Requirements for Application

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **M (must)** | **S (should)** | **C (could)** | **W (won't have)** |
| **Pages/Data** | **Login**  Login, Request Access  **General Info**  Gen info page with links to internal & external general sources. Link 'owner' listed  **Find Client**  List to/Search for specific clients then route to their page  **Client Pages**  Client specific pages with table of information/notes/links in a user friendly format. Client 'owner' listed |  |  |  |
| **Authorizations**  See auth table below for details | Level 1 - Read  Level 3 - All Read/Write  Level 5 - Admin | Level 2 - All Read/Specific Write | Level 4 - Managers access "secret" section |  |
| **Supporting Documents** (excel, word, pdf, outlook) documents that record and support the notes as well as clients' own documents | Save link to internal supporting documents saved in existing/simple folders  Links and access info to files held on client web pages etc. | Semi-automated link creation to add support documents to existing folders | Drag-n-drop feature to quickly upload documents  Protect those files from change/deletion unless user has write access to that client  --OR-- bridge to existing infrastructure that performs these processes |  |
| **Additional/General Features** | Static fields with dynamic content | Dynamic fields with dynamic content  Spell check functionality on notes  View notes in both excel format and user-friendly web app format  Ability to collapse fields to allow view of item of interest  client tables have 'action' column in addition to 'notes'/data columns. Ex. if choose protocol, can link/go directly to Zope but also have specific notes available | Users can do a 'pull request' so 'owners' can review before changes are applied to tables or support documents. Changes to be approved by Level 2/3 access.  Auto-email owner to trigger review.  User has a 'homepage' i.e. view their starred items/the clients they own for quick access |  |
| **Log/Data tracking** | Revision history (manual input of what changed) for each client or general use table | Automatic log of user/time of changes for each file and each line of tables | Detailed version control |  |
| **Search** |  |  | Robust search function to search all visible documents for keywords  Robust search function to search file names of supporting documents |  |
|  |  |  |  |  |
| **Security** | Hosted on company servers and access based on registered/approved user | Periodic data backup in 3rd location |  |  |

Authorization levels

|  |  |  |  |
| --- | --- | --- | --- |
| **Auth level** | **Who can access** | **What can access** | **Access details** |
| **Level 1 - Read only** | All registered Users | All visible | Can see visible and links |
| **Level 2 - Read/Write Specific** | Specific client 'owners' | Level 1 + Client 'owners' can write their clients only | Can see background for their clients |
| **Level 3 - Read/Write All** | Senior CSS and Managers | Level 1 + All write | write in visible and background, upload docs, etc. except secret |
| **Level 4 - Manager** | Managers | Level 1 + Level 3 + read/write secret | Secret section - per client to hold long term intelligence notes/documents not ready for general knowledge |
| **Level 5 - Admin** | Designated admins | Level 1 + Level 2 + Level 3 + User list |  |

Routes

|  |  |  |  |
| --- | --- | --- | --- |
|  |  |  |  |
| **/** |  |  |  |
| **/login** |  |  |  |
| **/register** |  |  |  |
| **/geninfo** |  |  |  |
| **/clients** |  |  |  |

Auth Controller

|  |  |  |  |
| --- | --- | --- | --- |
| **auth-controller**  handles authorization processes |  |  |  |
| **notes-controller**  handles data input into tables |  |  |  |
| **doc-controller**  handles support document access and upload |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

Notes Controller

|  |  |  |  |
| --- | --- | --- | --- |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

Document Controller

|  |  |  |  |
| --- | --- | --- | --- |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

Menus

|  |  |  |  |
| --- | --- | --- | --- |
| **Nav Bar** |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |