PorkBelly Requirement Elicitation

1st September, 2021

This document outlines the requirements elicitation process for Team PorkBelly's capstone project. The software system in issue is a personalised Company Relations Management software. It compiles the preparation the team has done prior to meeting the client on August the 10th, 2021, requirement analysis through the Do Be Feel table, generation of user stories, as well as defines a series of Acceptance Criteria for these. Test cases for these stories are considered during the development phase.

Interviewing questions:

The team had prepared questions to ask the client regarding the product they would be producing. This list of questions were compiled in the document "InterviewQuestions.pdf". An extract of topics to ask may be found below:

1. What's the goal for this system, for who to do what?
2. What are the problems that the software is expected to solve?
    1. "What are you going to use it for?"
    2. "In what way do you expect the CRM to help you?"
        1. Searchable list
            1. By company name
            2. Or by any field
            3. With any boolean combination function?
        2. Tagging system (find all <sales> contacts, find all <managers>)
        3. Summary box
3. What data do you have (eg. customer information)?
    1. How many customers will it manage
        1. Unknown, unbounded
    2. Will it be used to manage groups of customers or only one at a time
    3. Will it be used to manage customers from different organizations (discretion required?)
    4. How should the customer data be imported(import method)
        1. Some tabular format
        2. Name
        3. Job
        4. Email
        5. Phone number
        6. Company name
        7. Variable fields

Key	Value
Name	ABC
Email	a@b.c
+	Add more information...

4. What functions would you like CRM to have regarding the data collected?
    1. What is the data that is expected to be automated?
        1. Campaigning features (e.g CRM in Sales department)
5. What do you normally do to extract useful information from the data you have?
6. Which platform do you want the software to be on?
    1. Does it need to run offline
        1. Progressive web application - Wikipedia
    2. Hosting location

Interview Procedures:

The client was to be invited for an interview through email and WeChat correspondence, and the interview itself was held through Zoom. Consent to have the session recorded was to be asked just prior to starting the interview. All team members were to attend the meeting, so as to introduce themselves to the client. The team representative would use the list of questions prepared to learn more about the application from the client, however other team members were encouraged to ask questions arising from the conversation.

Roles:

- Walter: Minute Taker
- Richard: Product Owner and the representative to ask questions.

The interview would begin with the representative communicating to the client the team's understanding of the knowledge of the project – that it entailed personalised CRM software. It would end with thanking the client for their time, and that the meeting minutes will be shared with them.

Interview Results:

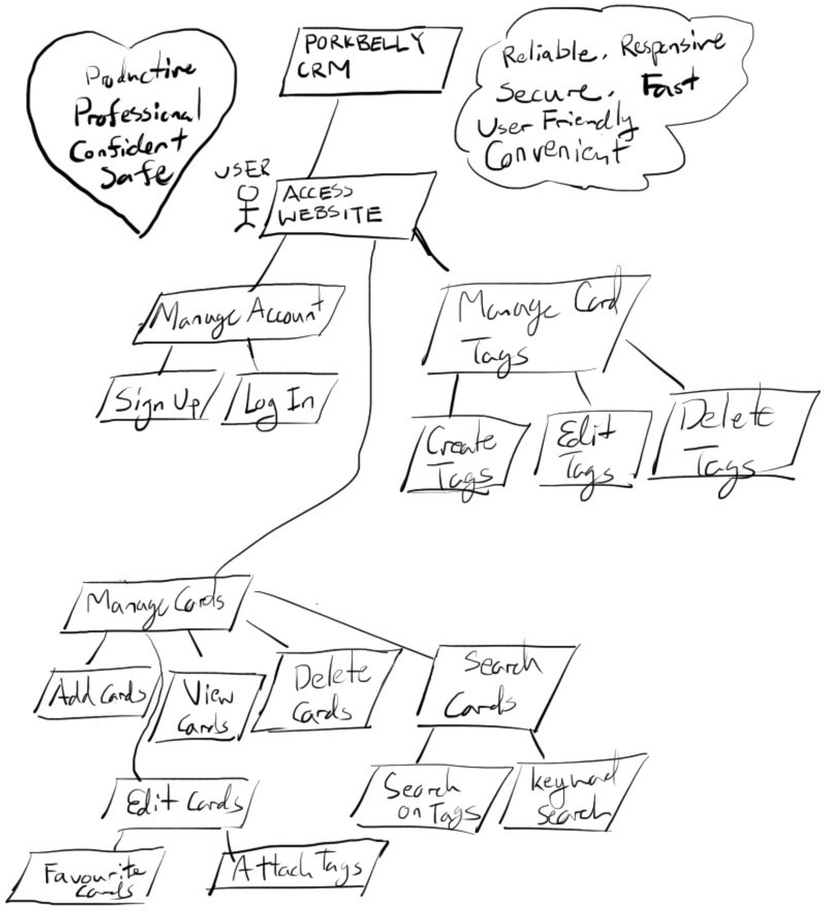
The meeting occurred at 5:29pm, 10th August, 2021. The meeting minutes were recorded and were stored under 'client_meetings' in the documentations repository. The client had described the system as a 'Business Card Management' application. They had stated that the application would be a website that would allow multiple end users to manage their own contacts. In addition, the application should be able to support card search queries through keywords and the 'Tags' attached to each card. The cards themselves should be securely stored and user authentication would be a great quality. Finally, the client had provided the team with an example layout for which the cards could be displayed.

Motivational Modelling:

A 'Do Be Feel' table was created through an analysis of the minutes. The table outlines what the system would Do, how it should Be, and how it should Feel to use it.

Do	Be	Feel
Use the personal CRM software	Reliable	Professional
Sign up to the system	Secure	Confident
Login to the system	User friendly	Safe
Manage Business cards	Standardised	Productive
Add, delete, edit Business cards	Intuitive	
Search business card	Fast	
Attach tags to the business card	Responsive	
Create, update, delete tags		
Set favourite cards, pin card		

From this a motivational model can be created.



User Stories:

Using this motivational model, user stories were created. These may be found in the 'Week6Artefacts/RequirementElicitation' directory of the documentation repository, and this document was shared with the client for confirmation. The table below covers the user stories identified:

	As a [role]	I want (to) [do]	So I can [achieve]	Priority (HIGH / MEDIUM / LOW)
1	User	Register	Do anything else	HIGH
2	User	Login	See all my business card	HIGH
3	User	Create Business card	Have more business card	HIGH
4	User	Edit a Business card	Change a business card	HIGH
5	User	Delete a business card	Clear out old contacts	HIGH
6	User	See more information about a card	To see more information about the card, such as notes	HIGH
7	User	Keyword Search	Find a business card quickly	HIGH
8	User	Add more fields for a business card	have other info on a business card	MEDIUM
9	User	Add long notes to my business card	have other info about the business card	MEDIUM
10	User	Add tags to card	To be able to filter search by tags	HIGH
11	User	Filter Search by tags	To be able to filter search by tags	HIGH
12	User	Add existing tags	For the tag to be added to some business card in the future	LOW
13	User	Delete existing tags	Remove used tags	LOW
14	User	Edit existing tags	Change the name and any other info about a tag.	LOW
15	User	Search in various fields	To search more efficiently	LOW
16	User	Favorite/pin business card(s)	Keep track of frequently used business cards	LOW

Acceptance Criteria:

Each of these user stories belonged into one of three epics: managing business cards, managing tags or user management. The following acceptance criteria would elaborate on these stories.

User Story Id	Story description	Given	When	Then
1	As a user, I want to register so I can access the platform.	I have provided my registration information.	I confirm my registration.	The system records my account.
2	As a user, I want to login to the system in order to see my business cards.	I have provided the correct credentials.	I log in.	I am provided with a view of my cards in the home page.
3	As a user, I want to create new business card record so I can store more business cards.	I have entered the new card's details.	I save the card.	The card is saved permanently and I see the new entry among my collection of cards.
4	As a user, I want to edit a business card in order to update their details.	I have altered the card's details.	I save the card.	The card is updated permanently and I see the changes reflected in its entry.
5	As a user, I want to delete a business card in order to clear out old contacts.	I have selected the card to delete.	I delete it.	The card is removed permanently and removed from my collection.

6	As a user, I want to see view detailed information about a card in order to see additional information such as custom notes..	I have my list of cards.	I select one of them to view.	The system displays the card's details with all its relevant fields, including custom notes.
7	As a user, I want to be able to search cards based on keywords in order to quickly locate a suitable card.	I have my list of cards.	I enter a search query.	The system displays qualifying cards.
8	As a user, I want to add more field(s) to a card entry so that I can save additional information on a card.	I am editing the card and have added new fields.	I commit the addition of new field(s).	The card is updated permanently with addition fields under its record. The updated card state is shown to me.
9	As a user, I want to add a long note to a particular card so that I can add miscellaneous information to it.	I am editing the card and have written my long note.	I save the contents of the note.	The card is updated and its new state is shown to me, which must contain the note I have provided.
10	As a user, I want to attach a tag(s) to a particular card to be able to filter cards based on their tags.	I am editing the card and have attached my tags to them.	I commit my selection of tags.	The card is associated with the tags and the system reflects these changes to me.
11	As a user, I want to filter cards by their tags in order to quickly search cards by the tags I have given them.	I have my list of cards.	I select which tag(s) to filter by.	The list is filtered to show only cards with the tags I selected.
12	As a user, I want to add new tags for my account so that I can attach them to business cards in the future.	I have entered the tag's details.	I save the tag.	The tag is saved permanently and I can select it to add to new cards.
13	As a user, I want to delete the tags I use so that I can clear out used tags.	I have selected the tag I would like to delete.	I confirm my selection.	The tag is permanently deleted from my account and all cards that had had it.
14	As a user, I want to edit my existing tags in order to change the name or any information about the tag.	I am editing the tag and entered its new values.	I commit my changes.	The tag is permanently changed and its changes are reflected in the system.
15	As a user, I want to be able to search in various fields in order to make my searching efficient.	I have my list of cards.	I enter one or more field keys and values.	The list is filtered to show cards with the present fields and appropriate cards.
16	As a user, I want to be able to favourite / pin cards for me to keep track of frequently accessed cards.	I have my list of cards and have made my selection to favourite.	I confirm my selection.	The card states are updated and I can see their changes.