

LYCHEE

Mobile Design Specification

Specification Version: 1.0

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Created for: The Jonah Group

Table of Contents

1 Overview.....	5
1.1 Introduction.....	6
1.2 Main Components.....	7
2 Dashboard.....	8
2.1 Dashboard Structure.....	9
2.1.1 Project Tile Headings.....	10
2.1.2 Project Tile Ordering.....	10
2.1.3 Dashboard Dropdown Menu.....	10
2.2 Dashboard Example.....	11
3 Project Detail.....	12
3.1 Project Detail.....	13
3.2 Project Detail Header.....	14
3.2.1 Project Manager Modal.....	15
3.2.2 Project Health Modal.....	15
3.3 Overview Tab.....	16
3.3.1 Overview Tab: Project Performance.....	17
3.3.2 Overview Tab: My Open Issues.....	18
3.3.3 Overview Tab: Open Issue Modal.....	18
3.3.4 Overview Tab: Milestones.....	18
3.3.5 Overview Tab: Project Updates.....	19
3.3.6 Overview Tab: Project Updates - All.....	19
3.3.7 Risks.....	19
3.4 Timeline Tab.....	20
3.4.1 Milestone Marker.....	21
3.4.2 Invoice Marker.....	21
3.4.3 Point In Time Information.....	21
3.4.4 Team Member Info.....	22
3.5 Invoices Tab.....	23

Version History

1.0		- Created specification document.
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Open Issues

1 Overview

1.1 Introduction

The **Lychee Client Portal app** is a responsive web app that provides Jonah Group clients with convenient, at-a-glance summaries of the performance of their active projects, as well as more detailed data for each project (generated dynamically from the Lychee backend database).

The Lychee Client Portal App will provide an added value for Jonah Group clients, fostering trust and promoting transparency around the projects they are being billed for.

Client-side executives and project managers will be the main stakeholders for the app. Executives will wish to quickly check in on the 'health' of their projects with Jonah Group, while project managers will use the app to track project specifics and billing/invoice information (to process payments).

1.2 Main Components

The **Lychee Client Portal app** consists of 2 main component types:
the main Dashboard, and Project pages (that are launched from the Dashboard).

Dashboard View:

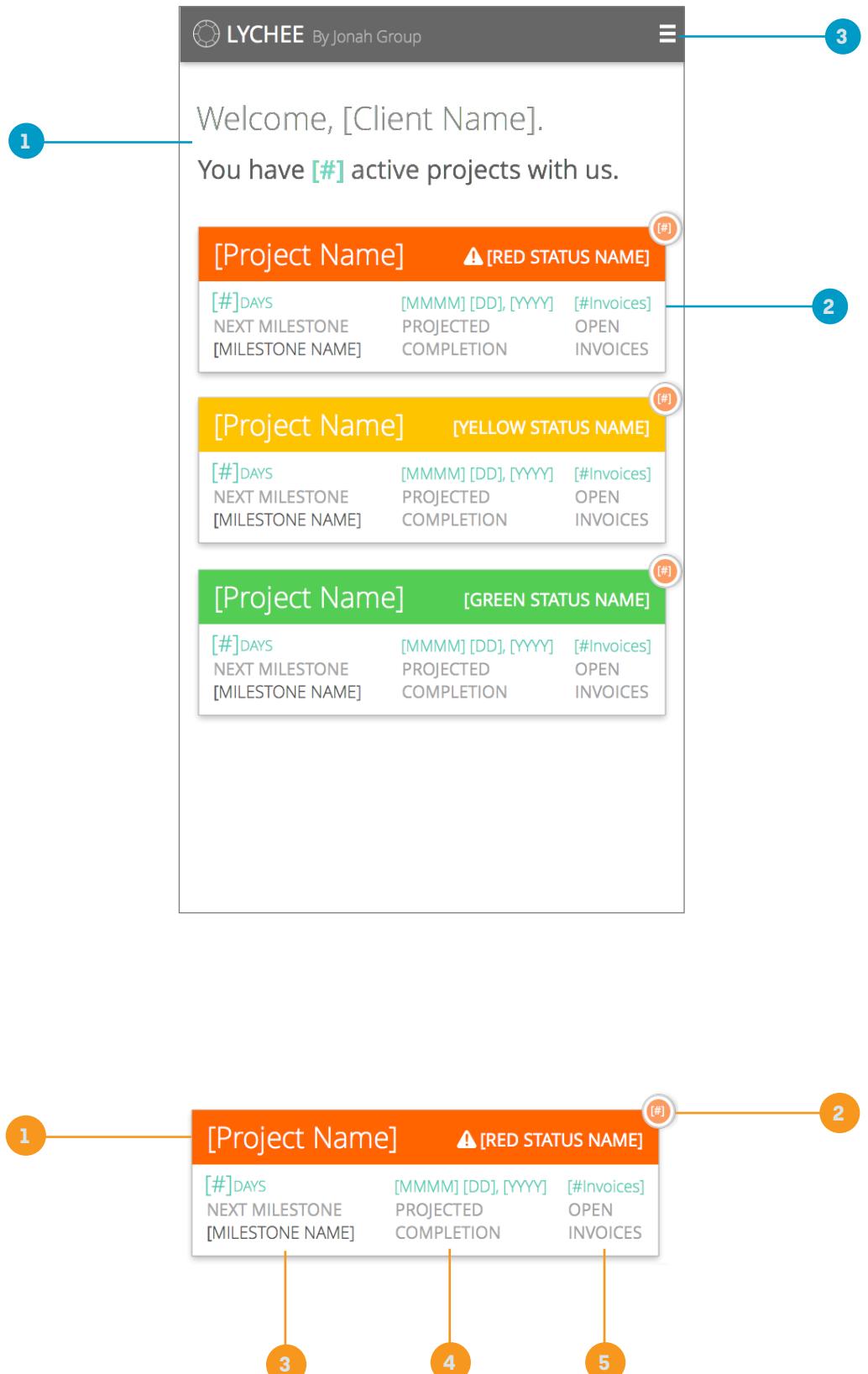
- IBM Infosphere**: DANGER status. Next milestone: Sept 20, 2015. Open invoices: 2.
- IBM Watson Analytics**: DANGER status. Next milestone: Sept 20, 2015. Open invoices: 2.
- IBM Cognos Express**: FAIR status. Next milestone: Sept 20, 2015. Open invoices: 2.
- IBM Predictive Analytics...**: ON TRACK status. Next milestone: Sept 20, 2015. Open invoices: 2.

Project Detail View (JONA-1234, IBM Infosphere):

- Project Performance:** \$58230 ESTIMATED EFFORT, \$49200 SPENT EFFORT (81% of Estimate), \$9030 REMAINING EFFORT.
- Progress Chart:** 81% SPENT OF TOTAL ESTIMATE.
- Burn Rate:** \$2132 /WK CURRENT BURN RATE.
- Remaining Days:** 100 days remaining in project.

2 Dashboard

2.1 Dashboard Structure



The Dashboard provides a client with a summary of performance and high-level alerts across all their projects with The Jonah Group.

GENERAL ELEMENTS

1	Client information area
	Client Name and # of current projects (prepopulated).
2	Project tile
	Provides summary information for a single project. Tapping a tile will launch the Project Detail page for the project.
3	Secondary menu icon
	Tapping this will open the dropdown menu.

PROJECT TILE ELEMENTS

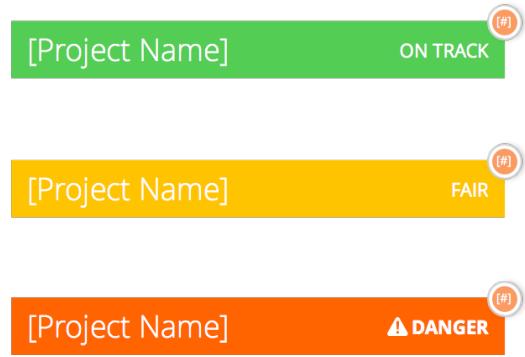
1	Project Information/ Health Bar
	Project names longer than 15 characters will be abbreviated with an ellipsis (...). Current project health is denoted by the bar color (yellow, red, green) and the assigned name for the health status (e.g. "On Track"). Items in bad health (red) will feature an additional icon to call more attention.
2	Update Count
	Contains the total number of updates for the Project, across the following sections within a Project: news items, invoices, ... This badge will not be shown if all updates have been viewed, or no updates exist. If number of updates exceeds 9, the badge will contain the text "9+".
3	Milestone Information
	Shows number of days until next Milestone, and the name of the Milestone. If name of Milestone exceeds 15 characters, it will be abbreviated with an ellipsis (...).
4	Project Completion
	Shows calendar date for project completion.
5	Open Invoices
	Shows number of open invoices. If there are late invoices, the title label ("Open Invoices") will be shown in red to call more attention.

** The data visualization for utilization has been removed from this new version of project tile -- it occupied too much horizontal space, and not meaningful enough at this size.

2.1.1 Project Tile Headings

Each tile heading type represents a different level of project health (Red, Yellow, Green).

The heading type for Red ("Danger") level of health will be shown with an alert icon beside it, to call more attention.



2.1.2 Project Tile Ordering

Project tiles will be ordered by level of health, with items of lowest health (i.e. red) appearing first in the stack.

Within items of the same health level, ordering will be determined by the project with the highest activity count (projects with the highest count appearing at the top of the stack).

2.1.3 Dashboard Dropdown Menu

The Dashboard Dropdown menu contains links to features of secondary importance (About Lychee, Log Out).



2.2 Dashboard Example

Example of a dashboard with sample content.

Welcome, IBM Canada.
You have **5** active projects with us.

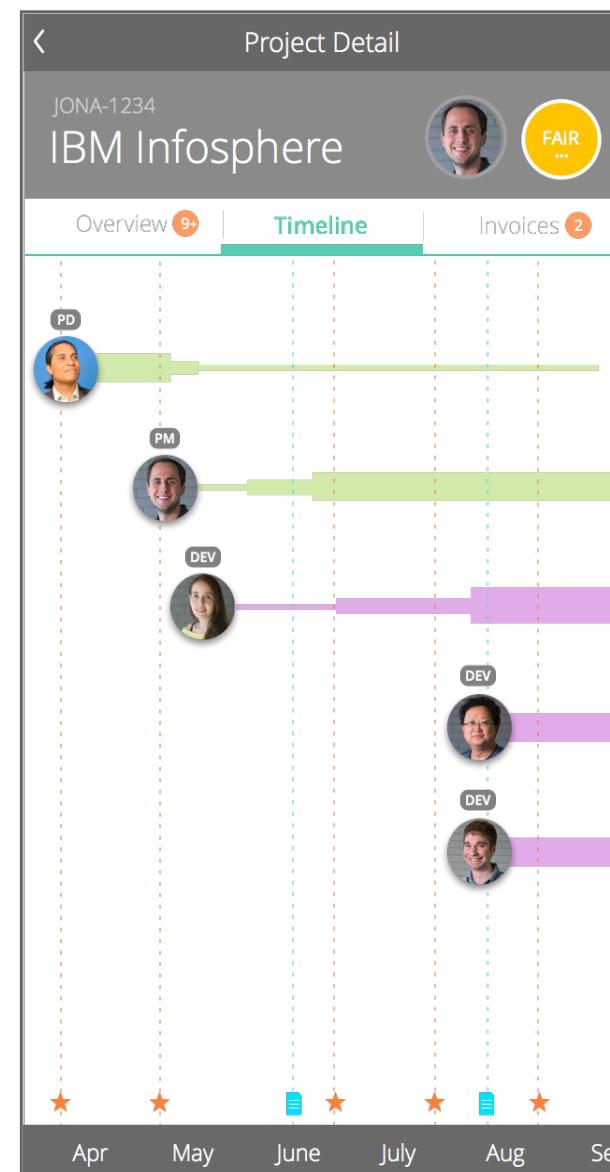
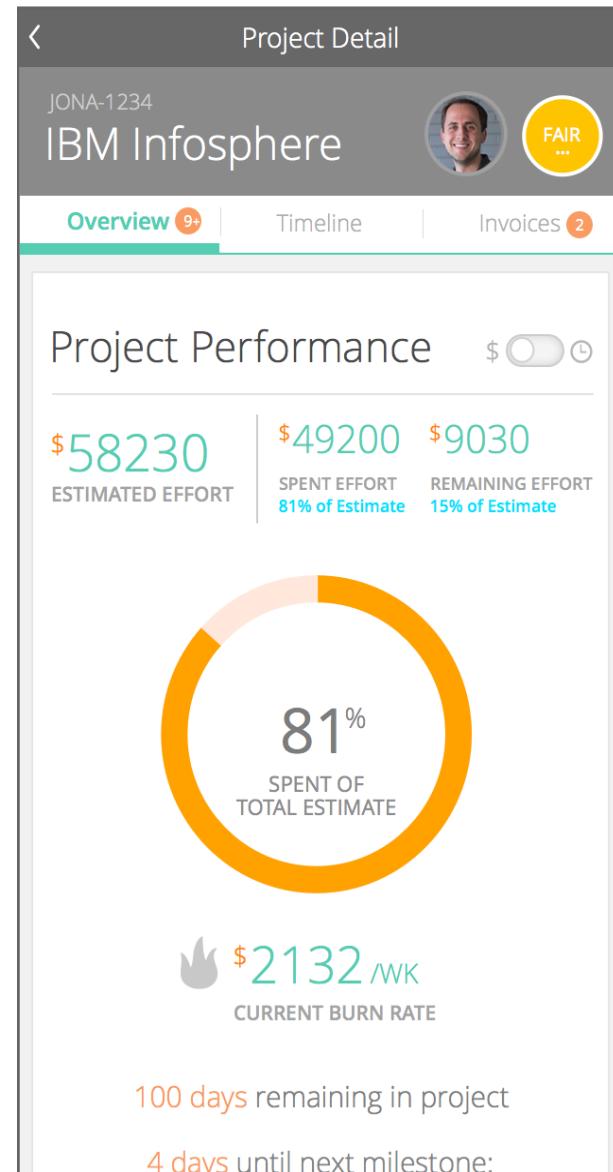
Project	Status	Days	Next Milestone	Projected Completion	Open Invoices
IBM Infosphere	DANGER	10 DAYS	Sept 20, 2015	2	OPEN INVOICES
IBM Watson Analytics	DANGER	10 DAYS	Sept 20, 2015	2	OPEN INVOICES
IBM Cognos Express	FAIR	2 DAYS	Sept 20, 2015	2	OPEN INVOICES
IBM Predictive Analytics...	ON TRACK	20 DAYS	Sept 20, 2015	2	OPEN INVOICES

3 Project Detail

3.1 Project Detail

The Project Detail page for a project is launched when a project tile is selected from the Dashboard.

It contains 3 main tabs: **Overview**, **Timeline**, and **Invoices**. The **Header** (containing high-level project information and links) is shared across all tabs. These components are described in detail in the following pages.



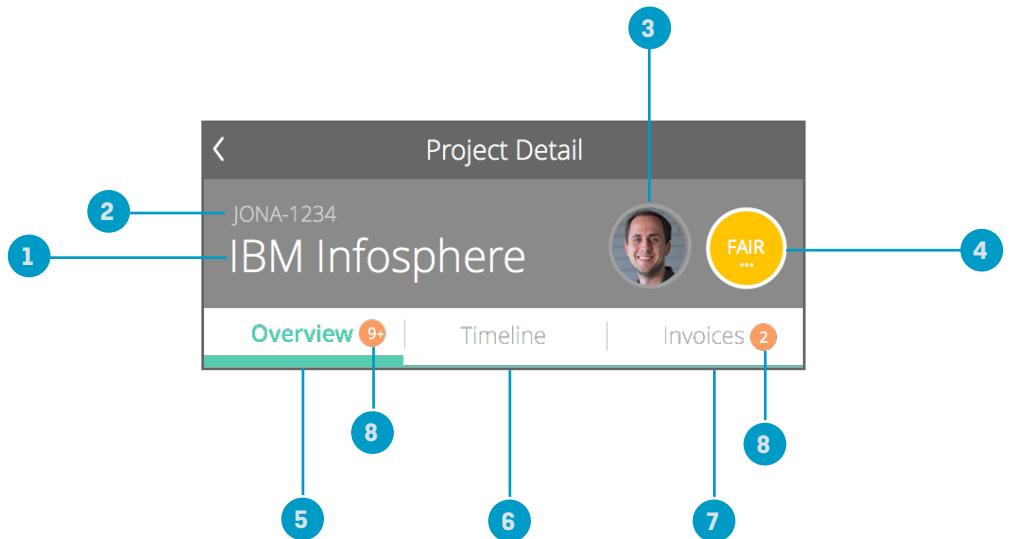
This screenshot shows the 'Invoices' tab of the Project Detail page. The header and navigation tabs are identical to the Overview tab. The main content area lists recent invoices:

Invoice Amount	Paid Status
\$1514.01	PAID (Paid on: Sept 1, 2015 - Thank you)
\$2213.21 Due	LATE (Invoiced on July 25, 2015)
\$3216.10 Due	OPEN (Invoiced on July 25, 2015)

A button at the bottom right allows users to 'Show older invoices (15)'.

3.2 Project Detail Header

The Project Detail Header is a common component shared between all tabs of the Project Detail page for a project.

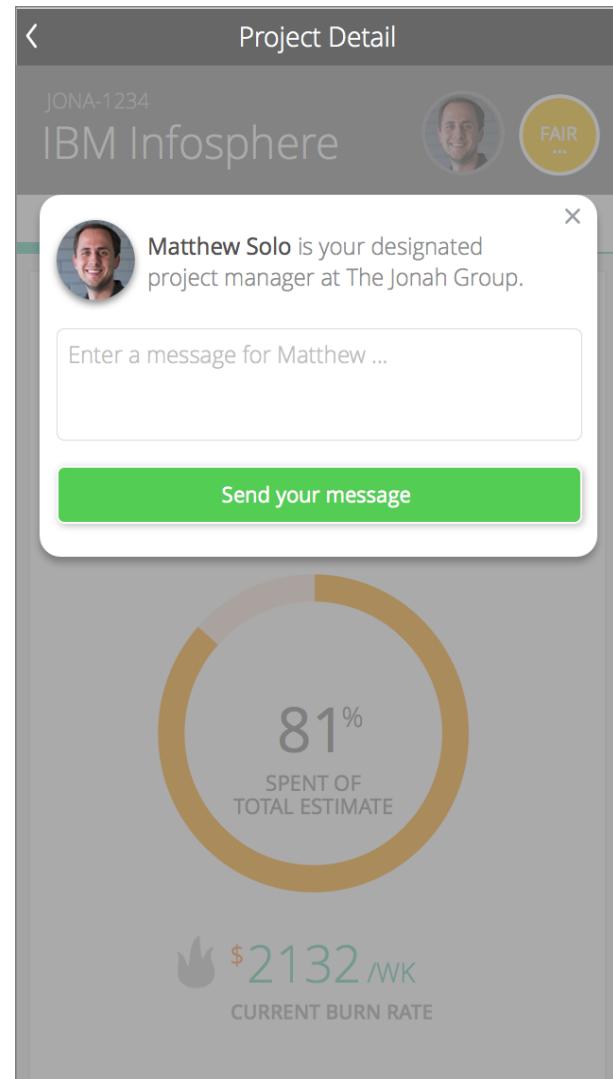


ELEMENTS

1	Project Name Names longer than 15 characters will be abbreviated with an ellipsis (...). Tapping on an abbreviated name will reveal the full name in a tooltip.
2	Internal Project Code
3	Project Manager Link Shows a photo of the project manager for the project. Tapping on this opens the Project Manager Modal (described in a later section).
4	Project Health Badge Contains colored background and short text summarizing the overall project health. Tapping on the badge will open the Project Health Modal for more detail (described in a later section).
5	Overview Tab Contains statistics and high-level info for the project. (In this wireframe, Overview is currently selected tab). This tab features an updates badge, whose count is affected by the following sections: TBD
6	Timeline Tab Contains a scrollable timeline for the project. This tab features an updates badge, whose count is affected by the following sections: TBD
7	Invoices Tab Contains a list of current invoices for the project.

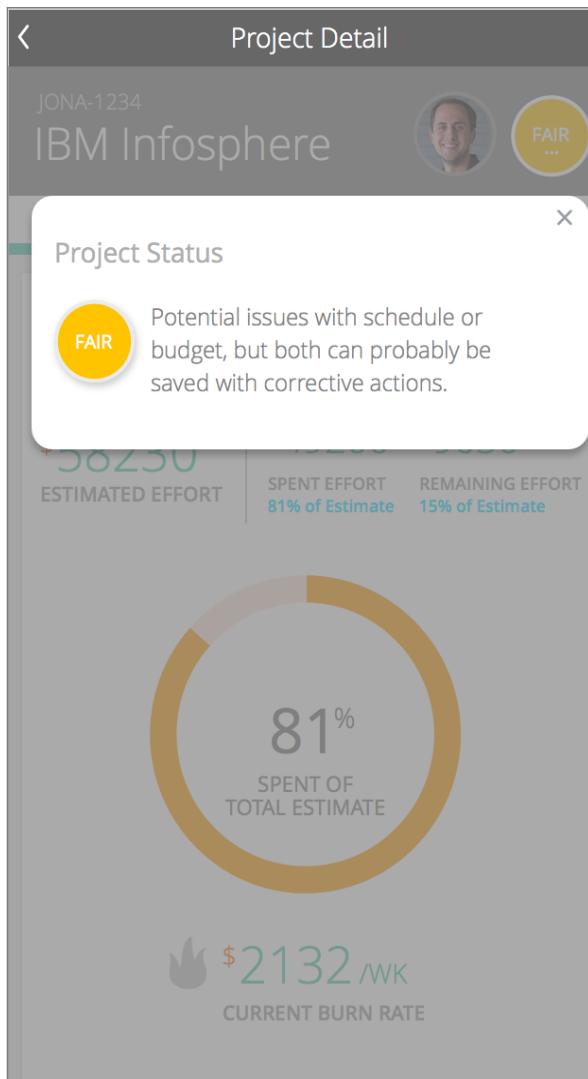
3.2.1 Project Manager Modal

Launches when name of project manager is tapped.
Provides opportunity to send a quick email to the PM (replies are sent to their regular email, no interface inside the app).



3.2.2 Project Health Modal

Launches when project health badge is tapped.
Provides further description of project health, as entered by the PM.



Project Detail

JONA-1234
IBM Infosphere

 FAIR

Overview 9 | Timeline | Invoices 2

Project Performance

\$58230 | \$49200 | \$9030

ESTIMATED EFFORT SPENT EFFORT REMAINING EFFORT

81% SPENT OF TOTAL ESTIMATE

\$2132/wk CURRENT BURN RATE

100 days remaining in project
4 days until next milestone: Integration testing

My Open Issues

Please provide all text copy and title labels for the backend pages.

Added 1 days ago by John Doe

Please send all IBM logo assets in vector format (EPS preferred).

Added 2 days ago by John Doe

Ut faucibus bibendum nulla vel placerat. Sed mattis consequat venenatis. Duis laculis consequat ornare. Curabitur rhoncus nulla ...
Added 4 days ago by John Doe

[View all my open issues in JIRA \(32\) >](#)

Project Updates

Hugh Smithwick has been added to this project.
2 hours ago

Project status has been changed to Fair.
1 day ago

Josh Petersen has been removed from this project.
2 days ago

[View all project updates \(32\) >](#)

Milestones

Next: Integration Testing

Discovery	Jan 1	
Sprint Aerosmith	Feb 15	
Sprint Bad Company	Mar 7	
Sprint Cars	Mar 28	
Sprint Death Charge	Apr 17	
Sprint Entwistle	May 4	
Sprint Foreigner	June 16	
Sprint Genesis	July 16	
Sprint Hendrix	Aug 5	
Integration Testing	Sept 28	
Project Completion	Nov 24	

Risks

Account for known issues in the XYZ Javascript Framework API.

1 days ago by John Doe

Ut faucibus bibendum nulla vel placerat. Sed mattis consequat venenatis. Duis laculis consequat ornare. Curabitur euismod semper sapien, eu sagittis justo feugiat et.
Added 4 days ago by John Doe

[View all risks for this project \(32\) ...](#)

Project Detail

JONA-1234
IBM Infosphere

 FAIR

Overview 9 | Timeline | Invoices 2

Project Performance

\$58230 | \$49200 | \$9030

ESTIMATED EFFORT SPENT EFFORT REMAINING EFFORT

81% SPENT OF TOTAL ESTIMATE

\$2132/wk CURRENT BURN RATE

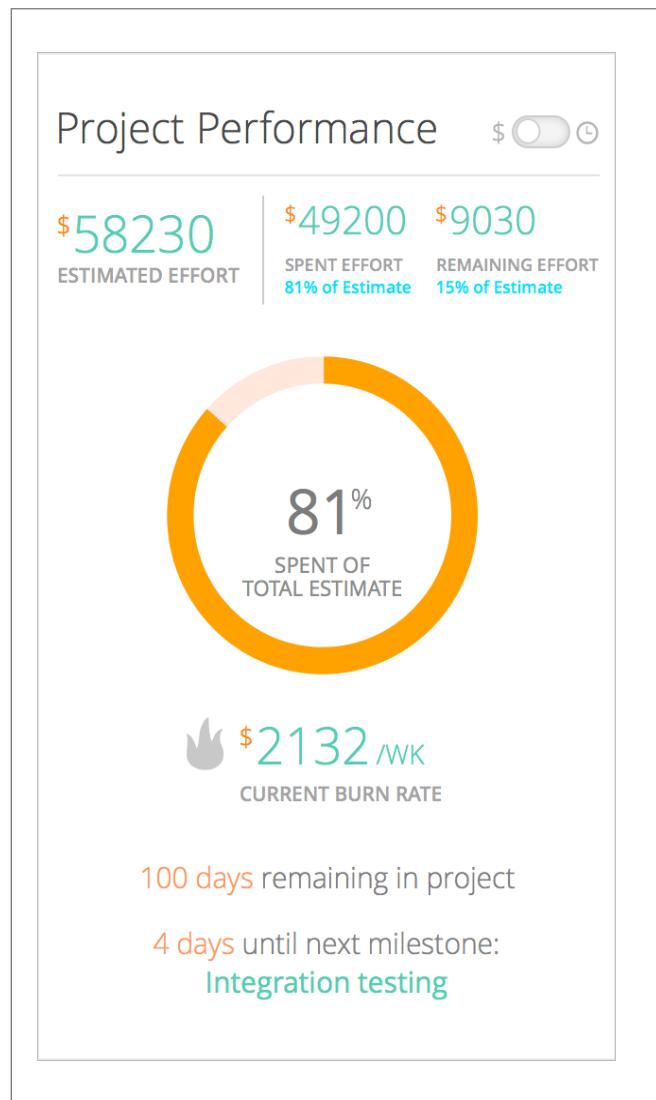
3.3 Overview Tab

The overview tab contains several sections that give information on the different aspects of a project. The sections are described in more detail in the following pages.

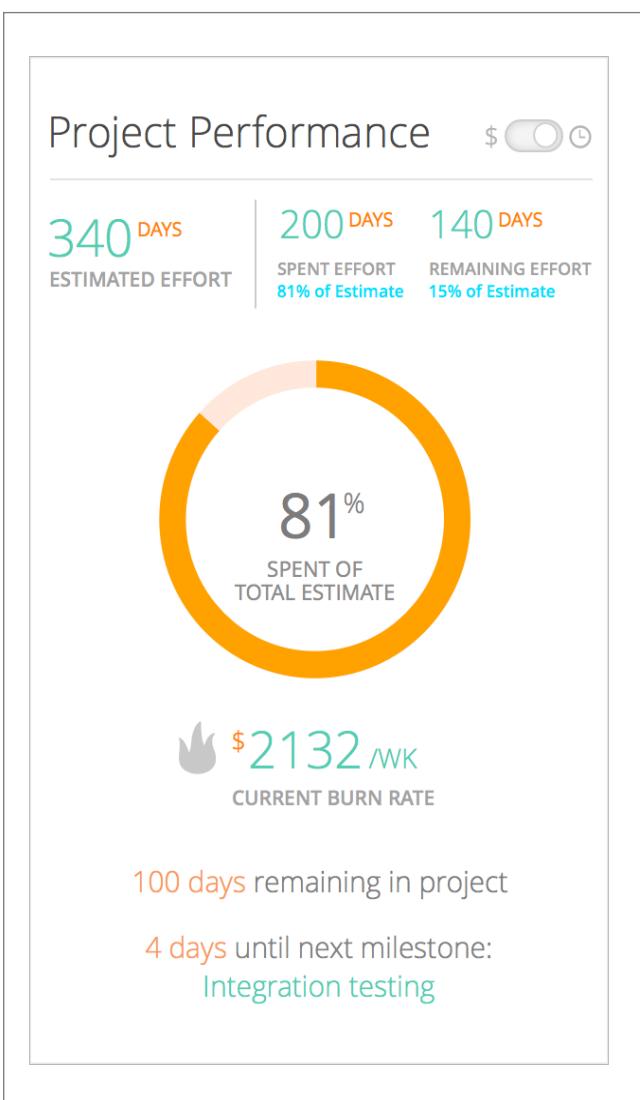
Sections will be shown in the following order:

1. Project Performance
2. My Open Issues
3. Project Updates
4. Milestones
5. Risks

PERFORMANCE: DOLLARS UNIT (\$)



PERFORMANCE: TIME UNIT (HOURS)

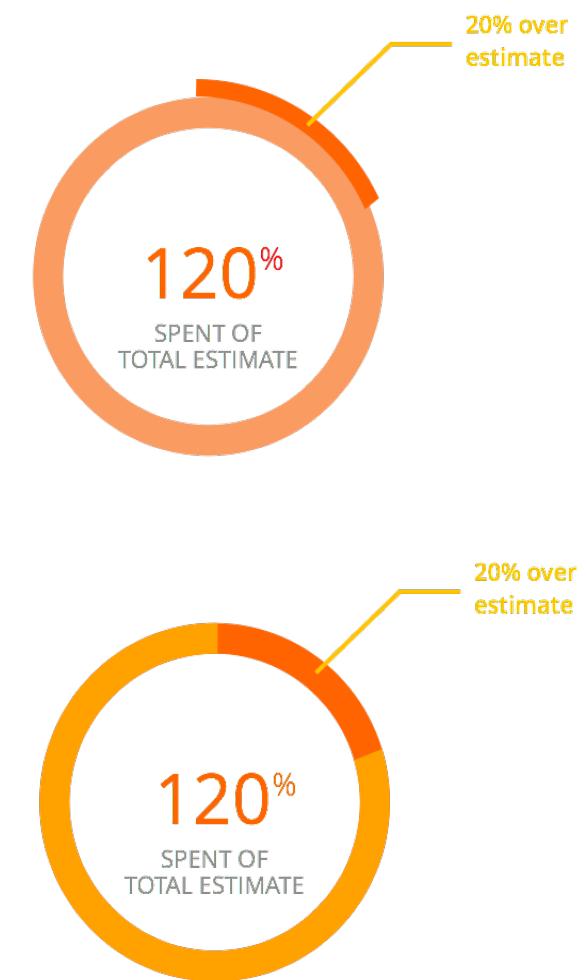


3.3.1 Overview Tab: Project Performance

This section provides performance visualizations and top-level stats for the project. The units of display (\$) or hours) is toggled using the slider on the top right. A visualization of budget spent is shown.

Other data visualization that could feature in the Performance section are TBD.

The following are two possibilities for visualizing overspending of budget. The second is preferred -- the circle can feature an animation of 'drawing itself' from 0% to 100% in orange, then shift to red as it exceeds 100%.



3.3.2 Overview Tab: My Open Issues

Shows the client's open issues in JIRA, along with a link that opens up JIRA in a browser, with filters pre-applied. Issues are tappable, opening the Open Issue Modal.

My Open Issues (3)

Please provide all text copy and title labels for the the backend pages.
Added 1 days ago by John Doe

Please send all IBM logo assets in vector format (.EPS preferred).
Added 2 days ago by John Doe

Ut faucibus bibendum nulla vel placerat. Sed mattis consequat venenatis. Duis iaculis consequat ornare. Curabitur rhoncus nulla ...
Added 4 days ago by John Doe

[View my open Issues in JIRA \(3\) >](#)

3.3.3 Overview Tab: Open Issue Modal

Tapping on an open issue will open it full-text in a modal. A link will be available to open the JIRA in a browser.

My Open Issues

ibm-websphere-3215 X

Please provide all text copy and title labels for the the backend pages.

1. Lorem ipsum dolor sit amet, consectetur adipiscing elit.

2. Proin eu quam at lectus rutrum dictum sed sed mauris. Vivamus

3. Imperdiet consequat magna quis sollicitudin.

4. Morbi luctus lacus nec commodo tempus.

5. Vivamus quis enim fringilla quam vehicula maximus id ac erat

[View issue in JIRA >](#)

3.3.4 Overview Tab: Milestones

List of milestones, indicating the current, past, and upcoming milestones.

Milestones

Discovery	Jan 1	✓
Sprint Aerosmith	Feb 15	✓
Sprint Bad Company	Mar 7	✓
Sprint Cars	Mar 28	✓
Sprint Death Charge	Apr 17	✓
Sprint Entwistle	May 4	✓
Sprint Foreigner	June 16	
Sprint Genesis	July 16	
Sprint Hendrix	Aug 5	
Integration Testing	Sept 28	
Project Completion	Nov 24	

3.3.5 Overview Tab: Project Updates

Shows the last 5 project updates. A link brings the user to All Project Updates.

The screenshot shows a card titled "Recent Updates (3)". Inside, there are three entries:

- Hugh Smithwick has been added to this project. 2 hours ago
- Project status has been changed to Fair. 1 day ago
- Josh Petersen has been removed from this project. 2 days ago

[View all project updates \(32\) >](#)

3.3.6 Overview Tab: Project Updates - All

Shows a full history of all updates since the inception of the project.

The screenshot shows a modal window titled "Project Updates" with a sub-section titled "All Project Updates". It lists several project updates in reverse chronological order:

- Hugh Smithwick has been added to this project. 2 hours ago
- Project status has been changed to Fair. 1 day ago
- Josh Petersen has been removed from this project. 2 days ago
- Project status has been changed to On Track. 4 days ago
- Bob Hunter has been added to this project. 4 days ago

3.3.7 Risks

Displays risks for the project from JIRA. A link enables users to see all risks in JIRA in their browser.

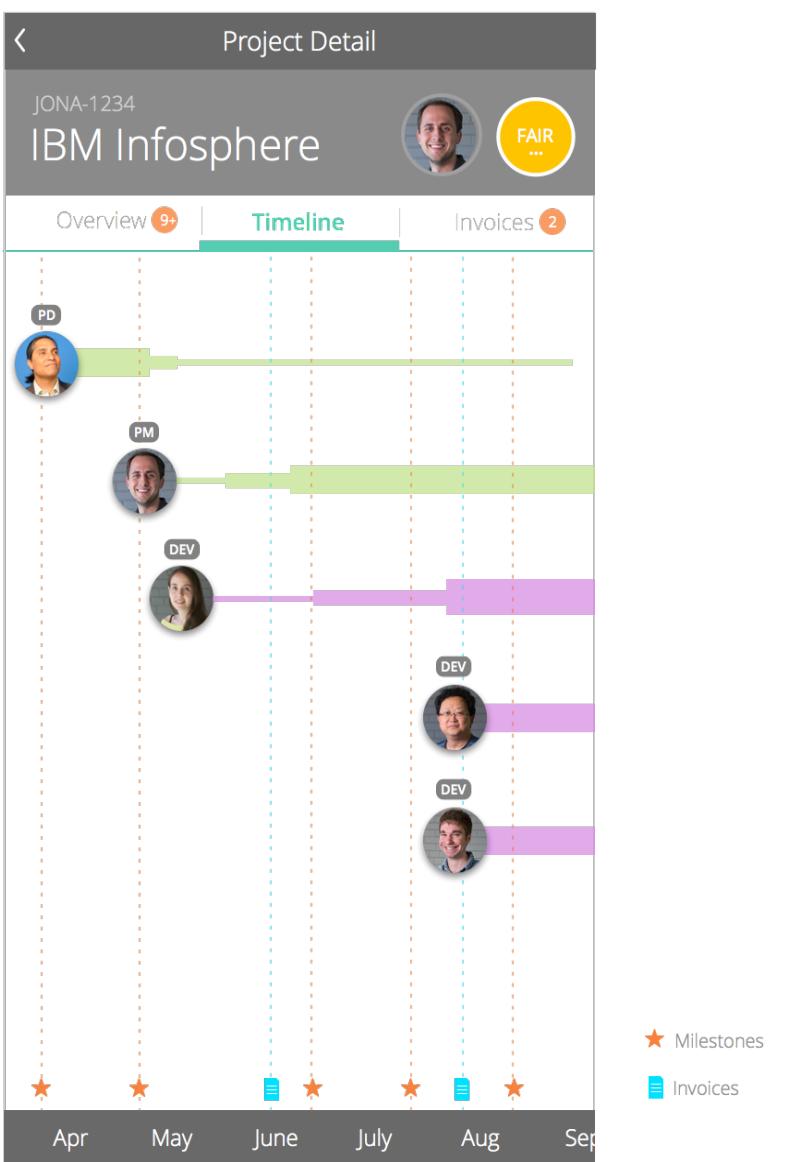
The screenshot shows a card titled "Risks". It contains a single entry:

Account for known issues in the XYZ Javascript Framework API.
1 days ago by John Doe
Lorem ipsum dolor sit amet, consectetur adipiscing elit.
Added 2 days ago by John Doe
Ut faucibus bibendum nulla vel placerat. Sed mattis consequat venenatis. Duis iaculis consequat ornare. Curabitur euismod semper sapien, eu sagittis justo feugiat et.
Added 4 days ago by John Doe

[Show all 32 risks for this project ...](#)

3.4 Timeline Tab

The Timeline tab shows the entire timeline of the project, with the following features marked:

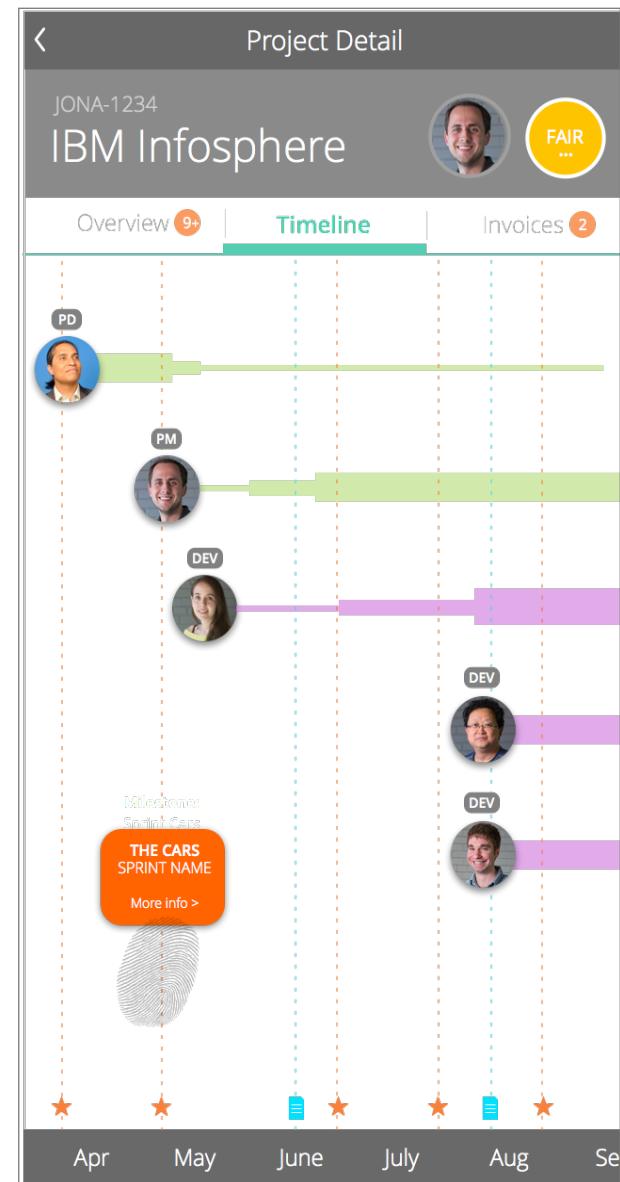


1. Team members who have worked on the project, with utilization across time marked by the height of their colored bar. Management and development personnel have a different associated color. For visual simplicity, team members are badged with only an abbreviation for their project role (e.g. PD = project director, PM = project manager, DEV = developer, etc). Tapping on a team member brings up more information.
2. Milestones are marked with a vertical red line, and a star icon. Tapping on the line will bring up more information.
3. Invoices are marked with a vertical blue line, and an icon. Tapping on the line will bring up more information.

3.4.1 Milestone Marker

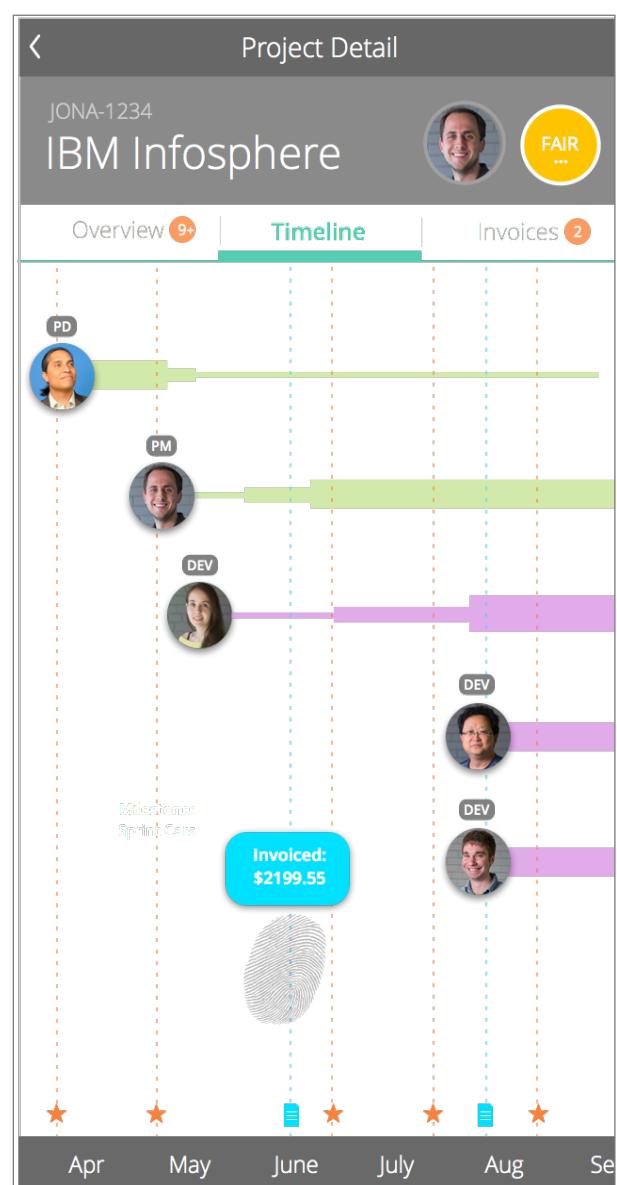
Tapping on the milestone marker brings up an information box with a summary (milestone name, duration).

Tapping on this information box brings up a modal with more detailed information (TBD).



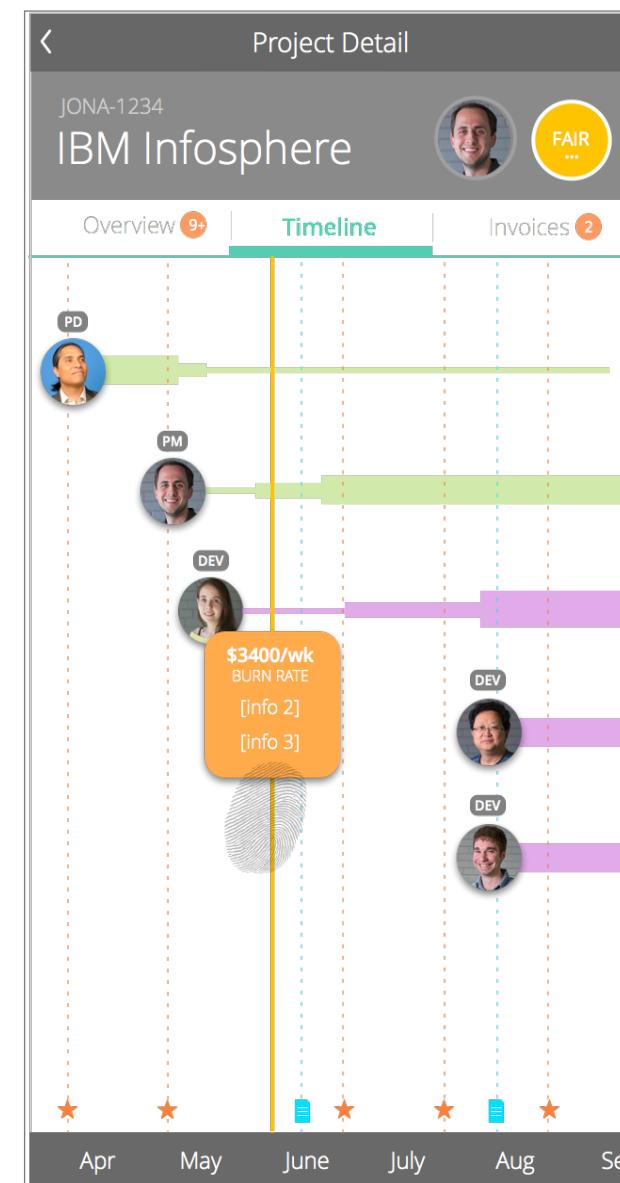
3.4.2 Invoice Marker

Tapping on the invoice marker brings up an information box with a summary (invoice date and amount).



3.4.3 Point In Time Information

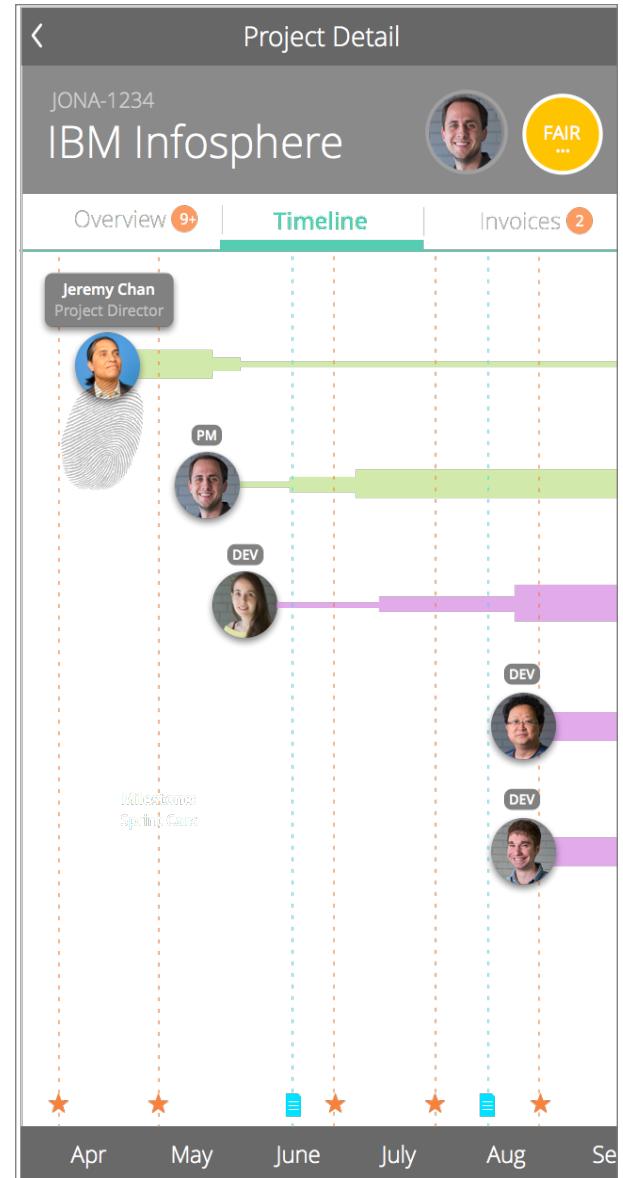
Long-pressing anywhere on the screen will bring up a point-in-time information box (described in later section). The user will be educated about this feature through onboarding on the first few uses (TBD)



3.4.4 Team Member Info

Tapping on a team member's badge will open an information box with their name and role.

Tapping on the information box could possibly bring up a detailed summary of their task history (TBD)



3.5 Invoices Tab

Shows a list of recent invoices. Tapping on a invoice will open its associated PDF.

