

# **CSCC01 Product Backlog**

Team Name: Ctrl-Alt-Elite

Team Number: 11

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# Table of Contents

Personas	3
User Stories (Version 0)	5
User Stories (Version 1)	6
User Stories (Version 2 - Final)	7
Changes	8

# Personas

## Settlement Officer - John Smith

- John Smith is a 35-year old man working for the Agincourt Community Services for 5 years, who was recently promoted to Settlement Officer. He has a family of two kids and loves spending time with his wife and children. However, due to work pressure, he cannot spend enough time with his family.
- He validates the form before sending it to TEQ and spends long periods of time making sure there are no errors or spelling mistakes.
- John is responsible for fixing any mistakes TEQ might find and send it back to them. He gets frustrated about taking long periods of time looking and fixing small errors for numerous templates.
- As a Settlement Officer, it is his responsibility to make sure that all the new immigrants and refugees get the services they need. However, it is difficult to spot the areas that need improvement and which services are helping the most.
- John does not want the reports sent out to other agencies to contain information that can be traced back to his agency or clients.

## TEQ Representative - Martha Stewart

- Martha Stewart is a 42 year-old woman who represents TEQ board when meeting agencies.
- Every year, she receives the reports produced by iCare with a summary of the information they gather from different agencies across Canada even though TEQ is focused only on a certain region of Ontario.
- She is tech-savvy but not good doing queries to the database, she feels more comfortable filtering and sorting in excel.
- TEQ, similar to other agencies, collects their client's information. Martha is responsible of recording it and filling up the iCare templates with the proper details.
- She has to submit client information physically in this modern age of computers that is taking a lot of her time amongst other responsibilities as a TEQ representative.
- Martha is looking forward to new technology to automate some of her work.

#### TEQ Data Analyst - Matt Damon

- Matt Damon is a 24 year-old data analyst who is a recently Statistics and City Studies graduate.
- During his studies, he had the opportunity to combine both of his majors and do research about immigration services in the region.
- Matt uses all the custom charts and reports to try to understand the areas of improvement and where government funding is needed the most.
- Despite of being skilled at SQL, managing the data on hard copies and customizing reports on a monthly basis takes large amount of effort, even though most of the reports are exactly the same for every term.
- Matt is allowed to take his laptop home, however, he is not allowed to take the documents and reports from the office.

## User Stories (Version 0)

1. As Matt, a TEQ data analyst, I want to be able to add new templates to the system based on any updates on templates from iCare.
2. As John, a settlement officer, I would like to upload templates to the system.
3. As John, a settlement officer, I would like to upload user data in Microsoft Excel or CSV files.
4. As Martha, a TEQ representative, I need to be able to create accounts for agencies and my coworkers.
5. As Martha, a TEQ representative, I need to submit my agency's templates as a regular settlement officer.
6. As Martha, a TEQ representative, I need to be able to view the data sent by the agencies for inaccuracies or invalid entries.
7. As Martha, a TEQ representative, I need to generate custom reports with the data.
8. As Matt, a TEQ data analyst, I need to run SQL queries to generate reports on the data.
9. As John, a settlement officer, I would like the application to automatically fix formatting errors for my templates such as missing spaces in cells.
10. As Martha, a TEQ representative, I would like the application to point out errors in the data that it cannot resolve.
11. As Martha, a TEQ representative, I would like to filter and sort the reports already I make.
12. As Matt, a TEQ data analyst, I also need to get some standard reports such as summaries and trend reports without doing any filtering or SQL queries.

## User Stories (Version 1)

1. As Matt, a TEQ data analyst, I want to be able to add new templates to the system based on any updates on templates from iCare using SQL queries, in order to have a place to store them on the database.
2. As John, a settlement officer, I would like to upload user data in templates to the system in Excel format, in order to share my agency and client's data with TEQ.
3. As John, a settlement officer, I would like to upload user data in CSV files, as a second option.
4. As Martha, a TEQ representative, I need to be able to create accounts with the correspondent permissions for agencies and my coworkers. Other agencies can only upload user data in templates, while my coworkers can have access to view the entire database, and my more skilled coworkers can directly modify the database.
5. As Martha, a TEQ representative, I need to be able to view the data sent by the agencies for inaccuracies or invalid entries in order to avoid imprecise or faulty reports.
6. As Martha, a TEQ representative, I need to generate custom reports with the data, in order to display users' trends and compare it between different services.
7. As Matt, a TEQ data analyst, I need to run SQL queries to generate reports on the data.
8. As John, a settlement officer, I would like the application to automatically fix formatting errors for my templates such as missing spaces in cells, in order to reduce tedious manual work.
9. As Martha, a TEQ representative, I would like the application to point out errors in the user data that it cannot resolve automatically, such as missing fields, incorrect formatting, wrong type.
10. As Martha, a TEQ representative, I would like to filter and sort the reports already created, based on different fields such as creation date, contents of report, type of report, and more.
11. As Matt, a TEQ data analyst, I also need to get some standard reports such as summaries and trend reports without doing any filtering or SQL queries.
12. As Martha, a TEQ representative, I would like to add new templates to the system by using the user interface.

## User Stories (Version 2 - Final)

1. As Matt, a TEQ data analyst, I want to be able to add new templates to the system based on any updates on templates from iCare using SQL queries, in order to have a place to store them on the database.
2. As John, a settlement officer, I would like to upload user data in templates to the system in Excel format, in order to share my agency and client's data with TEQ.
3. As John, a settlement officer, I would like to upload user data in CSV files, as a second option.
4. As Martha, a TEQ representative, I need to be able to create accounts and set up passwords.
5. As Martha, a TEQ representative, I need to be able to view the data sent by the agencies for inaccuracies or invalid entries in order to avoid imprecise or faulty reports.
6. As Martha, a TEQ representative, I need to generate custom reports with the data, in order to display users' trends and compare it between different services.
7. As Matt, a TEQ data analyst, I need to run SQL queries to generate reports on the data.
8. As Martha, a TEQ representative, I need to be able to set accounts with the correspondent permissions for agencies and my coworkers. Other agencies can only upload user data in templates, while my coworkers can have access to view the entire database, and my more skilled coworkers can directly modify the database.
9. As John, a settlement officer, I would like the application to automatically fix formatting errors for my templates such as missing spaces in cells, in order to reduce tedious manual work.
10. As Martha, a TEQ representative, I would like the application to point out errors in the user data that it cannot resolve automatically, such as duplicate entries.
11. As Matt, a TEQ data analyst, I also need to get some standard reports such as summaries and trend reports without doing any filtering or SQL queries.
12. As Martha, a TEQ representative, I would like to add new templates to the system by using the user interface.

# Changes

- From Version 0 to Version 1:

- Our team decided to make changes to the user stories to add more details about each requirement and to clarify what each story entails in terms of functionality.
  - For User Story #1 (Current version 1), we included how Matt would like to add the new templates so it would differentiate from another user story.
  - For User Story #2 (Current version 1), we clarified the meaning of templates and the format of the file that will be uploaded.
  - For User Story #3 (Current version 1), we updated the file type.
  - For User Story #4 (Current version 1), we specified the type of permissions and accounts that need to be created to differentiate between agencies and TEQ accounts.
  - For User Story #5 (Current version 1), we clarified why TEQ needs to have access to the data.
  - For User Story #6 (Current version 1), which entails one of the most important capabilities of the application, we specified the need of creating custom reports and how they will be used.
  - For User Story #8 (Current version 1), we included the need of the functionality, which is to avoid manual work.
  - For User Story #9 (Current version 1), we listed more examples of what we want the functionality to do.
  - For User Story #10 (Current version 1), we specified the filtering feature for the reports, giving examples of how the reports need to be filtered.
- User Story #5 (Version 1) was removed because it was redundant and repetitive, as the requirement can be accomplished with two different stories functionalities.
- Some of the user stories were reprioritized based on the necessary requirements and the optional nice-to-haves requirements.
- One last user story was added, User Story #12 (Current version 1), to cover a requirement using a different functionality.

- From Version 1 to Version 2 (Final):

- Our team decided to make changes to the user stories to add more details about each requirement and to clarify what each story entails in terms of functionality.
  - For User Story #4 (Version 2), we specified only the features that were implemented.
  - For User Story #8 (Version 2), we created a continuation of U4 for key functionalities that were not implemented fully.
- User Story #11 (Version 1) was removed because it is not necessary.