Gift Garden UX V1.1

Oct 30, 2016 - Version 1.1, driver for Sprint #2  
Oct 5, 2016 - Version 1.0, driver for Sprint #1  
Sep 28, 2016 - Version 0.2, action-based UX  
Sep 22, 2016 - Version 0.1, created

Gift Garden UX V1.1. Viva la Sprint #2!  
I have only changed sections A and B and added section C.  
There’s no point to redoing old stuff, so the bones of Donna Donor live in section D.  
thanks… yow, bill

Sections include: A. Issues, B. Screens Summary, C. Sprint #2 Changes, D. Screen Mockups, and there’s an appendix with some kooky stuff.

This UX description is only a roadmap, not the final say-so on anything. Some things are incomplete and some things are just wrong. The right answer: Use your best judgement, discuss ideas with your teammates. The best solution will come from the creativity we can capture throughout the term.  
thanks… yow, bill

A. Issues

Of course, we still need a name and some colors. (shrug) We’ll get there.

These are only major issues, no small ones for now. Most of these are queued up for debate and resolution before the next Sprint. We shall see.

★ **Philosophy** - Place the onus of correctness and completeness on the data entry tech person, not executroids. This means not accepting incomplete information.

★ **Filter, search** - This is a major Sprint #2 addition to surfing and the basic reports.

★ **Hyper-search** - hyper-search is a rock star… both flashy and useful. Let’s make it happen in Sprint #2.

★ **Recurring Activities** - Great idea from Carrie P! Report is… year-to-year comparison of activities like golf outing, etc. This only impacts the RA report.
★ CSV import check - This may be too much work... when user imports a CSV, walk through each record online to have the user and Donna verify its OK-ness.

★ Deleting things - We’ll allow users to trash objects in Sprint #2. We’ll add a way to view the trash.

Old and/or later ideas:

- **Labels** - This idea is old and dead, I think. We want simple, fixed options.

- **PDF me!** - Can we add a button to lists (Activity, Donor, Donation) to PDF the list you’re currently viewing online? This is a good idea, but we probably won’t have time to do it. Let’s just make sure that our screens print OK.

- **Previous session** - An old idea, but a goodie... add an accordion on the Home page to show the commands/activity of the user’s previous session. Another good idea that might not make the cut.
B. Screens Table

Here are the screens so far. They are in, sort of, logical order.

<table>
<thead>
<tr>
<th>Title/Subtitle</th>
<th>Description</th>
</tr>
</thead>
</table>
| Login.1        | Username + password login  
Successful login => Home; unsuccessful stays here |
| Home.1         | Home screen after successful login  
Selecting Donna logo returns to Home |
| New.1          | Create 1 or more new gifts  
This page is "special" because of the "New" icon on Home |
| Activity.1     | Surf all activities!  
List all Activities, choose one to edit or create a new one |
| Activity.2     | Create a new Activity  
Set the fields and go |
| Activity.3     | Surf (view/edit) one activity  
Similar to New Activity, but fields are filled in  
Link to all gifts made during this Activity |
| Donor.1        | Surf all donors  
List all donors, choose one to edit or create a new one |
| Donor.2        | Create a new donor  
Set the fields and go |
| Donor.3        | Surf (view/edit) one donor  
Similar to New Donor, but fields are filled in  
Link to all gifts made by this Donor |
<p>| Gift.1         | Surf all gifts associated with either an Activity or Donor |</p>
<table>
<thead>
<tr>
<th>Surf Gifts</th>
<th>User can dynamically change Activity or Donor combo</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gift.2</td>
<td>Create a new gift</td>
</tr>
<tr>
<td>New Gift</td>
<td>Set the fields and go</td>
</tr>
<tr>
<td>Gift.3</td>
<td>Surf one gift</td>
</tr>
<tr>
<td>Surf Gift</td>
<td>Similar to New Gift, but fields are filled in</td>
</tr>
<tr>
<td>Hyper.1</td>
<td>Display results of a Hyper surf issued from the header</td>
</tr>
</tbody>
</table>

| Reports.1  | All reports                                         |
|            | Basic static reports                                |
| Reports.2-N| I anticipate that each Report will have its own screen, asking the user to specify any available options. These screens will be relatively simple and are not specified in detail here. |
| ImpExp.1   | All static import/export options                    |
|            | Import/export of CSV files                          |
| ImpExp.2-N | I anticipate that each Import/Export will have its own screen, asking the user to specify any available options. These screens will be relatively simple and are not specified in detail here. |
| Wei.1      | Import Gift CSV                                     |
| Wei.2      | Validate Import                                     |
|            | Validate the data in a Gifts CSV. Report errors and Donor ambiguities. |
| Wei.3      | Import Congrats                                     |
|            | Congrats screen on a successful validation and import. |
|      | Account/Setting page  
User can change password |
|------|-------------------------------------------------|
| Admin.1 | Account/Admin page  
**Admin only!** List all users. New User button. |
| Admin.2 | Create a new user  
**Admin only!** |
| Admin.3 | Account/Edit user  
**Admin only!** Change user’s level or password. Completely remove user from system. |
| About.1 | A page about Donna and her creators  
EZ page. We’ll do this later |
| Help.1 | Simple Help page  
We’ll do this later |
C. Sprint #2 UX

UX screen additions and changes for Sprint #2.
Everything in section C. is new, so I didn’t put is all in blue.

The first set of screens is related to login/authorization.

Account.1 - Account settings
Access this from the header menu: Account/Settings

- Should we require a re-type of current password?
Admin.1 - User admin page

Access this from the header menu: Account/Admin

- This is an **admin only** screen.
- Select Add New User button, goto Account.4 New User
- Select a user from the list, goto Account.3 Edit User
This is an admin only screen.

- On create or cancel, return to Account.2
Admin.3 - Edit user

This is an admin only page.

- This is an **admin only** screen.
- Change password or Cancel returns to Account.2
Wei.1 - Import Gifts CSV

Begin the process of importing multiple Gifts from a CSV file.

- Bill: Write the text describing the process.
- Issue: Is there a File Chooser available somewhere in Rails. Ask Pat M.
Wei.2 - Validate

Begin the process of importing multiple Gifts from a CSV file.

- Bill: Write the text describing the process.
- On “Validate again” return to this screen if more errors or goto Wei.3 if no errors;
  On “Cancel”, goto Reports.1 screen.
Wei.3 - Import Successful

Congrats on a successful import!

- Select OK, goto Report.1
D. Screen Mockups

This section shows a wireframe mockup of each Donna screen, one per page.

Login.1 - Login

The first screen in Donna Donor to login to the system

Notes:

- Allow either email or username on login? Or just email?
- The model relies on human admin for new accounts and passwords. Control is more important than convenience.
- Successful login => Home.1; Unsuccessful => stay here with flash error at top
- About => About.1; Help => Help.1
- **Idea**: I think this is one of our weakest, most incomplete screens… Mike D has some ideas here. Get him to work on this for Sprint #1?
Home.1 - Home

The actions available in Donna Donor

Welcome to Donna Donor... select one of 4 basic actions:
1) Add new gifts, 2) "Surf" means view/edit information online, 3) Create formatted reports, or 4) Import/export data.

New Gifts  Reports

Surf  Import/Export

Notes:
● This header and footer the same (mostly) for all screens; Click on Donna logo in header always returns to Home.1
● The left icons are dynamic and online. The right icons are static and I/O.
● All icons and related text change color on hover
● Refine: Paragraph text. Better/real icons
● We could add an (+) accordion with the commands from last session. This is either optional or probably not worth the effort
● Action icons: New Donations => New.1; Surf Donations => Surf.1; Reports => Report.1; Import => Import.1; Export => Export.1
New.1 - New donations

Add new donations to the system, one at a time or many

Notes:

- These are +/- accordions in Bootstrap that open/expand or close/contract. The screen above shows “One donation” open and “Many donations” closed. I need to show the opposite case. What does “Many donations” look like?
- Select Activity from list in the spinner, or create a new one
- Select Donor from list in the spinner, or create a new one
- Refine: Donation will have more fields
- Issue: If user creates new activity, can we then return to this screen with the spinner pointing to the Activity he/she just created?
Activity.1 - Surf!

Surf all Activities

Notes:
- New Activity => Activity.2; Switch to Donors => Donor.1
- Click on an activity in the list to view/edit => Activity.2
- Activity rows change color on hover
- Click on more… for more activities (Rails pagination)
Activity.2 - New Activity

Create a new activity, add it to the database

Notes:
- Create Activity => Activity.1; Cancel => Activity.1 (same)
- Refine: Calendar helper or something for start/end
- Refine: There will be (many?) more fields that this
- Required fields have a red **
- Issue: We need design work on recurring Activities (Golf outing 2016, 2015, 2014...)
Activity.3 - Edit Activity

View or edit an existing activity

Notes:

- Field values are filled in and can then be changed
- Update => Activity.1; Cancel => Activity.1
- Idea: Add an Activity ID? 12 chars or less for reporting?
Donor.1 - Surf Donors

Surf all donors

Notes:
- New Donor => Donor.2; Switch to Activities => Surf.1
- Click on a Donor in the list to view/edit => Donor.2
- Donor rows change color on hover
- Click on more… for more Donors (Rails pagination)
Create a new donor

Notes:
- There are many more fields that this.
- 

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Donor.3 - Edit Donor

View or edit an existing donor

Notes:
- There are many more fields that this.
Gift.1 - Surf Gifts

Surf all gifts

Notes:

- Default Activity and Donor spinner is “All”
- Change the spinners, then hit Update Surf to get a new list of Gifts
Gift.2 - New Gift

Create a new gift

Notes:
- An Activity and a Donor are required for every Gift

-
Gift.3 - Edit Gift

Edit an existing gift

Notes:
- Future: Delete this gift link or button? Archive? Remove?
- 

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Hyper.1 - Hyper Surf results
Display the results of a Hyper Surf (found in the header of most screens)

**Sorry: No screen yet!**

Notes:
- List any Activity, Donor or Gift that matches the hyper surf query
- If none, empty table?
-
Select a report

Reports
These are quick, canned reports with minimal options. Executroids should be able to come here and quickly get what they need. Each report is PDF. Each has three options to control content: brief, medium, and long. Simplicity!

- Activity Report - donors and donations for an Activity
- Donor Report - donors and their donations
- All Donations Report - all donations for a time period
- Recurring Activity - comparison of recurring activities over time

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Notes:
- Static list of canned reports with minimal options… tuned for executroid use!
- Need to work with users to specify what real reports we’ll create (duh)
ImpExp.1 - Import/Export CSV files

Import and export CSV data into/out of Donna

Notes:
- Static list of canned import/export... tuned for use by tech person in charge of donation database
- Need to work with users to specify what real CSV we'll handle (duh)
Coming soon…
  ❖ About.1
  ❖ Help.1
  ❖ Account.1
  ❖ Settings.1

thanks… yow, bill
A. Appendix A.

Kooky miscellany.

Colors

Donna Donor colors are based on the dollar bill: hex #85bb65 and rgb(133,187,101).
This site is a good resource on this: www.colorhexa.com/85bb65.
It includes a number of dollar-compatible color palettes, tints, and more.

Here are palette choices from the site above. Do we need 3 colors? Or 4?
We'll make final decisions on this later (aka soon). And yes, it would be good to get
some help on this.

Another good site to help with this: color.adobe.com/
See my $100 bill palette in the appendix if you're as kooky as I am.

$100 bill palette

I searched for a palette based on the colors in a new $100 bill.
  ● You can get a palette for this here: www.cssdrive.com/imagepalette/index.php,
  ● Using this $100 bill image: i.huffpost.com/gen/1392894/images/o-100-BILL-facebook.jpg

Boy, this palette looks nice, classy. We will choose. Soon!
Donna sticks

If Donna Donor survives as a name, I had another kooky idea. Solicit users (About page?) for their own stick figures. Email them in and we’ll add them to a rotation of randomly chosen Donna stick figures.

Quirky + fun!

Or too cute?