

Angelo LaGreca

Chris Peloso



Budget Buddy

User Interface Technical Design Document

NEIT Capstone 2018

NEIT Capstone 2018	1
Strategy	4
What is it?	4
Why are we making it?	4
Who is it for?	5
Features	6
User signup and login	6
Income tracker	6
Expense tracker	6
Goal setting and tracking	6
User and administrator login	6
Infographic representations of selected financial data	6
Clear, concise, and straightforward data presentation	6
Design and Technical Limitations	7
Website design and visuals	7
Colors	7
Fonts	8
Platforms	9
Devices	9
Technologies Used	10
Languages	10
Database and Support	11
Web Services	11
User's and User Needs	13
Children	13
Teens/Young Adults	14
Adults	14
User Profiles	15
Bobby	15
Lucca	16
Dwight	17
Site Navigation and Flow Diagram	18
Individual Page and Section Layouts 1.0	20
Old Landing Page	20

New Landing Page	21
Signup Page	22
Login Page	23
Home/Overview Page	24
Income Page	25
Expenses Page	26
Goals	27
Settings	28
Specific Visual Specs	28
Background:	28
Header text:	29
Motto accent text:	29
Landing page text:	29
Register Link:	29
Back Button:	30
Pie chart Infographic:	30
LogoutButton	30
Prototype Link	31
Website Interactivity	31
Navigation Bar	31
Overview Page	31
Income/Expenses	32
Goals	32
Styling Information and Examples	32
Fonts	32
Fonts used	32
Examples	32
Colors	33
Colors used	33
Examples	33

Technical Design Document

Strategy

What is it?

Budget Buddy's goal is to create a web application that serves as a way for a user to easily create and track their personal budget. This will be accomplished by letting a user enter income, expenses, and goals. Budget Buddy will display the users financial data in an easy to read and interpret format through the use of tables and graphs. These tables and graphs will interact dynamically with the database to automatically update with regard to user inputted data.

Why are we making it?

It can be very easy for anyone to lose track of their financial status. From keeping track of income and expenses to overall goal tracking, maintaining an accurate assessment of your overall budget can be overwhelming. This website is designed to take in financial information and display the information to the user in an intuitive and easy to use manner to minimize the chance of losing track of their overall financial status.

Who is it for?

This website will be designed with students in mind, however it can be used by anyone that would like help setting and keeping a budget in a simple and easy to use interface. The design will not be in depth enough for business owners or people with complicated dynamic financial situations, but will work great for anyone trying to stick to a relatively simple budget. Students, kids, young adults, and even first time home buyers should be able to utilize the features of this site effectively.

Features

- User signup and login
 - 1. Can personalize with profile pictures
- Income tracker
- Expense tracker
- Goal setting and tracking
- User and administrator login
- Infographic representations of selected financial data
 - 1. Users will be able to set and track simple financial goals and easily monitor their progress with straightforward and intuitive tables and infographics
- Clear, concise, and straightforward data presentation
 - 1. There will be a strong focus on a simple, sleek, uncomplicated user interface.

Design and Technical Limitations

Website design and visuals

The visual design of the website will be primarily focused on readability and simplicity.

There will be a landing page, a log in/sign up page, content pages sharing a similar design template, and a user settings page. There will also be an administrative side with a very simple admin login page and admin management page.

Colors

At first we were planning on using a green gradient for our background. We were thinking this would be appropriate because it is the same hue as the green on printed bills and this would go well with the financial theme of our site. However, after considering some of the concepts and design techniques we have been learning this semester in class as well as feedback from other students and Jay, we have decided to change this. We will now be using an off white for our background. It took a couple weeks to come around to making this decision because we really liked the feel the old background color itself gave the website. After careful consideration though we decided a more neutral background would make text and content easier to read as well as make the sight look less busy and more professional. We will be using the old background

color as an accent color instead. Focusing on the design function over the form of the website makes more sense for us. This definitely improved the readability of user input, and considering this is the priority for our sight we think this design change will greatly improve our end users overall experience.

Fonts

Impact will be used for the majority of our website. We thought that a no nonsense, straightforward sans-serif font would be the most appropriate for a site that is focused around serious financial information. Also again considering readability is the priority impact seemed like an appropriate font because digits in impact are very easy to read, even on smaller screens with few pixels. Normal bold and italicized versions of impact will be implemented for styling and variety in our design. Though we think impact will be perfect for content sections of the site that contain information the user needs to be able to easily interpret, a second font for added personality seems like a good addition.

Caveat or a similar text will be used for accent text such as the budget buddy motto and other sections where readability is not a priority. The combination of these two fonts and their italicized and bolded versions should provide us with an appropriate text for any content on the site. Most of the header text will be a slate blue, and user inputted information, tables, and titles on graphs will be black in order to contrast the background as much as possible.

Platforms

Budget Buddy will be a web based application. We will be using bootstrap to make it responsive to tablets and phones, however due to the number of tables, graphs, and input fields the user experience on smaller screens may be more crowded. Though the site will still function readability will not be optimal.

Devices

Budget Buddy will be designed primarily for PCs. Users will be able to use Budget Buddy on a tablet or mobile device, however navigation and layout will not be as clean. Using multiple input fields and submitting data may be a bit frustrating on smaller screens, but it is possible.

Technologies Used

Languages



As a web based application HTML5.0 and CSS will be used heavily.



They hypertext processor PHP will be used in conjunction with HTML for the majority of our websites code. The IDE PHPstorm will be used to write most of our code.

Database and Support



We will be using Apache to run our website, and MySQL will be utilized for our databases. The cross platform web server solution pack XAMPP will be running these programs for us.

Web Services



Google's web service, GoogleCharts will be employed to create dynamic graphs for the user. These graphs will use information from our MySQL servers. GoogleCharts uses embedded javascript to create their graphics.



Because there will be two of us working on this project we will be using GitHub for version control.

User's and User Needs

All of our websites function will be easy to use even for novice computer users, so our user profiles are based more around how our websites features will be used to suit different user needs, rather than which users will be using which features.

Children

Due to the simplicity of BudgetBuddy even a child can use it. As long as a user can read at a basic level and navigate the internet there is no reason they can't use this application. Because the data is presented in such a straightforward way in an effort to maximize readability, it is also simple enough for a child to understand. This also applies to all the graphics that represent the users data. Because they were designed to present information that can be quickly and easily interpreted they should be perfect for kids as well. BudgetBuddy could even be used as a learning tool for parents to begin to teach their children the importance of financial responsibility. Very young users could track things like allowance and birthday money and enter goals such toys they might want to buy.

Teens/Young Adults

These are the primary users that this application is designed for. Users with standard financial situations will be able to utilize all of BudgetBuddy's features very efficiently. Students or really anyone with a hectic schedule and on their plate should appreciate not only how easy it is to create and update their finances, but also how easy it view their information through graphs and tables.

Adults

Even adults with more complicated budget situations should be able to benefit from the organization and information BudgetBuddy provides at a glance. There are virtually no limits on the amount of any income, expense, or goal. So while children can keep track

of their lemonade stand money there's no reason a lucky adult user can't enter and track 1,000,000,000 dollars in lottery winnings with goals and graphs to match.

User Profiles

Bobby



Basic, younger user.

Bobby is 10 years old and will probably be using the service to keep track of small amounts of money and appropriate goals, possibly with the help of his parents. He has minimal skills navigating the internet and might have trouble reading bigger words. He will need big buttons with large text to make it easier for him to use the site comfortably. He needs straightforward easy to understand data input fields and table display. Features must be very intuitive for Bobby to use and understand. Bobby's parents may even use this software as a learning tool to teach Bobby about finances, using the easy to read graphics as learning tools. May use features like picture upload with the help of parents.

Lucca



Intermediate, Teen User

Lucca is 17 years old. Lucca will be using the service to keep track of relatively small amounts of money. Lucca needs to be able to see her data well on smaller devices because she is always on the go. She is very busy so she needs to be able to add expenses and income on the go, quickly. She will probably not use the service if it takes too much time to use the features. For this same reason she needs to be able to easily see her overall financial status at a glance. Lucca will easily be able to use and understand all the features on the site, and may use the goal tracking feature for more extravagant goals. Uploading a picture to personalize her account may be important to Lucca.

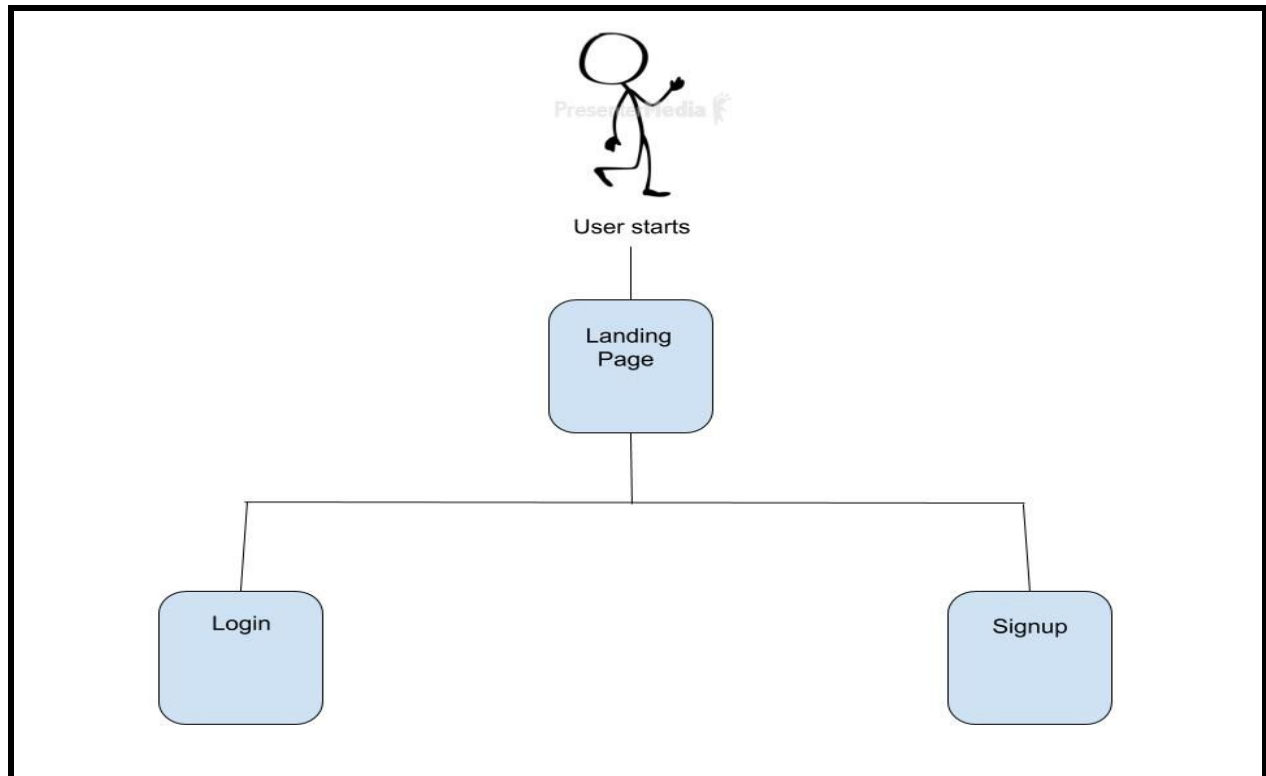
Dwight



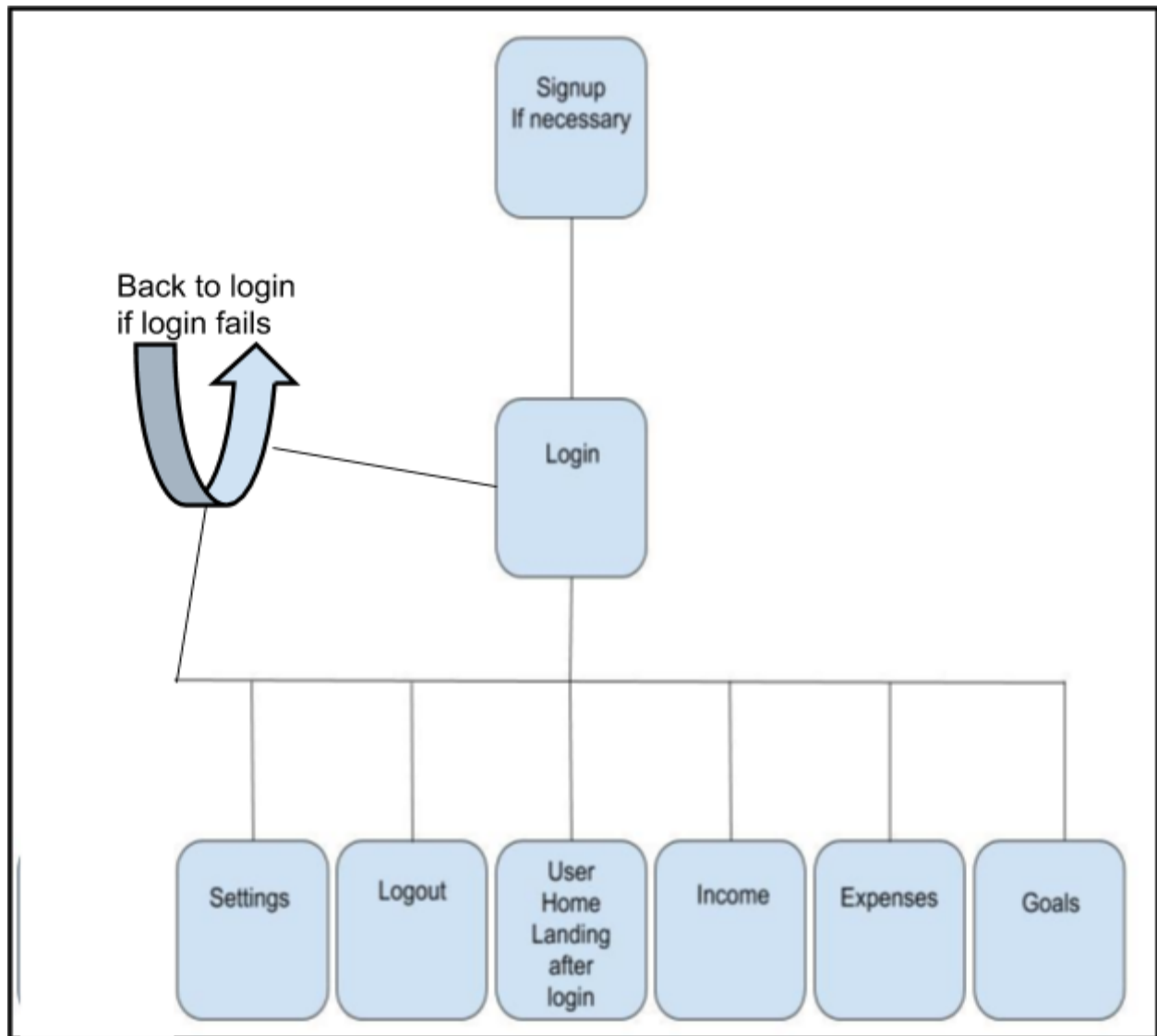
Advanced, Adult User

Dwight is 28. Dwight will be using the service to keep track of rent, groceries, and other costs of living while tracking a goal of saving up enough money for a down payment on a house. Budget Buddy will have no problem keeping track of these larger sums of money and the information will still be easy to interpret quickly and easily. Dwight may also want to be able to keep track of multiple goals at the same time. Mobile use will also be important to Dwight as he is rarely at a desktop computer.

Site Navigation and Flow Diagram



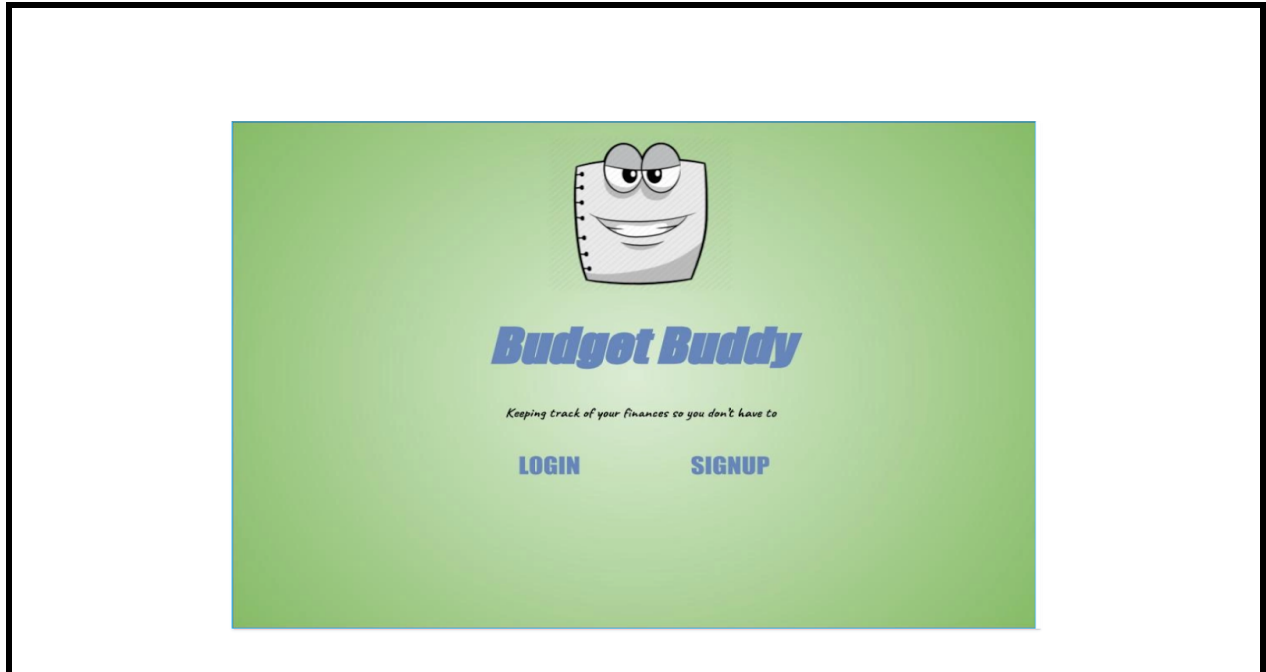
Users will be directed to the landing page upon entering the site, and from there will either login in or sign up



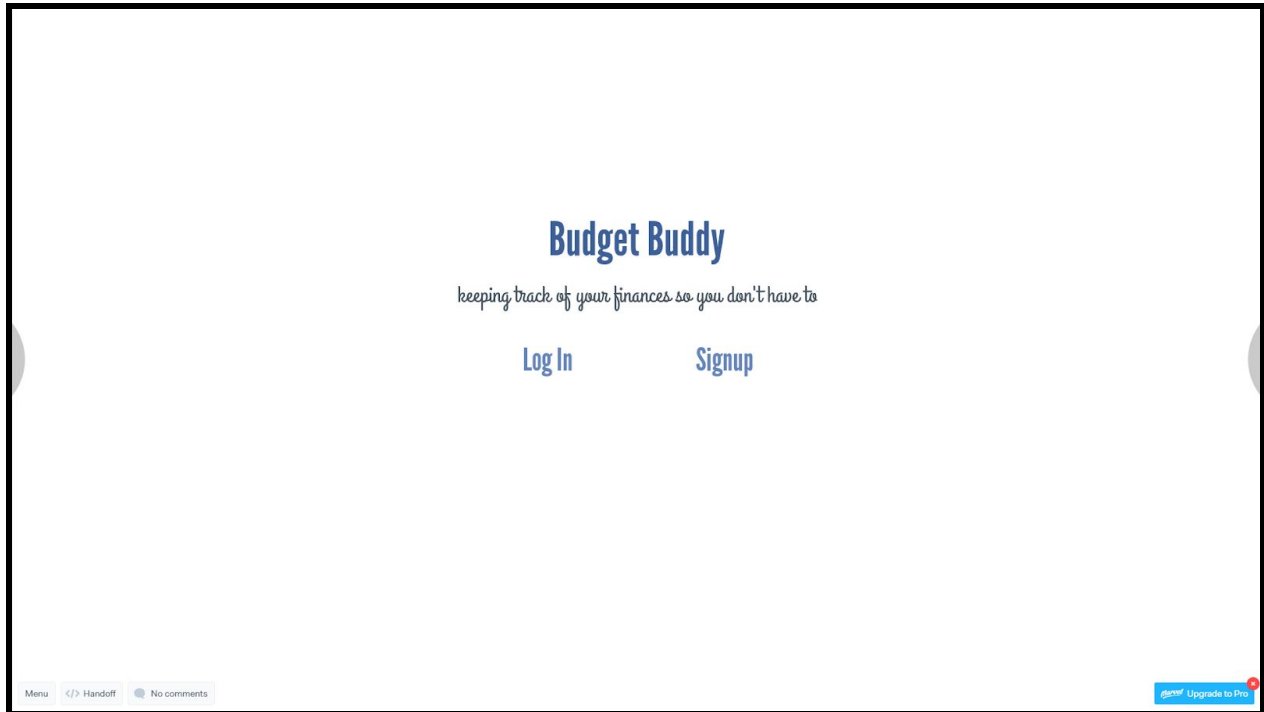
Then they will enter the appropriate information and be brought to the main content pages, landing on the home/overview page initially. From the overview page users will be able to navigate to the income, expenses, or goals pages. They will also be able to log out or go to their settings page.

Individual Page and Section Layouts 1.0

Old Landing Page

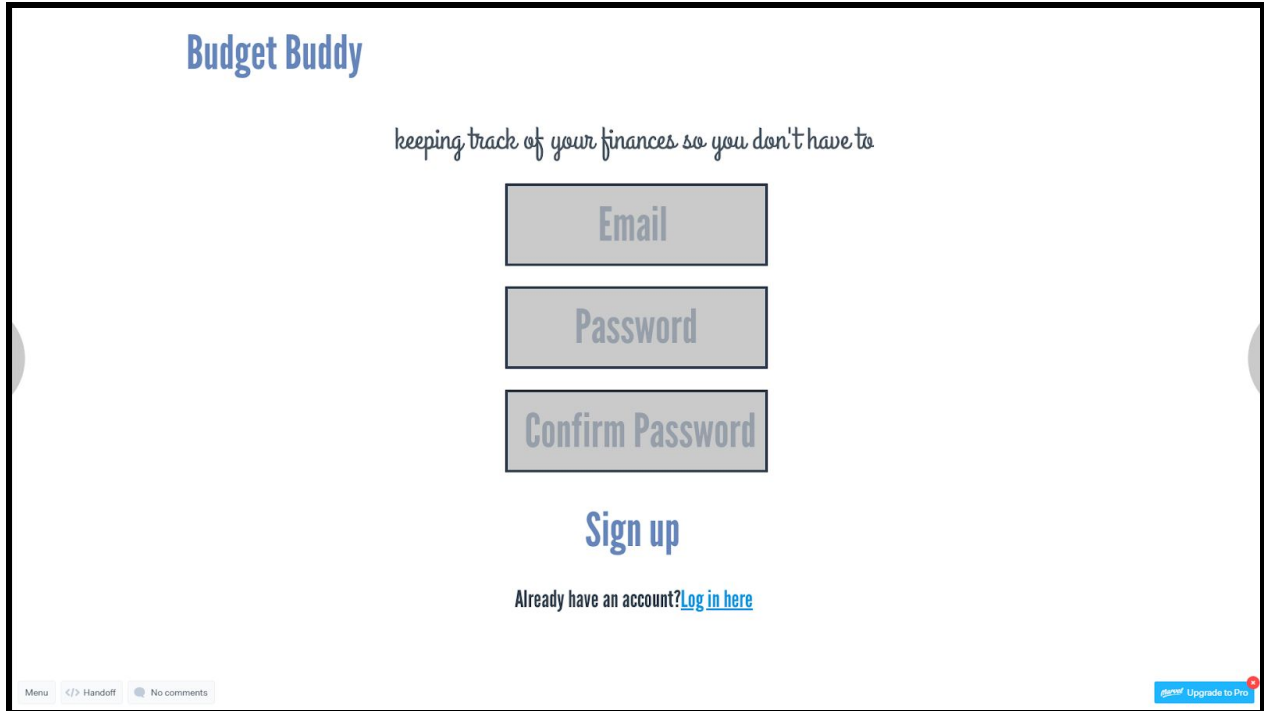


New Landing Page



Simple and to the point this page is designed to catch the users attention and communicate the softwares mission statement. The logo is simple and friendly. Purposefully reminiscent of a notebook version of the helpful paperclip, Clippy, from the old days of Microsoft Office.

Signup Page



The screenshot shows the 'Budget Buddy' signup page. At the top left is the logo 'Budget Buddy' in blue. Below it is the tagline 'keeping track of your finances so you don't have to' in a cursive font. The form consists of three stacked input fields labeled 'Email', 'Password', and 'Confirm Password'. Below these fields is a blue 'Sign up' button. At the bottom of the form area, there is a link: 'Already have an account? [Log in here](#)'. The footer contains a navigation menu with 'Menu', '</> Handoff', and 'No comments'. In the bottom right corner, there is a blue 'Upgrade to Pro' button with a red notification badge.

The signup page continues the sleek and simple design plan with appropriate fields.

The user can also navigate to the login page if they already have an account but find themselves on this page for some reason. We are considering combining the landing and signup pages in order to simplify the navigation a user has to use to get to the main content sections of the website.

Login Page



The screenshot shows a web page for 'Budget Buddy'. The header area is light blue and contains the brand name 'Budget Buddy' in a bold, blue, sans-serif font. Below the header, the tagline 'keeping track of your finances so you don't have to' is written in a smaller, black, cursive-style font. The main content area is white and features two large, light gray rectangular input fields with black borders. The first field is labeled 'Email' and the second is labeled 'Password' in a bold, black, sans-serif font. Below these fields is a blue 'Login' button with white text. Underneath the button, there is a link that says 'Don't have an account? [Sign up for free now](#)'. At the bottom of the page, there is a footer with a 'Menu' button, a '</> Handoff' button, a 'No comments' button, and a 'Upgrade to Pro' button with a red notification badge.

Budget Buddy

keeping track of your finances so you don't have to

Email

Password

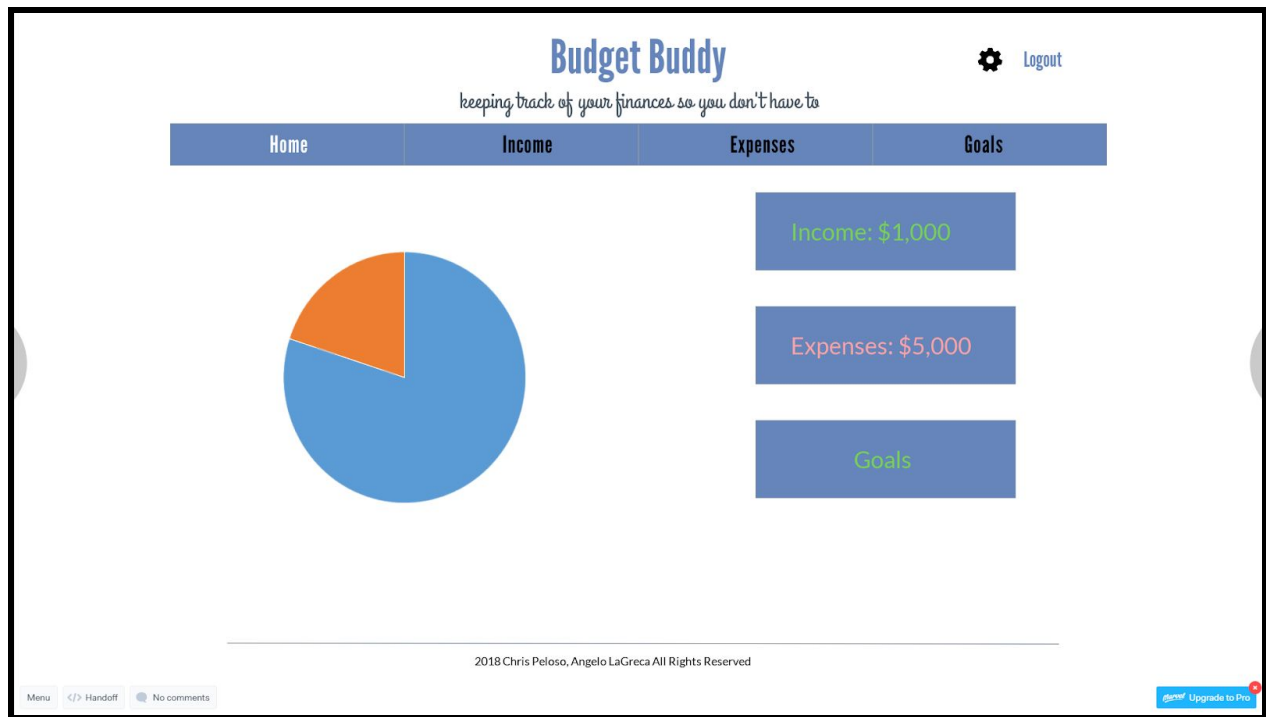
Login

Don't have an account? [Sign up for free now](#)

Menu </> Handoff No comments Upgrade to Pro

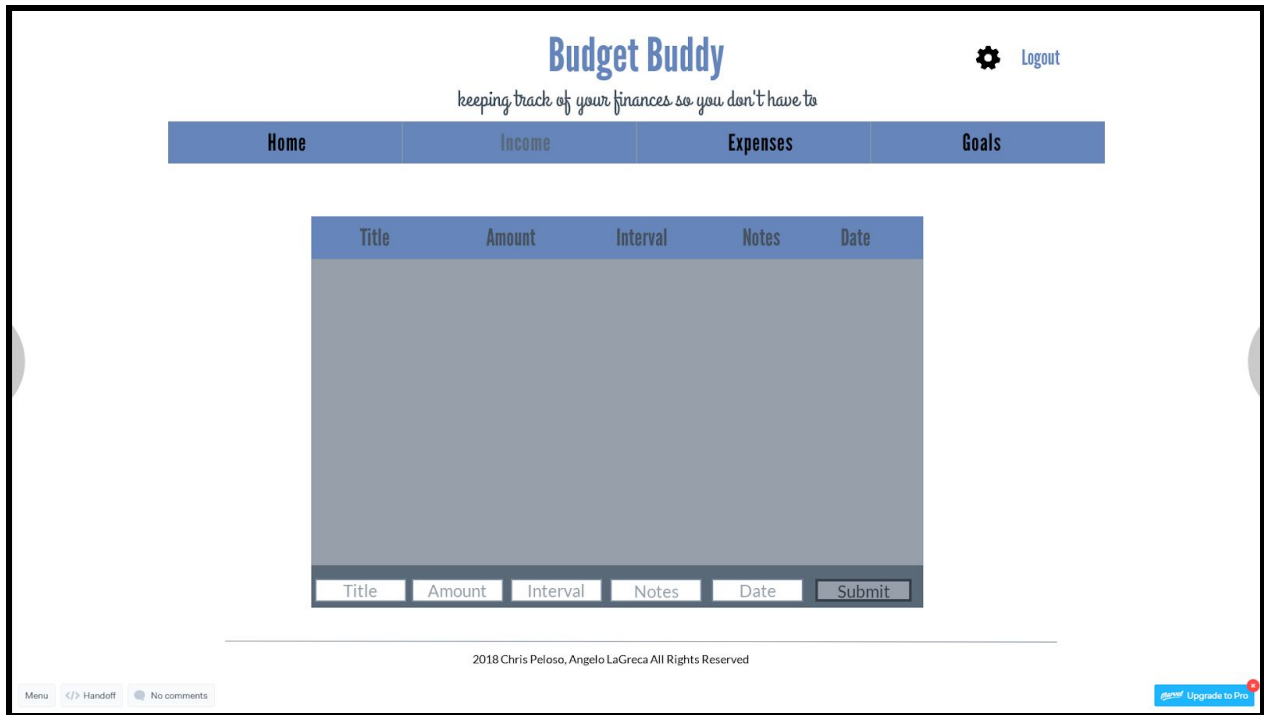
The login page is very similar to the sign up page with fewer fields, only the ones necessary for logging in. We may combine this in some way with user sign up and login pages to simplify navigation.

Home/Overview Page



The Home/overview page is where the user will end up after successfully signing into an active account. From this page a user will be able to navigate to any of the other main content sections of the website through the standard navigation bar that appears on every section in the main content area, and also be able to navigate to the goals, income, and expenses area by clicking on the appropriate graphic representation of the desired content. There is also a button for easy logout, and link to the user settings page in the top right corner.

Income Page



The screenshot shows the 'Income' page of the 'Budget Buddy' application. At the top, the logo 'Budget Buddy' is displayed in blue, with the tagline 'keeping track of your finances so you don't have to' below it. To the right of the logo is a gear icon and a 'Logout' link. Below the logo is a navigation bar with four tabs: 'Home', 'Income' (which is highlighted), 'Expenses', and 'Goals'. The main content area features a large, empty table with a blue header row containing the columns 'Title', 'Amount', 'Interval', 'Notes', and 'Date'. Below the table is a form with five input fields labeled 'Title', 'Amount', 'Interval', 'Notes', and 'Date', followed by a 'Submit' button. At the bottom of the page, there is a footer with the text '2018 Chris Peloso, Angelo LaGreca All Rights Reserved'. In the bottom right corner, there is a small blue button that says 'Upgrade to Pro' with a red notification icon.

Budget Buddy
keeping track of your finances so you don't have to

Logout

Home Income Expenses Goals

Title	Amount	Interval	Notes	Date
-------	--------	----------	-------	------

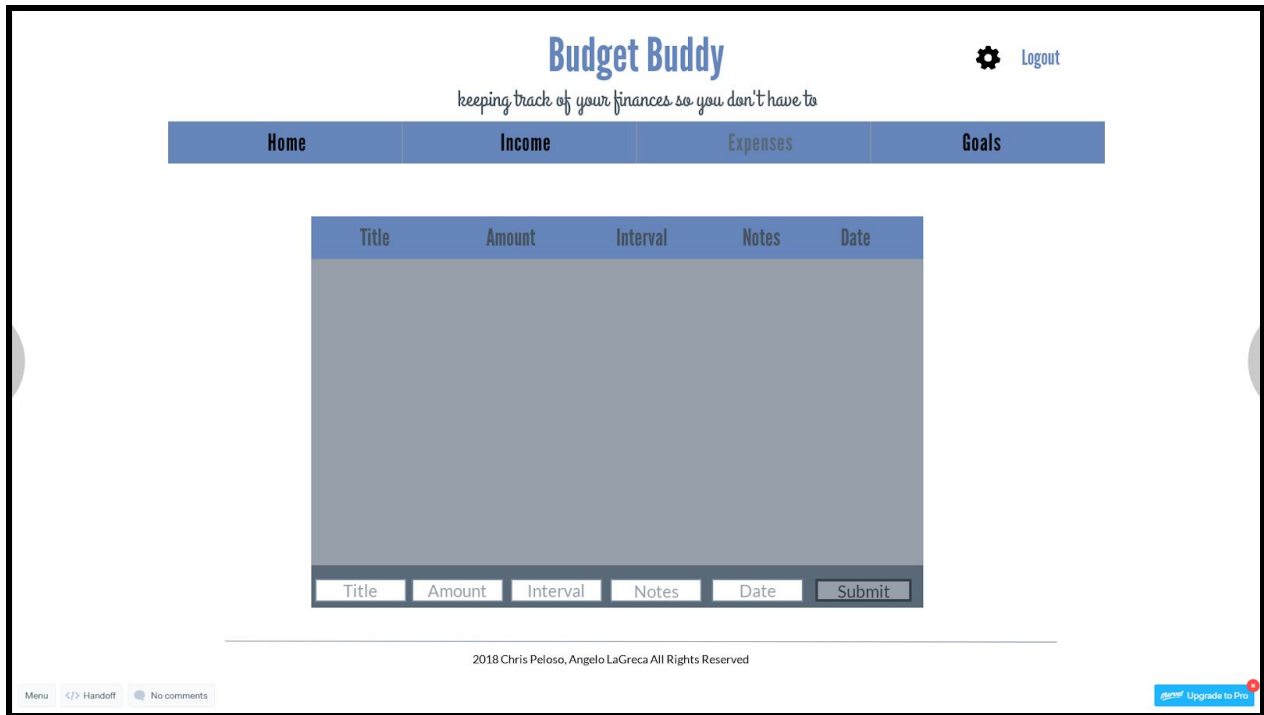
Title Amount Interval Notes Date Submit

2018 Chris Peloso, Angelo LaGreca All Rights Reserved

Menu </> Handoff No comments Upgrade to Pro

The income page has all the necessary fields for the user to fill out income to be stored into the database. There is also a table that updates automatically and displays all the users data in an easy to read format. The actual look of the table is subject to change.

Expenses Page



The screenshot shows the 'Expenses' page of the 'Budget Buddy' application. The page has a header with the logo 'Budget Buddy' and the tagline 'keeping track of your finances so you don't have to'. A navigation bar contains links for 'Home', 'Income', 'Expenses' (which is highlighted), and 'Goals'. On the right, there are links for 'Logout' and a settings gear icon. The main content area features a table with the following columns: 'Title', 'Amount', 'Interval', 'Notes', and 'Date'. Below the table is a form with input fields for 'Title', 'Amount', 'Interval', 'Notes', and 'Date', followed by a 'Submit' button. The footer includes a copyright notice '2018 Chris Peloso, Angelo LaGreca All Rights Reserved' and a 'Menu' button. In the bottom right corner, there is a 'Upgrade to Pro' button with a red notification badge.

Budget Buddy
keeping track of your finances so you don't have to

Logout

Home Income **Expenses** Goals

Title	Amount	Interval	Notes	Date
-------	--------	----------	-------	------

Title Amount Interval Notes Date Submit

2018 Chris Peloso, Angelo LaGreca All Rights Reserved

Menu </> Handoff No comments Upgrade to Pro

The expenses page is basically a copy of the income page with adjustments for expenses rather than income. Whatever changes are made in the income area regarding styling will be replicated here.

Goals

Budget Buddy
keeping track of your finances so you don't have to

Logout

Home Income Expenses Goals

Title	Amount	Priority	Notes	Date
-------	--------	----------	-------	------

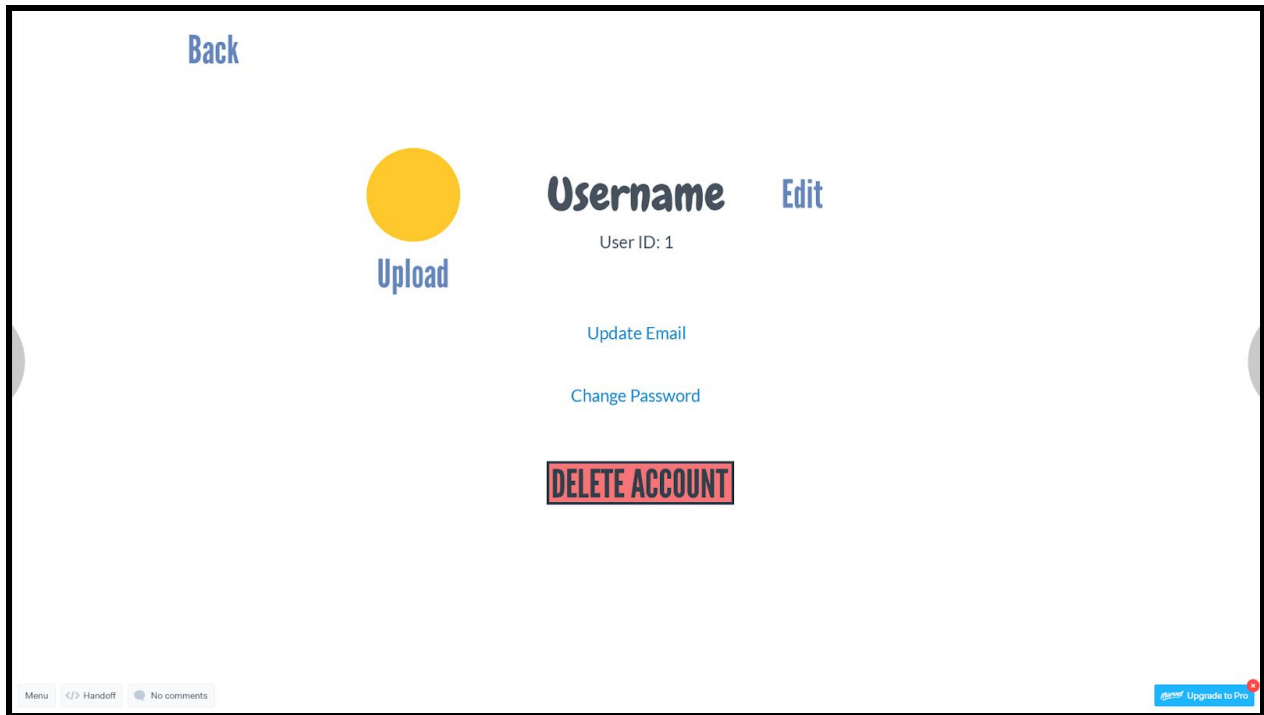
Title Amount Priority Notes Date Submit

2018 Chris Peloso, Angelo LaGreca All Rights Reserved

Menu </> Handoff No comments Upgrade to Pro

The goals page will have fields to input appropriate data relative to the users goals and will again display them in a table. If time allows we will also add an infographic of some sort to represent progress towards goals stored in the database.

Settings



The user settings page will contain simple links to update user information as well as save the changes or delete user account. There will also be a section to upload user pictures to personalize the look and feel of the website.

Specific Visual Specs

Background:

Radial-gradient(#FFFFFF, #E2EAF7)

Header text:

Font-family:impact,arial

Color:#6585bb

Font-style:Italic, Bold

Motto accent text:

Font-family:Segoe Script,Brush Script Std,arial;

Color:black

Font-style:italic

Link background: :#6585bb

Landing page text:

Font-family: impact,arial

Color:#6585bb

Font-style:italic

Register Link:

Dodgerblue

Font-size:16px

Margin-left:15px

Footer Text:

Font-family:Arial

Font-size:14px

Back Button:

Font-size:16px

No border

Margin-left:50px

Font-family: impact,arial

Pie chart Infographic:

Income slice color: #6585bb

Expenses slice color: #e6693e

Width: 550 px

Height: 400 px

LogoutButton

Font-size:16px

Width:100px

Height:65px

Font-family: Arial

Font-style: Bold

Prototype Link

Old Marvel App Design Link: <https://marvelapp.com/3327ee0>

New Marvel App Design Link: <https://marvelapp.com/42h15ac>

Website Interactivity

Navigation Bar

Overview Page

In addition to being able to navigate to other content sections of the site with the navigation bar as normal, the user can also click the graphic representations for income, expenses, or goals to navigate to that section of the website. This should be a very simple and straightforward way for users to navigate the site even if they cannot read the link text on a smaller screen.

Income/Expenses

It should be very easy for users to know what and where information needs to be entered, as well as to see the data they have already stored.

Goals

The goals section should display all current goals and progress towards reaching them at a glance, as well as have an intuitive form for entering them into the database in the first place.

Styling Information and Examples

Fonts

Fonts used

Impact will be used for most of the content on the website, for readability.

Segoe Script will be used for accent text, such as the BB motto.

Different styles, sizes, and colors of these fonts will be employed as we continue to adjust based on user feedback.

Examples

This is an example of the Impact font. Digits are especially easy to read in this font. 0123456789

This is an example of the script that will be used for accent text.

Colors

Colors used

We originally used a mint green gradient for our background, but based on user feedback we have switched to a white to off white gradient. The gradient will start with a pure white (#FFFFFF) and end with #E2EAF7.

Examples

Original background color gradient: #85bb65



#E2EAF7(look really close!)

