# Design

Estate Vault Student Team

# Business Requirements

- Construct a mobile-friendly website app
  - Client expects most traffic to be on computers rather than mobile devices, but does not want it to be inaccessible to mobile. Therefore, we will create a web app that will still be accessible to mobile.
- Handle Account Owner Information
  - Estate Vault will need to handle account creation and will need to allow accounts to be editable and maintained.
- Document Vault
  - Essential to the purpose of estate vault, the document vault will be the place to store all of the user's estate and other related documents, so they are collected and in one place.

# Business Requirements

- Contacts
  - Contact information will need to be recorded so user's can make sure those who need to be contacted after they pass to handle estate management and funeral care are able to be reached without lots of searching.
- Access Control
  - Client wants multi-level access implemented so that family members, attorneys, accountants and anyone else that must have access to the user's documents have access only to the documents they need.
- Checklists
  - Checklists will be offered to the user in order to make sure they are aware of what they have and have not done, and provide a guide if user's need to know what to do next.

# Business Requirements

- Notifications
  - Notifications will be used to make sure that the user has updated any information they may need to in the event that something in their life has changed, like a beneficiary.
- Assets & Liabilities
  - Assets and liabilities will connect the user to any other assets they may own, such as properties, loans, insurance, etc.
- Account Aggregation
  - The client wishes to be able to aggregate estate vault accounts into their already existing accounts so that everything can be accessed from one account.

# Use Cases

Organize Estate Documents:

- This function is the main aspect of our system. A client should be able to access their account and store their assets, whatever they may be, and allow other people to have access to these assets.

Scenario:

The client logs into their account. They are prompted with a checklist to upload a set of documents that are necessary or important for their estate. They upload a new document into the system. They remove a document that is no longer up to date. The client adds contacts that can view certain documents, such as their attorney and financial advisor. They give specific permissions to each contact to regulate access to confidential documents.

# Use Cases

View Client's Documents:

- One of the main business requirements is to allow legal professionals, such as attorneys, to view certain documents as allowed by the client.

Scenario:

The professional receives an invitation from a client to add them to their network within the vault. This gives the professional access to a number of documents that the client has previously specified. The professional can check if the document is properly formatted and can contact the client about any issues.

# Use Cases

Create Professional Account:

- One of the main business requirements is to allow legal professionals to review documents, and it is likely a professional may have access to multiple clients' documents.

Scenario:

The professional hears about EstateVault from a colleague and decides to create an account proactively with the intention of helping set up a client in the future. They are set up with an account and wait for their client to invite them to their network. Until this happens, the professional will have no actions on the account. When the professional is added, they can select any of their clients to review documents and make any changes and contact the client about any issues.

# Use Cases

View Family Documents:

- One of the business requirements brought to us was the ability to allow family, in the form of heirs, estate admins, etc., to view the clients documents. One things brought up several times was the importance of storage for usernames and passwords on various sites like Facebook, Twitter, bank accounts, etc.

Scenario:

The son of an estate owner logs into his account following the death of his father. He navigates to the documents containing the login information for his father's Facebook. He finds that information as well as a step by step guide to deleting the Facebook account.

# Use Cases

Notifications:

- One of the business requirements was in reference to a notification system used to make clients aware when documents have been unchanged or missing for too long.

Scenario:

The client sets up an account and adds a number of documents. A couple of months go by with no changes, and the system emails the client asking them to log in and review or update their will just in case something has changed. When the client logs back in, the notification tab lets them know there is a new notification. Clicking this notification will navigate them to the documents needing review.

# Use Cases

Mobile Friendly Website:

- One of the first thing brought up during the discovery meeting was the importance of a website that can be viewed easily from a mobile device.

Scenario:

A client logs into their estate vault from their mobile phone. The mobile website has a very similar flow to the desktop version aiding a smooth transition from one to the other. The buttons are big enough to read and click without trouble.

# Use Cases

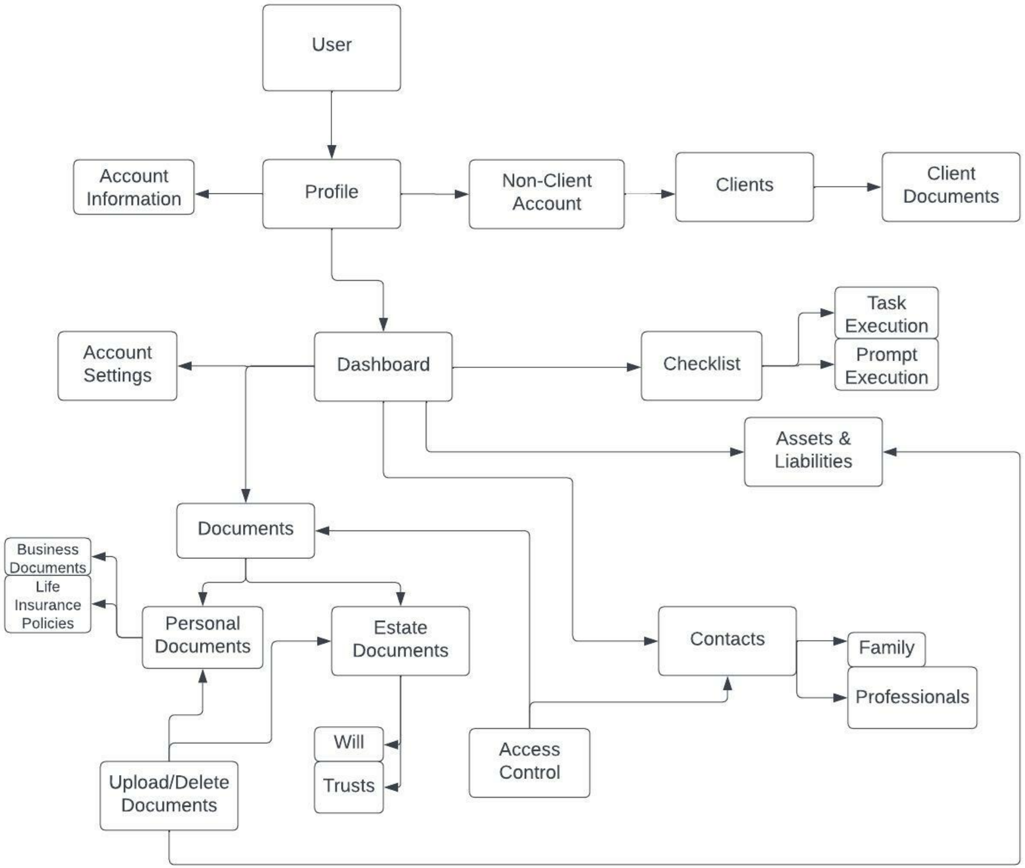
Client Account Creation:

- In order for the entire system to function, the client needs a way to create an account and manage it.

Scenario:

A client visits the EstateVault website and chooses to sign up for an account. They enter an email and a password as well as some personal information like name and phone number. Once the account is set up, they can navigate to their account page on the dashboard and change the password or email associated with their account.

# Domain Model



# TechStack

Vue

- Well respected open source front end framework
- Large community
- Comprehensive documentation
- Lightweight and easy to learn
- Accutech uses it for other projects

# TechStack

.Net and C#

- .Net and C# are going to be used for our backend
- Very popular with developers (lots of libraries and documentation)
- Accutech told us to use it since it is used on their other projects

# TechStack

Docker

- Tool for building, managing, running, and distributing code
- Works hand in hand with Git which will obviously be used for this project

BitBucket

- Interface that interacts with Git
- Serves the same purpose as GitHub, different interface
- Accutech uses it to store their code for all of their development projects

# TechStack

AWS

- AWS will serve as our cloud storage system for the clients documents
- Fast becoming the most popular DevOps tool
- Accutech plans to use it for their other projects

# Functional Requirements High Priority

The document storage system will store documents submitted by clients in a database.

The document storage system will match a client to all of their pertaining documents in the database.

The system can set permissions individually for each file, to limit who can view the document.

# Functional Requirements Low and Medium Priority

Notifications will be sent to the front end when a document has been flagged for review, or some other information is missing. - Medium

A user needs to be able to aggregate estate vault accounts into other, existing accounts. - Low

The system will track which documents are not logged in the database yet. - Low

# Non-functional Requirements

The app will display a checklist of documents that the user needs to upload to the system.

- High

The site can be accessed via a mobile device.

- Medium

A user can set custom accessibility settings, such as increasing the font size, depending on their needs.

- Medium

The notification system should ensure that notifications are visible to the user, and prompt them to take further action.

- Low

# Prototype

- Desktop Design Draft
- Mobile Design Draft

# First Iteration Features

Database Set-up

- Basic API entry points for receiving hard coded documents not tied to specific users

Basic Front End Functionality

- Contact Display (likely with static data)
- Dashboard with Contacts link

# Mentor Meeting Changes

Feedback on Requirements

- Michael made sure we were very specific on our requirements regarding the permission system

Feedback on Domain Model

- Helped us streamline some connections, specifically between access control and documents

# Mentor Meeting Changes

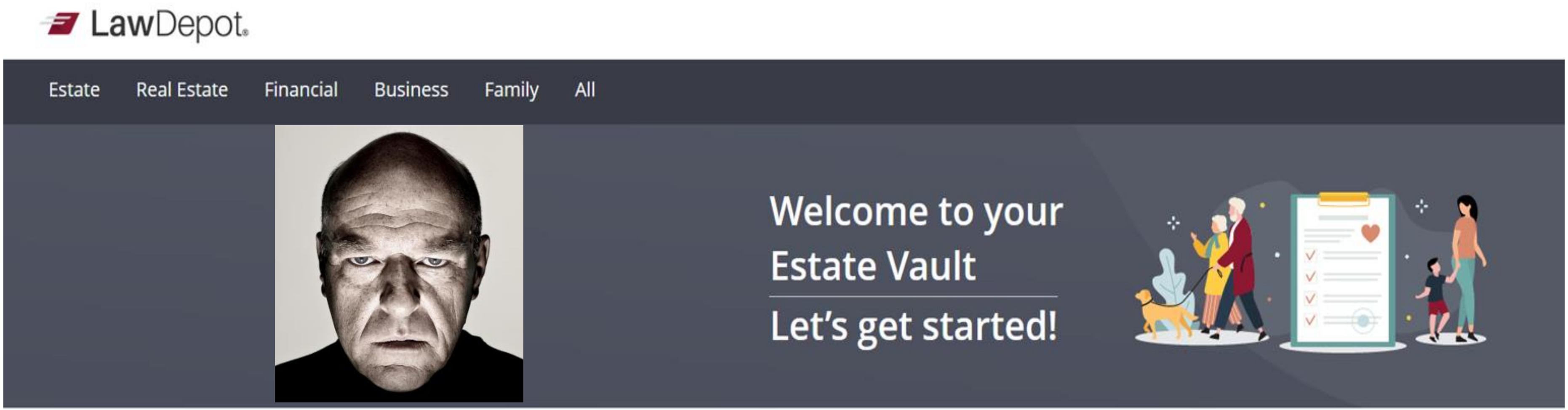
Feedback on Use Cases

- Access control was mentioned but could have been more obvious, so we made a whole use case regarding them
- Brought to our attention that the notification system had no use case and it is big system that should have its own use case

# Client Meeting Changes

- Prototype’s file manager needs to be reworked into something that is more user - friendly and up to date with other file managers.
- The size of everything in the menus needs to be dialed back to allow for more dead space, and reduce the cluttered look.
- Account Aggregation and Assets and Liabilities requirements need to be looked at now that those terms have been more clearly defined to the Estate Vault team.

# Fun(?) Fact!


LawDepot
Estate
Real Estate
Financial
Business
Family
All
Welcome to your Estate Vault
Let's get started!

Any questions?