# 

# 

Functional Specification Document

PANDO Mobile Application

**Dec 9th, 2015**

Table of Contents

[1 Introduction: 4](#_Toc437459860)

[2 Change History 4](#_Toc437459861)

[3 Glossary 4](#_Toc437459862)

[4 Web Use cases 5](#_Toc437459863)

[4.1 Home – About us & Offers page 5](#_Toc437459864)

[4.2 Home – Organization registration 5](#_Toc437459865)

[4.3 Home – Contact us: 7](#_Toc437459866)

[4.4 Login 8](#_Toc437459867)

[4.5 Forgot Password 9](#_Toc437459868)

[4.6 Change Password 10](#_Toc437459869)

[4.7 User Profile – View/Edit 11](#_Toc437459870)

[4.8 Organization Profile – View/Edit 12](#_Toc437459871)

[4.9 Organizations - List View/details page 13](#_Toc437459872)

[4.10 Organization Details – Add New 14](#_Toc437459873)

[4.11 Organization Details - Edit 15](#_Toc437459874)

[4.12 Organization Details – Delete Organization 17](#_Toc437459875)

[4.13 Users – List view /details page 17](#_Toc437459876)

[4.14 Users – Add New user and assign role 18](#_Toc437459877)

[4.15 Users – Edit user details 20](#_Toc437459878)

[4.16 Users – Activate/Deactivate account 21](#_Toc437459879)

[4.17 Users – Delete user 22](#_Toc437459880)

[4.18 Users – Upload using excel 23](#_Toc437459881)

[4.19 Plans - list view 25](#_Toc437459882)

[4.20 Plan Cards - Create new and assign 26](#_Toc437459883)

[4.21 Plan Cards – Edit 28](#_Toc437459884)

[4.22 Plan Cards - Delete 29](#_Toc437459885)

[4.23 Plan Cards - Approve/Reject Card 30](#_Toc437459886)

[4.24 Plan Cards – Activity details 31](#_Toc437459887)

[4.25 Travel log - List view and details 32](#_Toc437459888)

[4.26 Dashboard – Need inputs from KG 33](#_Toc437459889)

[5 Mobile application Use cases 33](#_Toc437459890)

[5.1 Sign Up: 33](#_Toc437459891)

[5.2 Sign in 34](#_Toc437459892)

[5.3 Forgot Password 35](#_Toc437459893)

[5.4 Mobile app menu items - Swipe 36](#_Toc437459894)

[5.5 User Profile page – View: 37](#_Toc437459895)

[5.6 User Profile - Edit 38](#_Toc437459896)

[5.7 Build Plan 39](#_Toc437459897)

[5.8 Pending plans - List view/Details page 41](#_Toc437459898)

[5.9 Completed cards - List view / Details page 41](#_Toc437459899)

[5.10 Pending/Completed cards – List view search 42](#_Toc437459900)

[5.11 Home page – Map and pending 42](#_Toc437459901)

[5.12 Card – Submission 43](#_Toc437459902)

[5.13 Travel Log – List view /Details 45](#_Toc437459903)

[5.14 Help 46](#_Toc437459904)

[5.15 Mob app – Performance - Need inputs 46](#_Toc437459905)

# Introduction:

PANDO application is all about empowering the input companies by providing field force team with a mobile application. Field force team constantly updates the ground root level activities to the relevant reporting managers. This app also enables the managers to track and analyze the FF and also the needs of the farmers at root level. Overall, this app helps in quick transfer of data between IC and the FF employees.

# Change History

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Version** | **Date** | **Author** | **Reviewed by** | **Changes** |
| 1.0 | 23-11-2015 | Prapul | Shyam |  |
| 1.1 | 27-11-2015 | Prapul | Shyam | Included mob use cases |
| 1.2 | 04-12-2015 | Prapul | Shyam | Org registration, Contact us, Forgot password, User profie, Company details fields updated.  User profile mass upload – sample template functionality, Channel card/campaign cards tab view removed and both are merged into one list view. In web view, campaign/channel card menu item removed and only Plan card menu item made available. |
| 1.3 | 12-08-2015 | Prapul | Shyam | Remove awaiting approval functionality from mobile. |

# Glossary

|  |  |
| --- | --- |
| Term | Description |
| Kisan Gates | They are the ones who market the application to Input companies and retailers. They own the application and sells the application to IC(s) |
| Input Company – IC | Input companies(IC) are the ones who purchase the license of application and make use of the application features to share the company information (about products, deals etc) to retailers and field force.  And also through field force who got access to apps, they will collect the ground level data of farmers and retailers. |
| Field Force | Filed force are the employees of Input company and who work with access the PANDO app and submits the field level data. |
|  |  |

# Web Use cases

## Home – About us & Offers page

|  |  |
| --- | --- |
| Objective | Allows the end users to view the content posted in the about us and offers page. |
| Pre-condition | NA |
| Inputs/ Data | NA |
| Outputs | ‘About us’ page renders and displays the available content.  ‘Offers page’ renders and displays the available content. |
| Post Condition | NA |
| Functionality | * User clicks on ‘about us’ in the home page and the home page will be re directed to about us page. * User clicks on ‘offers page’ in the home page and the home page will be re directed to about us page. |
| Validations | NA |
| User Privilege | All users |

## Home – Organization registration

|  |  |
| --- | --- |
| Objective | Allows the user to register the details of his/her company details for subscribing the application. |
| Pre-condition | NA |
| Inputs/ Data | * Person Name * Designation * Organization * Mobile no * Email Address * Password * Apps required * Terms and Conditions along with check box |
| Outputs | If details are submitted, Input companies registration details will be saved. |
| Post Condition | NA |
| Functionality | Main Flow:   1. User clicks on ‘ Register’ in the home page 2. User enters the registration details 3. User clicks on ‘check box’ against terms and conditions and clicks on submit. 4. System validates for the mandatory fields, validates email, password strength and submits them. 5. System will display a success message “Registration details are submitted successfully”.   Note: User cannot login to account until the account is activated at the back end.  Alternate flow 3.2a: Email Id already exists   1. System tells the user email already exits. 2. System prompts user to enter e-mail Id which was not registered. |
| “Validations | Person Name (Type your name)   * Mandatory   + Text field   Type your Designation   * + Optoinal   + Text field   Type your Organization Name   * Mandatory   + Text field   Type your Mobile no   * Optional   + Text field   Email (Type your email)   * + Mandatory   + Text field   + Must be validated for existence   Password (Type your password)   * + mandatory   + Must be Password Text field   + Must be validated   + Minimum One small alphabet (a-z), One capital alphabet (A-Z) and one numeric (0-9)). Allowed special characters are “ !, @, #, $, %, ^, &, \*, (, ), \_, and + ”   + Must indicate the strength of the password and prompt the user to increase the strength of the password   Apps Required:  Must be a dropdown (options will be 1-50, 51 -200 etc)  Set to ‘select’ label display by default.  Terms and conditions   * Check box * Mandatory   Note: Mandatory fields need to have inline validations. |
| User Privilege | All Users |

## Home – Contact us:

|  |  |
| --- | --- |
| Objective | Allows the user to contact ‘Pando’ team for any required information. |
| Pre-condition | NA |
| Inputs/ Data | * Email ID * Message (400 words) * Phone Number (Optional) |
| Outputs | If the message and details are submitted, authorized Pando team members can access it. |
| Post Condition | An email notification will be sent to the Pando admin with all the content . |
| Functionality | Main Flow:   1. User clicks on ‘Contact us’ in the home page 2. User enters his/her email along with message and submits them 3. System validates for the mandatory fields and submits them. 4. System will display a success message “Thank you for your interest in Pando. Our support team will respond to you as soon as possible”. |
| Validations | * Type your email   + Mandatory   + Text field * Type your 10 digit number   + Not mandatory   + Must be Number field   Minimum of 10 and max of 12 numbers allowed.   * Your Message :   + Mandatory   + Text area |
| User Privilege | All Users |

## Login

|  |  |
| --- | --- |
| Objective | Allows the registered users to log in to the system. Based on the role and access privilege, user will be re-directed to the dashboard with access only to defined features. |
| Pre-condition | User should be a registered user. |
| Inputs/ Data | * Email Address * Password   ‘Submit’ is clicked to validate the inputs |
| Outputs | User will be allowed to login to the application. |
| Post Condition | System displays the dashboard. Dashboard content will vary based on the access privilege. Only reporting managers will have the details of the field force employees. All the managers above the reporting managers can only see the summary details of their below managers. Plans menu will only be displayed to the field force reporting managers. |
| Functionality | **Main Flow:**   1. User clicks on login button. 2. User enters login details and submits them. 3. System validates the entered login details. 4. System displays the home page.   **Alternate flow a :** Incorrect login details:   1. If the login fails, user is shown the following error message    * *‘***Login Failed! Please check your Email and Password’**. 2. Return to Main flow step 2.   **Alternate flow b:** Account not activated   1. If the user entered login credentials are correct and account is not activated then following message to be displayed, “your account is not activated, please contact admin”. |
| Validations | * Type your Email   + Mandatory   + Text field   + Must be validated for existence * Type your Password   + mandatory   + Must be Password Text field |
| User Privilege | KG Admin, IC Users |

## Forgot Password

|  |  |
| --- | --- |
| Objective | Allows the registered user to retrieve password through e-mail |
| Pre-condition | User should be a registered user. |
| Inputs/ Data | * Email Address |
| Outputs | Confirmation message need to be displayed. |
| Post Condition | An email is sent to User’s email address with a link to set new password. |
| Functionality | **Main Flow:**   1. User clicks on Forgot Password on the login page. 2. User enter ‘email ID’ registered with the application and submits. 3. Systems validates the e-mail ID for existence in the system 4. System will send a new link to the registered e-mail. Success message (‘we have sent link to your e-mail address). 5. User needs to create his own password with the provided link access.   **Alternate Flow a:** email – id not matching against the ones in system   * 1. If the Inputs/Data is invalid, following message is displayed. ‘The information provided does not match our database. Please try again with the correct Email Address.”   2. Return to step 2 in main flow.   **Alternate Flow b:** Email exist but account not activated:   1. If the email exists but the account is not activated then the following message to be displayed “Your account is not activated”. |
| Validations | Type our email Address   * Mandatory * Must be text field * Set to blank by default * Input must be matched to the one existing in database. |
| User Privilege | All users |

## Change Password

|  |  |
| --- | --- |
| Objective | Allows the registered user to Change password |
| Pre-condition | User must be logged in to perform the action |
| Inputs/ Data | * Old Password * New Password |
| Outputs | Account Password is updated. |
| Post Condition | Confirmation Messages is Displayed according to Status |
| Functionality | **Man Flow:**   1. User clicks on Change Password on Profile Update Page. 2. User enters old password and new password. 3. Systems verifies the verified old password 4. Password details will be updated. Success message (Password updated successfully).   **Alternate Flow a: Incorrect Wrong Password**   1. Use will be shown a message “Old password is incorrect” |
| Validations | **Similar to 4.4 login password validations**  Old Password   * Mandatory * Set to blank by default * Password text field * Must be validated for existence   New Password   * Mandatory * set to blank default * Password text field * minimum 6 Characters * Must be validated (Minimum One small alphabet (a-z), Minimum one capital alphabet (A-Z) and minimum one numeric (0-9). Allowed special characters are “!, @, #, $, %, ^, &, \*, (, ), \_, and + ”. * Password strength needs to be displayed |
| User Privilege | KG Admin, IC users |

## User Profile – View/Edit

|  |  |
| --- | --- |
| Objective | Allows the user to View/edit the profile details. |
| Pre-condition | User must have logged into the application |
| Inputs/ Data | * First Name * Last Name/Initial * E-mail ID (Read only, since this would be user name) * Mobile No * Designation(Read only) * Reporting manager (Read only) * Actions (Edit) |
| Outputs | If the user details are updated, following message will be displayed (User details are updated successfully). |
| Post Condition | Profile details will be updated and success message will be displayed. |
| Functionality | **Main Flow:**   1. User clicks on profile and the page will display users details. 2. User clicks on edit 3. System displays a pop –up message with all the fields. 4. User enters the editable details and submits 5. System saves the details and success message (User details are updated successfully) will be displayed. |
| Validations | First Name   * Mandatory * set to blank default * Text field   Last Name   * set to blank default * Text field   Email Id   * Mandatory * Text field (Read only field)   Phone Number   * Text Box (Should allow only numeric numbers). * Minimum numbers should be 10 and maximum allowable numbers should be 12.     Designation   * Read only   Reporting manager   * Read only |
| User Privilege | KG Admin, IC users |

## Organization Profile – View/Edit

|  |  |
| --- | --- |
| Objective | Allows the user to update profile of the company. |
| Pre-condition | User must have logged into the application |
| Inputs/ Data | * Company Name * Company email Id * Phone No |
| Outputs | If the company details are updated, following message will be displayed (Company details updated successfully). |
| Post Condition | Company details will be updated and success message will be displayed. |
| Functionality | **Main Flow:**   1. User clicks on company profile and the page gets displayed with the fields to be displayed. 2. User clicks on edit 3. System displays a pop –up message with all the fields. 4. User enters the editable details and submits |
| Validations | Company Name   * Text box * Editable   Email ID   * Text box * Editable |
| User Privilege | KG Admin, IC Company Admin |

## Organizations - List View/details page

|  |  |
| --- | --- |
| Objective | Allows the user to view the information of the listed organization and also the details page of a org. |
| Pre-condition | User must have logged into the application. |
| Inputs/ Data | * Person Name * Designation * Organization * Mobile no * Email Address * Password * Apps required * License information * Status * Payment made * Actions (Edit, Delete) |
| Outputs | System displays list view of company information and details page of a company. |
| Post Condition | NA |
| Functionality | Main Flow:   1. User clicks on organizations in the menu. 2. System will render and display the details in the list view 3. User clicks on organization name and system will re-direct to the details page. |
| Validations | * All the fields will be read only both in list view and details page. |
| User Privilege | KG Admin |

## Organization Details – Add New

|  |  |
| --- | --- |
| Objective | Allows the user to add new organization details and also activate/deactivate an account. |
| Pre-condition | User must have logged into the application and in list view of companies |
| Inputs/ Data | * Person Name * Designation * Organization * Mobile no * Email Address * Password * Apps required * License information * Amount paid * Terms and Conditions along with check box |
| Outputs | System adds company details and activates/deactivates the account. |
| Post Condition | System adds company details and success message will be displayed (“Company details added successfully”). If the account is activated/deactivated, respective email notification mentioning the status of company account will be sent to the registered email id.  If the account is activated, then relevant user credentials are needs to be sent with email id as user name and auto generated password. |
| Functionality | **Main Flow:**   1. User click on ‘Add New; 2. System will display a page where the above mentioned input fields will be displayed. 3. User enters the input details and clicks on ‘submit’. 4. System submits the details and displays a success message (Company details has been created successfully).   **Alternate flow a :** Activate/Deactivate organization account   1. User clicks on ‘Submit and activate’ 2. System submits the details and activates the account. 3. System sends an email to the user with credential details (email as user name and password to be auto generated). 4. ‘Submit and activate’ button will be changed to de – activate button.   **Alternate flow b**: Save the organization details   1. User clicks on ‘submit’ after entering the details. 2. Account details get saved. |
| Validations | Person Name   * Text box   Designation   * Text box   Organization Name   * Text Box * Mandatory field   Email ID   * Read only field (Both in list view and details page)   Contact person name   * Text box   Contact phone number   * Text box * Minimum 10 number and maximum 12 numbers   License Information:   * Text box * Upload file (image, jpeg – 5 mb size)   Amount Paid   * Text box   Number of App users   * Text box   Terms and conditions   * Check box |
| User Privilege | KG Admin |

## Organization Details - Edit

|  |  |
| --- | --- |
| Objective | Allows the user to edit company details. It also allows user to activate/deactivate the Organization. |
| Pre-condition | User must have logged into the application and in list view of organizations |
| Inputs/ Data | * Person Name * Designation * Organization * Mobile no * Email Address * Password * Apps required * License information * Amount paid * Terms and Conditions along with check box |
| Outputs | System updates company details. |
| Post Condition | System edits company details and success message will be displayed (“Company details updated successfully”). If the account is activated/deactivated, an email notification mentioning the status of company account will be sent to the registered email id |
| Functionality | **Main Flow:**   1. User click on edit Icon 2. System will display a page where the above mentioned input fields along with auto populated content will be displayed. 3. User enters the input details and clicks on submit. 4. System submits the details and displays a success message (Company details updated successfully).   **Alternate flow 4.19a** : Activate/Deactivate company account   1. User clicks on ‘Submit and activate’ button. 2. System submits the details and activates the account. 3. ‘Submit and activate’ button will be changed to de – activate button. 4. If the company account is already activated, user clicks on ‘De-activate’ button, company gets de activated and ‘submit and activate’ button will be enabled. |
| Validations | Person Name   * Text box   Designation   * Text box   Organization Name   * Text Box * Mandatory field   Email ID   * Read only field (Both in list view and details page)   Contact person name   * Text box   Contact phone number   * Text box * Minimum 10 number and maximum 12 numbers   License Information:   * Text box * Upload file (image, jpeg – 5 mb size)   Amount Paid   * Text box   Number of App users   * Text box   Terms and conditions  Check box |
| User Privilege | KG Admin |

## Organization Details – Delete Organization

|  |  |
| --- | --- |
| Objective | Allows the user to delete organization details. |
| Pre-condition | User must have logged into the application and in list view of organization. |
| Inputs/ Data | NA |
| Outputs | System deletes organization details. |
| Post Condition | System deletes organization details and success message will be displayed (“organization details deleted successfully”). |
| Functionality | Main Flow:   1. User clicks on delete icon. 2. System displays an alert message “Are you sure, you want to delete?”. If yes, company details will be deleted or else system will display organization details. 3. If details are deleted, success message will be displayed “organizatoin details deleted successfully”.   Note: If there are any activities that are running against a organizatoin, organization details should not be allowed to delete. User only can deactivate the account. |
| Validations | * NA |
| User Privilege | KG Admin |

## Users – List view /details page

|  |  |
| --- | --- |
| Objective | Allows the user to view the information of the users listed and also the details page of a user. |
| Pre-condition | User must have logged into the application. |
| Inputs/ Data | * Employee Name * Area of operation * Employee email id * Phone Number * Employee Role * Reporting employee name * Actions(edit, delete ) |
| Outputs | System displays list view of the users and details page of a user. |
| Post Condition | NA |
| Functionality | Main Flow:   1. User clicks on users in the menu. 2. System will render and display the user details in the list view 3. User clicks on user name and system will re-direct to the user details page. |
| Validations | All the above mentioned fields are read only in list view and details page. |
| User Privilege | KG Admin, Company Admin |

## Users – Add New user and assign role

|  |  |
| --- | --- |
| Objective | Allows the u ser to add new user details and assign a role. |
| Pre-condition | User must have logged into the application and in list view of users. |
| Inputs/ Data | * Employee Name * Employee Number * Employee email Id * Phone number * Employee Role * Reporting manager role * Reporting manager name * Photo * State * District * Headquarters * Area of operation * Actions( edit, delete) |
| Outputs | System adds user details and also assign role to the user. |
| Post Condition | System adds user details along with role and success message will be displayed (“User details added successfully”). |
| Functionality | Main Flow:   1. User clicks on ‘Add New’ 2. System will display a page where the above mentioned input fields will be displayed. 3. User enters the input details. 4. User selects role of the employee. 5. User selects the reporting manager role and relevant employee’s names will be displayed. User selects the reporting employee’s name. 6. User submits the details. 7. System submits the details and displays a success message (User details added successfully). |
| Validations | Employee Name   * Text Box * Mandatory field   Employee Number   * Text box * Mandatory   Email id   * Text box * Mandatory   Phone number   * Text box * Minimum 10 number and maximum 12 numbers   Employee Role:   * Drop down(Manager, Employee ) * Default ‘select role’ label will be displayed.   Reporting Manager role   * Dropdown (Super admin, Manager) * Default select ‘Select reporting manager role’ will be displayed.   Reporting manager name   * Dropdown (reporting manager names) * Default select ‘Select reporting manager name’ will be displayed.   Photo   * Image upload (JPG, PNG)   State   * Dropdown   District   * District   Headquarters   * Textbox   Area of operation   * Textbox   Note: If super admin is selected, super admin name will be displayed. If Manager is selected, available relevant managers name to be displayed. Select the manager name and he will be assigned as reporting manager for that employee to be reported. |
| User Privilege | KG Admin |

## Users – Edit user details

|  |  |
| --- | --- |
| Objective | Allows the user to edit user details. |
| Pre-condition | User must have logged into the application and in list view of users. |
| Inputs/ Data | * Employee Name * Employee Number * Employee email Id * Phone number * Role * Reporting manager * Photo * State * District * Headquarters * Area of operation * Actions( edit, delete) |
| Outputs | System edits user details and also the role. |
| Post Condition | System edits user details along with role and success message will be displayed (“User details edited successfully”). |
| Functionality | Main Flow:   1. User clicks on ‘Edit 2. System will display a page where the above mentioned input fields will be auto populated. 3. User enters the input details. 4. User selects role of the employee. 5. User selects the reporting manager role and relevant employee’s details will be displayed. User selects the reporting employee’s name. 6. User submits the details. 7. System submits the details and displays a success message (User details updated successfully). 8. If the user is assigned with any task(s), role of the user or reporting manager cannot be edited. Alert message should be displayed saying “role cannot be edited since activities are assigned against the user”. |
| Validations | Employee Name   * Text Box * Mandatory field   Employee Number   * Text box * Mandatory   Email id   * Text box * Mandatory * Not editable since it would be user name   Phone number   * Text box * Minimum 10 number and maximum 12 numbers   Employee Role:   * Text Box to set employee role * Add additional role to form a list * Default ‘select role’ label will be displayed.   Reporting Manager   * Dropdown (Super admin, Manager) * Default ‘Select reporting manager role’ will be displayed.   Reporting manager name   * Dropdown (reporting manager names) * Default select ‘Select reporting manager name’ will be displayed.   Photo   * Image upload (JPG, PNG)   State   * Dropdown   District   * District   Headquarters   * Textbox   Area of operation   * Textbox |
| User Privilege | KG Admin |

## Users – Activate/Deactivate account

|  |  |
| --- | --- |
| Objective | Allows the user to activate/deactivate a user. |
| Pre-condition | User must have logged into the application and in edit page of users. |
| Inputs/ Data | NA |
| Outputs | System activates/deactivates the user. |
| Post Condition | System activates/deactivates the account. An sms will be sent to user to inform about the account activation. |
| Functionality | **Main Flow:** Activate/Deactivate account   1. User registers from the mobile app with the username (email id) and password. 2. System verifies with the user name(email id) and mobile number registered. 3. If the mob number and email id matches then account gets activated. User email id will be the user name of the FF employee. If mob number doesn’t match, account number doesn’t get activated.   **Alternate flow 4.17b :** Deactivate account   1. User clicks on edit icon in the list view of users. 2. If the account is already activated, the ‘deactivate’ button will be displayed at the bottom of the page. 3. User clicks on ‘deactivate’ button. Account gets deactivated. FF user/any other web user can no more use the account. |
| Validations | * NA |
| User Privilege | IC Admin |

## Users – Delete user

|  |  |
| --- | --- |
| Objective | Allows the user to delete a user. |
| Pre-condition | User must have not assigned tasks/reporting employee against him. |
| Inputs/ Data | NA |
| Outputs | System deletes user details. |
| Post Condition | System deletes user details and success message will be displayed. |
| Functionality | **Main Flow:**   1. User clicks on delete icon. 2. System displays an alert message “Are you sure, you want to delete user details?”. If yes, user details will be deleted or else system will display user details. 3. If details are deleted, success message will be displayed “user details deleted successfully”.   **Alternate flow 3.17a** : Reporting employees exist   1. User has reporting employee and click on delete icon. 2. System doesn’t allow deleting and an Alert message will be displayed “User has reporting employees”.   **Alternate flow 3.17b:** Task assigned against employee   1. User has tasks (campaign cards, channel) assigned against him 2. System doesn’t allow deleting and an alert message will be displayed “User has tasks assigned”. |
| Validations | * NA |
| User Privilege | IC Admin |

## Users – Upload using excel

|  |  |
| --- | --- |
| Objective | Allows the user to upload all the employees details through excel. |
| Pre-condition | User must have logged into the application and in list view of users. |
| Inputs/ Data | Excel Inputs:   * Employee Name * Employee Number * Employee email Id * Phone number * Employee Role * Reporting manager Role * Reporting Manager name * Photo * State * District * Headquarters * Area of operation |
| Outputs | System inputs all the user details into the application. |
| Post Condition | System uploads the users and success message will be displayed (“User details uploaded successfully”). Reporting hierarchy needs to be built as per the reporting structure of the employees. |
| Functionality | **Main Flow:**   1. User clicks on upload attachment. Content in the excel should be in the required format. 2. System displays an alert message “Are you sure, you want to upload?” If yes, user details will be uploaded and displays in the users list. 3. Reporting hierarchy needs to be built as per the reporting structure of the employees     **Alternate flow 4.19a :** Excel format not correct   1. User submits the excel with wrong content format. 2. System doesn’t allow the content to be uploaded and displays a message “Content in the excel is not correct format”.   Note : Display a downloadable sample excel format for the user reference   1. Displays a set of guidelines to prepare correct format |
| Validations | Excel Input details  Employee Name   * Mandatory field   Employee Number   * Mandatory field   Employee email Id   * Mandatory field   Phone number   * Mandatory field   Employee Role   * Mandatory field   Reporting manager Role   * Mandatory field   Reporting Manager name   * Mandatory field   Photo   * Image upload (JPG, PNG)   State   * Dropdown   District   * District   Headquarters   * Textbox   Area of operation   * Textbox |
| User Privilege | IC Admin |

## Plans - list view

|  |  |
| --- | --- |
| Objective | Allows the user to view the cards along with their status and also details page of selected campaign card. |
| Pre-condition | User must have logged into the application and clicked on Campaign cards. |
| Inputs/ Data | * Date * Village * Crop Name * Activity * Status * Plan type (Adhoc/Planned) * Card type (Channel/ Campaign) * Created by (FF reporting employee/Manager) * Assigned to * Actions( edit, delete icons) |
| Outputs | System displays list view of campaign cards information and the details of campaign card. |
| Post Condition | NA |
| Functionality | **Main Flow**:   1. User clicks on campaign cards in the menu. 2. System will render and display the details in the list view 3. User clicks on campaign card in the list view and system will re-direct to the relevant details page of campaign card. |
| Validations | All the fields in the list view and details page are read only. |
| User Privilege | Input company Manager |

## Plan Cards - Create new and assign

|  |  |
| --- | --- |
| Objective | Allows the user to create new plan and assign to reporting FF employee. |
| Pre-condition | User must have logged into the application and in list view of cards. |
| Inputs/ Data | * Date * Village * Crop Name * Activity * Product * Status * Plan type (Planned) * Card type (Channel/ Campaign) * Channel Partner name * Created by (FF reporting employee/Manager) * Assigned to * Actions( edit, delete icons) |
| Outputs | System adds plan details and assigns to the reporting employee. |
| Post Condition | System adds plan details and success message will be displayed (“Plan details added successfully”). |
| Functionality | Main Flow:   1. User click on ‘Add New; 2. System will display a page where the above mentioned input fields will be displayed. 3. User enters Pick date and village name. 4. User selects activity. 5. User selects one of the following activities (Farm – Home visit, Farmer group meeting, Mass campaign and demonstration) and system displays following fields (Activity, Crop, Product). 6. User selects Channel partner name following field will be displayed (Channel partner name). 7. User selects reporting employee from the ‘assign to’ field. 8. User clicks on submit. 9. System submits the details and displays a success message (“Plan has been created and assigned to ‘Reporting employee’”). |
| Validations | Date   * Date calendar * Mandatory field   Village Name   * Drop down list * Mandatory filed   Crop Name   * Drop down list * Mandatory   Activity:   * Dropdown list (Farm and Home visit, Farmer group meeting, Mass campaign, demonstration, Channel partner). * Mandatory   Product   * Dropdown list (Should display all the products that are uploaded ate the back end). * Optional   Created by:   * Read only * By Default Manager name to be displayed * Mandatory   Assign to:   * Dropdown (reporting employees). * By default ‘Select assignee’ will be displayed. * Mandatory   Status:   * Ready only field * By default ‘Not approved’ will be displayed * Once the campaign card is submitted, status will be changed to ‘Approved’.   Submitted by   * Read only (Name should come automatically)   Plan type (Planned)   * Default plan type would be planned.   Card type (Channel/ Campaign)   * Based on the type of activity selected it would be defined as campaign/channel. If Channel partner is selected then the card type would be channel and for the remaining cards it would be campaign card.   Channel Partner   * Text box * Mandatory |
| User Privilege | IC Manager |

## Plan Cards – Edit

|  |  |
| --- | --- |
| Objective | Allows the user to edit card details until the field force submit the activity for a given card. If the campaign activity is submitted by the field force, edit icon will be disabled. |
| Pre-condition | User must have logged into the application and in list view of cards. |
| Inputs/ Data | * Date * Village * Crop Name * Activity * Product * Status * Plan type (Planned) * Card type (Channel/ Campaign) * Channel Partner name * Created by (FF reporting employee/Manager) * Assigned to * Actions( edit, delete icons) |
| Outputs | System edits card details. |
| Post Condition | System edits campaign details and success message will be displayed (“Campaign details updated successfully”). |
| Functionality | Main Flow:   1. User clicks on edit Icon. This edit icon will not be enabled if the reporting employee submitted the activity. 2. System will display a page where the above mentioned input fields along with auto populated content will be displayed. 3. User enters the editable input details and clicks on submit. 4. System submits the details and displays a success message ( card details updated successfully). |
| Validations | Date   * Date calendar * Mandatory field   Village Name   * Drop down list * Mandatory filed   Crop Name   * Drop down list * Mandatory   Activity:   * Dropdown list (Farm and Home visit, Farmer group meeting, Mass campaign, demonstration, Channel partner). * Mandatory   Product   * Dropdown list (Should display all the products that are uploaded ate the back end). * Optional   Created by:   * Read only * By Default Manager name to be displayed * Mandatory   Assign to:   * Dropdown (reporting employees). * By default ‘Select assignee’ will be displayed. * Mandatory   Status:   * Ready only field * By default ‘Not approved’ will be displayed * Once the campaign card is submitted, status will be changed to ‘Approved’.   Submitted by   * Read only (Name should come automatically)   Plan type (Planned)   * Default plan type would be planned.   Card type (Channel/ Campaign)   * Based on the type of activity selected it would be defined as campaign/channel. If Channel partner is selected then the card type would be channel and for the remaining cards it would be campaign card.   Channel Partner   * Text box * Mandatory |
| User Privilege | **IC Manager** |

## Plan Cards - Delete

|  |  |
| --- | --- |
| Objective | Allows the user to delete card details. Manager can delete the plan card at any point of time (Irrespective of whether the campaign activity is submitted or not) |
| Pre-condition | User must have logged into the application and in list view of companies |
| Inputs/ Data | NA |
| Outputs | System deletes plan card details. |
| Post Condition | System deletes company details and success message will be displayed (“Plan card details deleted successfully”). |
| Functionality | Main Flow:   1. User clicks on delete icon. 2. System displays an alert message “Are you sure, you want to delete?”. If yes, card details will be deleted or else system will display card details. 3. If details are deleted, success message will be displayed “ Cards details deleted successfully”.   Note: At any status of the card, deletion is allowed. |
| Validations | * NA |
| User Privilege | IC Manager |

## Plan Cards - Approve/Reject Card

|  |  |
| --- | --- |
| Objective | Allows the user to approve/reject card that was submitted by reporting employee (FF employee). |
| Pre-condition | User should be in the list view of cards and there should be cards for approval/rejection. |
| Inputs/ Data | Approve/Reject button. |
| Outputs | System submits the card for approval (Approval/Rejected). |
| Post Condition | System displays a message based on the approval type. “ card has been approved/Rejected” |
| Functionality | Main Flow:   1. User clicks on edit icon in the list view 2. System will render the available fields filed with auto content. Approve and Reject button will be displayed at the bottom. 3. User clicks on Approve button. 4. System submits and displays a success message. 5. Card status will be updated to Approved. FF officer can fill the activity and send it back to the manager.   Alternate flow : Card Rejected   1. User clicks on Reject button. 2. System submits and displays relevant message. 3. Card status will be updated to reject. FF officer can see the status and cannot submit the activity from the app. |
| Validations | Approved/ Rejected Button:   * User can click on either of approve or reject button. If clicked on approve, reject button will be enabled. If clicked on reject, approve button will be enabled. |
| User Privilege | **IC Manager** |

## Plan Cards – Activity details

|  |  |
| --- | --- |
| Objective | Allows the user to view the activity details of card submitted by reporting employee. |
| Pre-condition | User must have logged into the application and should be in the details page of card. |
| Inputs/ Data | Activity : Farm and home Visit   * Purpose * Farmer Name * Mobile no * Feedback * Picture one(JPG, PNG) * Picture two(JPG, PNG) * Picture three (JPG, PNG)   Note: For other activity responses, refer to the excel doc ‘plan card forms Dec 7th’ available in hive. |
| Outputs | System renders and displays details page of card where activity details will be displayed. |
| Post Condition | NA |
| Functionality | Main Flow:   1. User clicks on ‘Activity’ (url available) of a card in the list view. 2. System renders the details page of the card. 3. In the details page, system displays all the card details and relevant activity details. 4. If card activity is not submitted, then the activity details will not be displayed. |
| Validations | * All fields will be read only. |
| User Privilege | **IC Manager** |

## 

## Travel log - List view and details

|  |  |
| --- | --- |
| Objective | Allows the user to view the travel details of an reporting employee on a given day. |
| Pre-condition | User must have logged into the application and Card activity details needs to be submitted. |
| Inputs/ Data | * Date * Employee Name * Villages travelled * Distance in Kms * Start Time and End time |
| Outputs | System renders and displays list view of employees travel detail and details page of reporting employee travel details |
| Post Condition | NA |
| Functionality | Main Flow 4.32a : List view   1. User clicks on ‘Travel log’ menu item. 2. System renders and displays list view of reporting employees travel log. 3. In the villages travelled, all the villages should be display with comma separation. Max two wrapped lines should be displayed with ‘…’ for more info.   Main Flow 4.32b : User level view   1. User clicks on employee name 2. In the details page, System displays all the travel details of the selected employee on that given date. |
| Validations | Date   * Read only field   Employee Name   * Read only field   Villages travelled   * Read only field   Distance   * Read only field   Time   * Start time and end time |
| User Privilege | **IC Manager** |

## Dashboard – Need inputs from KG

# Mobile application Use cases

## Sign Up:

|  |  |
| --- | --- |
| Objective | Allows the user to register for the mobile app. |
| Pre-condition | Should have a user details and mobile number registered in the system. |
| Inputs/ Data | * User Name (email ID) * Password * Mobile No   ‘Submit’ is clicked to validate the inputs |
| Outputs | If details are submitted, mobile app user registration details will be saved. |
| Post Condition | System validates for the submitted mobile number, email ID . An SMS message will be sent to the user about the activation of the account. |
| Functionality | Main Flow:   1. User clicks on ‘Sign up’ in the home page 2. User enters the email details and clicks on ‘next’. 3. System renders and displays user name and a textbox to enter password. 4. User enters password and clicks on ‘next’. 5. System renders and displays ‘user name’, masked password, and text box box for mobile number. 6. User enters mobile number and clicks on submit. 7. If submitted mobile number and email id matches with registered ones, System will display a success message “Your account has been activated. Please login with your credentials”.   Alternate flow a: Phone number doesn’t match with existing on in the system   1. System tells the user “phone number doesn’t match with the one in the system” 2. System prompts the user to input 999XXXX857 the phone number masking middle 4 digits. |
| Validations | User Name   * Mandatory   + Text field   + Filed should be validated for email id format.   Password   * + Mandatory   + Must be Password Text field   + Must be validated (Minimum One small alphabet (a-z), Minimum one capital alphabet (A-Z) and Minimum one numeric (0-9). Allowed special characters are “!, @, #, $, %, ^, &, \*, (, ), \_, and + ”.   + Minimum number of characters are 6   Phone Number   * Text box * Max number of characters is 12 and min is 10. |
| User Privilege | Field Force employees |

## Sign in

|  |  |
| --- | --- |
| Objective | Allows the registered users to log in the system. |
| Pre-condition | User should be a registered user. |
| Inputs/ Data | * User name (e-mail ID) * Password |
| Outputs | User login to the application. |
| Post Condition | System displays the home page.  Notification for manager on successful sign in, for the first time. |
| Functionality | **Main Flow:**   1. User clicks on sign in button. 2. System renders and displays ‘user name’. 3. User enters user name and clicks on ‘Next’ 4. System renders and displays username and a text box for entering password. 5. User enters password and submits them. 6. System validates the entered login details.   **Alternate flow 4.2a :** Incorrect login details:   1. If the login fails, user is shown the following error message    * *‘*Login Failed! Please check your Email, Password. 2. Return to Main flow step 2   **Alternate flow 4.2b : Account de-activated**   1. If the user account is de-activated, following error message is displayed “Your account is deactivated. Please contact admin”. |
| Validations | Email   * Mandatory * Text field * Must be validated for existence   Password   * Mandatory * Must be Password Text field * Must be validated * Case sensitive |
| User Privilege | All users |

## Forgot Password

|  |  |
| --- | --- |
| Objective | Allows the registered user to retrieve password through e-mail |
| Pre-condition | User should be a registered user. |
| Inputs/ Data | * Email Address |
| Outputs | Upon email existence validation, an email is sent to User’s email address with newly generated password. |
| Post Condition | Confirmation Message is Displayed according to Status |
| Functionality | **Main Flow:**   1. User clicks on Forgot Password on the Sign in page. 2. User enter ‘email ID’ registered with the application and submits. 3. Systems validates the e-mail ID for existence in the system 4. System will send a new password to the registered e-mail. Success message (‘we have sent password to your e-mail address).   **Alternate Flow: 3.6a:** email – id not matching against the ones in system   * 1. If the Inputs/Data is invalid, following message is displayed. ‘The information provided does not match our database”.   2. Return to step 2 in main flow. |
| Validations | Email Address   * Mandatory * Must be text field |
| User Privilege | All users |

## Mobile app menu items - Swipe

|  |  |
| --- | --- |
| Objective | Allows the logged in users to view the menu items on the left side of the application. On swiping from left to right in the application left menu will be displayed. |
| Pre-condition | User should have logged in with valid credentials. |
| Inputs/ Data | Menu Items   * Profile * Performance * Completed cards * Travel log * Settings * Help * Sign out |
| Outputs | Menu items will be displayed. |
| Post Condition | System displays the home page. |
| Functionality | **Main Flow:**   1. User login to the application and swipes from left to right in the application. 2. System will display the menu item. 3. Menu items can be accessed from any page in the application. |
| Validations | NA |
| User Privilege | Field Force users |

## User Profile page – View:

|  |  |
| --- | --- |
| Objective | Allows the registered users to view the profile details. |
| Pre-condition | User should be a registered user and in menu list. |
| Inputs/ Data | * Photo * Employee ID * Name * Headquarters * Reporting Manager * Email ID * Phone Number |
| Outputs | System displays the profile page. |
| Post Condition | NA |
| Functionality | **Main Flow:**   1. User clicks on profile in left menu. 2. User clicks ‘profile’ 3. System renders and displays the above mentioned fields. |
| Validations | Photo   * Image   Employee ID, Name, Headquarters, Reporting manager, Email Id, Phone Number   * Read only |
| User Privilege | Filed Force users |

## User Profile - Edit

|  |  |
| --- | --- |
| Objective | Allows the registered users to edit the profile details. |
| Pre-condition | User should be a registered user and in menu list. |
| Inputs/ Data | * Photo * Employee ID * Name * Headquarters * Reporting Manager * Email ID * Phone Number |
| Outputs | System updates the profile page details. |
| Post Condition | Notification for manager on profile edit |
| Functionality | **Main Flow:**   1. User clicks on ‘edit’ icon in the profile page 2. User enters all the editable fields and clicks on update. 3. System updates the profile details. |
| Validations | Photo   * Image * Editable * ‘Take photo’ and upload option should be allowed. * Upload photo from albums to be allowed.   Employee ID, Name, Headquarters, Reporting manager, Email Id, Phone Number,   * Read only |
| User Privilege | Filed Force users |

## Build Plan

|  |  |
| --- | --- |
| Objective | Allows the user to create new plan by the FF employee. |
| Pre-condition | User must have logged into the application and in the build plan page. |
| Inputs/ Data | * Date * Village * Crop Name * Activity * Product * Status * Plan type (Planned) * Card type (Channel/ Campaign) * Channel Partner name * Created by (FF reporting employee/Manager) * Assigned to * Actions( edit, delete icons) |
| Outputs | System adds plan details and submits to the reporting manager. |
| Post Condition | System adds plan details and success message will be displayed (“Plan details added successfully”). |
| Functionality | Main Flow:   1. User click on ‘Build plan’. 2. User enters Pick date and village name. 3. User selects activity. 4. User selects one of the following activities (Farm – Home visit, Farmer group meeting, Mass campaign and demonstration) and system displays following fields (Activity, Crop, Product) below the date, village name and activity. 5. User fills the details and submits. 6. System submit the plan as campaign card and also the card will be tracked as planned one. 7. If the plan for the next week is created before this week 12.30 PM Friday, then it will be considered as planned card. 8. If the card for the next week is created after 12:30 pm Friday this week , then it will be considered as adhoc card. 9. Submitted card will be displayed in the pending cards list view.   Alternate flow a:   1. User selects Channel partner name activity ,following field will be displayed (Channel partner name). 2. User inputs the field and submits 3. If the plan for the next week is created before this week 12.30 PM Friday, then it will be considered as planned card. 4. If the card for the next week is created after 12:30 pm Friday this week , then it will be considered as adhoc card. 5. Submitted card will be displayed in the pending cards list view. |
| Validations | Date   * Date calendar * Mandatory field   Village Name   * Drop down list * Mandatory filed   Crop Name   * Drop down list * Mandatory   Activity:   * Dropdown list (Farm and Home visit, Farmer group meeting, Mass campaign, demonstration, Channel partner). * Mandatory   Product   * Dropdown list (Should display all the products that are uploaded ate the back end). * Optional   Status:   * Card will be grayed out   Submitted by   * Read only (Name should come automatically)   Plan type (Planned)   * Default plan type would be planned.   Card type (Channel/ Campaign)   * Based on the type of activity selected, it would be defined as campaign/channel. If Channel partner is selected then the card type would be channel and for the remaining cards it would be campaign card.   Channel Partner   * Text box * Mandatory |
| User Privilege | IC Manager |

## Pending plans - List view/Details page

|  |  |
| --- | --- |
| Objective | Allows the registered users to view the pending cards that need to be submitted. |
| Pre-condition | Cards should have been approved by reporting manager. |
| Inputs/ Data | * NA |
| Outputs | System renders and displays approved campaign cards. |
| Post Condition | NA |
| Functionality | **Main Flow:**   1. User clicks on ‘pending plans’ in the footer. 2. System will render and display a page in which all the pending plans will be displayed. 3. User selects a card in which all the details of that plan will be displayed. 4. User can’t answer pending card, unless the ‘start’ is enabled in the map. |
| Validations | NA |
| User Privilege | Filed Force users |

## Completed cards - List view / Details page

|  |  |
| --- | --- |
| Objective | Allows the registered users to view the completed cards that are submitted. |
| Pre-condition | Card should have been filled and submitted by user. |
| Inputs/ Data | * NA |
| Outputs | System renders and displays completed cards. |
| Post Condition | NA |
| Functionality | **Main Flow:**   1. User clicks on ‘completed’ in Menu list. 2. System will render and display a page in which completed cards are displayed. 3. User selects a card. 4. System renders a details page in which all the details of that plan and the responses for the plan will be displayed. |
| .Validations | NA |
| User Privilege | Filed Force users |

## Pending/Completed cards – List view search

|  |  |
| --- | --- |
| Objective | Allows the user to search for the pending or completed cards |
| Pre-condition | User should be either pending or completed cards list view. |
| Inputs/ Data | * NA |
| Outputs | System renders and displays the pending / completed cards based on the search input. |
| Post Condition | NA |
| Functionality | **Main Flow:**   1. User clicks on the pending/completed cards. 2. System searches for the relevant input mentioned in the search box and displays in the list view. 3. If the search input is not found in the list view, following message is displayed “No search result found”. |
| Validations | Search Text box   * Free text search |
| User Privilege | Filed Force users |

## Home page – Map and pending

|  |  |
| --- | --- |
| Objective | Allows the registered users to view the home page in which map along with status of map (Start/Stop) will be displayed. Travel log statistics at the top where pending plans will be displayed. |
| Pre-condition | User should have logged into the application. |
| Inputs/ Data | * NA |
| Outputs | System renders and displays map, footer, and dashboard. |
| Post Condition | NA |
| Functionality | **Main Flow:**   1. User log into the application. System renders and displays home page in which Map, travel log details and a footer (Pending cards, Build plans) will be displayed. 2. User clicks on ‘home’ from any page in the application. System renders and displays home page in which Map, travel log details and footer (Pending cards, Build plans) will be displayed. 3. On the top section of the Map displays ‘Today’s pending cards’ ‘Weeks pending cards’ and today’s distance travelled. 4. User swipes the map towards left, and then pending cards list will be displayed. This is same as the ‘pending option ’ at footer which displays pending details. |
| Validations | NA |
| User Privilege | Filed Force users |

## 

## Card – Submission

|  |  |
| --- | --- |
| Objective | Allows the registered users to submit the card with responses. |
| Pre-condition | User should have logged into the application and ‘start’ button on the map should have been enabled. |
| Inputs/ Data | * Purpose * Farmer Name * Mobile no * Feed back * Image one * Image two * Image three |
| Outputs | System submits the pending card with response details and records the current location of the employee. |
| Post Condition | Pending card will be moved to the completed cards section.  Notification for manager on successful completion of campaign card |
| Functionality | **Main Flow:**   1. User clicks on the ‘start’ button in the map of home page. Start button should be clicked only for the first card submission. For the submission of consecutive cards, no need to click ‘’start’ since map keeps tracking the location once the plan is submitted. 2. System records the current location of the employee and start button will be replaced by ‘stop’ button 3. User clicks on the ‘pending cards’ icon at the bottom. 4. System will render and display a page in which card will be displayed. 5. User selects a pending card. 6. System displays details page of the selected card. 7. User clicks on ‘submit info’. 8. System renders and displays a page where purpose, farmer name, and mobile no   Fields need to be filled.   1. User enters the details and clicks on next at the bottom. 2. System renders and displays a page where feedback needs to be filled. 3. User enters feedback details and clicks on next. 4. System renders and displays a page where user need to attach images (Max of 3) 5. User captures and uploads image either from album or through camera.   Note: These fields will vary based on the activity selected during plan was being built. Refer to the ‘plan card dec 7th ‘document   1. User clicks on submit. 2. System captures the current location and submits the pending card response. An alert message will be displayed. “Do you want to continue? Yes or No “. If yes, repeat from the above step 5. If ‘No’ map at the back end stops and the day ends. |
| Validations | Purpose   * Text area * Mandatory   Farmer Name   * Text box   Mobile no   * Text box * Min 10 and max 12 characters   Feedback   * Text area   Image one   * Image from album or photo   Image two   * Image from album or photo   Image three   * Image from album or photo |
| User Privilege | Filed Force users |

## Travel Log – List view /Details

|  |  |
| --- | --- |
| Objective | Allows the registered users to list the travel log history and details of each day travel . |
| Pre-condition | User should have minimum one day travel or one plan completed. |
| Inputs/ Data | * Start date * End date * Map display |
| Outputs | System displays the list view of travel log details based on the search dates. |
| Post Condition | System displays the plans completed and travel details on a selected date |
| Functionality | 1. User click on ‘Travel log’ in the left menu. 2. System will render and display a page in which all the travel details will be displayed. 3. User select start date and end date and clicks on search 4. If records exist, system will render travel log details per each date. 5. System also renders a map for the search duration with the locations highlighted during those dates. 6. User selects a date in the list view and details of that particular day travel will be displayed by system. |
| Validations | Start date   * Calendar * Date greater than today should not be displayed.   End Date   * Calendar * Date greater than today should not be displayed.   Map   * Location icons |
| User Privilege | Filed Force users |

## Help

|  |  |
| --- | --- |
| Objective | Allows the registered users to view the text content of how to use the application |
| Pre-condition | User should have logged into the application. |
| Inputs/ Data | * NA |
| Outputs | System displays the text content. |
| Post Condition | System displays the plans completed and travel details on a selected date |
| Functionality | 1. User clicks on hele 2. System renders and displays the text content that is available in the help page. |
| Validations | * NA |
| User Privilege | Filed Force users |

## Mob app – Performance - Need inputs