MyFCPlanner Requirements

November 17, 2017

**Required Approvers**

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| --- | --- | --- |
| **Name** | **Functional Area** | **Date of Approval** |
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# Change History

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Revision** | **Date** | **Author** | **Changes** | **Status** |
| 0.01 | 11/17/17 | Paul Chernick | Started requirements document and created the document template. Listed over 82 bullet points as requirements. | WIP |
| 0.02 |  | Paul Chernick |  | WIP |

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# Introduction

## 3.1 Abstract

People who do things well and in a timely manner are well organized. These people set goals to succeed. They create a process, or set of steps to accomplish these goals; this set of steps becomes a set of tasks to be completed. They may have multiple goals to work on in parallel. They prioritize the goals and the steps to achieve them. They create plans to accomplish the goals and generally have so method of tracking their progress. Many of these people use a paper or software system that helps them plan.

The goal of this project is to create a personal planning software system for people that want to get organized and use multiple platforms on a daily basis.

This is an architectural document that defines the requirements for the MyFCPlanner software.

## 3.2 References

|  |  |  |  |
| --- | --- | --- | --- |
| **Id** | **Author** | **Title** | **Link (if available)** |
| 1 | Stephan Covey | The 7 Habits of Highly Effective People | https://en.wikipedia.org/wiki/The\_7\_Habits\_of\_Highly\_Effective\_People |
|  |  |  |  |

## 3.3 Glossary

|  |  |
| --- | --- |
| **Term** | **Definition** |
| Appointment |  |
| Franklyn Covey |  |
| Interruption |  |
| Meeting |  |
| Planner |  |
| Priority |  |
| Schedule Item |  |
| Task |  |

## 3.4 Open Issues

|  |  |  |  |
| --- | --- | --- | --- |
| **ID** | **Description** | **Status** | **Contact** |
|  |  |  |  |
|  |  |  |  |
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## 3.5 Compatibility

This is a new product as well as a new project, the forms on a desktop or laptop computer must be compliant with the Franklyn Covey Planning system there is no other compatibility required.

## 3.6 Acknowledgements

TBD.

## 3.7 Footnotes

|  |  |
| --- | --- |
| **ID** | **Description** |
|  |  |
|  |  |
|  |  |

# Overall Description

To be determined.

## 4.1 Product Context

To be determined.

## 4.2 System Context

To be determined.

## 4.3 Assumptions and Dependencies

To be determined.

# Validation Strategy

## 5.1 Review and Approval Strategy

This document is of manageable size and will be reviewed and approved in one round of review (that is, it will not be reviewed in parts). All required approvers should cover the entire document, focusing on their respective functional areas. Their review and approval of this document will serve as the first step in validating these UI elements

|  |  |  |
| --- | --- | --- |
| **Name** | **Functional Area** | **Role** |
| Paul A Chernick | Software Engineer |  |
|  |  |  |
|  |  |  |

## 5.2 Pre-implementation Validation Strategy

The user interfaces described in this document are based on the current IG-XL interface. Approval of this UIS document will be followed by review and approval of High Level Design. The use cases, requirements, and user interfaces in this document will be reviewed with Applications and Marketing.

# Use Cases

Features that have been added to the UtralFLEX2 SOC tester or features that are significantly different between the UltraFLEX and the UltraFLEX2 have use cases preceding their requirements. Features that are not new do not have use cases preceding the requirements.

## 6.1 Applicable Standards

TBD

### 6.1.1 Internal Standards

Standards Tracing Requirement

Tracing to this requirement signifies that this complying project shall adhere to all the standards specified in the following standards:

### 6.1.2 External Standards

To be determined.

## 6.2 Assumptions and Dependencies

To be determined.

## 6.3 First Use Case

# Requirements

To reduce duplication, and to maintain the requirements in a single document, both user interface requirements and system requirements are included in this document.

## 7.1 User Interface Requirements

* Select goals for tasks
* Phone calls on smart phones will automatically go to interruption if timer is running
* The tool can be configured to meet the user’s needs.
  + The user can set the number of tasks to display
  + The user can set the starting hour, ending hour and number of hours displayed on the daily schedule
* Forms
  + Printing
    - Will be printable only from computers, not mobile devices
    - Will be printable on Franklyn Covey Paper
  + Will be based on Franklyn Covey forms where applicable (schedules, tasks, notes)
  + Creating tasks
  + Creating Goals
  + Creating Meetings
  + Creating Appointments
  + Creating any item will be done using a dialog to complete the form.
* Priorities
  + There are two levels of priorities, the first applies a context on where the priority fits in the overall plan, and the second is the priority in relation to the context the priority is in.
  + The context will be indicated by a letter of the alphabet, such as A, B or C. The priority within the context will be indicated by a number such as 1, 2 or 3. This indicates the first, second or third priority within the context.
* Notes
* Interruptions
  + Interruptions can be timed
  + Interruptions on mobile devices can be automatic for phone calls and text messages
  + Interruptions have types
    - Ad. Hoc meeting
    - Phone call
    - Send or receive text
    - Task related questions
    - email
  + Interruptions will be stored in temporary tables in the databases.
  + Interruptions will be synced with the master database
* Additional Requirements not yet defined.

## 7.2 System Requirements

* Data master is in the cloud
* Data Entry
  + Enter tasks on any platform.
  + Enter goals on any platform.
  + Enter meeting on any platform
  + Enter appointment on any platform
* Sync schedule items, tasks, goals on any platform
  + Each item needs to track changes in case web is not available when the change is made
* Data syncing
  + By default sync shall take place in the background as objects are created or modified
  + The user shall have the ability to sync by command.
    - When the user syncs by command the process shall be in the foreground.
  + When the data master is not accessible data will be stored locally and synced when communication has been reestablished with the data master.
* Select goals for tasks
* Interruptions are stored temporarily but are synced
* Phone calls on smart phones will automatically go to interruption if timer is running
* Forms must be printable on Franklyn Covey paper
* User can set the number of tasks to display
* Objects
  + Timers
    - Tasks
    - Interruptions
    - Meetings
    - Appointments
  + Tasks
    - Can be scheduled
    - Have a description
    - Can have a short name to use instead of the description
    - Have a start date and time
    - Have an end date and time
    - Have a priority
    - Have a status
      * Not started
      * Waiting on another task
      * In process
      * Completed
      * Cancelled
    - May be linked to goals
    - Have estimated effort in time
    - Can have recorded actual time to complete
  + Scheduled tasks
    - Scheduled tasks are tasks that have been added to the schedule and therefore have schedule item fields as well as task fields.
  + Reminders / Alerts
  + Notes
    - Can have a date and time
    - Can have a subject
    - Can be linked to schedule items
    - Can be searched
    - Can have large bodies of text
  + Goals
    - Will be able to set an end date but not required
    - Can be forever / unending
    - Can be selected by tasks
    - Have a description
    - Have a priority
  + Meetings
    - Meetings are a type of schedule item
    - Have agendas
    - Have a purpose
    - Can have a list of notes
  + Appointments
    - Appointments are a type of schedule item
  + Interruptions
  + Schedules
  + Schedules contain schedule items
    - Schedule items are:
      * Scheduled Tasks
      * Meetings
      * Appointments
    - Schedule items can be scheduled or rescheduled
    - Schedule items have a start time and date
    - Schedule items have an end time and date
    - Schedule items can have a location
    - Schedule items can be exported to other systems, see interfacing
    - Schedule items can have reminders / alerts
    - Schedule items can repeat on a daily, weekly, monthly or yearly basis
* Interfacing
  + The planning system can export meetings, appointments and tasks to other systems
    - Microsoft Outlook
    - Microsoft Exchange
    - Microsoft Project
    - iCalendar
    - Lotus Notes
    - ?? Franklyn Covey ??
  + Can meetings, appointments and tasks be imported from other systems?
* Forms
  + Printing
    - Will be printable only from computers, not mobile devices
    - Will be printable on Franklyn Covey Paper
  + Will be based on Franklyn Covey forms where applicable (schedules, tasks, notes)
  + Creating tasks
  + Creating Goals
  + Creating Meetings
  + Creating Appointments
  + Creating any item will be done using a dialog to complete the form.
* Priorities
  + There are two levels of priorities, the first applies a context on where the priority fits in the overall plan, and the second is the priority in relation to the context the priority is in.
  + The context will be indicated by a letter of the alphabet, such as A, B or C. The priority within the context will be indicated by a number such as 1, 2 or 3. This indicates the first, second or third priority within the context.
* Notes
* Interruptions
  + Interruptions can be timed
  + Interruptions on mobile devices can be automatic for phone calls and text messages
  + Interruptions have types
    - Ad. Hoc meeting
    - Phone call
    - Send or receive text
    - Task related questions
    - email
  + Interruptions will be stored in temporary tables in the databases.
  + Interruptions will be synced with the master database
* Privacy
  + The user’s data is private
  + The user may share data about an item on an item by item basis
* Security
  + User information such as Social Security Number and Credit Card Number will not knowingly be stored in the data store. There will not be specific fields for this data.
  + Text within objects such as notes will be encrypted within the database.
  + The encryption methodology source code will not be shared, or will be encrypted.
* Additional Requirements not yet defined.

# Traceability

## 8.1 Requirements Traceability - Defining

TBD

### 8.1.1 Defining Requirements

Put table here.

## 8.2 Requirements Traceability - Complying

TBD.

### 8.2.1 Complying Requirements

Put table here.