# PM Tracker v2.0

7/2/18 2:30PM PST

### Version History

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| --- | --- | --- |
| User | Date | Comments |
| MC | 5/29/18 | Started Create an Intake, View Request, Modify Kanban, Permissions Levels, Create User, Modify Profile sections |
| MC | 5/29/18 | Added Target System to Intake Field, Prioritization, Removed ability for Super Users to modify PWs, Added create user and password reset, |
| MC | 6/12/18 | Added details about versioning and edit request. Added WYSIWYG to intake field. Added some ‘Things to add’ below. |
| MC and DP | 6/13/18 | Package # to view and edit request. Added some clarification to previous requirements. Small updates. |
| MC | 6/13/18 | Added requirements around reporting |
| MC | 7/2/18 | Added more requirements around reporting |
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## Create an Intake

### User should have the ability to create an intake

* Use Case:
  + User Selects ‘Intake Form’
  + System directs user to ‘Intake Form’ screen

### User should have the ability to cancel intake form

* Use Case:
  + User selects ‘Cancel’
  + System redirects user to home screen

### User should have the ability to navigate to another page

* User Case:
  + User selects another link
  + System redirects user to home screen

### User should have the ability to modify and submit an intake form

* User Case:
  + User completes required fields in a valid manner
    - Intake Fields
      * Request Name
        + Field Type: text field
        + Default: blank
        + Required: yes
      * Attachments
        + Flavor Text: Please provide any attachments that will assist in this request
        + Field Type: Attachment
        + Default: blank
        + Required: no
      * Target Date
        + Flavor Text: Typical LOE is Two Weeks from Request Date
        + Field Type: Calendar
        + Default: blank
        + Required: no
      * Detailed Description
        + Flavor Text: Please provide as much detail as possible. If the request includes an existing offer/promo, please specify ID.
        + Field Type: Text Box w/ WYSIWYG
        + Default: Blank
        + Required: yes
      * Target System
        + Flavor Text: Please provide as much detail as possible. If the request includes an existing offer/promo, please specify ID.
        + Field Type: Checkbox
        + Options: USC, LSCRM and OPUS
        + Default: Blank
        + Required: no
      * Business Justification
        + Flavor Text: Requests will be prioritized by this information and date of request. Include ROI/Churn and any other financial benefits.
        + Field Type: Text Box w/ WYSIWYG
        + Default: Blank
        + Required: yes
      * Requestor
        + Flavor Text: If you are request this for someone other than you, please enter their ATTUID.
        + Field Type: text field
        + Default: Logged in User’s ATTUID
        + Required: no
      * Approver and PAES Number if Applicable
        + Flavor Text: Request will not be processed if a PAES is required until approval is received.
        + Field Type: text field
        + Default: blank
        + Required: no
  + User selects Save
  + System creates request.
    - System creates version 1 of request. (See versioning)
  + System adds request to Prioritization (priority 0), Kanban (requirements status) and Home screen.
  + System sends email….

## View Request

### User should have ability to view request details

* Use Case:
  + User selects request
  + System shows request details page with the following fields:
    - Request Name
    - Status
    - Attachment
    - Target Date
    - Package #
    - Detailed Description
    - Target System
    - Business Justification
    - Requestor
    - Approver & PAES
    - Offer Configurator
    - Offer Configurator Estimate
    - QA
    - QA Estimate
    - Comments

### User should have ability to view previous versions of the request details

* Use Case:
  + User selects request
  + System shows request details page
  + User selects ‘View Previous Versions’
  + System shows a log of versions sorted by newest to oldest
    - Need to build out what this looks like
  + User selects version
  + System shows the request with that versions’ fields

### PM User should have ability to modify request details

* Use Case:
  + PM User selects request
  + System shows request details page and ‘Edit’ button
  + PM User selects ‘Edit’
  + System shows the following fields available for edit:
    - Request Name
    - Status
    - Attachment
      * Add Only
    - Target Date
    - Package #
    - Detailed Description
    - Target System
    - Business Justification
    - Requestor
    - Approver & PAES
    - Offer Configurator
    - Offer Configurator Estimate
    - QA
    - QA Estimate
    - Comments
  + PM User modifies field and saves.
  + System stores data.
    - For versioning, please see Versioning section.
  + System shows view request page with latest data.

### QA User should have ability to modify request details

* Use Case:
  + QA User selects request
  + System shows request details page and ‘Edit’ button
  + QA User selects ‘Edit’
  + System shows the following fields available for edit:
    - Status
    - Attachment
      * Add Only
    - QA
    - QA Estimate
    - Comments
  + System shows the following fields NOT available for edit:
    - Request Name
    - Attachment
    - Target Date
    - Package #
    - Detailed Description
    - Target System
    - Business Justification
    - Requestor
    - Approver & PAES
    - Offer Configurator
    - Offer Configurator Estimate
  + QA User modifies field and saves.
  + System stores data.
    - For versioning, please see Versioning section.
  + System shows view request page with latest data.

### Offer Configurator User should have ability to modify request details

* Use Case:
  + Offer Configurator User selects request
  + System shows request details page and ‘Edit’ button
  + Offer Configurator selects ‘Edit’
  + System shows the following fields available for edit:
    - Status
    - Attachment
      * Add Only
    - Offer Configurator
    - Offer Configurator Estimate
    - Comments
    - Package #
  + System shows the following fields NOT available for edit:
    - Request Name
    - Attachment
    - Target Date
    - Detailed Description
    - Target System
    - Business Justification
    - Requestor
    - Approver & PAES
    - QA
    - QA Estimate
  + Offer Configurator User modifies field and saves.
  + System stores data.
    - For versioning, please see Versioning section.
  + System shows view request page with latest data.

### User should have ability to add comment on request details

* Use Case:
  + User selects request
  + System shows request details page
  + User adds comment in Comment text box and selects Save
  + System saves comment with time/date and user stamp
  + System redirects user to View Request page with comment

## Modify Kanban

### User should have ability to view Kanban

* Use Case:
  + User selects ‘Project Dashboard’
  + System shows request Project Dashboard page
* Use Case 2:
  + User clicks and holds on request and drags it left or right to a different status and releases mouse
  + System prompts message “Sorry, you do have permission to change the request status.”

### QA should have ability to modify request status in Kanban

* Use Case 1:
  + QA User clicks and holds on request in QA status and drags it left or right to ‘Development’ or ‘In Approval’ status and releases mouse
  + System shows changes status of request in kanban and request details
* Use Case 2:
  + QA User clicks and holds on request and drags it left or right to ‘Requirements’, ‘Ready for Development’ or ‘QA’ status and releases mouse
  + System prompts message “Sorry, you do have permission to change the request status.”

### Offer Configurator should have ability to modify request status in Kanban

* Use Case 1:
  + Offer Configurator User clicks and holds on request in ‘Ready for Development’ or ‘Development’ status and drags it left or right to ‘Ready for Development’,. ‘Development’ or ‘QA’ status and releases mouse
  + System shows changes status of request in kanban and request details
* Use Case 2:
  + Offer Configurator User clicks and holds on request and drags it left or right to ‘Requirements’ or ‘In Approval’ status and releases mouse
  + System prompts message “Sorry, you do have permission to change the request status.”

### PM should have ability to modify request status in Kanban

* Use Case:
  + PM User clicks and holds on request in a status and releases mouse with the request in a different status (NOTE: PM can change all statuses).
  + System shows changes status of request in kanban and request details

### Super User should have ability to modify request status in Kanban

* Use Case:
  + Super User clicks and holds on request in a status and releases mouse with the request in a different status (NOTE: PM can change all statuses)
  + System shows changes status of request in kanban and request details

## Permissions Levels

* Standard User
  + Default User Type
  + Can create intake
  + Can view all pages
  + Can view all versions of a request
  + Can add comments to requests
  + Can add attachments to request
* QA
  + Can create intake
  + Can view all pages
  + Can view all versions of a request
  + Can add comments to requests
  + Can add attachments to request
  + Can change request status from ‘QA’ to ‘Development’ or to ‘In Approval’
  + Can modify QA Estimate field
  + Can modify QA field
* Offer Configurator
  + Can create intake
  + Can view all pages
  + Can view all versions of a request
  + Can add comments to requests
  + Can add attachments to request
  + Can change request status from ‘Ready to Development’ to ‘Development’ or to ‘Requirements’
  + Can change request status from ‘Development’ to ‘Ready for Development’ or to ‘QA’
  + Can modify Offer Configurator Estimate field
  + Can modify Offer Configurator field
* PM
  + Can create intake
  + Can view all pages
  + Can view all versions of a request
  + Can add comments to requests
  + Can modify all fields of a request
  + Can change request status to and from all
* Super User
  + Can create intake
  + Can view all pages
  + Can add comments to requests
  + Can modify all fields of a request
  + Can change request status to and from all
  + Can create users

## Create User

### Super User should have the ability to create a user

* Use Case:
  + Super User Selects Profile 🡪 Create User
  + System directs user to ‘Create User’ screen

### Super User should have the ability to create a user and submit form

* Intake Fields
  + User Name
    - Field Type: text field
    - Default: blank
    - Required: yes
  + User Email
    - Field Type: text field
    - Default: blank
    - Required: yes
  + User Type
    - Field Type: Dropdown
    - Default: Standard User
    - Field Options: Standard User, Offer Configurator, QA, PM
    - Required: yes

### Super User should have the ability to delete user

* Use Case:
  + Super User Selects Profile 🡪 View Users
  + System shows list of users
  + Super User selects user
  + System shows user details
  + Super User selects ‘Delete User’
  + System displays Continue/Cancel Prompt: “Are you sure?”
  + User selects Continue
  + System removes User from selectable users.
  + System removes User’s ability to login

User should have the ability to reset their own password

* Use Case:
  + User selects ‘Reset Password’ from the login screen
  + System shows password reset page
  + User enters in email address and selects ‘Continue’
  + System shows email sent page
  + System sends email with link to password reset
  + User selects link from email
  + System shows password reset page 2
  + User enters in new password and hits ‘Save’
  + System updates the password

## Modify Profile

### Super User should have the ability to modify a user’s User Type

* Use Case:
  + Super User Selects Profile 🡪 View Users
  + System shows list of users
  + Super User selects user
  + System shows user details
  + Super user modifies User Type and hits Save
  + System updates user type.

## Prioritize Requests

### User should have the ability to view request prioritization

* Use Case:
  + User Selects ‘Prioritize’
  + System shows requests in priority order

### Project Manager should have the ability to modify priority

* Use Case:
  + PM User clicks and holds on request and drags it up or down to a different priority and releases mouse
  + System will shift rankings of other requests to accommodate. Examples:
    - Request is ranked #3 out of 5 total requests. Request is dragged to top and released. Request becomes #1. Ranks 1 and 2 become 2 and 3. Request 4 and 5 stay the same.
    - Request is Ranked #1 out of 5 requests. Request is dragged to the last position. Position 2 becomes 1, position 3 becomes 2, etc.
    - By default, new requests are ranked last.

## Header

* Create Intake
  + Ability for all users to create a new intake
* Kanban
  + Ability for all users to view requests in Kanban status form
  + Ability to change request status (permissions needed)
* Prioritization
  + Ability for PMs to change priority of requests
* Reports
  + Ability of all users to pull reports
* Search
  + Ability to search for requests via request # or summary fields
* Profile
  + Ability for a Super User to delete profiles
  + Ability for a Super User to change User Type of users
* Logout
  + Ability for all users to logout of system

## Versioning

* When an intake is created, the system will log the request as Version 1 (see Create an Intake)
* Any modification to certain fields (see below for fields) will change the version to the next version 1 🡪 2, 2 🡪 3, etc.
  + Versions will be date/time stored
* When the following fields are updated the version will be modified
  + Detailed Description
  + Target Date
  + Target System
* When the following fields are updated the version will NOT be modified
  + Request Name
  + Attachments
  + Comments
  + Business Justification
  + QA Owner
  + Offer Configurator Owner
  + QA Estimate
  + Offer Configurator Estimate
  + Requestor
  + Approver & PAES
  + Package #
  + Status
* System will store all fields but Attachments and Comments for each version
* User should be able to view any version and data associated from the View Request screen (see View Request)

## Reporting

Navigate to Reporting Tab  
Use Case:

* + User clicks on Reporting in the header
  + System displays reporting page with the following reports
    - Requests in Progress
    - Complete Requests
    - Version Report
    - Status Report

Select Requests in Progress

Use Case:

* + User clicks on ‘Requests in Progress’ report
  + System displays ‘Export to Excel’ button
  + User clicks ‘Export to Excel’
  + System exports excel file to user’s computer
    - File Contains the following columns:
      * Request Name
      * Status
      * Create Date
      * Target Date
      * Package #
      * Detailed Description
      * Target System
      * Business Justification
      * Requestor
      * Approver & PAES
      * Offer Configurator
      * Offer Configurator Estimate
      * QA
      * QA Estimate
    - Excel shows latest version of data only
    - Excel only shows requests in statuses Requirements, Ready for Development, Development, QA, Review

Select Complete Requests

Use Case:

* + User clicks on ‘Complete Requests’ report
  + System displays ‘Export to Excel’ button
  + User clicks ‘Export to Excel’
  + System exports excel file to user’s computer
    - File Contains the following columns:
      * Request Name
      * Status
      * Create Date
      * Target Date
      * Package #
      * Detailed Description
      * Target System
      * Business Justification
      * Requestor
      * Approver & PAES
      * Offer Configurator
      * Offer Configurator Estimate
      * QA
      * QA Estimate
    - Excel shows latest version of data only
    - Excel only shows requests in statuses Complete, Cancelled, Complete – Not Deployed

Select Version Report

Use Case:

* + User clicks on ‘Version Report’ report
  + System displays a From date field with calendar and a To date field with calendar ‘Export to Excel’ button
  + User inputs valid To and valid From date fields
  + User selects ‘Export to Excel’
  + System exports excel file to user’s computer
    - File Contains the following columns:
      * Request Name
      * Version
      * Status
      * Create Date
      * Target Date
      * Package #
      * Detailed Description
      * Target System
      * Business Justification
      * Requestor
      * Approver & PAES
      * Offer Configurator
      * Offer Configurator Estimate
      * QA
      * QA Estimate
    - Excel shows each version as a separate row
    - Excel only shows requests with the latest version with a target date between the To and From fields

Submit Version Report with blank From or To Date Fields

Use Case:

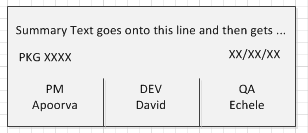
* + User clicks on ‘Version Report’ report
  + System displays a From date field with calendar and a To date field with calendar ‘Export to Excel’ button
  + User selects ‘Export to Excel’
  + System displays error “Date fields are required.”

Select Status Report

Use Case:

* + User clicks on ‘Status Report’ report
  + System displays a From date field with calendar and a To date field with calendar ‘Export to Excel’ button
  + User inputs valid From and To date fields
    - Apply same validation as Version Report
  + User selects ‘Export to Excel’
  + System exports excel file to user’s computer with the following columns:
    - Summary
    - Package
    - Requirements
      * Minutes in ‘Requirements’ status
      * Count cumulative status time
    - %
    - Ready for Development
      * Minutes in ‘Ready for Development’ status
      * Count cumulative status time
    - %
    - Development
      * Minutes in ‘Development’ status
      * Count cumulative status time
    - %
    - QA
      * Minutes in ‘QA’ status
      * Count cumulative status time
    - %
    - Review
      * Minutes in ‘Review’ status
      * Count cumulative status time
    - %
    - Do not count time ‘On Hold’, ‘Complete’, ‘Cancelled’ or ‘Complete Not Deployed’
    - Excel shows each request as a separate row
    - Excel only shows requests with the latest version with a target date between the To and From fields

Things to be added/thought about

* Email Notifications/QChat Integration
* View Request - log of versions – what will it show? How will it display? Show changes? Show everything?
* Kanban Cards, which fields will it display?
  + Name
  + Package #
  + Target Date
  + PM + QA + Offer Config Assignee
* 
* Linking requests
* Tagging Requests
* System generated package/request #