TwoStep Requirements v0.1.3

# Landing Page

## MVP

1. **As a new user, I want a clean, consistent product introduction page so that I can easily understand what the product is about.**
2. **As a new user, I want an easily identifiable Privacy Policy link on the footer of the landing page, so I can rest easy that the product will respect my privacy.**

## Non-MVP

1. **As a new user, I want to watch a short, narrated “explainer” video to learn about the product without having to read text on the screen.**

# Registration

## MVP

1. **As a new user, I want the registration “control” to be on the landing page, so that there is no friction between learning about the product and registering.**
2. **As a new user, I want to easily register a new account.**

*Implementation Notes:* I do this by typing in an email address and a password, and click on a “Register” button, so I can start playing with the product with minimal hassle.

## Non-MVP

1. **As a new user, I want to be able to use my Facebook credentials in lieu of registering a new account, so I don’t have to create yet another userid and password.**

*Implementation Notes:* Logging in with Facebook credentials creates a new account if one doesn’t exist for this user already.

1. **As a new user, I want to be able to use my Google credentials in lieu of registering a new account, so I don’t have to create yet another userid and password.**

*Implementation Notes:* Logging in with Google credentials creates a new account if one doesn’t exist for this user already.

# Login

## MVP

1. **As an existing user, I want the product to automatically log me in when I navigate to the landing page, assuming I have an unexpired authentication cookie.**
2. **As an existing user, I want the landing page to contain a sign-in “control”, so I can login using my registered email address and password.**

*Implementation notes:* The product will generate an authentication cookie with a 7-day expiration.

## Non-MVP

1. **As an existing user, I want a “Login with Facebook” button that enables me to login using my Facebook credentials.**
2. **As an existing user, I want a “Login with Google” button that enables me to login using my Google credentials.**

# First Login

## MVP

1. **As a first-time user logging in, I want to see a brief introduction to the product.**

*Implementation notes:* This will be accomplished using a series of tooltip “bubbles” with the arrows pointing to elements of the screen, with text in each bubble. I advance through the bubbles by clicking anywhere on the screen.

* 1. “Welcome to TwoStep! The Organizer contains all of your Activities, and allows you to organize them under Categories. Categories can also contain sub-categories.”
  2. “The Activity Gallery contains Categories and Activities that can be great starting points. You can drag Activities or whole Categories over to the Organizer, and customize the Activities to match your lifestyle – for example, for the Haircut Activity, you can set how often you’d like to get your hair cut”.
  3. “The Profile allows you to tell TwoStep about yourself, so that it can adjust itself to better serve you.”
  4. “The Profile allows you to connect to your Calendar and to Facebook, which makes TwoStep far more useful as an organizational tool.”
  5. “You’re ready to go! The best way to get started is to fill in your Profile and connect to your Calendar and to Facebook. After that, drag Activities from the Gallery and customize them to match your life’s cadences.”

1. **As a first-time user, once I’ve completed the introduction, I won’t see it again next time I log in.**
2. **As an existing user that has already completed the introduction, I want to see the introduction again.**

*Implementation Notes:* I do this by clicking the Settings menu and selecting “Introduction”.

# Sign Out

## MVP

1. **As a signed-in user, I want to be able to sign out.**

*Implementation notes*: I do this by inging. Signing out will remove the authentication cookie from my browser.

# Help

## MVP

1. **As a signed-in user, I want to click on the Settings menu and select “Help” so I can browse through the product help videos.**

*Implementation notes:* a “getting started” video is the only one required for the MVP.

1. **As a signed-in user, I want to scroll through a list of short product help videos, that show me how to:** 
   1. **Drag a Category or Activity from the Gallery to the Organizer.**
   2. **Customize an Activity by setting its frequency, location, and contacts.**
   3. **Navigate to Next Steps and sort by Type.**
   4. **Navigate to Next Steps from the iPhone Calendar.**
   5. **Complete a “Call” Next Step by tapping the Action icon on the Step.**

# Profile

## MVP

1. **As a novice user, I want to enter my profile information.**

*Implementation Notes:* I do this by clicking the Profile tab to show the Profile Editor, allowing me to fill in three sections:

* 1. Connect to Facebook
  2. Connect to Google
  3. Personal Information

1. **As a novice user, I want to connect to Facebook to import my personal information.**

*Implementation Notes:* I do this by clicking the Connect to Facebook button. I will be redirected to FB’s consent UI and authorize TwoStep to access my FB information. In addition to importing my personal information (reflecting in the Personal Information section) and my friends as possible contacts, TwoStep will show me a list of my Facebook friends that currently use TwoStep, and allow me to check a box next to each of them that I want to add as my Friends (they are all checked by default). Explanation text tells me that Friends are allowed to see my Activity information, and can authorize me to see theirs.

1. **As a novice user, I want to connect to my Google Calendar.**

*Implementation Notes:*I do this by clicking the Connect to Google button. I will be redirected to Google’s consent UI and authorize TwoStep to access my Google calendar.

1. **As a novice user, I want to fill out my personal information in the Profile Editor:**
   1. **Name**
   2. **Address / Location**
   3. **Gender**
   4. **Birthday**
   5. **Phone number**
   6. **Spouse (name, gender, birthday)**
   7. **Children (name, gender, birthday)**

## Non-MVP

1. **As a novice user, I can import Google contacts or Google+ friends.**

# Activity Gallery

## MVP

1. **As a novice user, I want to see a list of Categories that contain Sub-Categories and/or Activities.**

*Implementation Notes:* The Categories are arranged in a vertical accordion control, and the first Category is open, with all of the rest closed.

1. **As a novice user, I want to see all of the Sub-Categories under a Category and all of the Activities under these Sub-Categories.**

*Implementation Notes:* I do this by clicking on a Category. The accordion control collapses the rest of the Categories. All Sub-Categories are automatically open (there is no way to “close” a Sub-Category to hide its Activities).

1. **As a novice user, I want to scroll through the list of Categories.**
2. **As a novice user, I want to “install” a Category from the Gallery.**

*Implementation Notes:* I do this by dragging a Category from the Activity Gallery to the Organizer and see it appear with all of its Sub-Categories and Activities in the Organizer.

1. **As a novice user, I want to “install” a Sub-Category from the Gallery.**

*Implementation Notes:* I do this by dragging a Sub-Category from the Gallery to the Organizer and see it (along with all of its Activities) appear under the currently open Category (in the place it was dropped).

1. **As a novice user, I want to “install” an Activity from the Gallery.**

*Implementation Notes:* I do this by dragging an Activity from the Gallery to the Organizer and see it appear under the currently open Category under the Sub-Category and in the place it was dropped.

1. **As an intermediate user, I want to see the Categories, Sub-Categories, and Activities I’ve saved to my own Gallery.**

*Implementation Notes:* I do this by clicking on the “My Activities” tab of the Activity Gallery pane to show content (Categories, Activities) that I “saved to Gallery”.

1. **As an intermediate user, I want to view and select from the Community’s Categories, Sub-Categories, and Activities.**

*Implementation Notes:* I do this by clicking on the “Community” tab of the Activity Gallery pane to show user-generated content (Categories, Sub-Categories, Activities).

*Implementation Notes:* These items display the member’s name and the number of times the content was dragged. These items are ranked by the popularity (number of drags). I can click on the “TwoStep” tab to go back to seeing the system-defined Categories.

1. **want to search the Gallery for content.**

*Implementation Notes:* I do thising

## Non-MVP

1. **As an intermediate user, I want to “install” a Sub-Category or Activity from the Gallery into a Category other than the currently active Category.**

*Implementation Notes:* I do this by dragging the Sub-Category or Activity from the Gallery to the Organizer, hovering for one second over a non-active Category to open that Category (and close the currently open Category), so I can drop a Sub-Category or Activity into a different Category than the one that is currently open.

# Organizer

## MVP

1. **As a novice user, I want to click a Category to make it the active Category.**

*Implementation Notes:* this gesture opens the Cateogory up and closes all other categories in the accordion. All Sub-Categories are also opened to show the Activities inside them. None of the Sub-Categories are selected or have focus. The entire Category is slightly shaded to make it obvious that the entire Category has “focus”. The Activity Editor pane will be empty.

1. **As a novice user, I want to click a Sub-Category to make it the active Sub-Category.**

*Implementation Notes:* this will slightly shade the Sub-Category and all the Activities underneath (but unshade any other Sub-Category), to make it obvious that the Sub-Category has “focus”. The Activity Editor pane will be empty.

1. **As a novice user, I want to click an Activity to make it the active Activity.**

*Implementation Notes:* this will slightly shade the Activity (but unshade any other Activities), to make it obvious that the Activity has “focus”. The Activity Editor pane will now display the data for the active Activity.

1. **As a novice user, I want to be able to add a new Category.**

*Implementation Notes:* I click the + (add) button in the Organizer’s header to create a new Category at the bottom of the Category list called “New Category”. If one already exists by that name, a number (starting from 2) is appended.

*Implementation Notes:* an alternative implementation is to always have a Category at the end called “New Category” and the process of renaming it will instantiate it as a new Category (and add a new “New Category” at the bottom of the list).

1. **As a novice user, I want to rename a Category, Sub-Category, or Activity.**

*Implementation Notes:* I right-click a Category, Sub-Category, or Activity, and choose “rename” from the drop-down menu, to rename the Category, Sub-Category, or Activity in-place (transforming the Category, Sub-Category, or Activity to an edit box). Pressing Enter or clicking anywhere outside of the edit box will execute the rename operation.

*Implementation Notes:* an alternative implementation is to have glyphs for each Category, Sub-Category, or Activity with the relevant actions: in this case, a pencil icon for “edit”.

*Implementation Notes:* another alternative is to click and hold over a Category, Sub-Category, or Activity to be able to rename it in place.

1. **As a novice user, I want to reorder a Category.**

*Implementation Notes:* I do this by dragging a Category up and down (above and below other Categories) to reorder the Category.

1. **As a novice user, I want to reorder a Sub-Category.**

*Implementation Notes:* I do this by dragging a Sub-Category up and down (above and below other Sub-Categories) to reorder the Category.

1. **As a novice user, I want to reorder an Activity.**

*Implementation Notes:* I do this by dragging an Activity up and down (above and below other Activities in the Sub-Category) to reorder the Category.

1. **As an intermediate user, I want to move an Activity to a different Sub-Category.**

*Implementation Notes:* I do this by dragging an Activity to a different Sub-Category.

1. **As an intermediate user, I want to transform a Category into a Sub-Category or a Sub-Category into an Activity.**

*Implementation Notes:* I do this by right-clicking a Category or Sub-Category and selecting “indent” to make a Category into a Sub-Category or a Sub-Category into an Activity (with the parent being the Category or Sub-Category right above it).

1. **As an intermediate user, I want to transform a Sub-Category into a Category or an Activity into a Sub-Category.**

*Implementation Notes:* I do this by right-clicking a Sub-Category or Activity and selecting “unindent” to make a Sub-Category into a Category or an Activity into a Sub-Category. When transforming an Activity into a Sub-Category, all Activity information is no longer accessible. Ideally, the process of transforming an Activity into a Sub-Category and back would preserve Activity data (i.e. round-tripping isn’t lossy).

*Implementation Notes:* As an advanced user, I want the tab key to do the same thing as “indent”, and shift-tab to do the same thing as “unindent”, to the currently selected Category, Sub-Category, or Activity.

1. **As an intermediate user, I want to save a Category, Sub-Category, or Activity to the “My Activities” section of the Gallery.**

*Implementation Notes:* I do this by right-clicking a Category, Sub-Category, or Activity and selecting “save to my gallery”. The Category, Sub-Category, or Activity will show up in the “My Activities” section of the Gallery.

1. **As an advanced user, I want to share a Category, Sub-Category, or Activity to make it available to others (in their Gallery).**

*Implementation Notes:* I do this by right-clicking a Category, Sub-Category, or Activity and selecting “share”. All specific information (contacts, places) are stripped off the Activities. The Category, Sub-Category, or Activity will show up in the “Community” section of the Gallery.

## Non-MVP

1. **As an intermediate user, I want move a Sub-Category to a different Category.**

*Implementation Notes:* I do this by dragging a Sub-Category to a different Category. I drag the Sub-Category, hold over a new Category, which closes the existing Category and opens the new Category. When I release, the Sub-Category is moved to the new Category in the place I dropped it.

1. **As an intermediate user, I want move an Activity to a different Category.**

*Implementation Notes:* I do this by dragging an Activity to a different Sub-Category or a different Category in the same manner as described above.

1. **As an advanced user, I want to suspend or resume a Category, Sub-Category, or Activity.**

*Implementation Notes:* I do this by right-clicking it and selecting “Suspend” or “Resume”. The Category, Sub-Category, or Activity will turn gray.

# Activity Editor

## MVP

1. **As a novice user, I want to edit the name of the Activity.**

*Implementation Notes:* I do this by clicking it, seeing it transform into an edit box, and typing the new name.

1. **As a novice user, I want to edit the Frequency of the Activity.**

*Implementation Notes:* I do this by clicking it, seeing it transform into the frequency editor, and editing values. The frequency editor has three sections:

* 1. \_\_ Times (number)
  2. Per \_\_ (drop-down of “week”, “month”, “year”)
  3. Starting \_\_ (simple calendar control)

I can tab between the variables. When I press enter or click outside of the frequency editor, the changes are made.

1. **As a novice user, I want to add a contact to the Activity.**

*Implementation Notes:* I do this by clicking the Contacts section, and typing in a name (which will autocomplete from Possible Contacts). If a new name is typed, a new Contact is added to the Contact database. When the user selects a contact from the auto-complete drop-down, or presses Enter, the Contacts section transforms back to “view” mode and shows the Contacts on the Activity.

1. **As a novice user, I want to edit a contact on an Activity.**

*Implementation Notes:* I do this by clicking on a contact in the Contacts section, which shifts down the rest of the Activity Editor and renders a Contact information box with edit boxes for each of the Contact fields (Phone Number, Email, Address, Birthday, etc). I can tab between these fields. Clicking outside of the contact editor or pressing Enter will close the contact editor.

1. **As a novice user, I want to add a location to the Activity.**

*Implementation Notes:* I do this by clicking the Locations section, and typing in a name (which will autocomplete from a concatenated list of the Locations and Google Places). If a new name is typed, a new Location is added to the Locations database. When the user selects a contact from the auto-complete drop-down, or presses Enter, the Contacts section transforms back to “view” mode and shows the Contacts on the Activity.

1. **As a novice user, I want to add a note to the Activity.**

*Implementation Notes:* I do this by clicking the Notes section, and typing in text. When I click outside of the notes edit box or press Enter, the edits are saved.

1. **As a novice user, I want to create a new Step under an Activity.**

*Implementation Notes:* I do this by clicking the “+” (add) icon on the Activity Editor header, which will create a step called “New Step” at the bottom of the list.

*Implementation Notes:* An alternative is to have the last step in the Activity always be called “New Step” and the act of renaming this step actually creates it (and adds a new “New Step” step at the bottom of the list).

1. **As a novice user, I want to rename the Step.**

*Implementation Notes:* I do this by right-clicking the name, selecting “rename”, seeing it transform into an edit box, and typing the new name.

1. **As a novice user, I want to select the active Step.**

*Implementation Notes:* I do this by clicking the Step. The Step is slightly shaded to show that it has “focus”. The rest of the steps are shifted down and the details of the Step are shown below the Step name (the Step Editor).

1. **As a novice user, I want to set the “smart action” for the Step.**

*Implementation Notes:* I do this by clicking a value from a drop-down list (call, schedule, errand, find, review, …)

1. **As an intermediate user, I want to select / set the Contact or Location for this Step.**

*Implementation Notes:* I do this by making a Step active, and using the Step Editor to select the Contact or Location for this step. A combobox is displayed with a drop-down that is populated from the Activity’s Contacts and Locations is first displayed, and if a user types in the edit box, the auto-complete behavior of the Activity’s Contact or Location editor is employed.

1. **As a novice user, I want to reorder the list of Steps for the activity.**

*Implementation Notes:* I do this by dragging and dropping them.

1. **As an intermediate user, I want to Suspend or Resume an Activity.**

*Implementation Notes:* I do this by clicking the “power button” toggle button in the Activity Editor’s header.

1. **As an intermediate user, I want to Delete an Activity.**

*Implementation Notes:* I do this by clicking the “X” button in the Activity Editor’s header.

1. **As an intermediate user, I want to Delete a Step in the list of Steps.**

*Implementation Notes:* I do this by clicking the X button next to its name in the list.

1. **As an intermediate user, I want to add a link to an Activity.**

*Implementation Notes:* I do this by clicking on the Links section which creates an edit box and allows me to type in or copy-paste a link.

1. **As an intermediate user, I want to remove a link on an Activity.**

*Implementation Notes:* I do this by clicking on the “X” button on the left side of a link’s name.

## Non-MVP

1. **As an advanced user, I want to create a Shared Document on the Activity.**

*Implementation Notes:* I do this by clicking the Shared Document section, which will open a new browser tab and allow me to edit a (newly created) Google document. The URL for this document is saved so that clicking on Shared Document again will open the same URL.

# Next Steps – Web

## MVP

1. **As a novice user, I want to see all my Next Steps.**

*Implementation Notes:* I do this by clicking the Next Steps tab to see all my Next Actions across all my (active) Activities. The Next Steps are organized by “type” (calls, errands, schedule on calendar, …) – each on its own tab, with one “all” tab that shows them all. The Next Steps on each tab are sorted by Due date.

1. **As a novice user, I want to perform a “smart action” corresponding to the Step.**

*Implementation Notes:* I do this by clicking an “action” icon next to each next step to perform that action (if available). Each action may take parameters, which are displayed in edit boxes when the action is pressed. If parameters are required, an “execute” button is also supplied. Otherwise, the action is performed without any further gestures.

* 1. I can click on the “schedule” (calendar) icon for a “Schedule” action to schedule an appointment on my calendar. The additional parameters required are: Date, Start Time, End Time / Duration. In addition to creating the appointment, this smart action will open Google Calendar in a new tab and allow me to edit the appointment details.
  2. I can click on the “search” (magnifying glass) icon to do a web search on the “intent” of the Step.
  3. I can click on the “geosearch” (location marker) icon to do a geo search on the “intent” of the Step, localized to my current location (out of the Profile).
  4. I can click on the “friends” (contact) icon to see what my friends are doing for this “intent”. A list of friends and their values for this “intent” is displayed as hyperlinks, which when clicked allows me to view the Contacts and Locations they have set for this Activity.
  5. I can click on the “f” (facebook) icon to post a question to Facebook. An edit box allows me to edit the text of my question (and displays a reasonable default).
  6. I can click on the “bootmarks” (twostep) icon and see what people around me are doing for this “intent”. An anonymized list of TwoStep members and their values for this “intent” is displayed as hyperlinks, as for “friends”.

1. **As a novice user, I want to change the state of a step (complete it, defer it, skip it).**

*Implementation Notes:* I do this by right-clicking the Step and selecting one of the operations (“Complete”, “Defer”, and “Skip”).

## Non-MVP

1. **As an intermediate user, I want to sort my Next Steps in each section by priority or date.**

# Next Steps – Mobile

## MVP

1. **As a novice user, I want to see all my Next Steps.**

*Implementation Notes:* I do this by bringing up my calendar and tapping the “Next Steps” all-day appointment on my calendar for today. This navigates to a mobile-optimized web page displaying all my Next Steps. The Next Steps are organized by “type” (calls, errands, schedule on calendar, …) – each on its own tab, with one “all” tab that shows them all. The Next Steps on each tab are sorted by Due date.

1. **As a novice user, I want to perform a “smart action” corresponding to the Step.**

*Implementation Notes:* I do this by tapping an “action” icon next to each next step to perform that action (if available). Each action may take parameters, which are displayed in edit boxes when the action is pressed. If parameters are required, an “execute” button is also supplied. Otherwise, the action is performed without any further gestures.

* 1. I can tap the “call” (telephone) icon to make a phone call. The phone number is extracted from the Contact on the Step (or Activity) if any. If there isn’t a phone number (or there are multiple possibilities), a list is displayed for the user to select from.
  2. I can tap the “schedule” (calendar) icon for a “Schedule” action to schedule an appointment on my calendar. The additional parameters required are: Date, Start Time, End Time / Duration.
  3. I can tap the “search” (magnifying glass) icon to do a web search on the “intent” of the Step.
  4. I can tap the “geosearch” (location marker) icon to do a geo search on the “intent” of the Step, localized to my current location (out of the Profile).
  5. I can tap the “friends” (contact) icon to see what my friends are doing for this “intent”. A list of friends and their values for this “intent” is displayed as hyperlinks, which when tapped allows me to view the Contacts and Locations they have set for this Activity.
  6. I can tap the “f” (facebook) icon to post a question to Facebook. An edit box allows me to edit the text of my question (and displays a reasonable default).
  7. I can tap the “bootmarks” (twostep) icon and see what people around me are doing for this “intent”. An anonymized list of TwoStep members and their values for this “intent” is displayed as hyperlinks, as for “friends”.

1. **As a novice user, I want to change the state of a step (complete it, defer it, skip it).**

*Implementation Notes:* I do this by tapping one of the operations next to the step (“Complete”, “Defer”, and “Skip”).

1. **As a novice user, I want to navigate from the Step to the Activity, and view the information associated with the Activity.**

*Implementation Notes:* I do this by tapping a link that navigates back to the Activity.

1. **As a novice user, I want to perform a “smart action” using the data on the Activity (for example, map a location).**

*Implementation Notes:* on the Activity, appropriate icons are displayed for Call, Map, Text, Email, and Browse on the information that supports these actions.

## Non-MVP

1. **As an intermediate user, I want to sort my Next Steps in each section by priority or date.**

# Contacts

## Non-MVP

1. **As an advanced user, I want to view my list of contacts.**

*Implementation Notes:* I do this by clicking the Contacts tab and scrolling through an alphabetized list of contacts.

1. **As an advanced user, I want to edit a contact.**

*Implementation Notes:* I do this by clicking on any of the Contacts, which will open the Contact Editor and allow me to add or edit any information.

# Locations

## Non-MVP

1. **As an advanced user, I want to view my list of locations.**

*Implementation Notes:* I do this by clicking the Locations tab and scrolling through an alphabetized list of contacts.

1. **As an advanced user, I want to edit a location.**

*Implementation Notes:* I do this by clicking on any of the Locations, which will open the Location Editor and allow me to add or edit any information.

# Friends

## MVP

1. **As a novice user, I want to view my friends and who I’m sharing information with.**

*Implementation Notes:* I do this by clicking on the Friends tab to see my list of Facebook friends that use TwoStep. A checkbox is displayed next to each friend that I’ve authorized as a TwoStep friend.

1. **As a novice user, I want to turn sharing on or off for a friend.**

*Implementation Notes:* I do this by clicking on a checkbox next to a friend to share information with them (or to turn off sharing).

1. **As an intermediate user, I want to view friends who have shared information with me and be able to reciprocate.**

*Implementation Notes:* I do this by clicking on the “Added me” tab to show which friends have added me (giving me access to their information), and allowing me to add them back by clicking their checkbox.

1. **As an intermediate user, I want to invite other Facebook friends to use TwoStep.**

*Implementation Notes:* I do this by clicking on the Invite Others button to display a list of my Facebook friends that don’t yet use TwoStep, with checkboxes next to each of them. By default none are checked.

1. **As an intermediate user, I want to invite other non-Facebook friends to use TwoStep.**

*Implementation Notes:* I do this by entering a list of email addresses to invite others via email. This sends them a nice email explaining the benefits of joining.

## Non-MVP

1. **As a novice user, I want to invite Google contacts or Google+ friends.**