

Product Backlog

Team Java Bean (28)

CSCCo1 Project Deliverable #2

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Personas (Version 0)

Alice Apple

- Female, 35 years old
- Relatively quiet and keeps to herself, but is dedicated to completing her tasks in a punctual manner
- Analyst at Reva Agency, which provides an emphasis on language training services for newcomers
- Technologically proficient while using her smartphone to complete any work that she has not finished in the office such as emails, scheduling meetings, and creating spreadsheets
- Really comfortable with Microsoft Excel and iCare templates, as she has been working with these templates for over 3 years now
- Wishes to be able to upload single or multiple iCare spreadsheets at a time when uploading client information
- Extremely busy as she is constantly gathering new information and updates from clients, so she needs to be able to update these incremental changes in a timely manner
- Comfortable with speaking, reading, and writing both English and French
- Estimates that during peak seasons, she can get anywhere from 75-100 new clients at a time
- Currently uses text files to view her own clients' data, and is flustered by how it is not presented in a professional manner

Bob Beroy

- Male, 58 years old and is fluent in only English
- Supervisor at Proxo agency, which provides employment services for newcomers
- Easy, outgoing, and is extremely calm and patient when consulting with newcomers
- Technically challenged and incompetent, can only use technology to view and send emails, along with other simple tasks
- Main goal is to increase employee productivity and track the progress of all the information uploaded by each employee
- Wants to minimize the time between client sending new information and the application updating the info
- Wants to track all the information updated by his employees, including what was updated, when it was updated, and by which employee
- Has access to all the info uploaded by his employees, as he expects that some employees are much more careless with data entry which leads to more typos
- Currently spends a lot of time answering questions from clients regarding when they will receive assistance, and is constantly receiving pressure to expedite the process

Charlie Charles

- Male, 25 years old and is fluent in only English
- Likes to follow a routine procedure, and does not like losing or misplacing things
- Admin for the application, and is responsible for keeping the service up and running
- Neutral party who has access to all the information in the application, and is allowed to query the data to answer legitimate requests from agencies and CCS
- Responsible for performing manual merges after consulting the necessary parties involved when there are conflicts in client data changes
- Technically proficient with Excel and SQL to perform database changes, and is constantly responding to requests and concerns through his smartphone
- Creates accounts for all other users and restricts their privileges and permissions accordingly
- Frustrated with how much storage is being wasted by the storage of duplicate information
- New accounts are created once every few months and on special occasions, such as the on-boarding of a new agency

David Doe

- Male, 41 years old and is fluent in strictly English
- Project manager at CCS (the organization responsible for generating reports)
- Currently instructs his employees to manually use Excel to generate graphs based on the limited data available
- Responsible for generating summary reports, trend reports, and other funding reports 2-4 times a year based on demand and needs
- Extremely professional and emphasizes generating reports as soon as possible to ensure funding gets to the hands of those who need it immediately
- Organizes all his tasks based on priority, and is strict when it comes to employees making typos and careless mistakes
- Not familiar with technology and is limited to email and smartphone usage for videos and pictures, and currently has employees generate reports for him
- He needs technology to be as simple as clicking a single button, and having it all done without his attention

Ellie Fernandez

- Female, 41 years old
- Spanish is her primary language, and English is her second language
- Newly hired at Bogo agency, and has received minimal training
- Extremely friendly and outgoing when communicating with peers, and is always asking questions when unsure
- Inconsistently uses postal code and phone number formats, so finds herself going back multiple times to bring them to a consistent standard
- Unorganized and constantly finds herself skipping fields when entering info into spreadsheets
- Not really comfortable with technology and uses Excel with limited capabilities
- She is limited to what you teach her, but is not willing to learn new techniques and technologies on her own unless she is required to
- Currently is always frustrated because her manager always complains about her clients' data not being completed or being extremely slow at data entry

User Stories (Version 0)

1. As Charlie (an Admin), I would like to create accounts for agencies, so that they can upload their clients' data and be able to view just the data they uploaded.
2. As Charlie (an Admin), I would like to create accounts for CCS employees, so that they can generate all types of necessary reports based on aggregated data provided by the agencies.
3. As Alice (an Agency Representative), I would like to upload an iCare file of multiple formats to the system, and have the user's information stored securely so that I do not worry about losing my local copy and so that the data can be stored in a central location for production of reports in the future.
4. As Alice (an Agency Representative), I want all the data that I upload on behalf of my clients to be anonymized, as I do not want other agencies knowing and having access to confidential information about my specific clients and their needs.
5. As David (CCS organization manager), I would like to generate the summary reports for all newcomers bi-annually, so that I can use the report to improve future newcomer service.
6. As David (CCS organization manager), I would like to generate trend reports for all newcomers quarterly, so that I can see if the current distribution of funds is actually making an impact on the newcomers' lives.
7. As Alice (an Agency Representative), I want to be able to update details regarding a certain client that belongs to the agency, as clients are constantly moving around, and details such as their address and contact info are consistently changing.
8. As Alice (an Agency Representative), I want to be able to remove a certain user from the application, as they may no longer require any newcomer services or their circumstances have changed.
9. As Bob (an Agency Supervisor), I would like to generate all the changes made to a specific client based on my agencies' data, so I can monitor what changes were made and which employee made them in order to identify issues quickly if they arise.

10. As Ellie (an Agency Analyst), I would like for the application to let me know when it was unable to merge a field, so that I need to consult an admin to resolve this conflict and allow the correct info to get chosen.
11. As Alice (an Agency Representative), I want to be able to upload multiple Excel spreadsheets to the system at a time, so that I can save time when uploading information.
12. As David (CCS organization manager), I would like to be able to export my summary reports as a PDF, so that I can easily share this report with the necessary parties and ensure that the quality and the appearance of the report is the same as how I view it.
13. As Ellie (an Agency Analyst), I would like for the application to automatically merge postal codes and phone numbers if the only difference is their format, so that I don't need to worry which format the first uploaded document was in.
14. As Charlie (an Admin), I would like to be able to validate and manually merge data, when conflicts arise upon updating a client that already exists in the system, and this is performed by me to ensure that the data still remains anonymous to the agencies.
15. As Bob (an Agency Supervisor), I would like to know a timestamp and the details of which employee made the changes, so if mistakes or issues arise, the appropriate individual can be contacted.