12.09.2023

MY CS - MY GOAL- SURVEY

Manali Ashok Bhadirage   
manali.bhadirage@techneai.com

**Handover Document**

**CONTENTS**

[1. TICKET DETAILS 2](#_Toc31370)

[2. INTRODUCTION 2](#_Toc16927)

[3. BUSINESS REQUIREMENT 2](#_Toc4430)

[4. SCOPE 2](#_Toc25772)

[5. BUSINESS & SYSTEM RULES 3](#_Toc20421)

[6. ABBREVIATIONS & TERMS 3](#_Toc9996)

[7. GRAPHICAL REPRESENTATION 3](#_Toc16110)

[8. DEVELOPED SYSTEM 3](#_Toc10195)

[9. REFERENCES OF THE USERS 11](#_Toc32369)

1. **TICKET DETAILS**

|  |  |
| --- | --- |
| **Ticket ID** | TT12887 |
| **Ticket description** | in Connect Us survey Report need summery details before report export showing Details on Display 1) Number of total assign survey 2) Number of Attendee survey 3) Number of not attendee survey |
| **Created by** | Annappa Thikane |
| **Created on** | 05/06/2023 |
| **Priority** | High |

1. **INTRODUCTION**

We have successfully implemented a survey module within our Connect Us platform, as well as a corresponding survey menu in our MY CS application. This module allows authorities to effortlessly assign surveys to their employee which includes topics such as process knowledge, feedback, opinions, judgments, etc. The assigned employees can then respond to the surveys that have been assigned to them. Furthermore, the module offers the ability to export comprehensive reports regarding answers given by the employees.

Authorized user can export reports for each survey which will display the answer submitted by each employee and the date on which the employee has submitted survey.

1. **BUSINESS REQUIREMENT**

Through survey report, authorized user should get clear insights through pie chart. It wil display the count of employees who have submitted survey within time, count of employees who have submitted survey after validity date. Count of employees who still haven’t submitted survey and then total count of employees to whom the survey is assigned to.

1. **SCOPE**

Survey creation, assigning survey, receiving response on survey from employees, survey management and reporting & analysis lies within scope of this project. In addition to this, designing the survey module to handle a large number of surveys, respondents, and data points while maintaining optimal performance will be considered as scope of the project. Further, integrating the survey module seamlessly into the existing Connect Us platform and MY CS application, ensuring a cohesive user experience are part of our scope.

Any extensive redesign or revamp of the overall user interface of Connect Us or MY CS application beyond the survey module's specific requirements would be considered out of scope.

1. **BUSINESS & SYSTEM RULES**

* User should be registered and logged in to the system
* System should display error message for incorrect details if entered.
* All forms should have on field validations. System should display on field errors in case of incorrect inputs.
* End users cannot edit survey once they submit.
* Template master can be edited only if that template is not yet assigned to any of the user.

1. **ABBREVIATIONS & TERMS**

NA

1. **GRAPHICAL REPRESENTATION**

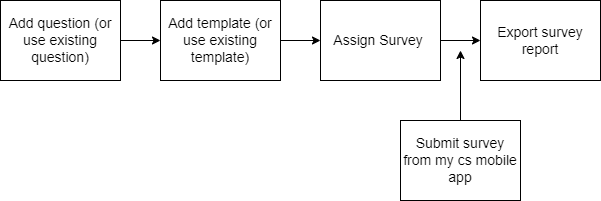
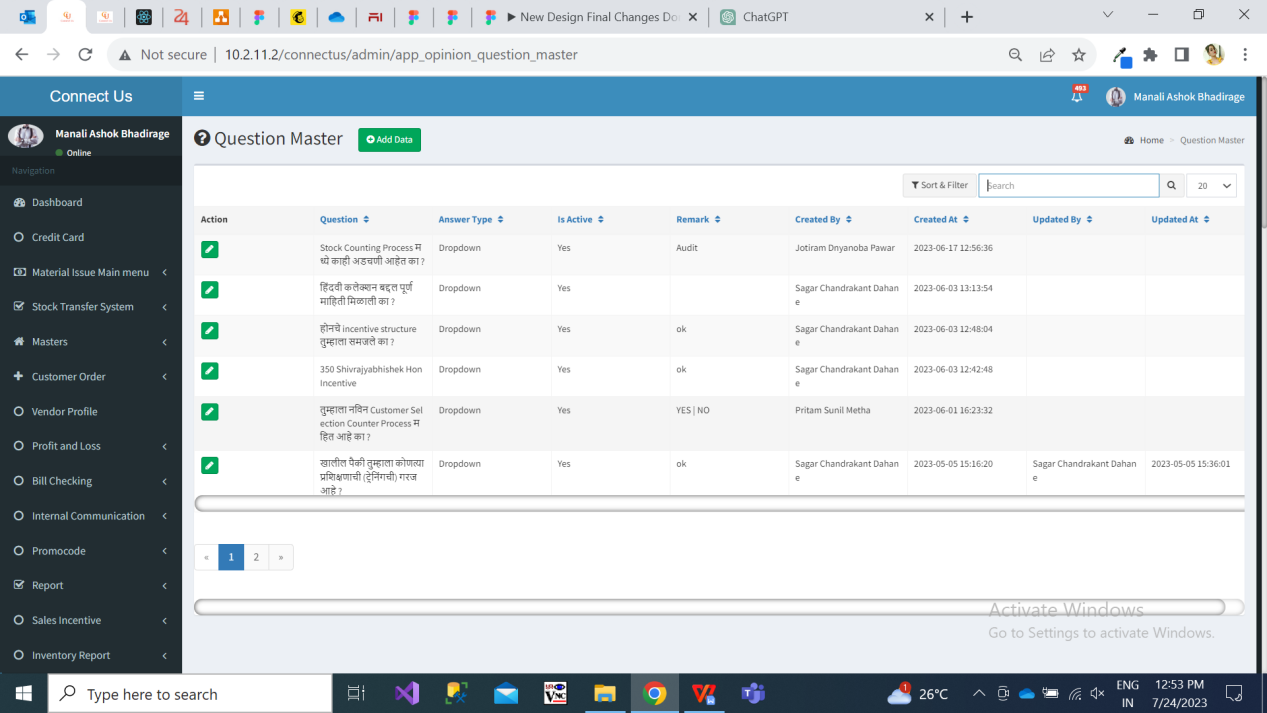


Fig: General Context Diagram

1. **DEVELOPED SYSTEM**

**Step 1.** User (authority) will create Questions from Connect-us -> My Goal App -> Survey -> Question Master. It includes following fields:

* Export button
* Add question button
* Action
* Question
* Answer Type
* Is Active
* Remark
* Created at and by
* Updated at and by



|  |  |
| --- | --- |
| **FIELDS** | **DESCRIPTION** |
| Add Question | Add question button consists of following fields:   * Question * Answer Type * Is Active * Remark     Question field accepts text, digits, space and special characters.  Answer type field includes either text or drop-down. If answer type is selected as text, then in application it will reflect text input box where employees will write their answer. Wheres, if answer type is selected as drop-down, then in application that question will display options out of which employees will select any one of the provided options.  Is active fields consist of yes or no button through which question can be kept active or inactive.  Remark field is input box where user may enter additional notes while adding question. It is not mandatory. |
| Action | Action field consist of edit action. |
| Question | Added question will be displayed in grid. |
| Answer Type | Text / drop-down of each question will be displayed in grid against each question. |
| Is Active | It displays either yes or no in grid. |
| Remark | Remark entered by user while adding questions will be displayed here. |
| Created at and by | It will display the name of the employee who created the question and the date and time when question was created. |
| Updated at and by | It will display the name of the employee who edited the existing question and the date and time when the update was made. In case any change is nor made, then it will be displayed blank. |
| Export button | Through export button, user can get all the data as in grid in the excel file. It will have following columns:   * Sr no. * Question * Answer type * Is active * Created at and by * Updated at and by |

Example: We have created question as “Share your feedback about survey feature” and selected its answer type as “Text”. On the other hand, we have added another question as “Is it possible for you to give surveys each month?” and selected its answer type as “Drop-down”.

**Step 2.** Create template.

Once questions are added, user need to map these questions in template. Hence template needs to be created from Connect-us -> My Goal App -> Survey -> Template master. Template can be referred as Survey. It will consists of following fields:

* Export button
* Add template button
* Action
* Template name
* Description
* Is Active
* Remark
* Created at and by
* Update at and by



|  |  |
| --- | --- |
| **FIELDS** | **DESCRIPTION** |
| Add Template | Once clicked on Add template button, it displays following fields:   * Template name * Description * Map Question * Answer type * Is active   Template name consists of input box where user can mention the name of the template. It accepts text, digits and space.  Description specifies the details of the template.  User will map the questions to this particular template from question master.  Answer type field should be kept blank if answer type is text. Else user should mention the options if type of question is drop-down and use | when adding multiple options.  Is required field consist yes or no. If yes, then answering the question will be mandatory.  User will enter the number in Sort Order field which means sequence of the question. It is not mandatory.  Once question, answer type, sort order, is required are specified, user will have to click on “Add to table” button. This mapped question will be reflected at the bottom. Then once again user can map another question into this template.  Once questions are mapped to template, user will click save and thus template will get created. |
| Action | Action field consist of view and edit action.  Through view action, user can view the details of the template as added / edited.  Through edit option if user edits any fields in particular template and submits it, then updated fields of that particular template will be displayed in grid. User will be able to edit any template only if that template is not assigned to any of the user yet. Edit action will be displayed against the template only if that template / survey is not assigned to at least one or more employees yet. |
| Template name | Added Template Name will be displayed in grid. |
| Description | Mentioned description of particular template will be displayed in grid. |
| Is Active | It will display either yes or no in grid. |
| Export button | Through export button, user can get all the data as in grid in the excel file. It will have following columns:   * Sr no. * Template name * Description * Question 1 , 2, 3, etc. * Is active * Created at and by * Updated at and by |

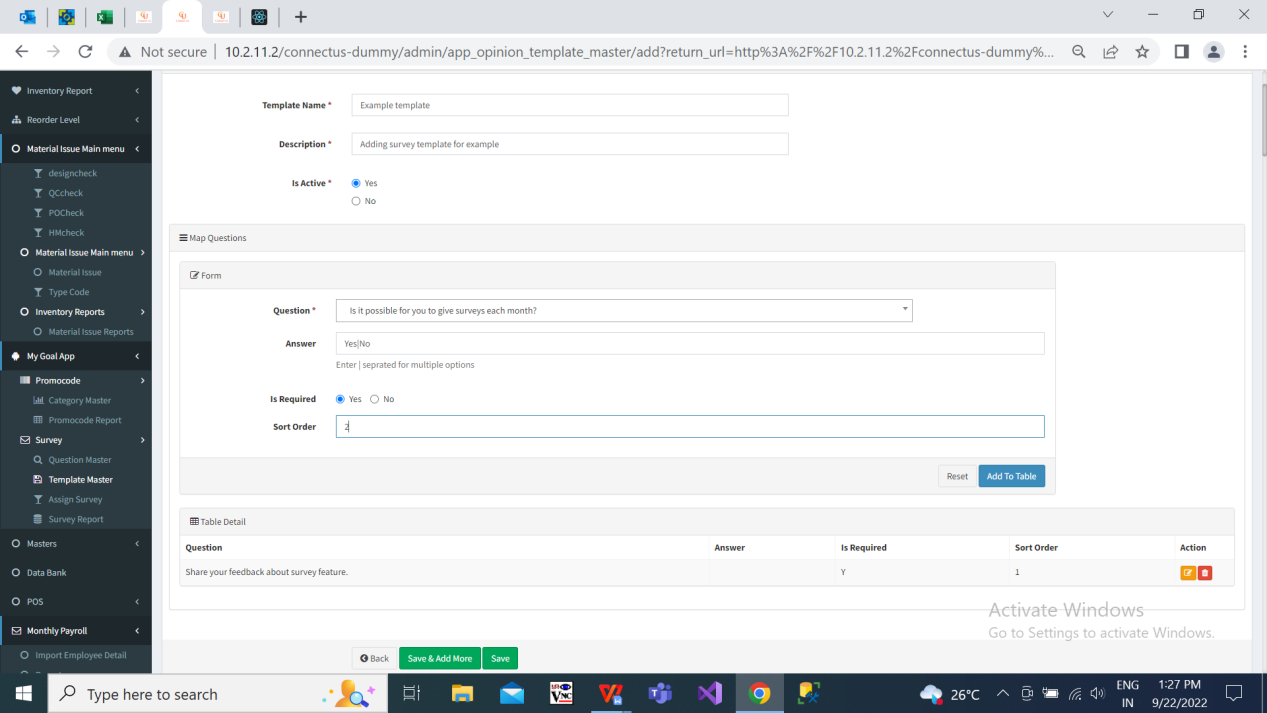


Fig: Mapping another question in same template.

Example: We have added template as “Example Template” and mapped two questions in it. First question, “Share your feedback about survey feature” and kept it answer field blank because answer type of this question is text in question master. Added another question, “Is it possible for you to give surveys each month?” and written Yes|No in answer field because answer type of this question is drop-down in question master.

**Step 3.** Once template is created, user can assign survey through Connect-us -> My Goal App -> Survey -> Assign Survey. It has following fields:

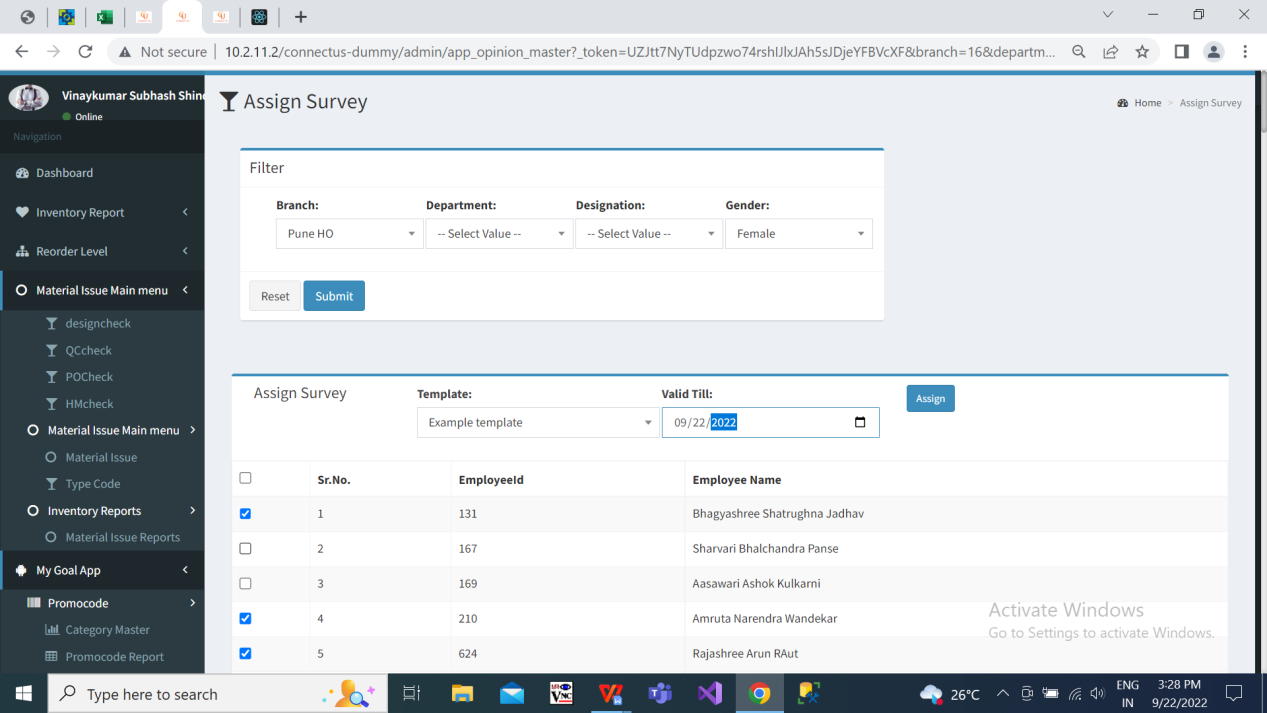
* Branch - (It includes All branches, All HO i.e. Pune HO and BMT HO, All i.e. all branches as well as all HO, and each branch in list individually)
* Department (All active department from dept. Master)
* Designation (All active designations from designation master)
* Gender (Male & Female)

Once user clicks submit, it will display the following input fields:

* Assign Survey
* Valid Date

Below above input fields, following details will be displayed

* Checkbox
* Sr. No
* Employee ID
* Employee name



User can select any of the created template from drop-down in “Assign Survey” field, select valid date (the date till which survey will be valid to assigned employee) and then click on the checkbox to whom user want to assign survey.

**Step 4.** Employees will be able to give survey / test through “Survey” feature in MY CS application. Once clicked on survey feature, it will display two radio buttons namely Pending & Completed. Surveys which aren’t submitted by employee yet will be displayed in pending menu. Surveys which are submitted will be displayed in Completed menu. It will display following details:

* Name of the survey
* Status (Pending / Complete)
* Validity Date

Whenever survey is assigned to the user, that user should receive fire-base notification.

Survey once submitted by employees cannot be edited. Once survey is submitted by the employee, then it will be displayed in my cs app -> survey menu -> completed list. It will display following fields:

* Name of survey
* Status
* Completed date

Once survey is submitted, then the count of survey should be reduced from the menu as it displays the count of pending surveys. (the count should get updated / reduced even when user doesn’t close the app.)



**Step 5.** Survey report can be exported of all the employees to whom the survey was assigned to and who have submitted the survey. It will have following input fields:

* From Date
* To Date
* Survey

Once details are filled in input fields and user clicks on submit, it will display following details in grid:

* Sr No.
* Survey Submitted Date
* Emp Id
* Employee name
* Branch
* List of Questions in selected template / survey.
* App verison

Furthermore, we have displayed Survey analysis and response analysis tables. Survey analysis table displays the count of employees to whom survey is assigned, count of employees who have submitted that survey and count of employees who have not submitted the survey yet. In response analysis table, question wise response sent by the employees for drop-down questions is displayed. For each question, we have displayed the count of employees who have selected the given options.

All the employees to whom the survey is assigned to will be displayed in report.

However, if the employee hasn’t submitted the survey yet (survey is still pending in MY CS app), then date and answers of questions will be kept blank. If employee has submitted survey, answers submitted by employee and the date on which employee submitted the survey, it will be displayed in report.

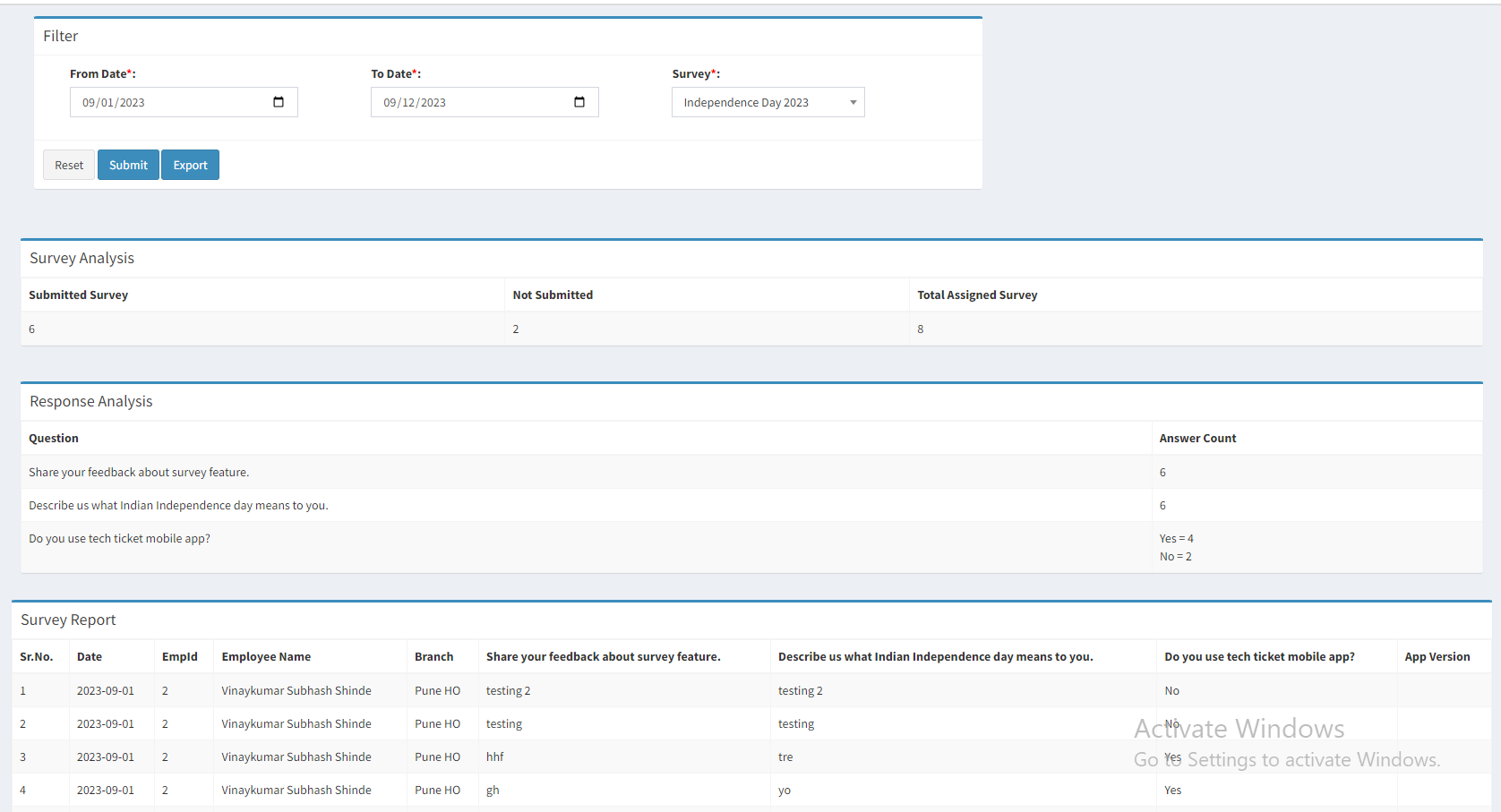


Fig: Survey Report

1. **REFERENCES OF THE USERS**

|  |  |  |  |
| --- | --- | --- | --- |
| **User** | **Name** | **Mail** | **Contact number** |
| **Actual user** | Annappa thikane | isa@csjewellers.com |  |
| **Ticket created by (if any)** | Annappa thikane | isa@csjewellers.com |  |
| **Assigned business analyst** | Manali bhadirage | Manali.bhadirage@techneai.com |  |
| **Assigned developer** | Prathmesh shinde  Yogita Jagtap | Prathmesh.shinde@techneai.com |  |
| **Assigned tester** | Priyanka dupargude | Priyanka.dupargude@techneai.com |  |