Sprint #2 Notes

Prof Bill - Oct 2016

Sprint #2 deadlines:
- Begin in week 7… **Tue Oct 25** @ 7:00 pm, a half hour into class
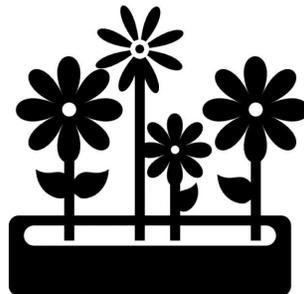- End in week 9… **Tue Nov 8** @ 6:30 pm, the beginning of class

These (BIG!) notes contain the following sections:
A. Getting started
B. Tasks
C. Assignments by coder
D. Design notes
E. Attribute changes
F. Class chalkboard notes

Away we go!
thanks… yow, bill

Gift Garden!

A. Getting started

Two biggie decisions made in class:

- **Decision:** We'll fork our repo and start anew with Sprint #2.
- **Decision:** Assignments are pretty stable, continuing on in Sprint #2.

Tech issues to get Sprint #2 started:

- ➤ **Github and Rails startup -** New repo and deploy coming soon from our System Guru, Pat M.
- ➤ **Data model and routes** - The Architecture Team needs to add new attributes to the Activity, Donor, and Gift tables. New tables will likely be added as well. The team will publish V1.1 of the architecture design document.
- ➤ **Bootstrap screens** - The UX Team need to supplement the UX with any screen additions and changes in Sprint #2. The team will publish V1.2 of the UX design document.

OK, here are the "Getting Started" answers:

- ★ Sprint #2 repo: github.com/noctrl-csc694-fall2016/sprint-2

- ★ Sprint #2 deploy: csc694-sprint2.herokuapp.com/

B. Tasks

For the sake of completeness... these are already done:

- ❖ Get 3 executive reports from TP (Prof Bill)
- ❖ Get additional Activity, Donor and Gift attributes from our users (Prof Bill)
- ❖ Better glyphicons, Font Awesome? (Jason K)

These are the TODO tasks for Sprint #2:

1. Filter, sort and paginate surf results (Andy W)
2. Authorization: Login, Admin, Settings, Logout, Security (Pat M)
3. Add user ID's for each object: Activity, Donor, Gift (Andy W)
4. Add new attributes to our data models (Andy W, Wei H); research and decide how to implement enums (Wei H); specify the enum values for each (Prof Bill)
5. Deleting things (Wei H); see chalkboard notes: create a string for object, save as a trash object, then really delete
6. Multiple new Gifts (Mike D); concept proven in 1 week, but Tue Nov 1 class
7. Smart Import CSV - this is related to multiple Gifts; reassess when multi-gifts is done
8. Basic reports and import/export (Pat M); see my detailed treatise on these
9. Hypersearch (Jason K)
10. Get UX feedback by 1-2 graphic designers (Prof Bill)
11. Get a logo, maybe some artwork (Prof Bill)
12. UX guidelines (Jason K, Prof Bill)
13. Totals, etc on surfing pages (Jason K)
14. Recurring Activities and Related Donors - these sound very similar, see design notes
15. Exotic reports will probably leak to Sprint #3; if we can sneak in a specialty report or two in Sprint #2, all the better

I'm holding onto these ideas for Sprint #3 or beyond:

- ➔ Handle pledges, which are Donor promises of Gifts in the future… what if a pledge is met in multiple Gifts? (ugh)
- ➔ Previous session on Home page
- ➔ PDF output of surfing results
- ➔ Merge Donors
- ➔ Labels. Never?

C. Assignments by coder

Here we go… due by the end of Sprint #2:
- ➢ Andy W - Architecture doc V1.1; #1 filter surf results; #3 ID's for objects; #4 new attributes;
- ➢ Jason K - UX duties in ERB/HTML/CSS; #9 Hyper search; #12 UX guidelines; #13 totals on surf pages
- ➢ Mike D - multiple new Gifts (by Tue Nov 1)
- ➢ Pat M - System Guru setup and deploy duties; #8 basic reports; #2 authorization (in that order… reports before auth!)
- ➢ Wei H - Architecture doc V1.1; #4 research enums; #5 deleting things
- ➢ Prof Bill - #4 enum values for object types; #10 UX feedback; #11 logo and more; #12 UX guidelines
- ➢ Open/??? - #14 recurring + related; #15 exotic reports

I'd much rather do this in person/in class, but so be it…
Important Reminder - We have little homework in 694. We have no tests. The first half of 694 was relatively light, focusing on the learning and the tutorial.
So right now, Sprint #2, is the time for, as DeadPool would say, **MAXIMUM EFFORT!**
Extra time. Extra effort. Extra attention to details. Extra communication.

Prediction: With MAX EFFORT, GiftGarden will be awesome in just 2 weeks. Huzzah!!!

Creativity + Ownership + Effort = Victory

thanks… yow, bill
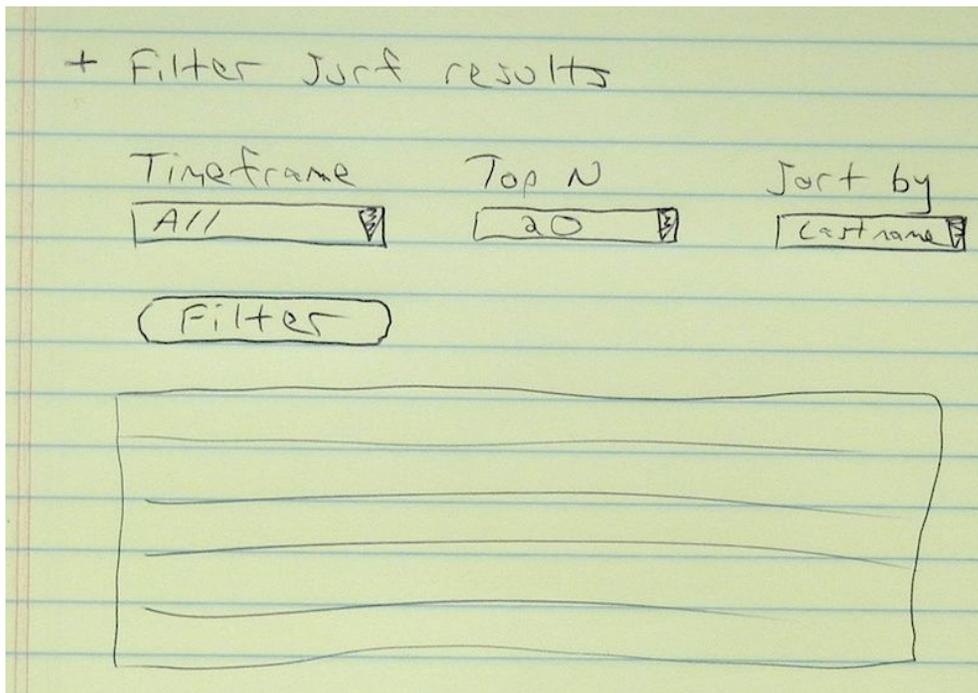
D. Design notes

Here are the design notes on the Sprint #2 TODO list.

1. Filter, sort and paginate our surf results (Andy W)

Put an accordion above the results of each surf. Expanded, the accordion shows the spinners below and a Filter button to update the results:
- Timeframe - this is the same list used in reports.
  - "all" - report all data
  - "this" - this year (YTD), this quarter (QTD), this month (MTD)
  - "last" - last year, last quarter, last month
  - "numbers" - 2 years, 5 years, 2 quarters, 3 months, 6 months
- Top N - All, 10, 20, 50, 100
- Sort by - list 2-3 most important fields specific to the results

Here's a bogus wireframe: accordion, filter button, surf results.

2. Authorization: Login, Admin, Settings, Logout, Security (Pat M)

"Borrow" from CSC 495. Which is a simpler version "borrowed" from the tutorial.

We want human account activation... no "remember me" or "forgot my password". These are small companies, so if you have a problem, email the admin.
Two user types: Standard and Admin. Separate flag for the one SuperAdmin (to rule them all).

Username is used for login. Email is **not** used by the system. It's there just for the admin to use if necessary.

Here's the User data model:
```
create_table "users", force: :cascade do |t|
   t.string   "email"
   t.string   "password_digest"
   t.string   "username"
   t.integer  "permission_level", default: 0
   t.boolean  "super_admin",      default: false
   t.datetime "created_at",                        null: false
   t.datetime "updated_at",                        null: false
 end
```

The repo = github.com/noctrl-csc495-spring2016/Odyssey495

Account submenus: Admin (only if admin), Settings, Logout.

Get help from Prof Bill on startup. Or… Prof Bill code this up? 1) It saves resources for other things, and 2) I can also write up a research note on it for future use.

3. User ID's for each object: Activity, Donor, Gift (Andy W)

Used in hypersearch and reports.
Format ideas:
- 3 letter prefix (act, don, gft) + Rails ID number for the object
- Example: Donor ID = don254

4. Add new attributes to data models (Andy W, Wei H)

These are specified in section E.
Add/migrate these changes into our Sprint #2 data model.

5. Deleting things (Wei H)

Delete = Move to trash, ala Mac
- Delete a Gift. Fine.
- Only delete an Activity or Donor if they have no Gifts.
- The delete (with a **red minus sign** in front) appears at the bottom right
- We shunned the Special header menu idea. (for now)
- Convert the object into a string. Store it in the Trash table. Then, really delete the Activity, Donor or Gift from the tables.
- Add Trash report (or is CSV better for this?) that dumps all the trash to a file.

6. Multiple new gifts (Mike D)

Results due halfway through sprint on Tue Nov 1. Then, we'll choose our next steps.

7. Smart Import CSV (???)

Wait on #6 for multi-gifts. Then decide our direction.

8. Basic reports and import/export (Pat M)

See my separate treatise on the (awesome) basic reports and screens!
We need basic import/export flushed out too.

9. Hypersearch (Jason K)

My two cents - "Hyper" means frenetic, not fast. I'd loop through each Activity, Donor and Gift… search the individual fields you're interested in. Be incremental! Hypersearch V0.1 should only search Activity ID's. Then Donor and Gift ID's. Then names. Rinse and repeat.

10. Get UX feedback by 1-2 graphic designers (Prof Bill)

Contact Mike's reference. Bill: ask Jennifer D for a reference.
We need a stable, high-enough quality deploy to do this. When?

11. Get a logo, maybe some artwork (Prof Bill)

I met with Noctrl art student Teresa B this week. If anyone knows other artists interested in some recognition, then please Ryver-message me.

12. UX guidelines (Jason K, Prof Bill)

The UX must be beautiful, intuitive, and consistent.

13. Totals, etc on surfing pages (Jason K)

When I'm surfing Activities… how many are there?
When I'm surfing Gifts… how many? how much $$$?
This will be decided screen-by-screen.

14. Recurring Activities and Related Donors

Ok. We did a lot of churning on this in class Tue. I met with Carrie P over at TP. Two important things from this meeting:
- She does not see either Recurring Activities nor Related Donors as part of any basic beport. The basic reports for Donors and Gifts are flat, without any relations.
- Both of these capabilities (recurring and related) are tagged to one specialty report each. For example, Related Donors… show all the Donors and their Gift while showing the relation tree. It's important to note it's OK to list a Donor's gifts in each relation that he is a part of: foundation, church, family, etc.

I will work on writing up specific reports for these and then propose UX changes to allow users to specify these things as well. Stay tuned.

15. Exotic reports

Start flushing these out in detail. (Prof Bill)
Can we add 1-2 easier ones for Sprint #2? Stay tuned.

20. Twenty!

Just reminiscing.

E. Attribute changes

These need to go into the Architecture document and then into Rails as migrations.

New attributes

Important - Each Activity, Donor and Gift will have a user-visible ID. This will be implemented as a method that combines a three letter prefix (act, don, or gft) with the Rails ID number for the object.
Example: the 97th Activity will be identified as "act97" to the user.

Important - I like that each object has a type. Are we using enums on this? We need some research on this and then a decision.

The new/changed attributes are in **bold and blue** and usually at the end.

Activity
    id: integer
    name: string
    start_date: datetime
    end_date: datetime
    goal: float   # dollar goal
    description: text
    notes: text
    created_at: datetime
    updated_at: datetime
    type: int or enum   # event, annual, gift in kind, foundations, endowments, community, corporate, auction, outing, mailer???

Donor
    id: integer
    first_name: string
    last_name: string
    address: string
    address2: string
    city: string
    state: string
    zip: integer
    phone: string

email: string
notes: text
created_at: datetime
updated_at: datetime
nickname: string   # or preferred name
title: string   # Mr, Mrs, Ms, etc
Country: string
type: int or enum # individual, prospect, board member, organization,
company, civic, faith-based, etc

Issue: Organization name?
Issue: Boolean if Donor requests no contact?

Gift

id: integer
donor_id: integer   # gift belongs_to this Donor
activity_id: integer   # gift belongs_to this Activity
amount: float   # can be $0 if in kind gift or volunteer time
type: string   # cash, check card, time, in kind, etc
notes: text
created_at: datetime
updated_at: datetime
pledge: float   # sort of like a Gift amount promised in the future
check_number: integer
check_date: date
anonymous: boolean
memorial_note: text   # If gift "in memory", note that here
solicited_by: string   # who solicited this Gift from Donor
gift_user: string   # username of person who created gift
gift_source: string   # "online" or the file name

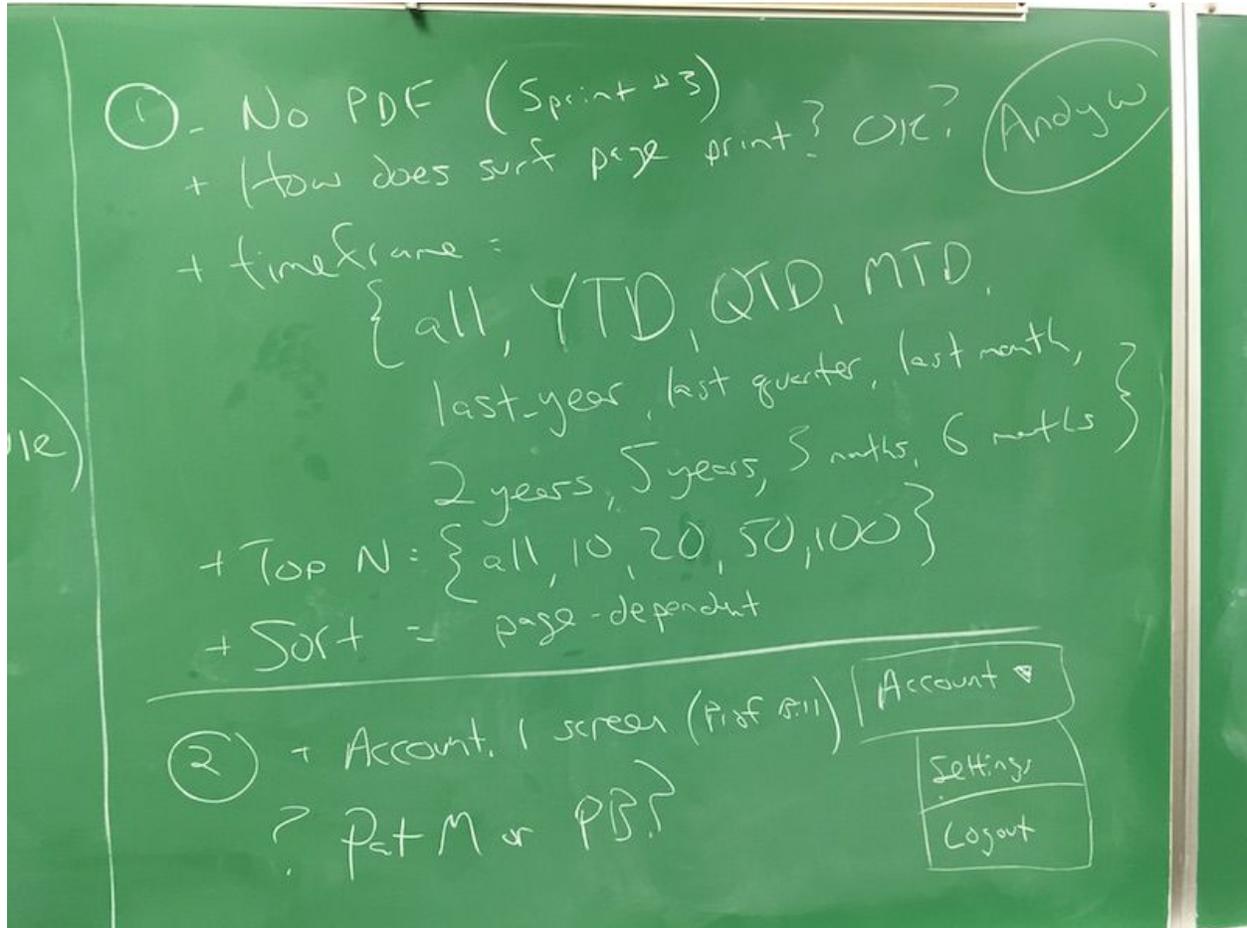Issue: Digital copy of a check > $250?
Issue: One Gift check that is split amongst multiple Activities?
Issue: One pledge is satisfied in multiple payments spread over time. Argh.

F. Class chalkboard notes

Here are my chalkboard selfie notes from Tue Oct 25. They are in order.

Board1 - filter surfing results; authorization

Board2 - Activity, Donor and Gift ID's; attribute additions and changes
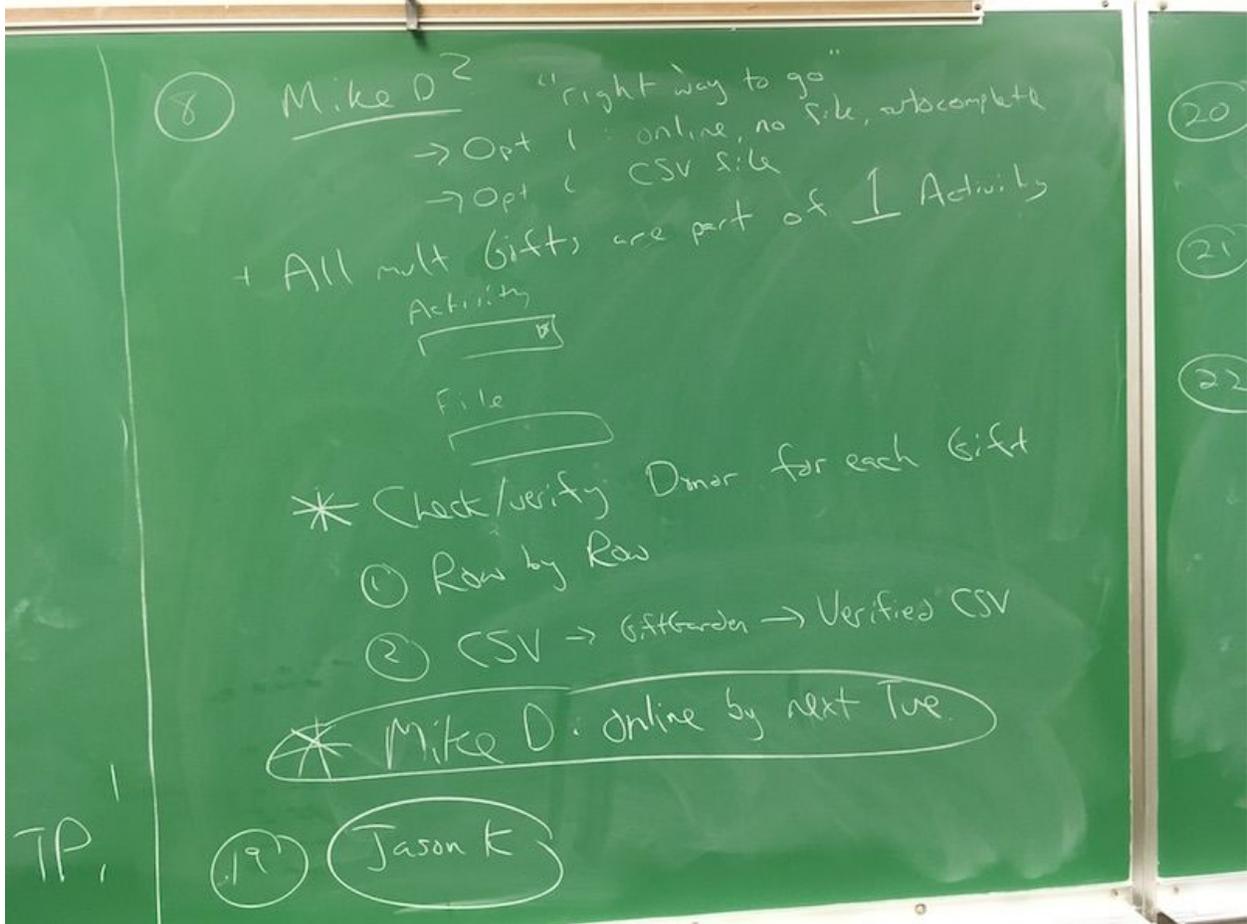

③ ID's
+ 3 chars = {act, don, gft}
   plus table id
+ add to surf
   results (1st col)
                    Andy W

? Not a database
  attribute ... just a method.
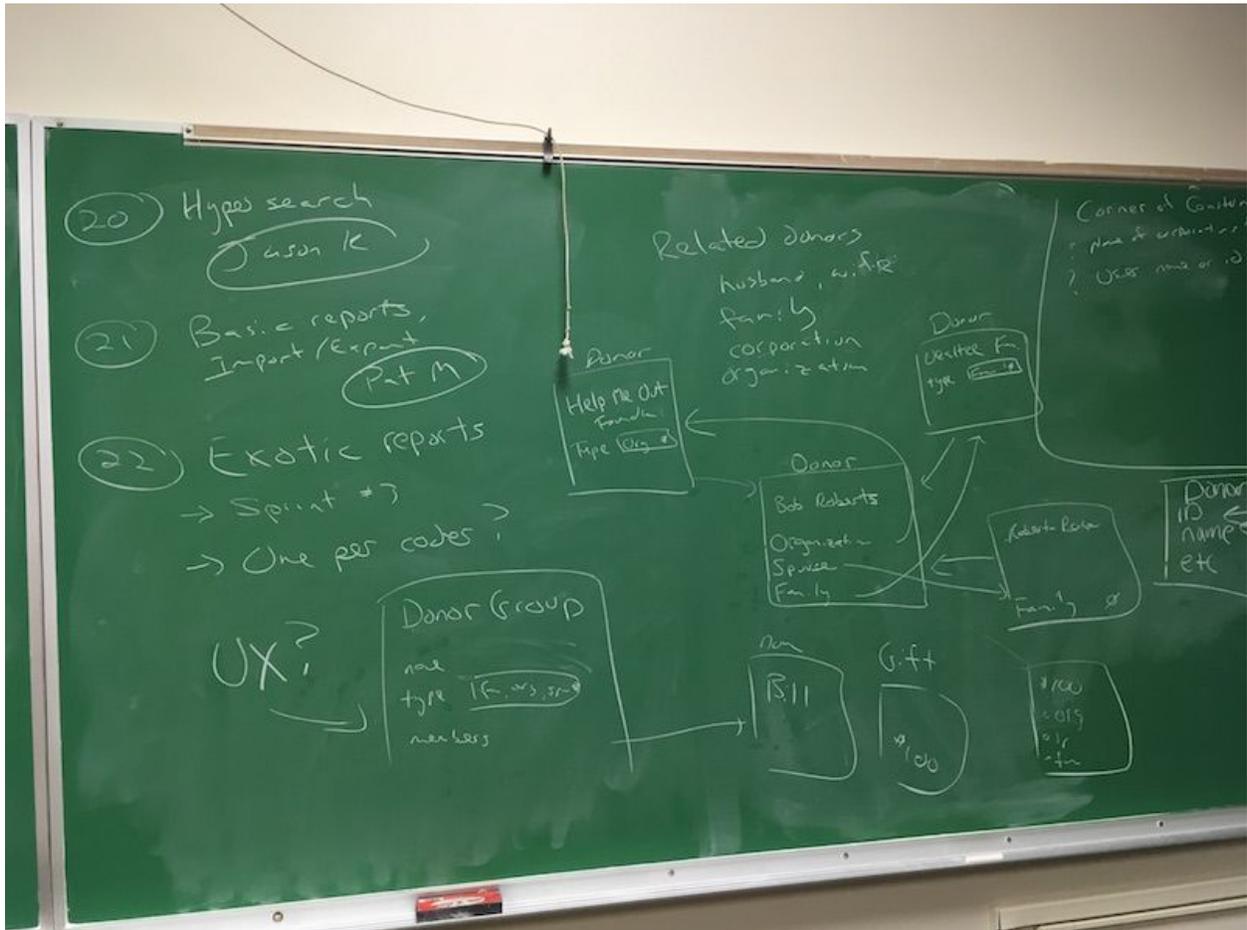 "derived"
? type int or enum?
                    Andy W +
④ ? searchable addt. names?   Wei H
+ Specify type enums (Prof Bill)
? gift_user : string or id?
+ Update Arch V1.1

6. Deleting   Wei H
  · Delete Gift,
       bottom of page,
          in RED (—)
  · Only delete empty
    (no Gifts) Activity or
    Donor
       → If empty, bottom p3*
       → Else, no delete
  + Add "trash" boolean
       to Act, Don, Gift
  + Surf + report ignore trash
       trash
          ┌──────────────┐
          │ type   │
          │ String   │
          │ user ? name or │
          │   id? │
          └──────────────┘
  + Trash report. Not special menu.

Corner
? Name
? User

Board3 - multiple new gifts; totals, etc on surfing results (number 19)

⑧ Mike D² "right way to go"
→ Opt 1: online, no file, autocomplete
→ Opt 2: CSV file

+ All mult Gifts are part of <u>1</u> Activity
Activity

File

✳ Check/verify Donor for each Gift
① Row by Row
② CSV → GiftGarden → Verified CSV
✳ Mike D. online by next Tue.

⑲ Jason K

TP,

⑳

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Board4 - hypersearch; basic reports and import/export; exotic reports; related donors discussion; the "corner of consternation"

Board5 - basic reports discussion