying admin when call service levels fall below an expected level * Notifying admin when a call queue size exceeds a certain limit, wherein an admin may feel the need to assign more volunteers * Notifying admin when a call exceeds a prescribed wait time etc |
|  | Integrations | The application should allow seamless integration between multiple applications for syncing data and other functions. |
|  | Advanced Settings *(out of scope, expecting the telephone app will have these features)* | Admins can configure advanced settings such as automatic call recording, call centre ID, call waiting, etc. |
|  | Queue Prioritisation *(out of scope, expecting the telephone app will have these features)* | This function enables an admin to prioritise calls in Queue based on the stage/status the parent is in. |
| Help & Support | Dashboard | As an admin, I should have access to all the tickets raised by a parent or a volunteer. The following are the different statuses of the tickets: # created, # unassigned, # open, # solved, #escalated  Apart from this, as an admin I should also be able to view different KPIs like tickets solved by owners, ticket response, ticket resolution time, tickets by type, tickets by channel, parent satisfaction rate etc |
|  | Tickets | The ticket consists of an Issue type, Title and Description. It would also include the ticket owner and the status. |

# **Epics & User Stories - WIP**

## **Epic: Sign Up**

### **Title: Admin registers caller**

User story:

**Description:**

**Acceptance criteria:**

**Business Rules:**

# **Non-Functional Objectives**

## **Reliability**

* The website will be operational 99.9% of the time
* Downtime for maintenance or due to failure will not exceed more than 4 hours

## **Usability**

* Users should be able to find appropriate information in less than 3 clicks, wherever possible
* Users should be able to use the app immediately after installing

## **Performance**

* The app should be able to support at least 50,000 simultaneous callers.
* The load time for any page should not exceed 3 seconds on an 10-18 Mbps connection

## **Security**

* The app shall provide secure access (https) to its callers, with each caller seeing only their information post login.
* Certain admin will be able to see some caller data
* Passwords should be encrypted
* Caller will be able to access pages depending on the roles and permissions assigned

## **Supportability**

* The app should have responsive UIs that’ll allow viewing them on iPhones, Android phones, iPads, desktops and laptops
* The app will support Mozilla versions 3.0 or later, Chrome 84.0.4147 or later, Safari 13.1.2 or later.

# **Wireframes**

Access the wireframes for the Call Centre App [here](https://xd.adobe.com/view/24355ab7-55f1-4cfb-9b2b-bbb8a049a4ff-7166/).

# **Link to Call Notes**

Access the call notes [here](https://docs.google.com/spreadsheets/d/1dheE9UuqWZgFAQ4e6uq2ZYtHTah_FjsBQDxsYAOyVq0/edit?usp=sharing).

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# **Revision History**

| Name | Date | Reason For Changes | Version |
| --- | --- | --- | --- |
| Utkarsha Saswadkar | Aug 27, 2021 | Creation of SRS | 0.1 |
| Utkarsha Saswadkar | Sept 06, 2021 | Updates | 0.2 |
| Utkarsha Saswadkar | Sept 09, 2021 | Updates to the feature list | 0.3 |
| Amit Nair | October 20, 2021 | Updated features & XD | 0.4 |

Notes:  
Segregation of different projects

Autoresheduling of roster

Ability to track the Targets of calls

Journey of a user : This includes the journey of calls / SMSs/ WhatsApp

Outbound SMS based on project

Managing opt ins and opt outs : Integration with Kaleyra for collecting optins

Uploading roster for all agents

Rosters

1. Changing status after he call- Active , Reschedule and opt out
2. Status of each call should be shown with the respective numbers.
3. Notes format can be changed
4. We can remove inbound but inbound calls detail can add in the call history. Would be great if we can add messages exchange detail on whastapp bot.