**Requirements Gathering**

## **Personas, User Stories and Features**

See versions of this document [on the team’s GitLab page.](https://stgit.dcs.gla.ac.uk/tp3-2020-SE03/se03-main/-/wikis/Requirements-Gathering)

## **HR Rep - User Story - Patricia**

### Goals:

* To improve the workplace atmosphere and work output by giving the employees an aim.
* Giving employees a concrete set of goals to accomplish and improve their skill set will help them stay motivated and focused at work.
* Provide employees with a framework of skills they need to improve to climb the hierarchical ladder at their place of work, or to be retrained at a different job

### Frustrations:

* No single resource available to manage all of the above goals
* It needs to be extremely quick, small, efficient so as not to take too much time out of employees work day

### User Story:

* As a user, I want to be able to navigate the system quickly **so that providing general action plans for my many employees isn't too cumbersome of a task.**
* **As a team manager, I want to be able to input general, non-personal, yet role-related data about my employees to produce an actionable plan for them, to improve their skill set and hence let them become a better worker.**
* **I want to be able to share these generated plans with my employees using e-mail or other instant messaging services**
  + **Once shared, a nice-to-have functionality would be to allow the employee to then create an account around that action plan. Integrating it and allowing the employee to have the choice to fill in their personal details and view a dashboard tracking their progress.**
* **??? I want my employees to be able to share their personal plans with me via email if they so desire. Whether that be to give me access to view their dashboard separately through a link they send me, or integrate their dashboard into my account as another viewable page.**
  + **Could we not have an integration with the actual HR account? So that if an employee chooses, they can allow to share plan natively (in the platform, no links).**
  + **HR reps would have a constant vision of all plans shared to them (inside the platform)**
* I want to be able to change my account details so that I stay keep consistent contact information
* I want to be able to change my own account password. I have set myself some security standards and change my password frequently to help prevent unauthorised access to personal data.
* I want the service to request minimal personal data from my employees to maintain their anonymity and hence minimise any reluctance to start using such a service.
* I want to be able to export individual employee plans into readable formats so that they can be handed out to the employees in a physical format if they won't be able to access the website.

### Features to implement:

* To be able to change their own account password
* To be able to export individual plans in various formats such as PDF/JPEG/HTML
* **To be able to fill in a non-personalised form to produce a role-specific action plan. (As opposed to a person specific action plan)**
* **To be able to easily share generated, de-personalised action plans with employees via email.**
  + **To be able to receive action plans from other users and view them.**
* **To be able to create an account using a de-personalised plan as a foundation. Meaning that, if a user wants to, they can input minimal personal information to produce a more tailored action plan. This can be to facilitate one of two scenarios:** 
  + **1) An employee wants to keep their de-personalised plan in a digital format on the Vilo Sky website under their own account.**
  + **2) An employee wants to make the action plan more tailored to them, and wants to fill in personal information to update the plan. Later to then have access to a digital copy of their action plan.**

### Tasks:

* **Changing a user’s details**
  + Have a user settings page which allows to
    - Input further account details (optional in registration process)
    - Change any account details (including password below)
* **Changing a user’s password:**
  + This means a form prompting the user for their previous password, new password and a confirmation of the new password.
  + Include a small pop up confirming the change
  + Possibly notify the user via email that their account password was changed
* **To be able to export individual plans in various formats such as PDF/JPEG/HTML (Agree with Customer on which is higher priority)**
  + ??? Figure out a way to export to PDF (research - highest priority format)
  + Make the (HTML) document interactive (See feature part of individual user below)
* **To be able to fill in a non-personalised form to produce a role-specific action plan (As opposed to a person-specific action plan)**
  + The user can fill in (~~2 types of forms)~~ only one and the same form. A generic one which doesn’t ask for any personal details. The (~~other, which is for themselves~~ form) has the option to add in their personal details and hence generate a more tailored (personalized) action plan.
  + De-personalized action plans should not be saved on the HR Reps account. Should be discarded once the page is closed. (Talk through again!!!)
    - Explain why
* **To be able to easily share generated, de-personalised action plans with employees via email.**
  + The HR Rep should be able to generate a shareable link and send it to employees so they can view it. The employee can then save that plan for themselves by:
    - Exporting it. I.e. creating a physical copy
    - Creating an account based on that plan. Enabling them to save the plan on the website and amend any details they want.
      * This means having a section on the account creation page which would query the user for a link to an already generated action plan. That would link the plan to the account.
* **To be able to receive action plans from other users and view them.**
  + Employees may want to send their plans to HR. That is, to add a shareable link to each action plan.
  + Alternatively, employees’ action plans may be visible in the HR rep’s dash.
* **To be able to create an account using a de-personalised plan as a foundation.**
  + Meaning that, if a user wants to, they can input the minimal necessary personal information to produce a more tailored action plan. This can be to facilitate one of two scenarios:
  + 1) An employee wants to keep their de-personalised plan in a digital format on the Vilo Sky website under their own account - create de-personalised form.
  + 2) An employee wants to make the action plan more tailored to them, and wants to fill in personal information to update the plan. Later to then have access to a digital copy of their action plan.

## **Donna - Individual User**

Has just finished a degree in Business and Economics. Hence, she decided to take a break from university and travel for a year! 3 months ago and she has just returned from travelling, she now wants to open a small hotel in the UK. Donna has no management experience at all but understands how a business is run financially. She also has never worked in a hotel, and no knowledge of marketing.

### Goals:

* Establish hotel identity
* Secure funding
* Use her knowledge of business to do this
* Obtain permits/licenses
* Market hotel - come up with marketing plan

### Frustrations:

* Donna doesn't know much about running hotels or hotel management.
* Where to look for funding and how to approach investors?
* Doesn’t have any work experience in hotel bureaucracy.
* Doesn’t know how to market the hotel.

### User Stories

* As an individual user, I want to..
* Save my progress and continue later on, so that I can include it in my busy schedule.
* Save the output advice, sites, pointers, so that I can refer back to it at any point. (no matter if registered or not)
* View the results in a format that’s easy to read so I can understand exactly what I have to do to achieve my goals
* Find out how I can improve myself based on my existing skills and knowledge in order to meet my career goals.
* Make additional submissions without entering over all the data, so that it is easy to get new outputs.
* Track action plan progress interactively inside the Vilo Sky dashboard page
* As a graduate, I want to find out what training I can get, so that I can come up with a marketing plan myself.
* As a graduate, I want to find out what training I can get, so that I can hire people that would manage parts of the business I cannot (HR).
* Input my past work experience, educational attainment, and other necessary inputs easily and reasonably time efficient

### Features to Implement

* Have user receive some sort of report from their results (account holder or not)
* If account holder: save progress
* If account holder: view progress
* If account holder: make additional submissions i.e. update skills/experience (check with louise)
* ??? If account holder: be able to track action plan progress interactively in my ViloSky dashboard.
* ??? If an account holder: be able to see past submissions (inputs/outputs) in a structured way.
* Update progress report when additional submissions made
* If account holder: Convey results of pathway as a dashboard with categories (soft skills, experience, training, reading/knowledge) to make it easy to understand.
* Users must give consent to data collection (for Vilo sky Admin).
* Make submission using inputs

### Tasks

* Create a user consent form (see generators online)
* Create a generic report (output) component in a web client which would display results from the backend. (Account Holders only - View Report Page)
  + Be able to see the input resulting in such output (maybe a different page?)
  + Converter (convert report to pdf and make it downloadable)
* Create submission form (how would it be different for registered users?)
  + Trigger email if the user is unregistered. Submit to backend if user is registered.
  + Account Holders: Save/View progress (research Django for such functionality)
  + Account Holders: See and pre populate form with past submissions
  + Create list of inputs that are needed, and the options for each of these
* Create a contact us form
* Create log-in, log out functions
* Create a dashboard
  + to hold (and track?) multiple reports from the same account
  + Be able to see a short extract of the report on dash
  + Interactive action plan (Account Holders only - View Action Plan Page)
    - Checkboxes for main events
    - Add your own smaller subtasks
    - Be able to cross out (complete) tasks
    - Add notes on each larger event

-Allow users to create a new output, but some inputs auto filled as to not waste time

Priorities

|  |  |
| --- | --- |
| Must have | * Create a user consent form * Create a generic report (output) component in a web client which would display results from the backend.   + Be able to see the input resulting in such output (maybe a different page?) * Create submission form * Contact us form |
| Should have | * Create/Register account functionality   + log in, log out * Converter (convert to secondary file type - PDF, HTML?) * Create a dashboard   + to hold (and track?) multiple reports from the same account * Interactive action plan (Account Holders only - View Action Plan Page)   + Checkboxes for main events   + Be able to cross out (complete) tasks * Allow users to create a new output, but some inputs auto filled as to not waste time * Notify users by email with an output |
| Could have | * Interactive action plan (Account Holders only - View Action Plan Page)   + Add your own smaller subtasks   + Add notes on each larger event |
| Would be nice to have | * Be able to see a short extract of the report on dash |

1. User Consent Form
2. Create submission form
3. Create output report template
4. Create example report(process of input to output)
5. Create account functionality - log in, log out
6. Create a dashboard

## **Louise - Vilosky Director/Employee**

Director at Vilo sky. They work at the company and will control the website once project is implemented

### Goals

* Help users attain their career and personal development goals by providing an online tool which delivers Louise’ expertise in an easy to access format.
  + Have a website feature where users can input their current job, skills and aspirations, and will be presented with possible job pathways and how to get there
* Give people a plan to achieve their workplace aspirations
* After plan is presented, want to help users along the process Wants to be able to amend to website data to allow for updated inputs and outputs
* Gain insight into how users interact with the website using statistics data.

### Frustrations

* Isn’t experienced in software development
* The tool needs to be efficient in its goals as the goal of the project is to expand it to a large user base. If the software is slow and a hindrance to use then users will be reluctant to use Vilo Sky online tool.

### User stories

* As a company director I need to be able to contact users directly to help add a touch of individuality to their action plan instead of generalisations based on a computer algorithm.
* As a Director I would like to be able to add more roles to the feature, so that as many roles are accounted for on the website.
* As a vilo sky admin I would like to make the inputs exactly correspond to outputs.
* Be able to view statistics data gathered by the system to gain insight into how users use the web site. And from there improve the service.
* I want to be able to amend the data that will be outputted for the user, so they get up to date resources, knowledge and advice.
* I want to be able to sort user’s input to capture keywords.
* Adding/removing features has to be easy.

### Tasks

* Implement an Interface which allows admin to **manage input and outputs**. This means, **adding**, **removing,** and **changing the details** of the presented to the user. There should be a **separate page which allows for this kind of management**. This **Management Page** will be split into inputs and outputs.
  + ??? This management system sounds a lot like SquareSpace’s functionality of dragging and dropping items like buttons/forms/text boxes/etc. How do we implement this?
    - ??? And how do we meaningfully allow the user to link said items together to facilitate the desired functionality? How do we store said links?
  + ??? What does adding new inputs and outputs mean to existing users with an action plan? Should they be notified to update their inputs? Should their action plans update automatically with the changes to the outputs? Should the admin be able to manage specific action plans as opposed to global changes?
  + **Adding Inputs.** Under each input item/category there should be an Add Button which the admin can press, showing a menu of inputs that can be added for e.g. a drop down menu/simple text box input/a radio button...
    - Once the appropriate detail is filled, the user can press the Save Button
    - Once saved, the backend will receive the addition and append it to the appropriate structure.
    - From there the website will have to update and appropriately display the change.
    - **Does this mean that existing users will be prompted to go back and add this piece of information?**
    - **How will this be implemented?** Does the backend store information about each input item and now the front end has to recreate the web page and in what order? The question becomes: if the inputs and outputs are modular, how does the system store how the inputs and outputs are displayed?
  + **Adding Outputs.** Under each output category/item there should be an Add button that the admin can press which will present a drop down showing the different type of outputs that can be added for e.g/ another Task to the To-Do-List/A link to an article/a text paragraph.
    - The admin will have to link the output to an input. This is so that the system knows how to generate valid action plans. I.e. which input links to which output.
    - Once the appropriate detail is filled, the user can press the Save Button.
    - Once saved, the backend will receive the addition and append it to the appropriate structure
    - From there the website will have to update appropriately and display the change in users dashboards???
  + **Changing inputs and outputs.** Under each item/category there should be an Edit Item Button which displays that item’s details and allows the user to edit them.
* ??? **What statistics exactly do we need to track?**Feature that tracks how users are interacting with the system eg how far they progress, do they complete it, do they come back?, account holder or non-account holder
* Create a way to be able to contact an account holder, messaging system, email?

### Features to Implement

* To be able to manage, add, remove user accounts
* Gather statistics on how users use the website, that may include:
  + How often users open their dashboard
  + On average, how fast users complete each goal on their action plan
  + Record frequency and date of meetings with Louise/Vicky
* To be able to modify the contents of the service. I.e. user inputs and outputs.
* To be able to revise data that offer material to users

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| --- | --- |
| Must Have |  |
| Should Have |  |
| Could Have |  |
| Would be nice |  |

Overall Task Prioritisation (using MOSCOW)

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| --- | --- |
| Must Have | * Create a user consent form * Create a generic report (output) component in a web client which would display results from the backend. * Create submission form (Can be depersonalized - for HR) * Vilosky contact details - email |
| Should Have | * Account functionality - dashboard, log in/out * Interactive action plan - track progress on main tasks given in report * Ease of re-submitting input to generate new report - auto fill some fields to save users time * Store multiple reports - only tracking most recent * Bulk upload of pathways  (Populating database with inputs/outputs) * Have a user settings page which allows to   + Input further account details (optional in registration process)   + Change any account details (including password below) * Changing a user’s password:   + This means a form prompting the user for their previous password, new password and a confirmation of the new password.   + Include a small pop up confirming the change   + Possibly notify the user via email that their account password was changed * Figure out a way to export outputs to PDF * HR Reps should be able to generate a shareable link and send it to employees so they can view it. The employee can then save that plan for themselves by:   + Exporting it. I.e. creating a physical copy   + Creating an account based on that plan. Enabling them to save the plan on the website and amend any details they want. * Contact form that translates to an email. |
| Could Have | * Add notes to tasks on dashboard * Employees may want to send their plans to HR. That is, to add a shareable link to each action plan. * Alternatively, employees’ action plans may be visible in the HR rep’s dash. * De-personalized action plans should not be saved on the HR Reps account. Should be discarded once the page is closed. (Talk through again!!!)   + Explain why * To be able to export individual plans in various formats such as PDF/JPEG/HTML (Agree with Customer on which is higher priority) * ViloSky admin: Adding inputs, outputs * ViloSky admin: Changing/Deleting inputs,outputs * Collecting/Displaying statistics gathered |
| Would be nice | * Be able to see a short extract of the report on dash |