

# PFS Retrospective Activity Report

## Problem

A big point of discussion with the design of our software was what buttons/controls should be available to the user from the main screen and what buttons/controls should be moved to another location. The discussion originally occurred back in iteration 2, but returned in iteration 3 with the introduction of graphical visualization of the user's spending habits.

Back in iteration 2 we agreed that only the core controls should be in the main view: new, remove, duplicate, and open. This was enforced by removing the detailed expense view and ability to edit an expense into a separate window. In iteration 3 with more functionality being added, buttons for viewing the graphs and mining results were being added to the main view.

## Solution

Like back in iteration 2, the focus of the main view was stated to be only contain the core functionality, and thus the view should only have the core controls in the main view: add, delete, duplicate, and open. All advance controls and features should be moved to a secondary layer of access to remove the cluttering of many controls and to make the view more user friendly, especially to new users.

All advance controls were moved into the menu and grouped together based on function. This allowed the main view to remain clean and simple, while still offering a quick and easy method to access all features. Menus were kept small and never going beyond a depth of one (Menu Name → Item Name). If deemed too slow to use, keyboard shortcuts were to be created for these functions.

## Success Method and Criteria

Our solution is to be considered a success if the main view is friendly and approachable while advance functionality is still accessible to users who want those features. The main view will be considered friendly and approachable if we are able to avoid users telling us they felt overwhelmed or lost while looking at the main view. Accessible advance functionality to be considered successful if we are able to avoid users telling us they could not find the advance features and avoid users telling us accessing the advance features is too slow or tedious.