

# Donna Donor UX

*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*

Donna Donor UX V1.0. This version will drive Sprint #1 development efforts. Many issues remain. But I think we have a strong foundation.

Sections include: A. Issues, B. Screens Summary, C. Screen Mockups, D. Conclusion, 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. Also, labels should be defined by the admin, not an everyday user.
- ★ **Labels** - add labels to any donor or donation (activity?), so that reports can be filtered on label values.
- ★ **Filter, search** - on the lists (activities, donors, etc), we need a consistent mechanism for filtering lists and also sorting them.
- ★ **PDF me!** - can we add a button to lists (Activity, Donor, Donation) to PDF the list you're currently viewing online?

- ★ **Entry question** - HEY! What's more common: entering donations online or a bunch at a time, in a CSV from a spreadsheet?
- ★ **Hyper-search** - Great idea: hyper search... enter a term and return all objects (activity, donor, donation, etc) that match it.
- ★ **Recurring Activities** - Great idea from Carrie P! Report is... year-to-year comparison of activities like golf outing, etc. This is complex as it's an architecture and UX issue.
- ★ **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.
- ★ **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.
- ★ **Deleting things** - How does the user delete an Activity or Donor or Gift? Is archive a better verb?

## B. Screens Table

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

<b>Title/Subtitle</b>	<b>Description</b>
Login.1 Login page	Username + password login Successful login => Home; unsuccessful stays here
Home.1 Home page	Home screen after successful login Selecting Donna logo returns to Home
New.1 New gifts	Create 1 or more new gifts This page is "special" because of the "New" icon on Home
Activity.1 Surf Activities	Surf all activities! List all Activities, choose one to edit or create a new one
Activity.2 New Activity	Create a new Activity Set the fields and go
Activity.3 Surf one Activity	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 Donors	Surf all donors List all donors, choose one to edit or create a new one
Donor.2 New Donor	Create a new donor Set the fields and go
Donor.3 Surf one Donor	Surf (view/edit) one donor Similar to New Donor, but fields are filled in Link to all gifts made by this Donor
Gift.1	Surf all gifts associated with either an Activity or Donor

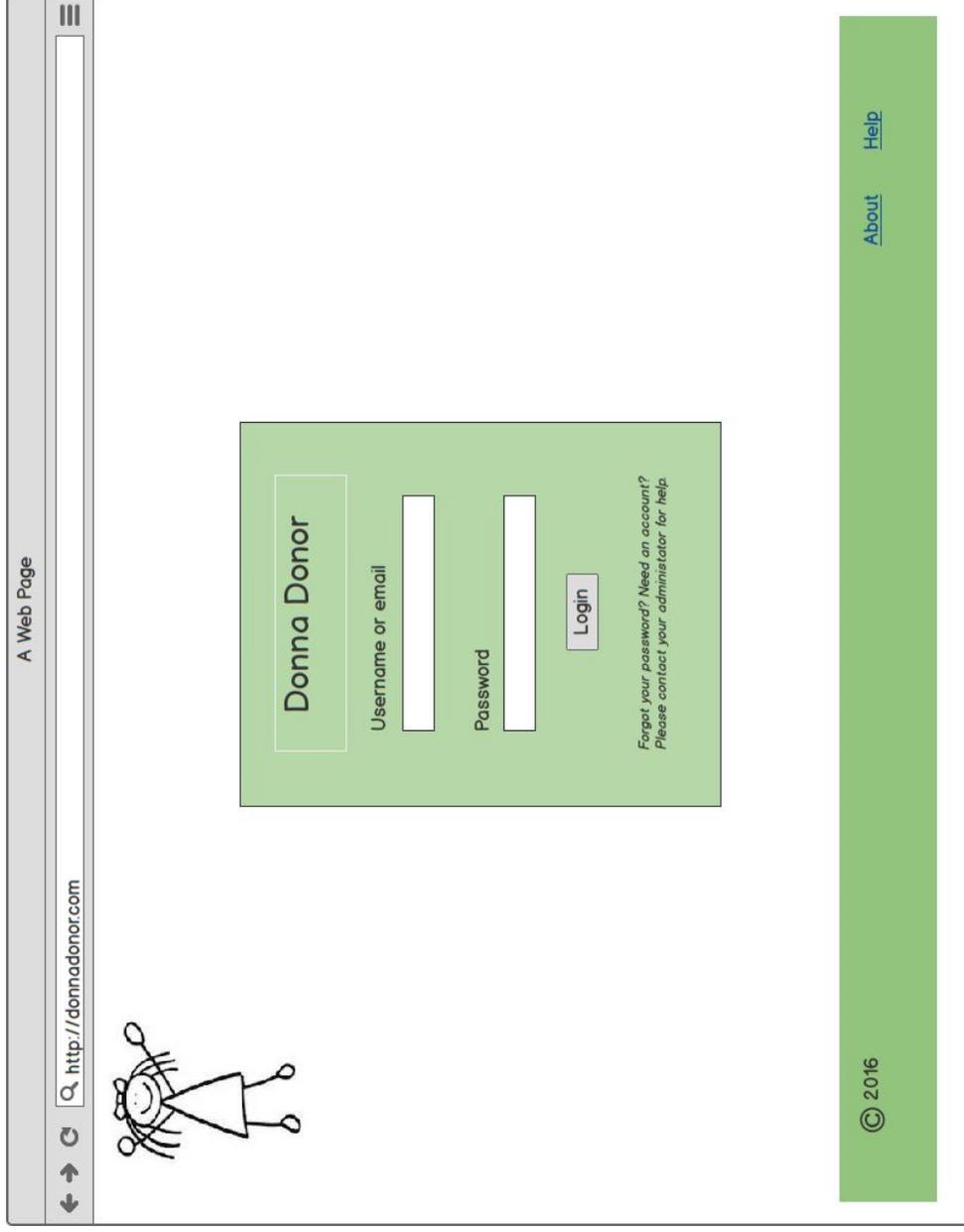
Surf Gifts	User can dynamically change Activity or Donor combo
Gift.2 New Gift	Create a new gift Set the fields and go
Gift.3 Surf Gift	Surf one gift Similar to New Gift, but fields are filled in
Hyper.1 Hyper surf	Display results of a Hyper surf issued from the header
Reports.1	All reports Basic static reports
ImpExp.1	All static import/export options Import/export of CSV files
About.1	A page about Donna and her creators We'll do this later
Help.1	Simple Help page We'll do this later
Account.1	Account Change password, etc
Settings.1	Settings ???

## C. 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

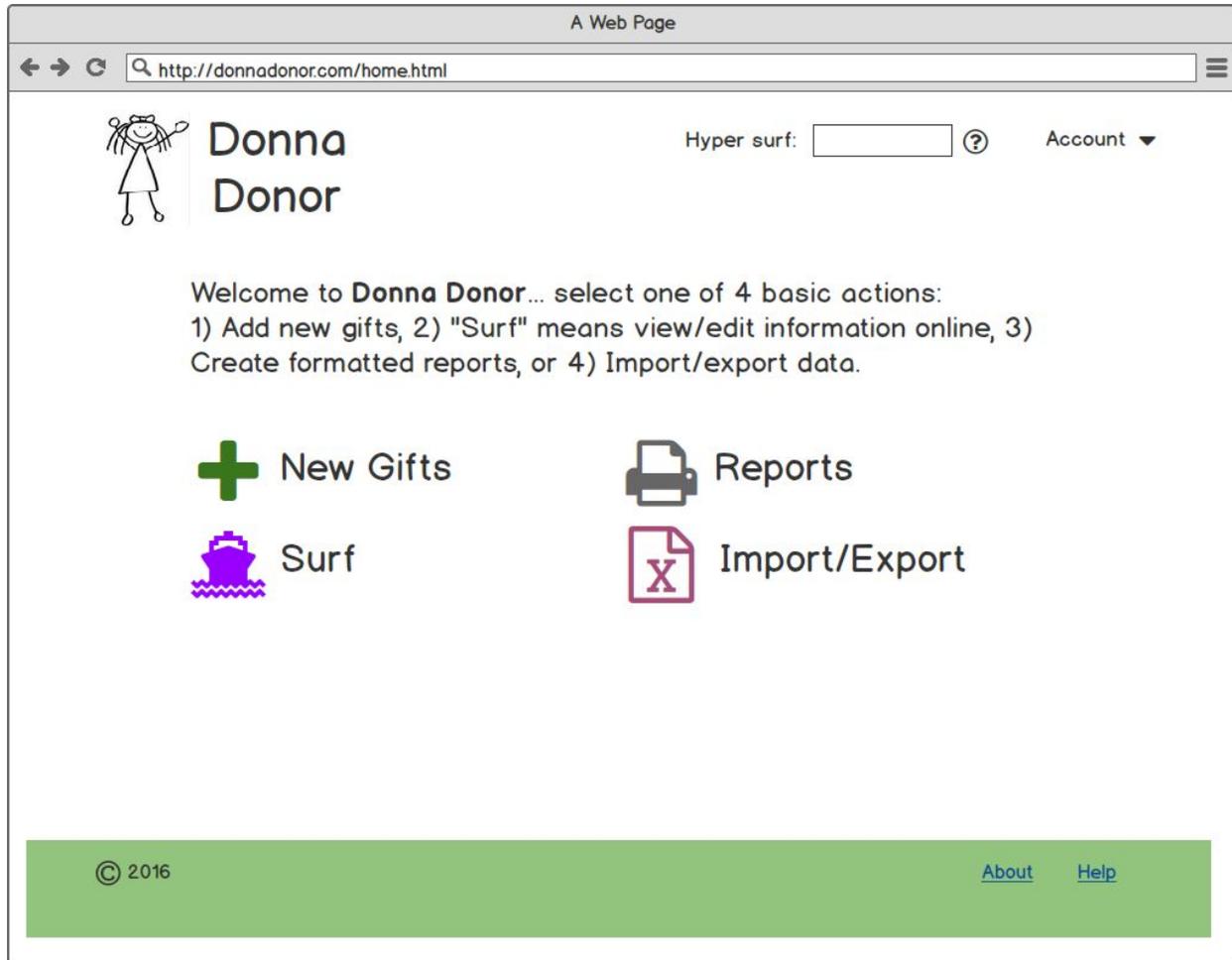


#### Notes:

- 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



### 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

A Web Page

http://donnadonor.com/new.html

Donna Donor

Hyper surf:  ? Account ▾

### New Gifts

Activity  
 ▾ [+ New Activity](#)

— One donation

Donor  
 ▾ [+ New Donor](#)

Type  ▾ Amount  Notes

[One Donation](#) [Cancel](#)

+ Many donations

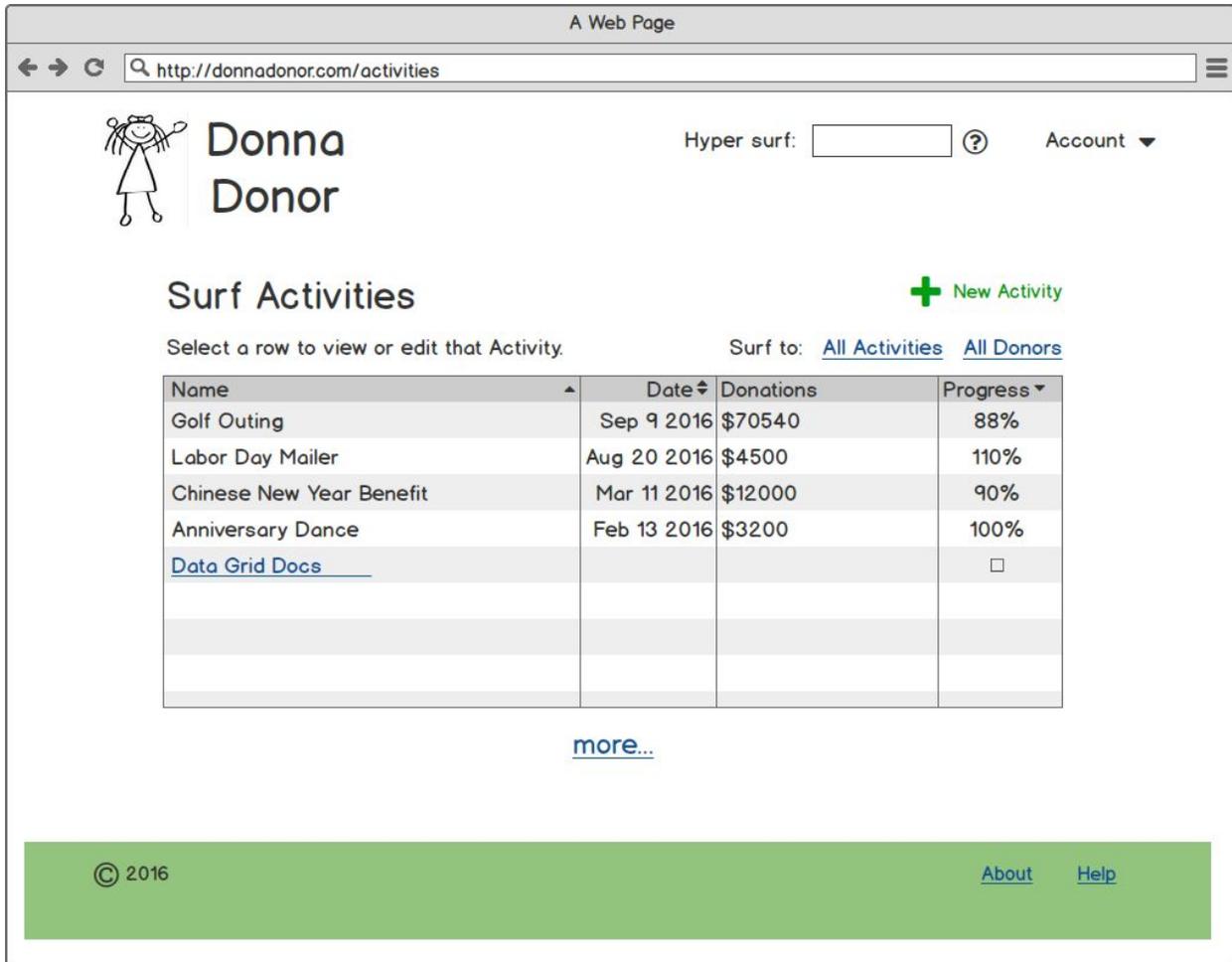
© 2016 [About](#) [Help](#)

### 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



The screenshot shows a web browser window with the URL <http://donnadonor.com/activities>. The page features the Donna Donor logo, a "Hyper surf:" input field, and an "Account" dropdown menu. The main heading is "Surf Activities" with a "+ New Activity" link. Below the heading, there is a prompt "Select a row to view or edit that Activity." and two links: "All Activities" and "All Donors". A table lists activities with columns for Name, Date, Donations, and Progress. The table includes a "Data Grid Docs" link and a "more..." link below it. The footer contains "© 2016" and "About Help" links.

Name	Date	Donations	Progress
Golf Outing	Sep 9 2016	\$70540	88%
Labor Day Mailer	Aug 20 2016	\$4500	110%
Chinese New Year Benefit	Mar 11 2016	\$12000	90%
Anniversary Dance	Feb 13 2016	\$3200	100%
<a href="#">Data Grid Docs</a>			<input type="checkbox"/>

### 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

The screenshot shows a web browser window with the URL `http://donnador.com/activities/new`. The page header includes the Donna Donor logo (a stick figure) and the text "Donna Donor". To the right, there is a "Hyper surf:" field with a question mark icon and an "Account" dropdown menu. The main content area is titled "New Activity" and contains several input fields: "Name \*" (required), "Start Date", "End Date \*" (required), "Description \*" (required), and "Goal \*" (required). Below these is a "Notes" section with a large text area. At the bottom of the form are two buttons: "Create Activity" (green) and "Cancel" (red). The footer of the page is green and contains the copyright notice "© 2016" and links for "About" and "Help".

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

A Web Page

← → ↻

 **Donna Donor** Hyper surf:  ? Account ▾

### Edit Activity [Surf all gifts for this Activity](#)

Name	Start Date	End Date
<input type="text" value="Chinese New Year Benefit"/>	<input type="text" value="Feb 6, 2016"/>	<input type="text" value="Feb 6, 2016"/>
Description	Goal	
<input type="text" value="Dinner, dancing and auction"/>	<input type="text" value="\$10,000"/>	

Notes

© 2016 [About](#) [Help](#)

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

Donna Donor

Hyper surf:  ? Account ▾

### Surf Donors

Select a row to view or edit that Donor. [+ New Donor](#)

Surf to: [All Activities](#) [All Gifts](#)

Name ▲	Donations ⇅	\$Amount ⇅	Last ▲	Last Activity ▼
Jane Doe	7	\$540	Sep 9 2016	GolfOut2016
Fred Miller	2	\$212	Aug 20 2016	AnnivDance
M Trumbo	1	\$120	Mar 11 2016	General
Bu Posey	24	\$3200	Jun 13 2016	AnnivDance
Prof Bill Krieger	1	\$12	Sep 28 2016	General

[more...](#)

© 2016 [About](#) [Help](#)

Notes:

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

## Donor.2 - Create Donor

Create a new donor

A Web Page

← → ↻

 **Donna Donor** Hyper surf:  ? Account ▾

### New Donor

Last Name *	First Name	Title
<input type="text"/>	<input type="text"/>	<input type="text"/>
Address *	City *	State
<input type="text"/>	<input type="text"/>	IL ▾

Notes

© 2016 [About](#) [Help](#)

Notes:

- There are many more fields than this.
-

## Donor.3 - Edit Donor

View or edit an existing donor

A Web Page

← → ↻

 **Donna Donor** Hyper surf:  ? **Account** ▼

### Edit Donor

[Surf all gifts for this Donor](#)

Last Name *	First Name	Title
<input type="text" value="Mozart"/>	<input type="text" value="Amadeus"/>	<input type="text"/>
Address *	City *	State
<input type="text" value="10 N. Brainard St."/>	<input type="text" value="Naperville"/>	<input type="text" value="IL"/> ▼

Notes

© 2016 [About](#) [Help](#)

Notes:

- There are many more fields than this.

# Gift.1 - Surf Gifts

## Surf all gifts

A Web Page

http://donnador.com/donation/gifts

Donna Donor

Hyper surf:  ? Account ▾

**Surf Gifts** [+ New Gift](#)

Select a row to view or edit that Gift. Surf to: [All Activities](#) [All Donors](#)

Activity Donor

Pledge Drive ▾ All ▾ [Update surf](#)

Activity	Donor	Date	Amount
Pledge Drive	William Tee	Feb 27 2016	\$700
Pledge Drive	Mike Dee	Feb 14 2016	\$4500
Pledge Drive	Wei Aych	Feb 12 2016	\$120
Pledge Drive	Andy Doubleyew	Feb 13 2016	\$30

[more...](#)

© 2016 [About](#) [Help](#)

### 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

The screenshot shows a web browser window titled "A Web Page" with the address bar containing "http://donnadonor.com/gifts/new". The website header features the Donna Donor logo (a stick figure) and the text "Donna Donor". To the right of the logo, there is a "Hyper surf:" field with a question mark icon and an "Account" dropdown menu. The main content area is titled "New Gift" and contains the following form elements:

- Activity:** A dropdown menu with "General" selected.
- Donor:** A dropdown menu with "Penelope Higgins" selected.
- Type:** A dropdown menu with "Cash" selected.
- Amount:** An empty text input field.
- Date:** An empty text input field.
- Notes:** A large empty text area.

At the bottom of the form, there are two buttons: a green "Create Gift" button and a red "Cancel" button. The footer of the page is a green bar containing "© 2016" on the left and "About" and "Help" links on the right.

Notes:

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

## Gift.3 - Edit Gift

Edit an existing gift

A Web Page

← → ↻

 **Donna Donor** Hyper surf:  ? Account ▼

### Edit Gift

Activity	Donor	
<input type="text" value="General"/>	<input type="text" value="Penelope Higgins"/>	
Type	Amount	Date
<input type="text" value="Cash"/>	<input type="text" value="\$100"/>	<input type="text" value="Oct 5, 2016"/>

Notes

© 2016 [About](#) [Help](#)

Notes:

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

## Hyper.1 - Hyper Surf results

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

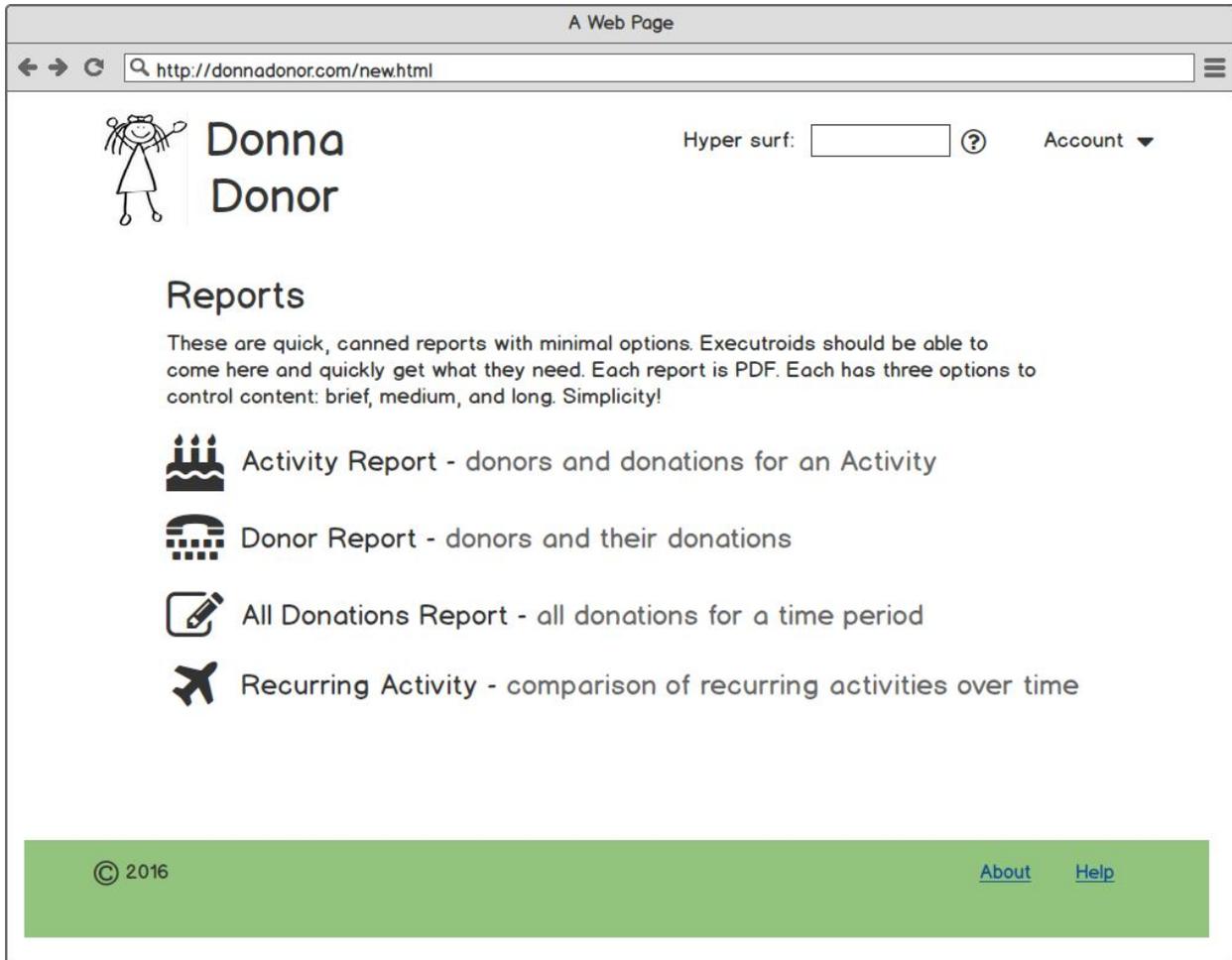
**Sorry: No screen yet!**

### Notes:

- List any Activity, Donor or Gift that matches the hyper surf query
- If none, empty table?
-

## Reports.1 - Reports

Select a report



The screenshot shows a web browser window titled "A Web Page" with the address bar containing "http://donnador.com/new.html". The website header features the "Donna Donor" logo on the left, a "Hyper surf:" search box with a question mark icon, and an "Account" dropdown menu on the right. The main content area is titled "Reports" and includes a paragraph: "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!". Below this are four report options, each with an icon and a description:

-  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

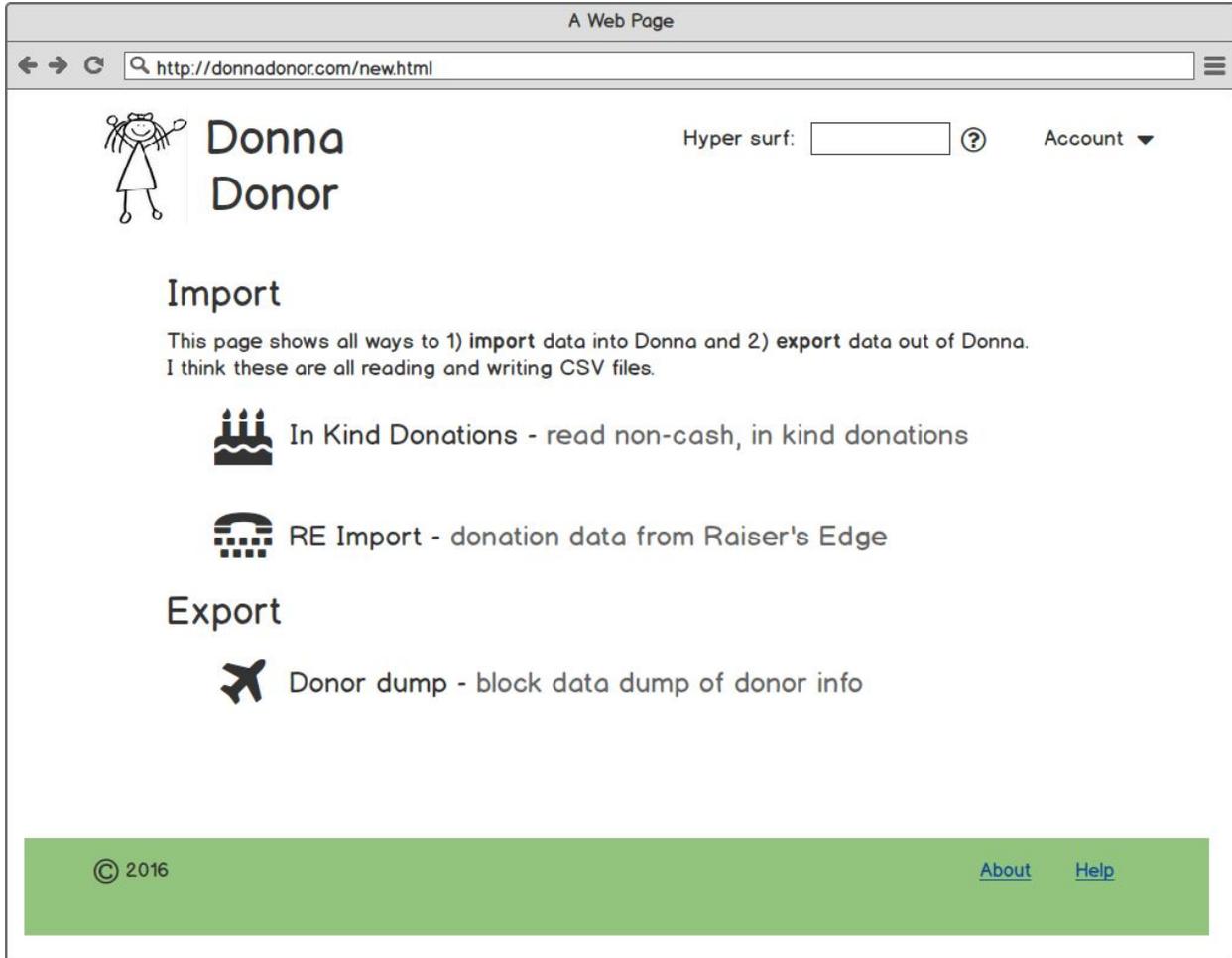
The footer is a green bar containing "© 2016" on the left and "About" and "Help" links on the right.

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



The screenshot shows a web browser window with the URL <http://donnadonor.com/new.html>. The page features the Donna Donor logo (a stick figure) and the text "Donna Donor". In the top right, there is a "Hyper surf:" input field, a help icon, and an "Account" dropdown menu. The main content is divided into "Import" and "Export" sections. Under "Import", there are two options: "In Kind Donations - read non-cash, in kind donations" (with a birthday cake icon) and "RE Import - donation data from Raiser's Edge" (with a server rack icon). Under "Export", there is one option: "Donor dump - block data dump of donor info" (with an airplane icon). The footer contains a copyright notice "© 2016" and links for "About" and "Help".

#### 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).

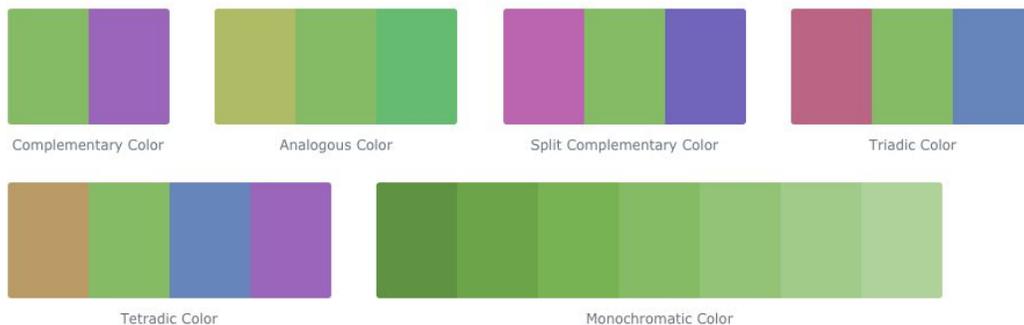
This site is a good resource on this: [www.colorhexa.com/85bb65](http://www.colorhexa.com/85bb65).

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.

#### Color Schemes with #85bb65



Another good site to help with this: [color.adobe.com/](http://color.adobe.com/)

See my \$100 bill palette in the appendix if you're as kooky as I am.

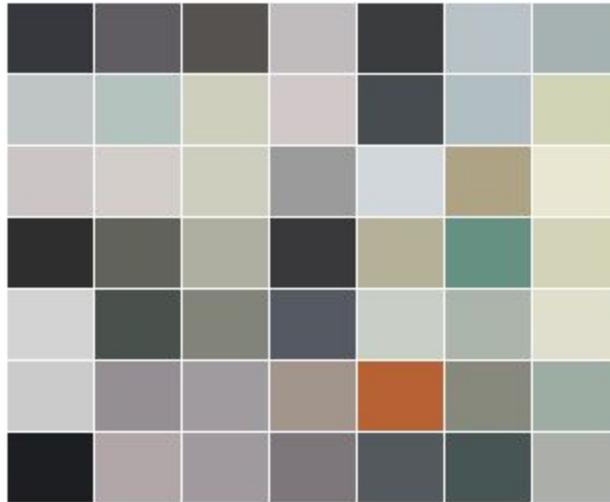
### \$100 bill palette

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](http://www.cssdrive.com/imagepalette/index.php),
- Using this \$100 bill image: [i.huffpost.com/gen/1392894/images/o-100-BILL-facebook.jpg](http://i.huffpost.com/gen/1392894/images/o-100-BILL-facebook.jpg)

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

## Complete Color Palette



### 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?