Personas

Adam DeRozan
Role: Agency Clerk
60-year-old male
Works at an Agency that provides services and support for newcomers/immigrants
Likes routine, predictability, and being on time
Speaks English and Spanish
Currently uses iCare templates to input their client's data
Is Overworked, and does a lot of repetitive data entry
Able to use iCare templates well, but he wants a new solution that does not add any time or complexity
Not technically savvy, uses the computer for basic purposes like excel and word, and has an ipad
He is grateful to use new technology/applications if it makes a positive difference in his data entry work
Estimates that he sees at least 20-25 families a day on average

Bob Smith
Role: TEQ Data Analyst
40-year-old male
Works at TEQ to coordinate and support the activities of agencies that support newcomers
Is detail oriented, and works at a fast pace
Has many projects, is very busy, and overworked
Speaks English and Arabic
Runs simple reports based on data collected from multiple sources - (using Microsoft products)
Is tired of the current, complicated user interface of the current applications at work - (managing Microsoft emails that receives excel files from clients)
Wants a new solution that will not add time or complexity, and at the same time, make it easier for organizations to collaboratively share data with TEQ
Not technologically advanced, can use computer for Microsoft products
Is willing to try a new system/application with guidance
Wants premade report templates and the ability to create new ones
Want the ability to visualize the reports as well as just plain data
Wants to be able to email the report files (PDF CSV)

User Stories

As Adam, an Agency Clerk, I would like to use an intuitive template form submission, just like excel, to fill out my client's information so that it is not any more time consuming than the current process of filling out the iCare excel template.

As Adam, an Agency Clerk, I would like the current excel templates that my agency currently uses to be still compatible with the centralizing data platform

As Adam, an Agency Clerk, I would like the ability to drag-and-drop forms as a submission method so that I can easily submit to the central data collection platform

As Adam, an Agency Clerk, I would like the feature of a cancel and submit button near the bottom of the submission page so data submission to TEQ is easy and intuitive

As Adam, an Agency Clerk, I would like the feature of data anonymizing before submission to protect our clients' personal information

As Bob, a TEQ Data Analyst, I would like to be able to view the aggregated information submitted by the agencies, displayed similar to an excel document with categories

As Bob, a TEQ Data Analyst, I would like to sort information submitted by the agencies based on their respective category by clicking the category, sorting linearly for numbers and alphabetical for strings

As Bob, a TEQ Data Analyst, I would like to be able to filter information based on a set date range so I can analyze trends and patterns

As Bob, a TEQ Data Analyst, I want to be able to generate a report with default categories and date range and save it as a PDF or CSV

As Adam, an Agency Clerk, I would like my uploaded data to be viewable before final submission to the system, I can double check my data to confirm correctness.

As Adam, an Agency Clerk, I would like to get a notification that I am missing information if I try to submit my excel form without mandatory fields filled in so that I do not make the mistake of not submitting important values

As Bob, a TEQ Data Analyst, I would like to have the ability to create/save new report templates that will display selected categories and is compatible with the data collection software so that we can customize reports for certain agencies

As Bob, a TEQ Data Analyst, I would like to be able to generate a report based on the aggregated submitted data from the agencies by selecting premade template or custom templates.

As Bob, a TEQ Data Analyst, I would like to be able to generate visual feedback (e.g. graph, bar, pie) based on the selected categories and time range to easily present readable overview reports

As Bob, a TEQ Data Analyst, I would like to be able to edit/customize saved templates by changing what visualizations/categories to display (selecting listed categories from set predefined time range with the option to add visualization based on select categories)