TwoStep Requirements v0.1.1

# 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 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. Logging in with Facebook credentials creates a new account if one doesn’t exist for this user already.
2. 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. 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 can see it again by clicking the Settings menu and selecting “Introduction”.

# Sign Out

## MVP

1. As a signed-in user, I want to click on the Settings menu and select “Sign out” so I can easily sign out of the product.

*Implementation notes*: 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.

## Non-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 can click the Profile tab to show the Profile Editor, allowing me to enter my profile information into three sections:
   1. Connect to Facebook
   2. Connect to Google
   3. Personal Information
2. As a novice user, I can connect to Facebook to import my personal information by clicking the Connect to Facebook button. I will be redirected to FB’s consent UI and authorize TwoStep to access my FB information.

*Implementation notes:* 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 can connect to Google to connect to my Calendar by clicking the Connect to Google button. I will be redirected to Google’s consent UI and authorize TwoStep to access my Google calendar.
2. As a novice user, I can 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 connect to Google to 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 click on a Category and see all of the Sub-Categories and all of the Activities under the Sub-Categories.

*Implementation Notes:* the accordion control collapses the rest of the Categories.

1. As a novice user, I want to scroll through the list of Categories.
2. As a novice user, I want to drag a Category from the Gallery to the Organizer and see it appear with all of its Sub-Categories and Activities in the Organizer.
3. As a novice user, I want to drag 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).
4. As a novice user, I want to drag 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.
5. As an intermediate user, I want to click on the “My Activities” tab of the Activity Gallery pane to show content (Categories, Activities) that I “saved to Gallery”.
6. As an intermediate user, I want to click on the “User-Defined” 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.

## Non-MVP

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

*Implementation Notes:* I do this by hovering for one second over a 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.

1. As an intermediate user, I can type in the search box in the Gallery pane to filter the Gallery content to matches on a full-text index of each word of a Category, Sub-Category, or Activity name.

# 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”.

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 drag a Sub-Category up and down (above and below other Sub-Categories) to reorder the Category.
2. As a novice user, I want to drag an Activity up and down (above and below other Activities in the Sub-Category) to reorder the Category.
3. As an intermediate user, I want to drag an Activity to a different Sub-Category, to move the Activity to a different Sub-Category.
4. As an intermediate user, I want to click and hold over a Category, Sub-Category, or Activity to be able to rename it in place.
5. As an intermediate user, I want to right-click a Category or Sub-Category and select “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).
6. As an intermediate user, I want to right-click a Sub-Category or Activity and select “unindent” to make a Sub-Category into a Category or an Activity into a Sub-Category.
7. 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.
8. As an advanced user, I want to right-click a Category, Sub-Category, or Activity and select “share” to make it available to others (in their Gallery). All specific information (contacts, places) are stripped off the Activities. The Category, Sub-Category, or Activity will show up in a “User-Defined” section of the Gallery.

## Non-MVP

1. As an intermediate user, I want to drag 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.
2. As an intermediate user, I want to drag an Activity to a different Sub-Category or a different Category in the same manner as described above.
3. As an advanced user, I want to suspend or resume a Category, Sub-Category, or Activity 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 by clicking it, seeing it transform into an edit box, and typing the new name.
2. As a novice user, I want to edit the Frequency of the Activity 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 can add a contact to the Activity 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.
2. As a novice user, I can click on a Contact in the contact 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.
3. As a novice user, I can add a location to the Activity 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.
4. As a novice user, I can add a note to the Activity 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.
5. As a novice user, I can create a new Step by clicking the “+” (add) icon on the Activity Editor header, which will create a step called “New Step” at the bottom of the list.
6. As a novice user, I can rename the Step by right-clicking the name, selecting “rename”, seeing it transform into an edit box, and typing the new name.
7. As a novice user, I can select the active Step by clicking it. 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).
8. As a novice user, I can set the “smart action” for the Step by clicking a value from a drop-down list (call, schedule, errand, find, review, …)
9. As an intermediate user, I can use 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.
10. As a novice user, I can reorder the list of Steps for the activity by dragging and dropping them.
11. As an intermediate user, I can Suspend or Resume an Activity by clicking the “power button” toggle button in the Activity Editor’s header.
12. As an intermediate user, I can Delete an Activity by clicking the “X” button in the Activity Editor’s header.
13. As an intermediate user, I can Delete a Step in the list of Steps by clicking the X button next to its name in the list.
14. As an intermediate user, I can add a link to an Activity by clicking on the Links section which creates an edit box and allows me to type in or copy-paste a link.
15. As an intermediate user, I can remove a link by clicking on the “X” button on the left side of a link’s name.

## Non-MVP

1. As an advanced user, I can create a Shared Document on the Activity 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

## MVP

1. As a novice user, I can click 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.
2. As a novice user, I can click 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. This will open Google Calendar in a new tab and allow me to schedule an appointment.
   2. I can click on the “call” (telephone) icon to make a phone call (this is only enabled if the server detects a mobile browser-agent). The phone number is extracted from the Contact on the Step (or Activity) if any.
   3. I can click on the “search” (magnifying glass) icon to do a web search on the “intent” of the Step.
   4. 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).
   5. 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 their copy of this Activity.
   6. 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).
   7. 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”.
3. As a novice user, I can bring up the Next Steps list on a mobile browser, which displays a mobile-optimized list of steps, with appropriate organization by Type (call, errand, etc).
4. As a novice user, I can click on a Step and be presented with a list of Actions for the step, including “Complete”, “Defer”, and “Skip”.
5. As a novice user, I can click on a Step and be presented with a smart action when appropriate. For example, for a Call step, I will be able to tap a Phone icon to make a phone call.
6. As a novice user, I can navigate from the Step to the Activity on a mobile browser, and view the information associated with 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 can sort my Next Steps in each section by priority or date.

# Contacts

## Non-MVP

1. As an advanced user, I can click the Contacts tab and scroll through an alphabetized list of contacts.
2. As an advanced user, I can click 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 can click the Locations tab and scroll through an alphabetized list of contacts.
2. As an advanced user, I can click 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 can click 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.
2. As a novice user, I can click on a checkbox next to a friend to share information with them (or to turn off sharing).
3. As an intermediate user, I can click 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.
4. As an intermediate user, I can click 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.
5. As an intermediate user, I can enter 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 can invite Google contacts or Google+ friends.