

# **Proactive Disclosure Documentation**

**July 3rd, 2014**

# Main Interface

## Search for disclosures

**Disclosure type:**

☐ Contracts ?

☐ Grants and Awards ?

☐ Position Reclassifications ?

☐ Travel Expenses ?

☐ Hospitality Expenses ?

☐ Wrongdoing ?

**Containing:**

[Add filters](#)

Search

**Primary actions**

Single selection provides clearer data display and clarity. List of types are in blue rectangles for easier selection.

? The '?' provides definitions for each type as a pop-up overlay for desktop and mobile.

Giving the user a few options to work with at first glance to keep it simple.

'Containing' field is only for text filtering such as for comments or description of work.

Search button is larger as it's a primary action and the colour matches the content types to also create the connection of what is primary.

**Secondary action**

Rather than displaying all the possible filters to the user at once, they are hidden in the secondary action.

Being a link with the colour green also refines the differentiation from primary and green is also considered to encourage users to pursue further.

**Results**

You must perform a search first before you see the results.

Show user's results *after* they perform a search otherwise there would be too much data to display beforehand.

# Filter Panel

## Search for disclosures

### Disclosure type:

- ☒ Contracts ?
- ☐ Grants and Awards ?
- ☐ Position Reclassifications ?
- ☐ Travel Expenses ?
- ☐ Hospitality Expenses ?
- ☐ Wrongdoing ?

### Containing:

[Add filters](#)

**Search**

## Results

You must perform a search first before you see the results

### Filter by



- ▶ Department
- ▶ Value
- ▶ Date
- + Another filter

**Apply**

Important filter selections are displayed and stacked vertically to allow hierarchical selection to guide the user.

### Advanced search

Users can pursue further in their search by giving them an option to “add another filter” rather than display all possible filters all at once. These extra filters are those that require more details for the search if the user wishes to narrow down the search further. If they want to plainly search for keywords, they can do so in the ‘containing’ text field on the main interface.

The **filter panel** creates less real-estate by opening to the side of the screen. Users can close the panel by either clicking anywhere else on the overlay or by clicking on the ‘X’ at top right corner. It doesn’t change for mobile, so users won’t have to learn twice on how to use the filter panel. Mobile users will have the panel take up the entire screen in portrait view.

# Filters - Departments and Value

Filter by

▼ Department

A

☐ Department name

☐ Department name

☐ Department name

☐ Department name

☐ Department name

☐ Department name

☐ Department name

☐ Department name

☐ Department name

☐ Department name

B

☐ Department name

☐ Department name

☐ Department name

☐ Department name

☐ Department name

☐ Department name

☐ Department name

► Value

► Date

+ Another filter

Apply

Filter by

► Department

▼ Value

☐ greater than \$10,000

☒ less than \$65,000

☐ equals to

☐ between and

► Date

+ Another filter

Apply

Based on 'Contracts' as the selected type, it is automatically displaying the amount that contracts are over \$10,000 in case the user is not aware of this.

There are 3 different options to specify value for clear and accurate results. This also gives the user some control to be able to meet their expectations.

A filtered list of checkboxes by typing in the text field to search for the name of the departments quicker.

**Note:** Filtered list function is currently not built in WET yet and is planning on being developed.

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# Filters - Date

Filter by

Department

Value

Date

Specify date by:

Calendar

Fiscal year

Quarter

+ Another filter

Apply

Filter by

Department

Value

Date

Specify date by:

Calendar

Fiscal year

Quarter

Year:

201

2012 - 2013

2011 - 2012

2010 - 2011

By quarter:

1st (Oct - Dec)

2nd (July - Sept)

3rd (April - June)

4th (Jan - Mar)

+ Another filter

Apply

There are three different options to specify the date in order to meet the user's expectations.

### Calendar option

Start Date:

December 2012

Su

Mo

Tu

We

Th

Fr

Sa

1

2

3

4

5

6

7

8

9

10

11

12

13

14

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30

31

1

2

3

4

End Date:

The user can have the option to choose a start and end date by either typing in the text field (DD/MM/YR) or clicking on the calendar icon to pop-up the calendar underneath.

### Fiscal year option

201

2012 - 2013

2011 - 2012

2010 - 2011

The auto-complete function works as a filtered list of fiscal years in which the user can select more than one.

**Note:** Filtered list function is currently not built in WET yet and is planning on being developed.

### Quarter option

Choosing this option narrows down the search by selecting a specific fiscal year and selecting a quarter(s).

Filter tags and results

Disclosure type:

○ Contracts ?

○ Grants and Awards ?

○ Position Reclassifications ?

○ Travel Expenses ?

○ Hospitality Expenses ?

○ Wrongdoing ?

Containing:

Add filters

× Clear all

× Treasury Board of Canada

× Transportation Appeal

× less than \$65,000

× 4th quarter 2012 - 2013

Search

Filter tags allow the user to continue to see what they’ve selected while viewing the results. They can close a tag if they wish by clicking on the ‘x’. The green border around the filter tags demonstrates a connection with the ‘Add filters’ link as secondary.

The user must click on the search button once they’re satisfied with their selection/filters before they see the results.

Results

# of records found (1-10)

Download table

More columns

- Show all
- ☒ Value
- ☒ Date
- ☒ Department
- ☒ Vendor name
- ☐ Original value
- ☐ Contract period
- ☐ Description of Work
- ☐ Detailed description
- ☐ Comments
- ☐ Reference number

Department	Vendor Name	Date	Value	
T				
Treasury Board of Canada	Titus International	2012 - 01 - 03	\$65,000	
Treasury Board of Canada	Worldanetwork	2012 - 01 - 03	\$25,000	
Treasury Board of Canada	Microsoft Corporation	2012 - 01 - 03	\$30,000	
Treasury Board of Canada	Media Q Inc.	2012 - 01 - 03	\$35,000	<a href="#">Read entire record</a>
Transportation Appeal of Canada	Canadian Press	2012 - 01 - 03	\$65,000	<a href="#">Read entire record</a>
Transportation Appeal of Canada	Worldanetwork	2012 - 01 - 03	\$33,000	<a href="#">Read entire record</a>
Transportation Appeal of Canada	Socrata	2012 - 01 - 03	\$26,000	<a href="#">Read entire record</a>
Transportation Appeal of Canada	ACL Services LTD	2012 - 01 - 03	\$60,000	<a href="#">Read entire record</a>
Transportation Appeal of Canada	RANDSTAD INC	2012 - 01 - 03	\$60,000	<a href="#">Read entire record</a>
Transportation Appeal of Canada	Apple	2012 - 01 - 03	\$60,000	<a href="#">Read entire record</a>

The results are displayed in a table format in alphabetical order by department name and by most recent date. It first only displays data based on their search and important data. This way it doesn’t overwhelm the user.

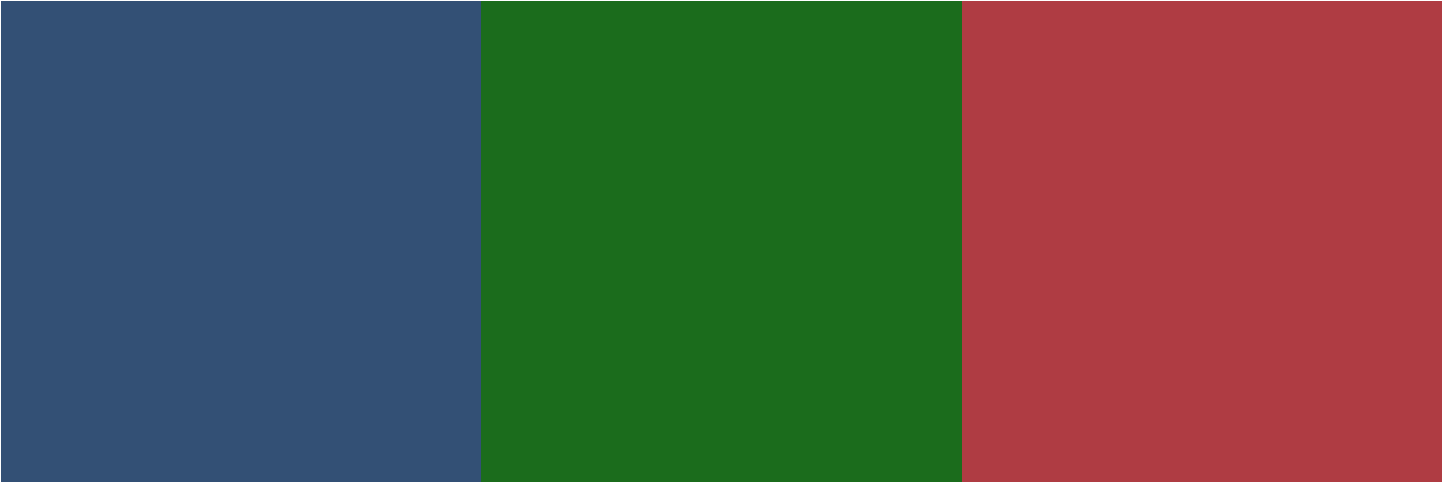
“Download table” allows the user to download the whole table if users are more comfortable to view data quickly anytime and anywhere (ideal for journalists/academics).

Columns sorting gives the user more flexibility and visibility. They have the option to see all columns that are available to view or select/deselect some if they wish to do so. This serves them more freedom while viewing the data.

**Note:** If multiple columns are displayed, the table may need to be horizontally scrolled, hence why there is an option to download the table as well. For mobile, columns would be stacked vertically as a new possibility for making lengthy tables responsive.

“Read entire record” is repeated for each row, however, in the back-end, each record is different by corresponding to their I.D.

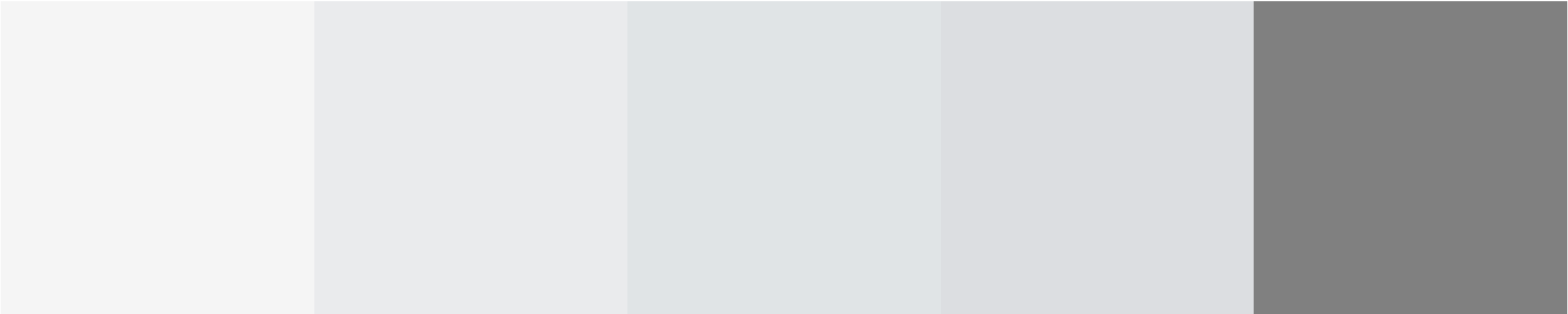
Colour palette



#335075

#1b6c1c

#af3c43



#f5f5f5

#eaebed

#e0e4e6

#dcdee1

#808080