Bryan Murphy LASM Final Project Biography

\*\*\*This is the shareable link to the Google Spreadsheet that Dave got to work for me (we both saw it) on December 7, 2016. It allows for editing: <https://docs.google.com/spreadsheets/d/1NtwjNfzTwF95wswrUWWlV1r5Ue2sT_e8ld-_DnA5oN4/edit?usp=sharing>

November 1, 2016:

On this date I began to fully understand what it is that I would be working on. I will begin to put together a QNA survey that will fill out (in theory) several different pre-written letters that would be sent out to the housing clinics clients upon completion of their legal work. Hopefully I can get these letters completed and looked at by a clinic worker to make sure they are what they are looking for.

November 9, 2016

I think now after talking with different parties that I will try to also to make the QNA more useful by also helping to fill in a majority of their clinics forms including intake forms. That way forms they use during cases are already part way done and the client can possibly fill out the intake form for them ahead of time. They now are doing it by phone or in person, I believe that this would make things faster and more efficient if they could get the information from clients willing to take the survey before even seeing them.

November 12, 2016

I have made so far 3 QNA surveys. One that is the longest is for the intake the other 2 are for the open memorandum sheet the clinic uses for themselves as well as the closed memorandum form they use when they are done with a client’s case. I have some basic letters they send to clients at the end as well but I have not made QNA for these letters.

November 17, 2016

I met with Dave yesterday to get my QNA to link up to a Google Spreadsheet. It took about 45 minutes and we made a soda test to make sure it worked. We also talked and he gave me the idea that having one massive QNA that took the intake form information would be best. Then I could merge all the documents into one big Word Doc and mail merge the entire thing into a master sheet. I am going to work on this one QNA as well as master sheet for my presentation coming up after the Thanksgiving break.

November 27, 2016

While working on the project the QNA is looking better as a whole and the Word Doc is merged as well including a letter sent to clients the google spreadsheet connection does not seem to work. It works when using the soda test, but not with my new QNA. I will ask Dave about it after my presentation in the coming week.

December, 7, 2016

I met with Dave and it seems like it certainly was a weird hiccup in my QNA. Coming to “Unknown Error” instead of “Data Saved”. However, we made a new spreadsheet and everything seems to be reset and working, we even did two test runs of my QNA. I am really pleased where I am with this project, and while I have three exams coming up I have complete faith in finishing this once they are done.

December, 16, 2017

After completing my finals this week I have begun the process of using mail merge on my document completely. However, upon opening my QNA saved file for the first time in just over a week it once again comes up with unknown error at the end. This is so frustrating, I felt like I was nearly there. I am going to push forward, and send out my QNA to a few colleagues to critique for me even if I cannot get their information saved on the spreadsheet. I have made 3 new spreadsheets on Google like with Dave on the 7th thinking that it would reset like last time but to no avail. I have used mail merge with the spreadsheet that Dave and I had two successful tests in on the 7th and thankfully that CSV file has given me the fields to fill in the form with the information, in theory. When I save and reopen, like with Dave in November, it will not find the CSV file so I just have to remove the sheets data and reattach. While I am frustrated that I could not get the final connection between the QNA and spreadsheet I hope having the merged document, QNA, and the spreadsheet (link above) shows that I was right there to having something that could work. I am going to work on a very basic pingendo page for the QNA/clinic, just as a layout of what a final online page may look like, and leave out information about the clinic unless I further talk to them. This page will most likely be a majority under construction but at least give a basic idea of where the QNA would go. I do not want to put anything online they would not want. They helped with this project idea, but time made it hard to collaborate fully make it completely ready for the real world.

December 17, 2016

I have seen comments from feedback about making the questions a little easier for people to understand, as well as maybe explaining how to answer (example: mm/dd/yyyy) and I plan to put edits for these things in today to the best of my ability. One suggested Spanish translation but that would have to be for a future time. Also, during the testing the data sent to the spreadsheet, so I am relieved that it worked again on its own!!

That was my bio through the end of the semester about my work on this project. I will now address the parts in the rubric quickly as required.

Framing:

This project deals with the age-old question of efficiency. The clients probably want to think that they can do more ahead of time online so they are not wasting time with intakes at the office. The clinical students probably do not want to take time on the phone or in person slowly asking the person one by one intake questions. Instead this would help both get information shared quickly so that the information could be analyzed to determine the best course of action the clinic could take in helping the clients.

Research:

I did not research drastically into new solutions, as this was a project I felt I could handle when I was desperately low of ideas for a project to begin with. That being said I did research later in the game and found that there are plenty of ways to do what I am doing, an intake system that will put the answers onto forms through a mail merge. If I had access to HotDocs then that may have been another option for quick document creation as well. QNA was what I was most familiar with however and that was what I stuck with, familiarity.

Ideation and Prototyping:

I actually in the end had over 4 different QNA’s in process before Dave’s idea in his office hours to have a master sheet that would only require 1 QNA. I initially took the documents I had received from the clinic and wrote out how a QNA may work in order to come to the QNA questionnaire that I am using now. I could have had more people test my QNAs in the end, I am sure that would have helped. Most people were busy by the time I had something for them to try. In regards to other options that I could have used, as mentioned before I think HotDocs may have been useful. I am also regretful that Python/Pycharm were not as easily available to me as people with Mac computers. Making this an app for clients who come into the clinic could also be an idea for the future of this project. However, at this time my app making skills do not exist.

User Testing/Refinement: (Screenshot of Feedback emails at bottom)

I had a couple friends and colleagues help me and test the QNA. When they got back to me they both said that looking at it as a random person off the street that explaining how some things should be answered or what some things meant would be helpful. An example is making sure that the date question explained that they wanted it answered as mm/dd/yyyy. I took this advice and did my best to go through all the questions and try to simplify or clarify them as best as I could. The only thing I regret is not getting more feedback from people in the clinic itself. Clinical feedback could have really helped me understand what more the clinic could want and what they may not want or find less important. This would not even be from an aesthetic standpoint but also from a legal standpoint, if I got everything correct or not. The one suggestion I did not have time to try and put into my work was a completely new QNA in Spanish to assist more users, which admittedly would be helpful but was out of my range of knowledge.

Novelty:

While there has been intake sheet forms done before, meaning this is not the most novel thing in the world, this project is novel for the clinic itself. They needed a boost in how they collected information and automated final letters and this overall project (QNA, spreadsheet, merge document) should be able to help with that.

Complexity/Robustness:

I believe that with the length of this project and multiple connected pieces that this project is not simple. Between document automation and expert systems (automated decision trees) this covers a couple areas necessary to use coding effectively. Creating a QNA with multiple trees that extends over 60 questions that were more than just yes or no also took some time. It is also more than just one form, but a number of forms merged together, handling nearly an entire clinics paperwork outside of actually casework paperwork.

Impact and Efficiencies:

This project offers a chance for the clinic to reach out to a number of new people by having a way to give them their information via an online intake questionnaire. Without limiting intakes to walk-ins or phone calls the clinic opens itself up to many more clients. Similarly, without someone always on the phone taking time to get this information from each new client, the clinic can focus more of its efforts on actual casework. The clinic workers can just merge the updated spreadsheet with the master form. From there they can filter through clients they can help and clients who they must turn away and notify of them of such without a long phone call or person to person interview.

Fit/Completeness:

I believe that when fully operational, this project addresses the problem at the clinic properly and provides proper assistance to their needs.

Documentation:

Help text is a continuing process on the project as long as users keep giving me feedback telling me what they do not understand. I may understand things as is, so after some changes from the first feedback of the QNA, more feedback can only help expand the questionnaire to a larger group of people. Many of the questions are basic information collecting but some may use more legal terms or want a specific answer from someone does not fully know how to answer. I have adjusted some of these, and can only expect more may need adjusting in the future.

Real World Viability:

This production I feel is a mere couple of test runs away from the clinic being able to use it. These test runs would be mainly with the clinic to make sure it is what they want and so that they can critique it for their operations. With the QNA and mail merge working, connecting the spreadsheet is the only thing keeping this from really working in the real world. A webpage that is fully operational to support the project as a whole would help, but the survey as a whole I feel is a connected spreadsheet away from really being able to be used by someone.

\*\*\*After this write-up after many failed attempts to connect to spreadsheet myself or with the first feedback user, my last colleagues review (she used a mac) did connect to the spreadsheet!! I am adding to my handed in files a new CSV download with her inputs.

Feedback Emails:



