E-Care @ Home

WP1: Functional Requirements Specification

D1.2.10: Friends & Family Portal Version 2

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ABSTRACT

This document describes the functionality of the WellTogether Friends and Family portal to be accessed via the UX-layer according to the architecture described by the wireframes, with the presentation style described in 'graphics' and the UX behavior to be fully specified, where necessary in the WP-2 – UX templates.

KEYWORDS
ECH, WP1, UX specifications, Functional Spec, Friends and Family Portal

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1.0	20.12.2013	Draft release	The Alloy	Internal

1) Overview:

1.1. Definition

In the terminology of the WellTogether service system, the Friends and Family portal is the software interaction portal used by informal care partners to assist service users. It runs on a chrome browser with a mouse based interaction on any PC style device. The UX should also allow for touch usage in future 'multi-portal' deployment onto tablets.

1.2. Scope

This document describes the functionality that will be required in Version 2. In many cases this will be similar to version 1.2. The main differences are in the area of improved usability and more sophisticated 'permission based' variation in the functionality presented to the user.

2) Summary of main workflows

2.1. Enrolment

2.1.1. As a guest user

2.1.2. Upgrading to paid user

2.2. Routine access

2.2.1. Via web browser

2.2.2. Via native web app

2.3. Default Functionality all roles:

2.3.1. Guest user

2.3.2. Paid user (not required for ECH)

2.4. Role based functionality

2.4.1. Contact only

2.4.2. Socialising contact

2.4.3. Totally trusted agent

2.4.4. Trusted carer

2.4.5. Authorised care agent

3) Enrolment functionality

3.1. Guest user

3.1.1. Invitation – non WT service user
Invitation is triggered either as part of a WT membership registration sequence or by a WT user via contacts.

3.1.2. Auto e-mail is received – in contains a unique 'enrollment' URL permission code.

3.1.3. Click link directs to WT web enrolment screen

3.1.4. Set up a user name and pwd   (can be your e-mail)

3.1.5. Set up a WT card for yourself

3.1.6.   Offer option to download desktop icon and local app.

3.1.7. At end of enrolment, you see 'FFP main screen' with the inviting WT user already in place.

3.1.8. An introductory 'capability overview / intro is displayed prominently.

3.2. Upgrading to paid user

3.2.1. Upgrade control:
The guest user shall have anytime access to an 'upgrade to paid membership' control that introduces the benefits, and sets up a workflow to collect credit card info and upgrade the controls available on the web app.

3.2.2. Additional paid functionality: (not needed for ECH)

3.2.2.1.   Full service user functionality for self

3.2.2.2.   Full Invitation rights

3.2.2.3.   Calendar synch with other calendars (not needed for ECH)

4) Default Functionality (all roles)

4.1.   Send and receive WT messages

4.2. Make and receive audio / video calls from any WT service user

4.3. Receive alerts

WT guest users who have accepted an invitation to receive alerts from a specific measure of a specific service user will have access to all the functionality needed to manage alerts (see D1.2.13A – measures common functionality).

4.4. View individual measures

(by invitation for each specific measure)

4.5. 'Own' FFP calendar

Guest users will have access to WT diary functionality and will have a personal calendar subset of their guest user service record. With this will come the right to invite other connected WT users to event's set up in that calendar.

4.6. Accept 'connection' introductions from any WT Service User

4.7. Issuing Informal care invitations:

Guest users will have limited invitation privileges towards other WT Guest users, aimed at adding contacts to build informal care groups. These will be implemented using the WT std protocols – using the 'find me' codes of invitees.

4.8. Introductions:

An FFP guest user connected independently to 2 WT service users, can introduce them to each other (see HP contacts – introductions)

5) Role Based functionality

During the invitation process WT service users assign sets of access permissions according to pre packaged 'roles' defined by WT. (Service users can then edit these permissions to customise access rights if required), The main roles are

5.1. Contact:

5.1.1. 'Common functionality

This is the minimum default permission set. It only gives access to the universal functionality previously defined. (calls, messages, alerts, limited invitations) with the inviting party.

5.2. Socialising contact.

5.2.1. As 'contact'

5.2.2. Additional 'blind' viewing access to the inviting SU's diary

5.3. Totally trusted agent

5.3.1. As contact

5.3.2. HP clone – including 'private' sub section.

Full read and write access to all functionality on the inviting service users HP. The UX will provide a 'clone' of the Homepad UX – accessing the full service record of the inviting service user. (Note this includes the carebook if present this will also be accessible.). This access will require use of the same privacy filters as set in the SU record (not that – Face recognition ID can't be used from the FFP)

5.3.3. Direct insertion

The FFP will include access to local file structures to select individual files and 'drag and drop' these to clearly identified fields on the tablet: photos, wellbeing library/personal subfolders, (other exact locations TBA).

5.4. Trusted carer

5.4.1. As contact

5.4.2. HP clone – EXCLUDING access to 'private' sub section.
Full read and write access to all functionality on the inviting service users HP. The UX will provide a 'clone' of the Homepad UX – accessing the full service record of the inviting service user. (Note this includes the carebook if present.)

5.4.3. Direct insertion
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6) Main screen elements

6.1. Master tool bar
This will use the same UX components as HP, but the colourway of the keys will be changed (TBD via UX design) to clarify differentiation with 'remote HP access' view. Light coloured sub-sections lead to amendments to the FFP user service record (as a guest or paid user), dark buttons relate to remote access to a service user HP.

6.2. 'Control bar'
Functions exactly as HP, with same sizing / location rules

6.3. 'Smart arrows area:
Functions exactly as HP, with same sizing / location rules

6.4. Top row 'icon'

No icons or clock – Undo and Redo only.

6.5. Main screen area:

6.5.1. Home screen

6.5.1.1. Right Side

Incoming messages behaviour exactly as HP

6.5.1.2. Left side

a narrow branded vertical branded 'care bar' appears next to a display of contact 'favourites' in a single column width.

When one of the favourites is selected the home screen is replaced with a 'care screen'

7) Care screen

7.1. Expanded care bar

The coloured bar expands to display the following:

7.1.1. Name and photo of the 'selected care partner' (non selectable)

7.1.2. Call

Leads to same 'in call' screen as HP.

7.1.3. Mail

Leads to same 'in call' screen as HP

7.1.4. Remote access

Leads to 'remote access' screens

7.1.5. Direct content link

Leads to 'direct' transfer screens

7.2. Remote access screen

7.2.1. Care bar

7.2.1.1. Graphics

care bar says ' remote connection to (name and photo of selected carer)

7.2.1.2. Controls: 'close remote connection'

7.2.2. Master tool bar:

7.2.2.1. Button colour: changes to a lighter 'remote access' colour

7.2.2.2. Button availability

Only buttons for which there is access permission are shown

e.g. 'social Contacts can only see a blind calendar, events they have been invited to and any shared measures.

7.2.3. Main screen and control bar

7.2.3.1. Controls as per HP UX for the relevant section

7.2.3.2. When selected – display a 'connecting remotely to (name of care partner) until screen content is displayed.

7.3. Direct file transfer screen

7.3.1. 'from' box

Displays a 'file selection' browser for local PC

7.3.2. 'to' box

Display a list of valid destinations on the selected care partner home pad:

Photo album

Wellness library

personal library (TBC).

7.3.3. Controls:

7.3.3.1. Copy file to (SU Name's) record

7.3.3.2. Copy link to (SU Name's) record

8) Friends and Family user record functionality

8.1. Guest users

Guest users on FFP will only have access to the following sub-sections (other controls will not be displayed):

8.1.1. Contacts

8.1.2. Calendar

8.1.3. Private (second login required for every access)

8.1.4. Services (not for ECH)

8.2. Paid users

Paid users will effectively have a full paid service user status with all associated functionality as per the HP functionality specification. Except for the following:

8.2.1. 'local HW' functionality deleted

'Settings' will not include any local HW connections and no battery / signal icons or clock will be displayed.

9) Alerts

9.1. Readyness

For alerts to be 'receivable' the local web app must have 'logged in' status – like skype. Users must be given the option to 'stay logged in' by default.

9.2. Alert pop-up

When alerts / reminders come in these will appear as a small pop-up on the local device.