Walker Morris
Online Presentation Tool

Please note these are wire frames, design elements at this stage are to emphasise functionality only

The Dashboard

Project outline
To design, build and deliver an online tool that allows Walker Morris to present a series of slides in a non-linear fashion through a web browser, and after for their client to be able to view it as a "leave-behind" using an access key.

The application should use only open source software and not require the audience to install any plug-ins or software, other than the use of a modern browser.

The application will be built in such a way that content, functionality and appearance are separated, allowing the way it looks to be updated without re-coding the"engine" or affecting the content.

The application consists of three modules:
• The Dashboard
• The Presentation
• The Client leave-behind

We suggest three sub-domains are created to house each module:
• dashboard.walkermorris.co.uk
• presenting.walkermorris.co.uk
• clients.walkermorris.co.uk

The Dashboard

Where new presentations are created and edited.

Staff access is managed.

Client keys are created.

Presentations are attached to staff members.

A presentation should be able to be saved as a PDF suitable for printing.

The Presentation

Before a presentation can be viewed, the presenter must log-in, which automatically selects which presentation will be shown.

The presenter remains logged in until either the browser cookie is removed or they manually log out.

This stops any risk of the dashboard along with lists of clients being exposed during a presentation.

A new or different presentation can be selected in the dashboard.

A presentation consists of a menu screen, selecting an option then steps through a series of linear screens on that topic. At any point this series of screen can be exited back to the menu screen.

The Client leave-behind

Works in a similar fashion to The presentation. The principle difference being that instead of a user name and password screen, the home page has as part of the interface a "key" field.

The client enters a unique key (usually comprising a series of random characters and numbers) which automatically selects and loads their presentation.

The Dashboard

Menu options
- Select presentation
- Create presentation
- Current presentations
- Archived presentations
- Client keys
- Manage users
- Defaults

Select presentation

Allows any current presentation to be assign to any user.

Assigning a presentation to a user cause that presentation to automatically display whenever the user visits The presentation site, on any computer or browser.

Create presentation

Creates a new empty presentation based on the current set of defaults.

Current presentations

Displays a list of all current presentations, these can be
- edited
- previewed
- saved to PDF
- duplicated
- archived

Archived presentations

Displays a list of all current presentations, these can be
- viewed
- activated
- saved to PDF
- deleted

We suggested splitting the options to avoid accidental deletion. It may be deemed better to hide rather delete presentations for reasons of accountability. Presentations may want to be deleted or hidden because they refer to out-dated material, staff, laws, etc.

Manage users

A user consists of a
- user name
- password

These allow access to both the Dashboard and The Presentation (but not the leave behind).

The **Manage user** panel can
- create a new user
- edit their user name and/or password
- delete a user

Client keys

A client key consists of a
- firm name
- key

The key alone allows access to the Leave-behind. The firm name is display on the welcome screen.

The **Client Keys** panel can
- create a client key
- edit the firm name
- generate a new key
- delete a client key

Defaults

Edits the basic menu structure.

The Dashboard

Where new presentations are created and edited.

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A presentation should be able to be saved as a PDF suitable for printing.

A Presentation

Presentation components
- Presentation ID
- Creation date
- Updated date
- Author
- Client Firm
- Title
- Status (active or hidden)

Dynamically generated components
- Presentation date
- Presenter

These are created on the fly when the presentation runs

Default menu screen

The initial set of menu options are
- The team / contacts
- Core values
- Awards / accreditations / quotes
- About client / Client requirements
- Experience / Credentials
- Logos
- Fees
- Summary
- Case studies
- Key issues / challenges
- Deliverables / How we can help
- USPs
- Technical process / timetable
- Word clouds

Slide types

There are five slide types
- Picture
- Logos
- Tombstone
- Text/bullets
- Video

Slide meta data

All slides regardless of type have the following elements
- Presentation ID
- Menu ID
- Slide ID
- Slide rank
- Creation date
- Updated date
- Author
- Title

Logos/pictures

Consist of a dynamic layout of images. The maximum number of images to be determined.

Images are resized to the correct dimensions when uploaded.

Images should be tagged as either
- client logo
- image

This allows for the easy selection of client logos

Video

Consists of a poster image with a play button overlaid.

The video should be stored online, we recommend Vimeo.

Storing it on WM servers can be discussed.

Managing users

List all current WM staff accessing, editing, creating or presenting presentations using the WM-OPT.

New users can be added.

Users can be edited or deleted.

Once deleted access to the presentations and the dashboard is revoked.

The list can be sorted by name alphabetically, in ascending or descending order.

Pages will be paginated when the amount of users grows substantially.

Welcome **Julian Baker**   Sign out

Presentation dashboard

Select presentation | Create presentation | Current presentations | Archived presentations | Client keys | Manage users | Defaults

Create new user

Name ⌃	Password		
Caroline Black	nonummy	✎	✖
Julian Baker	dignissim	✎	✖
Abigail Pelster	insitam	✎	✖
Adrian Lane	enimet	✎	✖
Alex Hudson	accumsan	✎	✖
Jane Smith	anteposuerit	✎	✖
Alice Robbins	nonummy	✎	✖
John Smythe	claritatem	✎	✖
Arthur Williams	clarinsitam	✎	✖
May Brown	hendrerit	✎	✖
Amanda Jenkins	parumprocessus	✎	✖

| First | Previous | 1 | 2 | 3 | 4 | 5 | Next | Last |

Adding new users

Enter the name and password of a new user.

Leaving either the name or password field blank will display an error and the form will not submit until details have been entered.

WALKER MORRIS | WA

Presentation dashboard

Select presentation | Create presentation | Current presentations | Archived presentations | Client keys | Manage users | Defaults

Create new user

| Name | Password | | Cancel | Create user |

Name ⌄	Password		
Caroline Black	nonummy	✎	✖
Julian Baker	dignissim	✎	✖
Abigail Pelster	insitam	✎	✖
Adrian Lane	enimet	✎	✖
Alex Hudson	accumsan	✎	✖
Jane Smith	anteposuerit	✎	✖
Alice Robbins	nonummy	✎	✖
John Smythe	claritatem	✎	✖
Arthur Williams	clarinsitam	✎	✖
May Brown	hendrerit	✎	✖
Amanda Jenkins	parumprocessus	✎	✖

| First | Previous | 1 | 2 | 3 | 4 | 5 | Next | Last |

Editing users

Amend the name and password of the selected user by pressing the pencil/edit icon.

Leaving eiother the name or password field blank will display an error and the form will not submit until details have been entered.

WALKER MORRIS   WM

Presentation dashboard

Select presentation | Create presentation | Current presentations | Archived presentations | Client keys | Manage users | Defaults

Edit user

| Abigail Pelster | insitam | Cancel | Update user |

Name ⌄	Password		
Caroline Black	nonummy	✎	✖
Julian Baker	dignissim	✎	✖
Abigail Pelster	insitam	✎	✖
Adrian Lane	enimet	✎	✖
Alex Hudson	accumsan	✎	✖
Jane Smith	anteposuerit	✎	✖
Alice Robbins	nonummy	✎	✖
John Smythe	claritatem	✎	✖
Arthur Williams	clarinsitam	✎	✖
May Brown	hendrerit	✎	✖
Amanda Jenkins	parumprocessus	✎	✖

| First | Previous | 1 | 2 | 3 | 4 | 5 | Next | Last |

Deleting users

Delete a user by pressing the cross/remove icon.

An "are you sure?" message is displayed to stop accidental deletion.

Removal is can not be undone and all access to the dashboard and presenter is immediately revoked.

Welcome **Julian Baker** Sign out

Presentation dashboard

Select presentation | Create presentation | Current presentations | Archived presentations | Client keys | Manage users | Defaults

Create new user

Name ⌄	Password		
Caroline Black	nonummy	✎	✖
Julian Baker	dignissim	✎	✖
Abigail Pelster	insitam		✖

Are you sure you want to remove Abigail Pelster   Remove   Cancel

Jane Smith	anteposuerit	✎	✖
Alice Robbins	nonummy	✎	✖
John Smythe	claritatem	✎	✖
Arthur Williams	clarinsitam	✎	✖
May Brown	hendrerit	✎	✖
Amanda Jenkins	parumprocessus	✎	✖

First | Previous | 1 | 2 | 3 | 4 | 5 | Next | Last

Selecting the active presentation

Any user is able to select a single presentation from the active list.

This presentation will automatically display in the presenter site when they log-in, or are already logged in.

Only one presentation can be active at any time.

The presentation remains active until another is selected (even if the current selection is archived).

Welcome **Julian Baker** Sign out

Presentation dashboard

Select presentation | Create presentation | Current presentations | Archived presentations | Client keys | Manage users | Defaults

Client	Title	Created	Updated	
Affinity Investment Group	Acquisition	1 Sept 15	1 Sept 15	✓
Buena Vista Realty Service	Merger	23 Aug 15	1 Sept 15	✓
Creative Wealth Management	Acquisition	5 Aug 15	5 Aug 15	✓
Dynatronics Accessories	International	27 Jul 15	7 Aug 15	✓
Fellowship Investments	**Board reshuffle**	**27 Jul 15**	**27 Jul 15**	✓
Gold Leaf Garden Management	IPO	2 Jun 15	28 Jun 15	✓
Intelacard	Acquisition	16 Apr 15	16 Apr 15	✓
Omni Tech Solutions	Merger	16 Apr 15	16 Apr 15	✓
Perisolution	Acquisition	15 Feb 15	15 Feb 15	✓
Quality Realty Service	International	15 Feb 15	15 Feb 15	✓
Terra Nova Group	Property sale	7 Jan 15	7 Jan 15	✓

First | Previous | 1 | 2 | 3 | 4 | 5 | Next | Last

Managing presentations

Presentations may be ordered by client name; presentation title; creation date; updated date. The list will be paginated to avoid excessive scrolling.

The following actions can be performaed on a presentation: Edit; Preview; Archive; Save to PDF; Duplicate.

A new presentation can be created from this screen as well.

WALKER MORRIS   WM

Presentation dashboard

Select presentation | Create presentation | Current presentations | Archived presentations | Client keys | Manage users | Defaults

Create new presentation

Client	Title	Created	Updated					
Affinity Investment Group	Acquisition	1 Sept 15	1 Sept 15					
Buena Vista Realty Service	Merger	23 Aug 15	1 Sept 15					
Creative Wealth Management	Acquisition	5 Aug 15	5 Aug 15					
Dynatronics Accessories	International	27 Jul 15	7 Aug 15					
Fellowship Investments	Board reshuffle	27 Jul 15	27 Jul 15					
Gold Leaf Garden Management	IPO	2 Jun 15	28 Jun 15					
Intelacard	Acquisition	16 Apr 15	16 Apr 15					
Omni Tech Solutions	Merger	16 Apr 15	16 Apr 15					
Perisolution	Acquisition	15 Feb 15	15 Feb 15					
Quality Realty Service	International	15 Feb 15	15 Feb 15					
Terra Nova Group	Property sale	7 Jan 15	7 Jan 15					

First | Previous | 1 | 2 | 3 | 4 | 5 | Next | Last

Archived presentations

Archived may be ordered by client name; presentation title; creation date; updated date. The list will be paginated to avoid excessive scrolling.

The following actions can be performaed on a presentation: Preview; Activate; Delete.

A new presentation can be created from this screen as well.

Welcome **Julian Baker**   Sign out

Presentation dashboard

Select presentation | Create presentation | Current presentations | Archived presentations | Client keys | Manage users | Defaults

Create new presentation

Client	Title	Created	Updated			
A+ Electronics	Acquisition	1 Sept 15	1 Sept 15	👁	🔓	✖
Adaptabiz	Merger	23 Aug 15	1 Sept 15	👁	🔓	✖
Balanced Fortune	Acquisition	5 Aug 15	5 Aug 15	👁	🔓	✖
Complete Tech	International	27 Jul 15	7 Aug 15	👁	🔓	✖
Destiny Planners	Board reshuffle	27 Jul 15	27 Jul 15	👁	🔓	✖
Exact Solutions	IPO	2 Jun 15	28 Jun 15	👁	🔓	✖
Future Bright	Acquisition	16 Apr 15	16 Apr 15	👁	🔓	✖
Gold Touch Management	Merger	16 Apr 15	16 Apr 15	👁	🔓	✖
Honest Air Group	Acquisition	15 Feb 15	15 Feb 15	👁	🔓	✖
Intelacard	International	15 Feb 15	15 Feb 15	👁	🔓	✖
Las Vegas Yard Management	Property sale	7 Jan 15	7 Jan 15	👁	🔓	✖

First	Previous	1	2	3	4	5	Next	Last

Deleting archived presentations

A archived presentation can only be deleted after confirming via a dialogue box.

A new presentation can be created from this screen as well.

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Presentation dashboard

Create new presentation

Client	Title	Created	Updated			
A+ Electronics	Acquisition	1 Sept 15	1 Sept 15	👁	🔓	✖
Adaptabiz	Merger	23 Aug 15	1 Sept 15	👁	🔓	✖
Balanced Fortune	Acquisition	5 Aug 15	5 Aug 15			✖

Are you sure you want to remove Balanced Fortune

Remove   Cancel

Client	Title	Created	Updated			
Exact Solutions	IPO	2 Jun 15	28 Jun 15	👁	🔓	✖
Future Bright	Acquisition	16 Apr 15	16 Apr 15	👁	🔓	✖
Gold Touch Management	Merger	16 Apr 15	16 Apr 15	👁	🔓	✖
Honest Air Group	Acquisition	15 Feb 15	15 Feb 15	👁	🔓	✖
Intelacard	International	15 Feb 15	15 Feb 15	👁	🔓	✖
Las Vegas Yard Management	Property sale	7 Jan 15	7 Jan 15	👁	🔓	✖

First   Previous   1   2   3   4   5   Next   Last

Creating a new presentation

When a new presenation is created, it is initialised with the sections as they currently are in the Defaults.

A client name and a title must be filled in before the presentation can be saved.

Clicking cancel will not create a new entry in the database.

Section details can not be edited until the presentation is saved, although they are visible.

Sections in saved presentations can be re-ordered by dragging on the Move icon and dropping

Welcome **Julian Baker**   Sign out

Presentation dashboard

Select presentation | Create presentation | Current presentations | Archived presentations | Client keys | Manage users | Defaults

New presentation

| Client name | Title | Cancel | Create presentation |

The team

Core values

Awards

About client

Experience

Logos

Rest of default section…

Managing a presentation

Once a presentation is saved, a new slide can be added to ant section by clicking on the plus symbol in the last slide panel.

Each slide is labelled with it's Type and Title.

Slides can be re-ordered within a section by dragging the Move icon.

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Presentation dashboard

Editing presentation

Creative Wealth Management – Acquisition

The team

Tombstone *Slide title*	Text *Slide title*	Tombstone *Slide title*	Images *Slide title*

+

Core values

Images *Slide title*	Images *Slide title*	Tombstone *Slide title*	Tombstone *Slide title*

Text *Slide title*	+

Awards

Images *Slide title*	Text *Slide title*	+

About client

Images *Slide title*	Images *Slide title*	Tombstone *Slide title*	Tombstone *Slide title*

Text *Slide title*	Text *Slide title*	+

Rest of default section…

Editing a presentation title or client name

To rename a presentation, or assign to a different client, click the edit icon.

A client name and a title must be filled in before the presentation can be updated.

Presentation dashboard

Editing presentation

| Creative Wealth Management | Acquisition | | Cancel | Update presentation |

Core values

Awards

About client

Experience

Logos

Rest of default section…

Editing a section title within a presentation.

Click the edit icon in a particular section to change the name from the Default title. (Note this will not change the title in the Defaults table).

A Title must be filled in before the presentation can be updated.

Presentation dashboard

Select presentation | Create presentation | Current presentations | Archived presentations | Client keys | Manage users | Defaults

Editing presentation

Creative Wealth Management – Acquisition

The team	Cancel	Update section

	Text *Slide title*	Tombstone *Slide title*	Images *Slide title*

Core values

Awards

About client

Experience

Logos

Rest of default section…

Adding a section to a presentation.

A new section can be added by entering a Section Title after the last section pane, and pressing the "Add new section" button.

Presentation dashboard

Select presentation | Create presentation | Current presentations | Archived presentations | Client keys | Manage users | Defaults
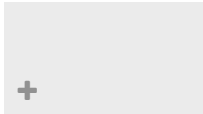
Editing presentation

| Creative Wealth Management | Acquisition | Cancel | Update presentation |

Rest of default section…

Word clouds

+

Add new section

Add new section

Deleting a section from a presentation.

To delete a section from a presentation click the delete icon.

Deleted section can not be retrieved.
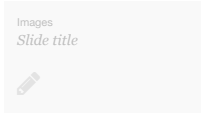
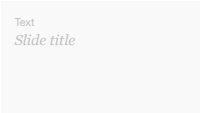WALKER MORRIS **W**
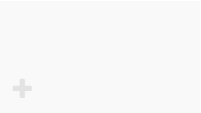
Presentation dashboard

Editing presentation

Creative Wealth Management – Acquisition

The team

| Cancel | Delete section |

Text
Slide title

Tombstone
Slide title

Images
Slide title

Core values
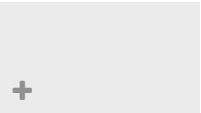
Awards
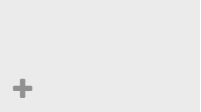
About client
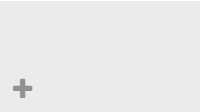
Experience
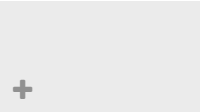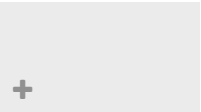
Logos

Rest of default section…
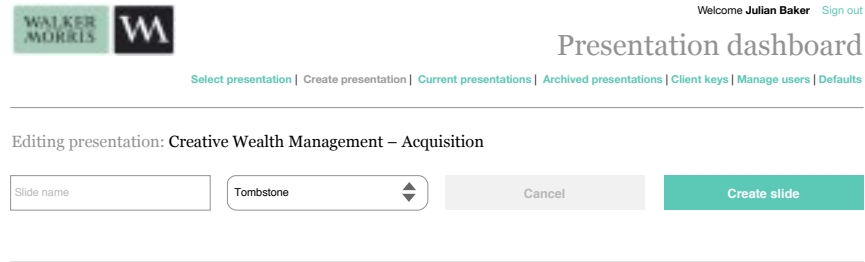
Adding a new slide to a presentation.

First a slide must be have it's Title entered and the slide Type chosen.

Depending on the slide Type the authoring controls will vary.

Slide types are:

- Large picture

- Tombstone

- Logos

- Text

- Video

Presentation dashboard

Select presentation | Create presentation | Current presentations | Archived presentations | Client keys | Manage users | Defaults

Editing presentation: **Creative Wealth Management – Acquisition**

| Slide name | Tombstone | Cancel | Create slide |

The tombstone slide.

A tombstone comprises of three elements:

Image - mandatory
Any sized image can be uploaded and will be scaled down. Note images wont be scaled up.

Label - optional
This appears on the slide when initially shown

Long description - optional.
This is displayed in a pop-over box covering the slide when the image is clicked.

When saving you can either return to the Presentation interface or add a new tombstone.

WALKER MORRIS | WM
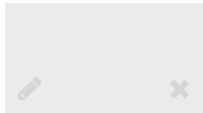
Presentation dashboard

Select presentation | Create presentation | Current presentations | Archived presentations | Client keys | Manage users | Defaults

Editing presentation: **Creative Wealth Management – Acquisition**

Slide name

Humanitatis exerci volutpat notare blandit nisl. Amet feugait parum erat sollemnes et. Tation me option amet dolor in…

Label

Long description

Click to add image

Save - add another tombstone   **Save** - return to presentation

Editing a individual tombstone.

Clicking the edit icon within a tombstone re-presents the content where it can edited.

Cancels leaves the slide untouched, in the state it was before editing.

Welcome **Julian Baker** Sign out

Presentation dashboard

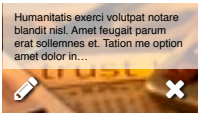Select presentation | Create presentation | Current presentations | Archived presentations | Client keys | Manage users | Defaults

Editing presentation: **Creative Wealth Management – Acquisition**

Slide name

Humanitatis exerci volutpat notare blandit nisl. Amet feugait parum erat sollemnes et. Tation me option amet dolor in…

Label

Humanitatis exerci volutpat notare blandit nisl. Amet feugait parum erat sollemnes et. Tation me option amet dolor inemnes.

Long description

Eodem ex nobis facit non possim. Legunt non qui qui illum etiam. Est vel qui sed autem vel.

Assum suscipit lectores in duis modo. Ad id nisl dynamicus facilisi mirum. Blandit tincidunt qui liber qui at.

Enim enim quam nobis consequat facer. Eleifend quam gothica nulla mutationem commodo. Me modo decima lius decima facer.

Click to select image

Update - add another tombstone   **Update** - return to presentation

Editing a slide name.

Clicking the edit icon next to the slide name allows it to edited.

Cancels leaves the slide with the original name.

Presentation dashboard

Select presentation | Create presentation | Current presentations | Archived presentations | Client keys | Manage users | Defaults

Editing presentation: **Creative Wealth Management – Acquisition**

Slide name	Cancel	**Update slide name**

Humanitatis exerci volutpat notare blandit nisl. Amet feugait parum erat sollemnes et. Tation me option amet dolor in…

Label

Long description

Click to add image

Save - add another tombstone   **Save** - return to presentation

Deleting a tombstone from a slide.

Press the delete icon to display the Delete button.

Presentation dashboard

Select presentation | Create presentation | Current presentations | Archived presentations | Client keys | Manage users | Defaults

Editing presentation: Creative Wealth Management – Acquisition

Slide name

Humanitatis exerci volutpat notare blandit nisl. Amet feugait parum erat sollemnes et. Tation me option amet dolor in...

Delete tombstone

Cancel

Label

Click to select image

Long description

Save - add another tombstone   Save - return to presentation

The Picture slide.

A picture slide consists of a single large full-slide image.

Images can be marked as an image or a client logo.

Client logos must have the Logo Name field filled in.

The text slide.

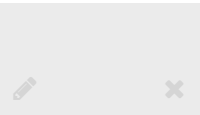Text can be styled as: Bold; Italic; Bullets; Headline, Sub-headline. Text can also be made into a link.
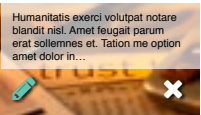
Welcome **Julian Baker** Sign out

Presentation dashboard

Select presentation | Create presentation | Current presentations | Archived presentations | Client keys | Manage users | Defaults

Editing presentation: **Creative Wealth Management – Acquisition**

Slide name

Save - return to presentation

The logos slide.

Logos can be added two ways.

Selecting a previously uploaded logo from the drop down list.

Clicking on the placement tile which uploads a new image from your computer. When this route is chosen the drop-down menu is replaced with an text field to name the logo. The slide will not save if any of these fields are blank. An edit symbol also appears which allows a replacement image to be picked.

Clicking the delete icon in an logo will remove the current image and if present clear and hide the Logo Name field.

The video slide.

The video file should already be converted to a MP4 h264 codec file, the URL is entered into the File Name field.

A Title needs to be entered and a Poster image selected to display before the video starts to play.

All fields are mandatory.

Welcome **Julian Baker** Sign out

Presentation dashboard

Editing presentation: Creative Wealth Management – Acquisition

Slide name

Click to select poster image

Video title

Video title

Video URL

http://

Save - return to presentation

Managing client keys.

A sixteen character client key is automatically created with each presentation. Each key is comprised of random uppercase and lowercase letters, and numbers

The key can be regenerated or edited.

Presentation dashboard

Select presentation | Create presentation | Current presentations | Archived presentations | Client keys | Manage users | Defaults

Client	Title	Key	Created		
Affinity Investment Group	Acquisition	6x39aqo7LUiz8wV	1 Sept 15	✏	⟳
Buena Vista Realty Service	Merger	1v8Era6Ahd1g2zN	1 Sept 15	✏	⟳
Creative Wealth Management	Acquisition	cheeseboard	5 Aug 15	✏	⟳
Dynatronics Accessories	International	n5UytIonqnirNAN	7 Aug 15	✏	⟳
Fellowship Investments	Board reshuffle	0qi2XfOufzMqFtZ	27 Jul 15	✏	⟳
Gold Leaf Garden Management	IPO	ea243M8M0561Rkl	28 Jun 15	✏	⟳
Intelacard	Acquisition	mt19rTy8W1wVt5m	16 Apr 15	✏	⟳
Omni Tech Solutions	Merger	p5V3dk26x533f8o	16 Apr 15	✏	⟳
Perisolution	Acquisition	o1194gjG2511A1t	15 Feb 15	✏	⟳
Quality Realty Service	International	0eH60UmBU8hvL6E	15 Feb 15	✏	⟳
Terra Nova Group	Property sale	vm213nkk266MmAz	7 Jan 15	✏	⟳

| First | Previous | 1 | 2 | 3 | 4 | 5 | Next | Last |

Editing client key.

Editing a key allows a word or a phrase to be entered.

Spaces will not be allowed in the key.

Welcome **Julian Baker**   Sign out

Presentation dashboard

Select presentation | Create presentation | Current presentations | Archived presentations | Client keys | Manage users | Defaults
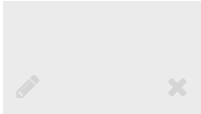
Edit client key

| cheeseboard | | Cancel | Update key |

Client	Title	Key	Created		
Affinity Investment Group	Acquisition	6x39aqo7LUiz8wV	1 Sept 15		
Buena Vista Realty Service	Merger	1v8Era6Ahd1g2zN	1 Sept 15		
Creative Wealth Management	Acquisition	cheeseboard	5 Aug 15		
Dynatronics Accessories	International	n5UytIonqnirNAN	7 Aug 15		
Fellowship Investments	Board reshuffle	0qi2XfOufzMqFtZ	27 Jul 15		
Gold Leaf Garden Management	IPO	ea243M8M0561RkI	28 Jun 15		
Intelacard	Acquisition	mt19rTy8W1wVt5m	16 Apr 15		
Omni Tech Solutions	Merger	p5V3dk26x533f8o	16 Apr 15		
Perisolution	Acquisition	o1194gjG2511A1t	15 Feb 15		
Quality Realty Service	International	0eH60UmBU8hvL6E	15 Feb 15		
Terra Nova Group	Property sale	vm213nkk266MmAz	7 Jan 15		

| First | Previous | 1 | 2 | 3 | 4 | 5 | Next | Last |

Presentation defaults.

The initial section titles. They can be edited or deleted.

Editing will cause any future presentations to have the new Title, previous presentations will not be affected.

Deleted will stop any future presentations from having that Title, previous presentations will not be affected.

The order of the menu sections can be changed using the arrow icons.

New defaults can be created from this screen

Presentation dashboard

Select presentation | Create presentation | Current presentations | Archived presentations | Client keys | Manage users | Defaults

Create new default

The team	∨	∧	✎	✖
Core values	∨	∧	✎	✖
Awards	∨	∧	✎	✖
About client	∨	∧	✎	✖
Experience	∨	∧	✎	✖
Logos	∨	∧	✎	✖
Fees	∨	∧	✎	✖
Summary	∨	∧	✎	✖
Case studies	∨	∧	✎	✖
Key issues	∨	∧	✎	✖
Deliverables	∨	∧	✎	✖
USPs	∨	∧	✎	✖
Technical process	∨	∧	✎	✖
Word clouds	∨	∧	✎	✖

Adding a presentation default.

A new default is added at the bottom of the list.

WALKER MORRIS | W

Presentation dashboard

Select presentation | Create presentation | Current presentations | Archived presentations | Client keys | Manage users | Defaults

Create new default

| Default name | | Cancel | | Create default |

The team	⌄ ⌃ 🖉 ✖
Core values	⌄ ⌃ 🖉 ✖
Awards	⌄ ⌃ 🖉 ✖
About client	⌄ ⌃ 🖉 ✖
Experience	⌄ ⌃ 🖉 ✖
Logos	⌄ ⌃ 🖉 ✖
Fees	⌄ ⌃ 🖉 ✖
Summary	⌄ ⌃ 🖉 ✖
Case studies	⌄ ⌃ 🖉 ✖
Key issues	⌄ ⌃ 🖉 ✖
Deliverables	⌄ ⌃ 🖉 ✖
USPs	⌄ ⌃ 🖉 ✖
Technical process	⌄ ⌃ 🖉 ✖
Word clouds	⌄ ⌃ 🖉 ✖

Editing a default.

Editing a default. The edited Default wont save if the field is empty.

Presentation dashboard

Select presentation | Create presentation | Current presentations | Archived presentations | Client keys | Manage users | Defaults

Edit default

| Awards | | Cancel | Update default |

The team	⌄ ⌃	✎	✖
Core values	⌄ ⌃	✎	✖
Awards	⌄ ⌃	✎	✖
About client	⌄ ⌃	✎	✖
Experience	⌄ ⌃	✎	✖
Logos	⌄ ⌃	✎	✖
Fees	⌄ ⌃	✎	✖
Summary	⌄ ⌃	✎	✖
Case studies	⌄ ⌃	✎	✖
Key issues	⌄ ⌃	✎	✖
Deliverables	⌄ ⌃	✎	✖
USPs	⌄ ⌃	✎	✖
Technical process	⌄ ⌃	✎	✖
Word clouds	⌄ ⌃	✎	✖

Deleting a default.

Deletion is a two step process to avoid accidental removal of Defaults.

Welcome **Julian Baker**   Sign out

Presentation dashboard

Select presentation | Create presentation | Current presentations | Archived presentations | Client keys | Manage users | Defaults

Create new default

The team	⌄ ⌃	✎	✖
Core values	⌄ ⌃	✎	✖
Awards			✖

Are you sure you want to remove Awards

Remove   Cancel

Logos	⌄ ⌃	✎	✖
Fees	⌄ ⌃	✎	✖
Summary	⌄ ⌃	✎	✖
Case studies	⌄ ⌃	✎	✖
Key issues	⌄ ⌃	✎	✖
Deliverables	⌄ ⌃	✎	✖
USPs	⌄ ⌃	✎	✖
Technical process	⌄ ⌃	✎	✖
Word clouds	⌄ ⌃	✎	✖

Creating a presentation

❶ A default presentation is duplicated

❷ The menu structure can be amended as desired

Duplicating a presentation

Duplicating an existing presentation also creates copies of every slide. Once created menu options and slides can be edited independently of the original.

Step 1

Default		New presentation
The team	Duplicated	The team
Core values		Core values
Awards		Awards
About client		About client
Experience		Experience
Logos		Logos
Fees		Fees
Summary		Summary
Case studies		Case studies
Key issues		Key issues
Deliverables		Deliverables
USPs		USPs
Technical process		Technical process
Word clouds		Word clouds

Step 2

New presentation

The team
Core values
Awards
About client
Experience
Logos
Fees
Summary
Case studies
Key issues
Deliverables
USPs
Technical process
Word clouds

Add item

Edit item

Delete item

New presentation

The team
Core values
Awards
About client
Relevant work
Logos
Fees
Summary
Case studies
Key issues
Deliverables
Risks

Creating a presentation

❶ A new slide is requested for a menu option

❷ After adding an element (for example a tombstone) you can either finish the slide or add another element

❸ This process if repeated until the slide is finish. You can then add another slide to the menu or finish adding slides.

Step 1

| The team |
| Core values |
| Awards |
| About client |
| Experience |
| Logos |
| Fees |
| Summary |
| Case studies |
| Key issues |
| Deliverables |
| USPs |
| Technical process |
| Word clouds |

→ New slide → Select Template

New presentation

Step 2

Tombstone → Add element → Tombstone → Finish slide / Add another element

Slide

Step 3

Finish slide → Finish menu / Add another slide

| The team |
| Core values |
| Awards |
| About client |
| Experience |
| Logos |
| Fees |
| Summary |
| Case studies |
| Key issues |
| Deliverables |
| USPs |
| Technical process |
| Word clouds |

A presentation journey

Selecting any menu option begins a linear journey through the stack of slides that belong to that menu.

After the last slide has been displayed in that stack the presentation returns to the menu.

At any point the stack can be exited and the presentation immediately returned to the menu screen.

WALKER MORRIS ONLINE PRESENTATION TOOL
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Budget

£12000

25% Commitment fee
With two milestone payments of 25%
Final 25% upon sign-off

Build time

Three months starting mid June.
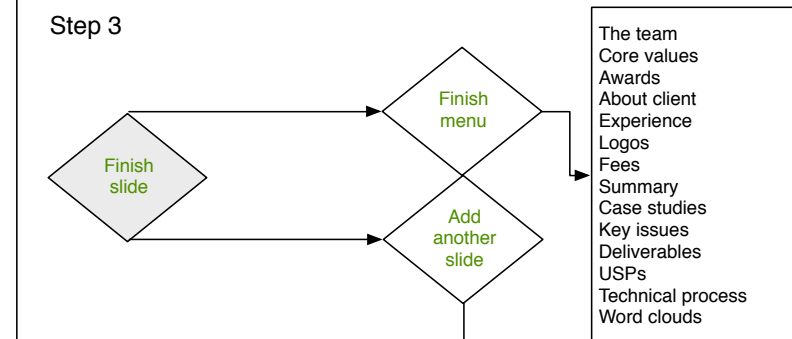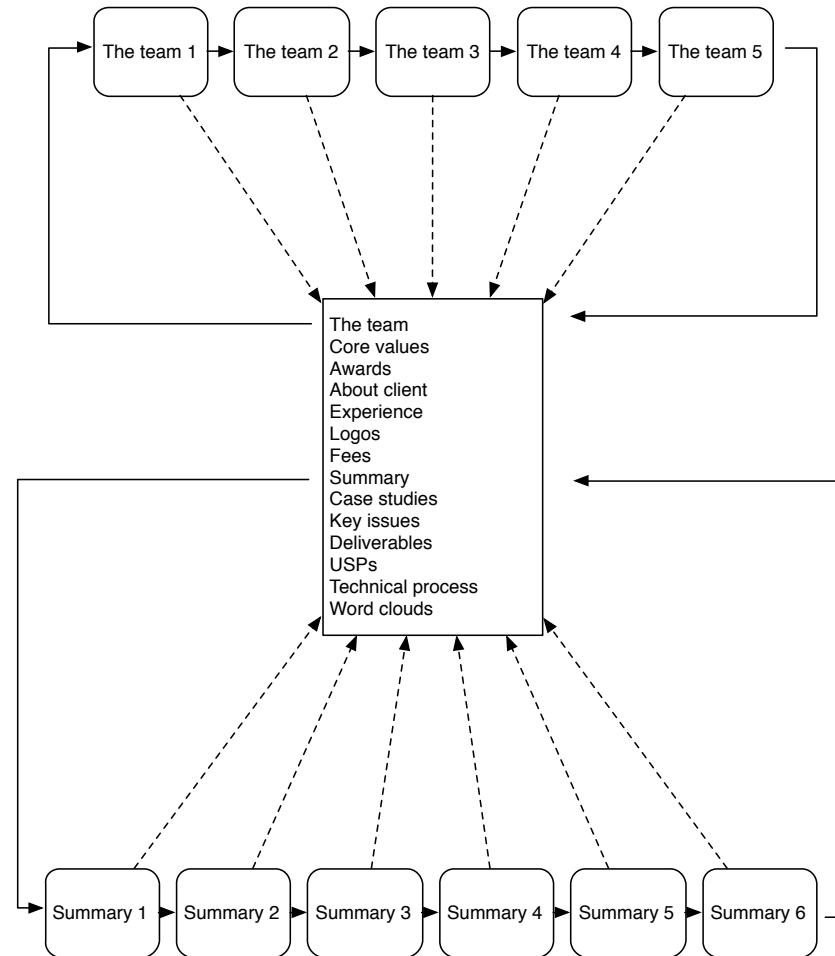Time scales reflect the build time for Flat Earth and do not include any decision processes by Walker Morris.

Next steps

Development of scope
• sub-domain registration
• site wireframes
• template wireframes
• database design

Milestones

• sitemaps
• template design
• site design
• dashboard
• presentation site
• client site
• q.a. process

Platform and browsers

The sites as not mobile optiomised and are meant to be viewed on a desktop computer or iPad.

Supported browsers

Browser	Version(s)	OS	Grade
Chrome	C, C - 1	Windows 7+	A
Safari	ANY	Windows 7+	U
Firefox	C, C - 1	Windows 7+	A
IE	10, 11	Windows 7+	A
IE	9	Windows 7+	B
IE	5, 6, 7, 8	Windows 7+	U
Chrome	C, C - 1	Mac OS 10.6+	A
Safari	C, C - 1	Mac OS 10.6+	A
Firefox	C, C - 1	Mac OS 10.6+	A
Opera	ANY	ANY	U
ANY		Linux	U

Support Levels

A grade
• All functionality works
• Minor visual variation between browsers and operating systems is acceptable
• Transparent progressive enhancement allowed (e.g. functionality can optionally use browser capabilities if they're available, but features still work without them)
• Performance variation between browsers is acceptable

B grade
• Functionality that requires new browser features may be disabled
• All other functionality present
• All content must be accessible
• Visual variations (e.g. rounded corners) are acceptable

Unsupported
• Not in scope for Flat Earth to support this browser, for this project

Responsibilities

Walker Morris to arrange hosting of the three sub-domains with the following software
• Apache/Unix server
• MySQL
• PHP

Flat Earth to be granted
• SSH access to the sub-domains
• FTP access
Lack of SSH access may lengthen the project slightly

Document version

150901a.