1. **General Look and Feel:**
   1. The content will be on a fixed width – **980 px** – white background with an expandable grey border (although it is not currently programmed as an HTML border, so I don’t mean this literally) around it. RGB values are already programmed but can be found in Photoshop or Illustrator files. Let me know if you need me to provide these values
   2. All content above the tab navigation bar (basically just the logo and a few links) will remain consistent across each page change
   3. Tab navigation bar has already been programmed
   4. Margins:
      1. The tab navigation bar is 10px to the right of the white containing box
      2. Everything else is 20px to the right of the white containing box
   5. Background images will be used for most graphics to retain color and look and feel
2. **Login page:**
   1. When the user mouses over the links “Create login” and “Forgot user name or password?”, these links should gain underlines/underscores
3. **Positioning Statement:**
   1. Most HTML and CSS will be/has been programmed by Allie
   2. In the tab navigation bar, the “Positioning Statement” tab will be active (see design file for look and feel)
   3. In the grey title box there is a text input box where user can name their Positioning Statement
      1. When the user clicks in the text input box, the greyed-out default text goes away
   4. The circular question mark button in the lower right corner of the title box and the other colored rectangular title boxes will prompt a pop-up graphic tool-tip that will look like the one in the Positioning Statement design file
      1. The tool-tip box will be draggable
      2. It will also have the ability to be closed (via an “x” button in the upper right hand corner)
   5. Row of buttons below Positioning Statement title box:
      1. History:
         1. When clicked will go to the history page
      2. My Positioning Statements:
         1. When clicked, a drop-down menu will appear with three options: “Go to”, “Make a Duplicate”, and “Compare with”
            1. If the user clicks “Go to,” another drop-down menu will appear to the right of it that will list all positioning statements that the user has created. If the user hasn’t created any, then show an empty drop down menu?? (I trust your judgement on this issue)

If the user named their Positioning Statement, the name of it will appear in the drop-down menu

If the user did not, the date created will appear

We must make sure that when the user navigates away from the current page, his/her information will be saved

Of course when the user selects a Positioning Statement, the page will load the html/css/data for the selected one

* + - * 1. If the user clicks “Compare with,” similarly another drop-down menu will show up containing the names or dates of all the Positioning Statements the user has created

If the user clicks on one of the Positioning Statements, a div with a high z-index appears over the page. What could appear in this div includes:

~~The selected Positioning Statement in accordian format, where only one part of the Positioning Statement shows at a time~~

The div could be a window-like object that has scroll bars, and could only be big enough to fit one part of the positioning statement in it. The user could scroll up and down to see other parts of the Positioning Statement. We want to make sure, however, that this “window” always stays in front of the actual Positioning Statement page unlike a real browser window, and also that it is not modal either

* + - * 1. If the user clicks “Create a Duplicate”, a prompt will appear, asking the user to enter a name for the duplicate. The default name that will appear is “[Copied Positioning Statement Name]2.” The text input box receiving the name will be subject to validation such that the user will not be able to use the same name as any other Positioning Statement (I assume this is necessary for the database to run smoothly). If the user tries to use a name already used and then clicks “Ok”, another pop-up will appear telling him that he must use a unique name
    1. Examples:
       1. The drop down menu will contain the names of the examples
       2. When the user selects an example, the same thing will happen as when the user clicks “My Positioning Statements” >> “Compare with” >> [Positioning Statement], except the example Positioning Statement will show up in the pseudo-window instead
    2. New:
       1. When the user clicks this button, a blank Positioning Statement appears
  1. Insert automatic bullet points in the textarea for the “Evidence” row in the Positioning Statement
  2. Row of buttons below Positioning Statement:
     1. Left-pointing single arrow/chevron button (previous Positioning Statement)
        1. If there are no Positioning Statements that the user previously made, the button will be invisible
        2. Otherwise, when the user clicks the button, the Positioning Statement that the user made before the currently open one will appear. The row of buttons at the bottom of the page will change accordingly
     2. Right-pointing single arrow/chevron (next Positioning Statement)
        1. If there are no Positioning Statements that the user made after the currently open one, the button will be invisible
        2. Otherwise, when the user clicks the button, the next Positioning Statement will appear and the bottom row of buttons will change accordingly
     3. Right pointing double arrows/chevrons button (go to Elevator Pitch/next section)
        1. When clicked, Elevator Pitch page comes up, buttons change to correspond with Elevator Pitch
     4. NOTE: If the single-chevron next Positioning Statement button is invisible, have the double-chevron Elevator Pitch button move up to be where the single-chevron button would have been
        1. If you can think of a better way to deal with this issue, you can try it out
     5. Print button
        1. Engages with computer’s print function, leading a print dialogue box to pop up
        2. When the user clicks “print”, a pdf of the current page will print
           1. NOTE: Maybe we should place only the useful parts of the page in a div, and just print that div
     6. Email button
        1. When clicked, a dialogue box appears asking for the user’s email address and providing an optional field where the user can attach a note
        2. When the user clicks “send”, an email is sent to the given email address with the subject line being “Positioning Statement: [Name of Positioning Statement or Date Last Modified”]
           1. It attaches a pdf of the Positioning Statement (only including from the Positioning Statement title to the Differentiation input)
           2. Can the pdf show up as content in the email too??
     7. PDF button
        1. When clicked, a Save dialogue box appears, allowing the user to generate a pdf version of the page and save it to their hard disk
  3. Privacy Policy Link at bottom of page
     1. I need to find a privacy policy to link to…

1. **Elevator Pitch**:
   1. Everything here works the same as in the Positioning Statement; just replace “Positioning Statement” with “Elevator Pitch” in my directions
2. **Brand Strategy**:
   1. Refer to the Positioning Statemtent section for anything not explained here; if it’s not explained here it probably means it works the same as it does in the Positioning Statement
   2. Top row of buttons:
      1. My Brand Strategies drop down menu button (will work almost the same as the My Positioning Statements one):
         1. When clicked, user can choose “Go to” or “Compare with”
         2. If user chooses “Go to”, another drop down menu appears to the right. When the user selects a Brand Strategy, that Brand Strategy table replaces whichever is currently showing
         3. If the user chooses “Compare with”, the same drop down menu as the “Go to” option will appear. When the user selects a Brand Strategy, a *draggable* div with a high z-index will appear over the page, and one to the two following options will occurr:
            1. Inside the div will be a vertical/column-format accordian, which shows one column of the Brand Strategy at a time
            2. The div will act like a window with horizonatal scroll bars, but will automatically be sized to fit only one column – it will always appear OVER the page though
      2. Examples button:
         1. When clicked, a drop-down menu will appear with names of the examples
         2. When the user clicks a name, the same thing happens as the “Compare with” function, except the div contains the example Brand Strategy instead
3. **Ecosystem Model**:
   1. The user gets to this page by clicking the “Ecosystem” tab, which prompts a drop-down menu which has the options “Ecosystem Model” and “Ecosystem Management” – obviously the user clicks “Ecosystem Model”
   2. Refer to the Positioning Statemtent section for anything not explained here; if it’s not explained here it probably means it works the same as it does in the Positioning Statement
   3. Top row of buttons:
      1. My Ecosystems:
         1. Has same functionality as Positioning Statement version
         2. When click “Compare with” option, what appears is a *draggable* div with the whole pyramid showing, so no need for scroll bars or accordians
      2. Examples:
         1. Same functionality as other examples buttons, except what appears when an example is clicked on is the same draggable div as in the second to last bullet point
   4. “Insert Row” drop-down menu in each row of the pyramid:
      1. When clicked, the drop-down menu includes the options “Above” and “Below” – meaning, “insert a row above/below this row”
      2. When a row is inserted anywhere, the pyramid will get bigger
         1. A new background image of the bigger pyramid will replace the smaller image
         2. (The text input boxes will each be in a row in an HTML table)
         3. A new, wider text input box will be inserted in the new top row (along with the “Insert Row” and “x” buttons)
         4. All existing text input boxes/buttons, will be shifted down a row
         5. If the user chooses to insert a row at the very top of the pyramid:
            1. When the text input boxes are shifted down, they retain their data
         6. If the user chooses to insert a row in the middle of the pyramid:
            1. Some of the text boxes retain their data and some don’t
            2. **The main goal is to keep the data, or names in the pyramid rows, in their intended order**
            3. So I think each row name/data should be stored as part of an array, and each text box would have an identity and that indentity would be stored in a separate array. The indexes of whatever text box and the text that it holds should be the same I think

When the user inserts a row in the middle of the pyramid, let’s say in space 2 out of (0,1,2,3), then text that was in indexes 2 and 3 move to indexes 3 and 4

However, the text boxes will remain in the same indexes, except a new index at the end of the array will be created for the new text box at the top

* + 1. If the user deletes a row:
       1. The array element storing the text data for that row will be deleted, and all the array elements with higher indexes than the deleted element will have their index lowered by 1
       2. The pyramid background image gets switched out for a smaller one
       3. The top text box and buttons go away / the HTML table’s top row gets deleted
          1. All the other rows containing text boxes move up to take its place
       4. Text data gets inserted in its new matching text box
          1. E.g., if the a row at the bottom of the pyramid is “deleted”, it’s really only the text that is deleted. The physical text box stays put and all text data moves down so the bottom row is filled

1. **Ecosystem Management**:
   1. Refer to the Positioning Statemtent section for anything not explained here; if it’s not explained here it probably means it works the same as it does in the Positioning Statement
   2. When the user clicks “Ecosystem Management” from the Ecosystem tab drop-down menu, the page should look like “ecosystem\_tool\_modal3.ai/pdf/jpg”
      1. The Ecosystem Management tool is greyed out, and above it is the key influencer input window
      2. Click the “x” button at the top right, and the Ecosystem Management tool will come into focus
         1. Before that happens though, a pop-up will appear asking, “Are you sure you want to close this window? New information for this key influencer will not be saved.”
         2. Should we autosave from the Key Influencer input window? It seems like the answer is no…
      3. The “Ecosystem” drop-down menu allows the user to choose from the various Ecosystem Models they’ve made
         1. It also has the option of “None”
      4. The “Tier” drop-down menu won’t be usable until the Ecosystem has been chosen
         1. Maybe have text in the drop-down menu say “Please choose Ecosystem” if the Ecosystem hasn’t been selected yet
         2. Once the Ecosystem (Model) is selected, the “Tier” drop down menu will show the names of the rows, or Tiers, in that Ecosystem Model
         3. If the user chose “None” for her Ecosystem, then the “Tier” drop down will be empty
      5. The rest of the inputs will be filled in by the user
         1. The options in the “Priority” and “Friend Rating” drop-downs will be numbers – this will be programmed into the HTML
            1. For reference I think “Priority” will have numbers 1, 2, 3 and “Friend Rating” will have numbers 1-5
      6. The “+” button below the Goal and Measurement inputs, when clicked, will add another Goal input and another Measurement input
         1. The background image will change to make room for the new inputs
      7. The “Examples” drop-down menu:
         1. When the user clicks it, a list of examples appears
         2. When the user clicks on an example, a read-only key influencer input window appears to the right of the current input window, shifting it to the left
      8. The “Save and close” button closes the input window and saves the information associated with the key influencer
      9. The “Save and new” button saves the information and then produces a new input dialogue
      10. Information in the database is organized by *name* of the key influencer
   3. The Ecosystem Management tool itself:
      1. Click on “New Key Influencer” button and a blank key influencer input window appears modally
      2. “My Ecosystems” drop-down menu in the upper right will have a list of the names of the Ecosystem Models the user has made
         1. The latest Ecosystem (Model) will be the default selection
         2. Whenever a Ecosystem is selected, the Ecosystem Management tool/grid is populated with the key influencers from that Ecosystem
         3. There is a “None” option if the user ever selected “None” from the Ecosystem drop-down in the Key Influencer input
            1. If selected, all key influencers with “None” as their ecosystem populate the grid
      3. The header of the grid:
         1. The title of the first column will by default be “Tier”; it also acts as a drop-down menu
            1. The things you can select from this menu are the labels of every input field in the Key Influencer input box except for Ecosystem, Goals, and Measurement
            2. This drop-down menu acts as a filter: if Tier is chosen, the first column of the Grid only shows the Tier of each influencer

The column is organized by Tier, and the Tiers are ordered by whichever Tier is closest to “Me” in the Ecosystem Model

If this is too complicated to program, make the Tiers ordered alphabetically

If organized by Name, Title, or Organization the column is organized alphabetically

If Priority is chosen, Key Influencers are organized by Priority and the column is organized from highest priority to lowest

If Friend Rating is chosen, the column is organized highest to lowest rating

* + - 1. The title of the second column will by default be “Name”; it also acts as a drop-down menu
         1. The second column organizes in the same way that the first does, except that it is constrained by the first
      2. When the user clicks on the reverse arrow icon on the left side of the column, the items in the column will be organized in reverse order, or in the oppposite order
      3. The title of the third column will always be the name of the selected key influencer
    1. A key influencer is associated with each row in the first two columns / each row represents a key influencer
    2. When the user clicks on one of the items in one of the first two columns, the key influencer / row is selected in a yellow orange color (R: 255, G: 203, B: 0 to be exact) and in the fat third column, the key influencer’s data appears (except for the name, which appears in the header row above, and the ecosystem, which appears as the title of the “Ecosystem” drop-down menu above the whole grid)
    3. When the user right-clicks on one of the key influencers in the first two columns, a context menu appears with the options: “Edit” and “Delete”
    4. When the user clicks the “x” button in the upper right corner of the column, the pop-up appears asking, “Are you sure you want to delete this key influencer?” If the user clicks “Yes” or “Ok” then the data is deleted from the database and the key influencer disappears in all forms from the grid
    5. When the user clicks “Edit”, the Key Influencer input modal view shows (like when the user clicks “New Key Influencer”), with the information for that key influencer filled out but editable
       1. When the user clicks the “x” button in this modal view (in the context of editing a key influencer), a pop-up should appear saying, “Are you sure you want to leave? Your changes will not be saved.”
    6. There are check boxes next to both the “Goal” data and the “Measurement” data in the third column
       1. When a check box is checked, the text next to it (either a Goal or a Measurement) will be greyed out
    7. On the same line as the “Goal” data is a small “x” button to the right
       1. When clicked a pop-up says, “Are you sure you want to delete this goal?” If the user clicks “Yes” then both the goal and the measurement associated with it will be deleted and erased from the database

1. **Action Plan**:
   1. When user clicks the “Action Plan” tab in the top navigation bar, what appears is the Action Plan (list of actions) itself underneath a modal input dialogue (like the Key Influencer input)
   2. Input dialogue:
      1. When the user clicks on a tool-tip “?” button, the tool tip will appear to the right of the modal window as another modal window
      2. The dialogue box will be made up of a combination of background images and HTML elements. Background images will be used for the grey container and the heading / title box for each row. These along with the HTML input elements will be placed in an HTML table. The white grid lines separating the rows and columns will be cell borders of the table (inside borders on, outside borders off essentially)
      3. When the user checks the “High Priority” checkbox (in the “Key Area” row) the checkbox and label get replaced with an image of a red square, indicating that this Key Area is a high priority. The database notes that this Key Area or set of actions is high priority.
      4. Achievement Rating drop-down menu options are 1-5
      5. When the user clicks on the “+” button in the Challenges and Achievement Ratings row, a new Challenges text area and Achievement Rating drop-down menu will appear, expanding the height of the HTML row. The “+” button will always appear at the bottom right of the last Challenges text area
         1. The background image(s) that represent the grey background wil be tweaked / resized to fit everything
      6. Same as is in the Key Area row, when the user checks the “High Priority” checkbox in the Actions and Due Dates row, a red square appears. However, it will tag a particular *action* as high priority.
      7. The input element next to the “Due Date:” label is a dojo DateTextBox
      8. When the user clicks on the “+” button in the Actions row, a new Action text area, Due Date calendar widget and High Priority icon will appear below, expanding the height of the HTML row. The “+” will always appear at the bottom right of the last Action text area
         1. The background image(s) that represent the grey background wil be tweaked / resized to fit everything
      9. When the user hits “Cancel”, a pop-up will appear asking, “Are you sure you want to leave? Your data will not be saved.”
         1. If the user clicks “Yes”, the dialogue and modal view will go away and only the Action Plan itself will show
      10. When the user selects an example from the Examples drop-down menu, another modal window appears to the right of the input window, pushing the input window to the left. It will show a read-only, filled-out version of the input form (the design is To Be Determined)
      11. When the user hits “Save and Close,” it will do just that
      12. When the user hits “Save and New”, the data will be saved and a new dialogue box will appear
   3. The Action Plan itself:
      1. Refer to the Positioning Statemtent section for anything not explained here; if it’s not explained here it probably means it works the same as it does in the Positioning Statement
      2. New Key Area button, when clicked, brings up blank input dialogue
      3. Actions Calendar button: navigates to a new page with a calendar widget that displays the user’s actions and due dates
         1. Ideally the user should be able to choose which Action Plans get displayed in the calendar
         2. Design and user interface will depend on the techology used to program the calendar
         3. *For the next iteration of brandingpays web tools: the user will be able to integrate this brandingpays Actions Calendar with their desktop calendar applications, such as iCal and Outlook*
            1. *For iCal: all actions or “events” will be placed under the category of “brandingpays”, so these actions/events can be turned on/off in iCal*
      4. Examples drop-down menu: when the user selects an example, a modal window appears displaying an entire example Action Plan grid
      5. The grid/table:
         1. The Action Plan grid holds all the information input by the user for that particular Action Plan
         2. The grid will only be tall enough to hold the information inside it (unlike what the design looks like)
         3. The order in which a set of actions, defined by a “Key Area that Influences Perception of My Brand”, appears in the grid is this: whatever was modified most recently appears first. If you can come up with a better order, let’s talk about it.
         4. [First] red square column: a red square appears next to a row if that Key Area was deemed a high priority in the input dialogue
         5. The format in which the information appears is pretty self-explanatory if you look at the design
            1. Actions and Due Dates column:

Inside each cell will be a mini-table with two columns, one for the actions and one for the corresponding due dates

A corresponding action and due date will appear in one row

Bullet points will accompany each action

A red square will replace a bullet point if that action was marked as a high priority in the input dialogue

* + - 1. Edit button in the Key Areas column: when clicked, takes user to the input dialogue and allows user to edit that particular Key Area

1. **To-do list for 2nd iteration of web tools:**
   1. Allow users to upload resumés
      1. User must be able to cut and paste from their resume into the web tools
      2. When the user wants to view their resume while using the web tools, the resume will show in a separate browser window
      3. The user will be asked if they want to upload a resumé(s) when they login
   2. Make web tools Actions Calendar sync with desktop applications (iCal and Outlook)
   3. History tool
   4. Summary view
   5. Make web tools accessible