**Requirements Specification**

**TRACE**

**User Stories**

**Version 1.0.0**

**October 01, 2013**

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# Revision History

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Date | Reason for changes | Version |
| Gerasim Georgiev | 01 October 2013 | First draft | 1.0.0 |
|  |  |  |  |
|  |  |  |  |

# Introduction

## 2.1 Purpose

The purpose of this document is to provide details of the functionality of the TRACE project. It is intended that this document provides sufficient information for the creation and functional specification of the desired elements

## 3. User Stories

## 3.1. Modify project space

|  |  |
| --- | --- |
| User story # | 1 |
| Brief description | As a user I would like to modify project space |
| Preconditions | * User has logged in with valid credentials |
| Navigation flow |  |
| Business Rules | 1. Only users with specific role(s) can modify the project space (roles to be specified, probably only admin) 2. User can add/edit CLs (confidence levels)    1. User can select from CL1 to CL4 and later select CL5    2. User cannot delete already selected CLs 3. User can add and edit business units (delete operation – to be specified) 4. User can modify user and project settings    1. User settings       1. Add Customer users       2. Add KPMG users    2. Process settings       1. Modify escalation times (predefined in v. 1)    3. Set currencies – after the initial setting, further currency changes are not taken into consideration       1. Euro   +   * + 1. Free selection from a list of currencies |
| Wireframe |  |

## 3.2. Specify commodities

|  |  |
| --- | --- |
| User story # | 2 |
| Brief description | As a user I would like to specify client commodities |
| Preconditions | * User has logged in with valid credentials |
| Navigation flow |  |
| Business Rules | 1. Only users with specific role(s) can modify the client commodities (roles to be specified, probably only admin) 2. Commodities are uploaded with an Excel file (template to be specified) 3. Commodities can be up to a 3rd level    1. Level 1 (must)    2. Level 2 & 3 (can) 4. User can specify the following data for a commodity    1. Name    2. Spend (decimal) |
| Wireframe |  |

## 3.3. Select saving levers

|  |  |
| --- | --- |
| User story # | 3 |
| Brief description | As a user I would like to specify saving levers |
| Preconditions | * User has logged in with valid credentials |
| Navigation flow |  |
| Business Rules | 1. Only users with specific role(s) can select saving levers for a project (roles to be specified, probably only admin) 2. User can select from up to 5 predefined saving levers 3. Saving lever is the pure description what is the strategy to achieve a confidence level (e.g. Outsourcing) |
| Wireframe |  |

## 3.4. Manipulate project master data

|  |  |
| --- | --- |
| User story # | 4 |
| Brief description | As a user I would like to modify project master data |
| Preconditions | * User has logged in with valid credentials |
| Navigation flow |  |
| Business Rules | 1. Only users with specific role(s) can modify project master data (roles to be specified, probably only admin) 2. User can upload an Excel document with the master data 3. User can edit/delete master data entries or set them to inactive |
| Wireframe |  |

## 3.5. Manually create initiative

|  |  |
| --- | --- |
| User story # | 5 |
| Brief description | As a user I would like to create an initiative |
| Preconditions | * User has logged in with valid credentials |
| Navigation flow |  |
| Business Rules | 1. User can select whether the initiative is qualitative or quantitative    1. Qualitative       1. Fields which are grayed out:          1. (to be specified)    2. Quantitative       1. Fields which are grayed out:          1. (to be specified) |
| Wireframe |  |

## 3.6. Create initiative via file upload (Import)

|  |  |
| --- | --- |
| User story # | 6 |
| Brief description | As a user I would like to create an initiative using Excel file upload functionality |
| Preconditions | * User has logged in with valid credentials |
| Navigation flow |  |
| Business Rules | 1. Excel file format to be specified 2. Status message when successful or in case of failure |
| Wireframe |  |

## 3.7. Define milestones

|  |  |
| --- | --- |
| User story # | 7 |
| Brief description | As a user I would like to define initiative milestones |
| Preconditions | * User has logged in with valid credentials |
| Navigation flow | 1) |
| Business Rules | 1. One initiative can have up to 5 milestones 2. A milestone consists of confidence levels – one or a combination of multiple ones 3. Confidence level fields:    1. (to be specified) 4. Fields Sav. potential & Sav. weighted are automatically calculated (calculation logic to be specified) |
| Wireframe |  |

## 3.8. Define business units

|  |  |
| --- | --- |
| User story # | 8 |
| Brief description | As a user I would like to define business units |
| Preconditions | * User has logged in with valid credentials |
| Navigation flow | 1) |
| Business Rules | 1. Fields:    1. (to be specified) 2. Business units are predefined by project setup 3. Business units are the entities (units/departments) which are affected by the savings 4. The user should have the possibility to add/modify business units after their initial specification 5. User should have the possibility to set a business unit to “inactive”. An inactive business unit is not calculated in the end sum 6. The sum of all savings % must be 100% 7. If the sum of all savings exceeds 100% - raise an error message |
| Wireframe |  |

## 3.9. Edit action plans

|  |  |
| --- | --- |
| User story # | 9 |
| Brief description | As a user I would like to edit action plans |
| Preconditions | * User has logged in with valid credentials |
| Navigation flow | 1) |
| Business Rules | 1. Fields:    1. (to be specified) 2. Operations with action plans:    1. Add    2. Edit    3. Delete    4. Populate via Excel file upload 3. The action plans are the detailed description of a saving lever – what was exactly done in order to achieve it 4. Possibility to upload multiple attachments    1. File name conventions and file size to be specified |
| Wireframe |  |

## 3.10. Initiate initiative

|  |  |
| --- | --- |
| User story # | 10 |
| Brief description | As a user I would like to initiate an initiative |
| Preconditions | * User has logged in with valid credentials |
| Navigation flow | 1) |
| Business Rules | 1. There will be a check box which when checked will initiate the initiative 2. When not checked, the user will have the option to do so from a context menu on the left-hand side tree view navigation |
| Wireframe |  |

## 3.11. Export initiative to Excel (Export)

|  |  |
| --- | --- |
| User story # | 11 |
| Brief description | As a user I would like to export an initiative in Excel format |
| Preconditions | * User has logged in with valid credentials |
| Navigation flow | 1) |
| Business Rules | 1. Excel format to be specified |
| Wireframe |  |

## 3.12. Delete initiative

|  |  |
| --- | --- |
| User story # | 12 |
| Brief description | As a user I would like to delete an initiative |
| Preconditions | * User has logged in with valid credentials |
| Navigation flow | 1) |
| Business Rules | 1. Logic to be specified |
| Wireframe |  |

## 3.13. Reports

|  |  |
| --- | --- |
| User story # | 13 |
| Brief description | As a user I would like to see the status of the project and its initiatives |
| Preconditions | * User has logged in with valid credentials |
| Navigation flow | 1) |
| Business Rules | 1. Implementation through Sql Server Reporting Services 2. UI separated in 4 windows (pods) 3. Logic and UI to be specified 4. Until more complete UI specification – use placeholders |
| Wireframe |  |

## 3.14. Export reports to Excel and PowerPoint

|  |  |
| --- | --- |
| User story # | 14 |
| Brief description | As a user I would like to export the reports to Excel and PowerPoint |
| Preconditions | * User has logged in with valid credentials |
| Navigation flow | 1) |
| Business Rules | 1. Logic to be specified |
| Wireframe |  |

## 3.15. Data extraction from KAP

|  |  |
| --- | --- |
| User story # | 15 |
| Brief description | TRACE must have the ability to connect to the KAP platform in order to extract specific master data |
| Preconditions | * User has logged in with valid credentials |
| Navigation flow | 1) |
| Business Rules | 1. Data will be extracted using services 2. Data to be extracted from KAP:  |  | | --- | | Charge Code | | Year | | Project Name | | Engagement Manager | | Engagement Partner | | Project Start | | Project End | | Project Savings Target | | Organisation Maturity | | Customer Name | | Customer Short Name | | Street | | ZIP | | City | | Country | | Project Members (KPMG & Client) |  1. User data from KAP:    1. Last name    2. First name    3. Email (User-Id)    4. Organization (Business unit)    5. Role    6. Password    7. Language |
| Wireframe |  |

## 3.16. User roles management

|  |  |
| --- | --- |
| User story # | 16 |
| Brief description | 5 main user types have different permissions to access certain functionality in TRACE and execute specific actions |
| Preconditions | * User has logged in with valid credentials |
| Navigation flow | 1) |
| Business Rules | 1. There are 5 main roles    1. Project manager (client side)       1. Approve initiatives       2. Approves delays in the initiatives planning    2. Project member (client side)       1. Add/modify critical parameters in the initiative planning – action plan and milestone deadlines       2. Create initiatives/milestones    3. Project manager (KPMG side)       1. Add project, commodities and users in TRACE       2. Approves delayed initiatives       3. Approves critical changes    4. Project member (KPMG side)       1. Create initiatives in TRACE – title, description, team       2. Verify and add milestones and action plans       3. Initiate initiative after its approval by the client    5. KPMG Quartermaster       1. Has access to all projects and their administrative part |
| Wireframe |  |

## 3.17. Export to PowerPoint templates

|  |  |
| --- | --- |
| User story # | 17 |
| Brief description | To be specified |
| Preconditions | * User has logged in with valid credentials |
| Navigation flow | 1) |
| Business Rules | 1. Logic to be specified |
| Wireframe |  |

## 3.18. Entities changes tracking

|  |  |
| --- | --- |
| User story # | 18 |
| Brief description | As a user I would like to see what were the changes to a specific entity (initiative, confidence level etc) |
| Preconditions | * User has logged in with valid credentials |
| Navigation flow | 1) |
| Business Rules | 1. All changes (updates) have to be stored as revisions, i.e. the following information has to be available:    1. Entity (initiative, confidence level etc)    2. Old value    3. New value    4. Changed by    5. Change date and time |
| Wireframe | 1. Which fields should be visible is to be specified |

## 3.19. Approval process

|  |  |
| --- | --- |
| User story # | 19 |
| Brief description | For each project a process specified which is regulated by the initiatives |
| Preconditions | * User has logged in with valid credentials |
| Navigation flow | 1) |
| Business Rules | Process logic is to be specified. When specified, the process steps would be separated into user stories |
| Wireframe |  |

## 3.20. Change customer logo

|  |  |
| --- | --- |
| User story # | 20 |
| Brief description | As a user I would like to change the visible logo based on the project customer |
| Preconditions | * User has logged in with valid credentials |
| Navigation flow | 1) |
| Business Rules | The workflow should be the same as in KAP |
| Wireframe |  |

## 3.21. UI and master data localization

|  |  |
| --- | --- |
| User story # | 21 |
| Brief description | As a user I would like to change the language the user interface and master data are displayed in |
| Preconditions | * User has access to the system |
| Navigation flow | 1) |
| Business Rules | 1. Initially support English and German 2. Make possible to select the preferred language 3. Use of resource files |
| Wireframe |  |

## 3.22. Notifications

|  |  |
| --- | --- |
| User story # | 22 |
| Brief description | The application must be able to send email notifications based on certain events or user interactions |
| Preconditions | * User has logged in with valid credentials |
| Navigation flow | 1) |
| Business Rules | 1. Events and user interactions to be specified 2. Email format to be specified |
| Wireframe |  |

## 3.23. Save changes alerts

|  |  |
| --- | --- |
| User story # | 23 |
| Brief description | The application must be able to detect changes in the data and if the user moves to a different screen without saving, the system must pop-up an alert asking whether they want to save the changes |
| Preconditions | * User has logged in with valid credentials |
| Navigation flow | 1) |
| Business Rules | 1. This functionality is present in the entire TRACE application |
| Wireframe |  |

## 3.24. Initiatives list

|  |  |
| --- | --- |
| User story # | 24 |
| Brief description | As a user I would like to see a list of initiatives with their current status |
| Preconditions | * User has logged in with valid credentials |
| Navigation flow | 1) |
| Business Rules | 1. Initiatives must be sorted after their priority |
| Wireframe |  |

## 3.25. ToDos list

|  |  |
| --- | --- |
| User story # | 25 |
| Brief description | As a user I would like to have a list of tasks I have to complete |
| Preconditions | * User has logged in with valid credentials |
| Navigation flow | 1) |
| Business Rules | 1. Tasks have priority 2. User should be able to filter the task list (filter criteria to be specified) |
| Wireframe |  |

## 3.26. Reports filtering

|  |  |
| --- | --- |
| User story # | 26 |
| Brief description | As a user I would like to specify filter criteria for the reports |
| Preconditions | * User has logged in with valid credentials |
| Navigation flow | 1) |
| Business Rules | 1. Filters apply to all 4 reports (pods) |
| Wireframe |  |

## 3.27. Find similar initiatives

|  |  |
| --- | --- |
| User story # | 27 |
| Brief description | As a user I would like to find similar initiatives (from other projects) based on a specific query |
| Preconditions | * User has logged in with valid credentials |
| Navigation flow | 1) |
| Business Rules | 1. Query is to be specified 2. Query should be defined from the administrator UI 3. Result initiatives must not contain confidential information – result view is to be specified (i.e. which fields should not be shown) |
| Wireframe |  |

## 3.28. Change initiative status

|  |  |
| --- | --- |
| User story # | 28 |
| Brief description | As a user I would like to change the status of an initiative |
| Preconditions | * User has logged in with valid credentials |
| Navigation flow | 1) |
| Business Rules | 1. Both automatic and manual status change 2. Possible statuses – green, yellow and red    1. Time status    2. Savings status 3. Delays in action plans affect the initiative status (Time) |
| Wireframe |  |

## 3.29. Upload of action plan templates

|  |  |
| --- | --- |
| User story # | 29 |
| Brief description | As a user I would like to be able to upload action plan templates |
| Preconditions | * User has logged in with valid credentials |
| Navigation flow | 1) |
| Business Rules | 1. Action plan Excel template to be specified |
| Wireframe |  |

## 3.30. Set inactive users

|  |  |
| --- | --- |
| User story # | 30 |
| Brief description | As a user I would like to be able to set other users as inactive |
| Preconditions | * User has logged in with valid credentials |
| Navigation flow | 1) |
| Business Rules | 1. Only Quartermaster would be able to execute this operation (to be verified) 2. Setting a user to inactive must be tracked and saved by the system (see user story # 3.18) |
| Wireframe |  |

## 3.31. Add document link to initiative

|  |  |
| --- | --- |
| User story # | 31 |
| Brief description | As a user I would like to be able to add document link to every initiative. |
| Preconditions | * User has logged in with valid credentials |
| Navigation flow | 1) |
| Business Rules | 1. A document link is mandatory for every initiative and it must be provided before an initiative is closed 2. The link would point to a document in the KPMG KAP platform 3. Document link will be visible only for KPMG employees. |
| Wireframe |  |

## 3.32. Upload document(s) for initiative

|  |  |
| --- | --- |
| User story # | 32 |
| Brief description | As a user I would like to be able to upload one or multiple documents for an initiative |
| Preconditions | * User has logged in with valid credentials |
| Navigation flow | 1) |
| Business Rules | 1. Uploaded documents will be available in an external project library |
| Wireframe |  |