User Stories and Acceptance Criteria

Emerging Questions

The creation of the user flow for the sustainability manager, supplier and BME prompted questions that I wanted to address in the next ESG Flo product meeting. I framed these questions as user stories…

Sustainability Manager User Stories

User Story: Upload Supplier Data

As a Sustainability Manager, I want to easily upload my spend data, so that I can manage spend-based emissions and supplier outreach based on these data points

Where is this data currently stored?

User Story: Add in Supplier Details

As a Sustainability Manager, I want to easily add in information about the supplier including Category Owner, the contact(s) at the supplier (Language, Email), so that I can use for supplier outreach

Where is this data currently stored?

User Story: Reach out to Supplier

As a Sustainability Manager, I want to have the option to pick and choose which suppliers to reach out to, so that I can manage the outreach process

What information do you need visually to make this decision? Filter by total spend? spend based emissions amount? category manager? OpCo?

Would you also want to see the total list of SKUs by supplier easily when making this decision?

User Story: Supplier Communication

- As a Sustainability Manager, I want to preview and review the email that's being sent to the supplier, so that I can approve the content
  - Who else would need to review the content?
  - How would you want to manage the process of seeking approval on the "go ahead" from the category managers
- As a Sustainability Manager, I want to ensure that there is a follow up email set up, so that the system can automatically follow up when there is no response
  - Outside of emails being sent from the platform - are there other forms of communication you expect to have with suppliers on the platform?

User Story: Handling of questions from suppliers

- As a Sustainability Manager, I want to ensure that the suppliers have a way to ask questions about what's asked of them, so that I can help them in the process
  - How would you like the questions to be forwarded to you?
  - Who should be managing the questions?
  - What kind of resources/ support are you planning to offer the suppliers?

User Story: Notifications

- As a Sustainability Manager, I want to be notified of updates in the portal, so that I can keep track of progress
  - What progress points do you want to see?
    - How many suppliers have opened survey
    - How many suppliers have added data
    - How many SKUs have information added
  - How do you want to receive notifications?
    - Via portal notification
    - Via email
      - What would be the trigger to warrant receiving an email

Supplier User Stories

User Story: Supplier Account creation

As a Supplier, I want to receive an email from my category manager, so that I know that the request to create an account is legit

As a Supplier, I want multiple people in my organization to create an account in the supplier portal, so that I can have multiple people contribute to adding in data

As a Supplier, I want the portal to be BME branded, so that I know that the portal is valid

User Story: Supplier data - Company level

As a Supplier, I want the option to add in my total S1,2,3 emissions and total revenue, so that BME can attribute to their spend

User Story: Supplier data - SKU level

As a Supplier, I want to see all the SKUs I provide to BME, so that I can add in PCF or EPDs for each

What IDs should we use that ensures the suppliers know the item and aligns with BMEs internal tracking system?

Client User Stories (PART ONE)

1. **User Story 1: Input Company Information**
   - **As a Client**, I want to input my company's spend details, emission data, currency, and SKU information in a step-by-step process, so that I can ensure all necessary information is accurately provided for compliance.
2. **Acceptance Criteria:**
   - **Given** I am on the Company Information page,
   - **When** I enter company name, total spend, currency, date range, total emissions for scopes 1, 2, and 3, total revenue, and SKU details (with supplier IDs and contacts associated with SKUs)
   - **Then** the progress bar should reflect my completion status (e.g., 1/3, 2/3, 3/3 steps), and I should be able to proceed to the next section.
3. **User Story 2: Calculate and Display Tabular Format of Spend-Based Emissions and All Company Information**
   - **As a Client,** I want to see the calculated spend-based emissions for each SKU based on the information I provided, so that I can review and ensure accuracy of the emissions data for compliance purposes.

4. **Acceptance Criteria:**
   - **Given** I have entered all required company information, including spend details, emission data, and SKU information,
   - **When** I proceed to the next section,
   - **Then** the system should calculate and display the spend-based emissions for each SKU in an additional column, within a tabular format created of all company information added for supplier compliance and data management (aka the 'Supplier Data Management' page)
5. **User Story 3: Add Additional Company Information**
   - **As a** Client, I want to add additional company information, such as new SKU details, after completing the initial input process, so that I can update and ensure all relevant data is included for compliance purposes.
6. **Acceptance Criteria:**
   - **Given** I have completed the initial input process and reviewed the spend-based emissions calculations,
   - **When** I navigate back to the Company Information page and add new SKU details,
   - **Then** the system should update the information, recalculate spend-based emissions, and display the updated data with an adjusted progress bar.

Client User Stories (PART TWO)

1. **User Story 1: Request Information from Suppliers**
   - **As a Client User**, I want to initiate requests for environmental data from suppliers to add to this tabular format of SKUs and spend based emissions, so that I can gather necessary information for compliance tracking and reporting.
2. **Acceptance Criteria:**
   - **Given** I am on the Supplier Data Management page,
   - **When** I click on "request all" CTA checking all suppliers and their IDs per SKU
   - **Then** the request should be sent to all the selected suppliers per SKU (via email to start an account for the supplier), and I should receive a confirmation notification with details of the request.

3. **User Story 2: Track Supplier Progress**
   - **As a Client User**, I want to track the progress of suppliers in completing their submissions, so that I can monitor compliance and follow up as needed.
4. **Acceptance Criteria:**
   - **Given** I am on the Supplier Data Management page,

    - **When** I view the status of each supplier's submission,
    - **Then** I should see a visual progress indicator for each supplier and any alerts for overdue submissions, with **Non-Compliant** live time shifting to **Compliant** when complete
5. **User Story 3: Customize Dashboard Through Data Builder Tool**
    - **As a Client User**, I want to customize my dashboard with relevant data visualizations and widgets, so that I can tailor my view to my specific needs.
6. **Acceptance Criteria:**
    - **Given** I am on the Dashboard Customization page,
    - **When** I select and add widgets based on AI suggestions,
    - **Then** my dashboard should update to include these widgets, reflecting dynamic data visualizations based on the selected metrics (e.g. create 'CDP data metric checklist to see compliance progress' —> 'CDP compliance readiness at 56%, or 'see completeness on a product grouping level' or 'see scope 1, 2, and 3 emission summaries at an SKU level' or 'see emissions per category / location / supplier / by offset ratio')

Supplier User Stories

7. **User Story 1: Account Creation**
    - **As a Supplier**, I want to create an account on ESG Flo by filling in my personal and company details, so that I can start managing my environmental data and compliance information.
8. **Acceptance Criteria:**

- **Given** I am on the ESG Flo registration page, I have reached from supplier manager email prompting me to make an account and add data
- **When** I enter my full name, work email, phone number, and password, and sign the confidentiality forms,
- **Then** my account should be created, and I should receive a confirmation email with a link to log in.

9. **User Story 3: Upload EPDs**
    - **As a Supplier**, I want to upload Environmental Product Declarations (EPDs) and add emission numbers for each SKU relevant to what I've supplied, so that my data is correctly entered and analyzed for compliance.
10. **Acceptance Criteria:**
    - **Given** I am on the Supplier Data Management page, that is ***customized*** to my account (only my own EPD responsibilities per SKU)
    - **When** I drag and drop EPDs into the designated area (per SKU row)
    - **Then** when done, a progress bar should indicate completeness of EPDs per SKU. The system should update the table column to say **Complaint instead of Non-Compliant.** I should see progress bar with label (e.g., '50 more SKUs left!"
11. **User Story 4: Add Emission Values**
    - **As a Supplier**, I want to review emission values per EPD document and so that I can ensure accurate reporting and compliance.
12. **Acceptance Criterias:**
    - **Given** I am on the Supplier Data Management page showcasing EPDs uploaded per SKU
    - **When** I review/change emission values for a specific SKU,
    - **Then** the page updates with the Compliant and Non-Compliant indicating **Supplier Reviewed**
13. **User Story 5: Receive and Act on Notifications**
    - **As a Supplier**, I want to receive notifications about urgent tasks and incomplete submissions, so that I am promptly aware of actions I need to take to maintain compliance.
14. **Acceptance Criteria:**
    - **Given** I am on the Tasks page,
    - **When** there are urgent tasks or incomplete submissions,
    - **Then** I should receive pop-up notifications prompting me to complete these tasks.

ESG Flo User Stories

7. **User Story 1: Add Emission Values**
    - **As a ESG Flo User** I would like to add emission values per EDP uploaded pdf
8. **Acceptance criteria**
    - **Given** I am on the Supplier Data Management page,

- **When** see the EPD pdf side by side with insert value cell
- **Then** I should be able to pull out emission data and add the value. I can also run an AI tool to do this for me and fix the values after double checking. I should see updated tables reflecting my selected filters, including progress tracking (e.g.,'50 more SKUs left!')

9. **User Story 3: Complete Missing Supplier Data**
   - **As a ESG Flo User**, I want to analyze data submitted by suppliers, so that I can assess compliance and make informed decisions in case estimations need to be made from missing data
10. **Acceptance Criteria:**
    - **Given** I am on the Supplier Data Management page,
    - **When** I filter data by location, emission category, or other criteria,
    - **Then** I should be able to make informed estimation decisions based off of benchmarks and unit guesses from location, for example

*****Example Breakdown of Supplier Data Management Page**