User Interface Descriptions

Brief Contents

I. Introduction

The interface consists of a main window with four tabs: “Contacts,” “Departments,” “Reports,” and “Settings.” Selecting a tab displays the information associated with that tab. Although each differs in content, the look-and-feel among the tabs is unified using two panes: the list pane and the details pane. The only exception to this rule is the “Settings” tab, which is discussed further in Section IV.

The list pane shows a list of items relevant to the current tab, updating as a user changes context. Likewise, the details pane will show in-depth information about the current selection in the list pane. As the user changes selections in the list pane, the details pane updates accordingly. This is analogous to the list pane updating when the user changes tabs.

Another component of the unified appearance is that user actions are grouped according to the target of the action. That is, creating and deleting items from the list pane will affect the list pane at the highest level. Thus, these actions are contained inside the list pane. Similarly, the details pane contains all of the controls that affect a single item, such as editing items. All actions are presented in a toolbar across the bottom of the appropriate pane, providing users a consistent and convenient location to find the available options.

II. Interface Overview

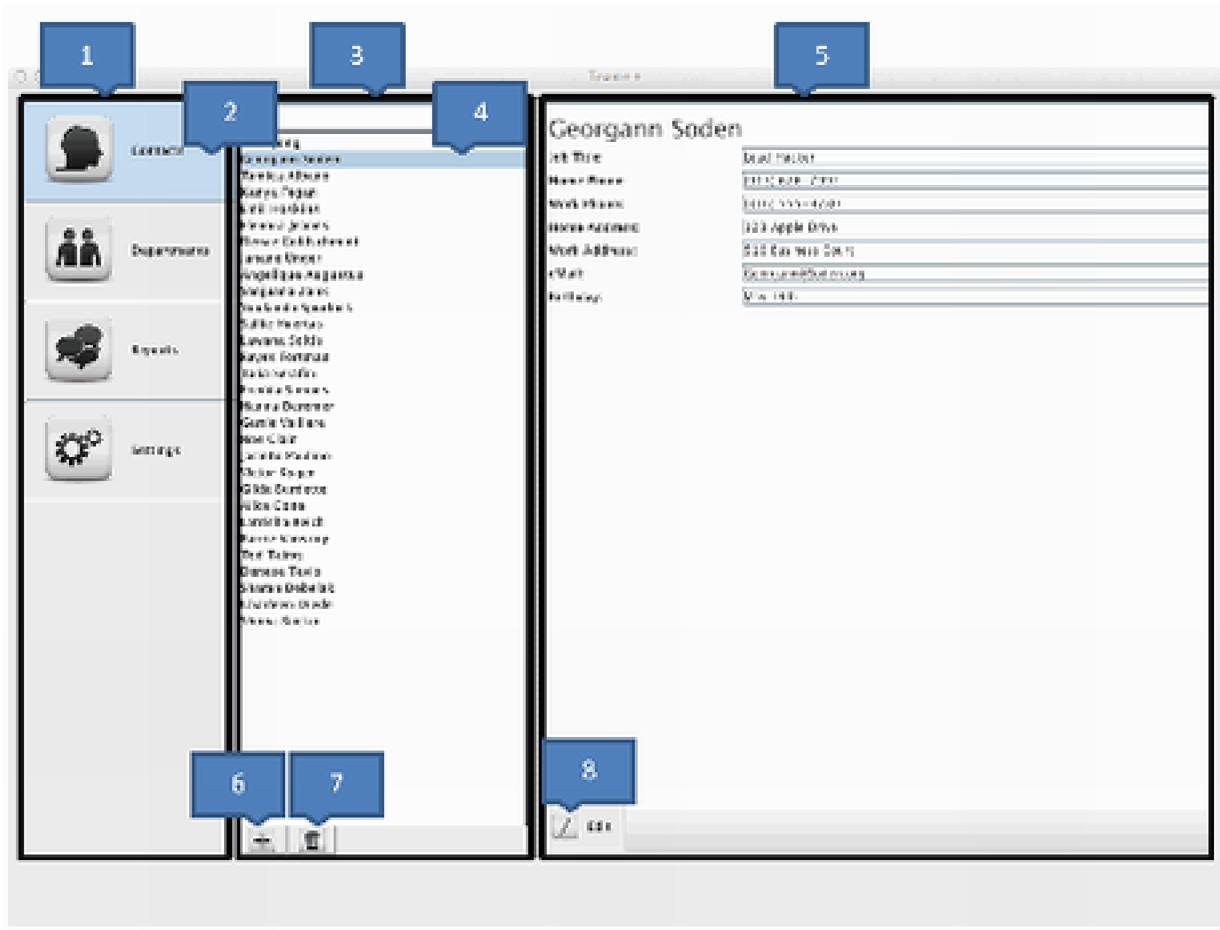

Figure 1. The typical appearance of the interface when viewing a list item.

1. Tabs - The tabs differentiate the operations a user will be performing. All of the content in the subsequent panes is determined by the selected tab.
2. Currently selected tab - The selected tab is highlighted.
3. List Pane - The list pane shows all of the available items in the current tab.
4. Currently selected list item - The selected list item is highlighted.
5. Details Pane - This pane displays the extended information about a currently selected list item.
6. Create Button - The “=” sign signifies the “Create” action. It allows the user to add a new item to the list.
7. Delete Button - The trash bin allows the user to permanently delete the currently selected item from the list.
8. Edit Button - Once selected, the fields for the currently selected item will become editable, and the “Edit” button itself transforms into “Cancel” and “Save” buttons. “Cancel” allows the user to abort the edit operation, and “Save” allows the user to save changes. These buttons may be seen in Figure 5.

III. Contacts Tab

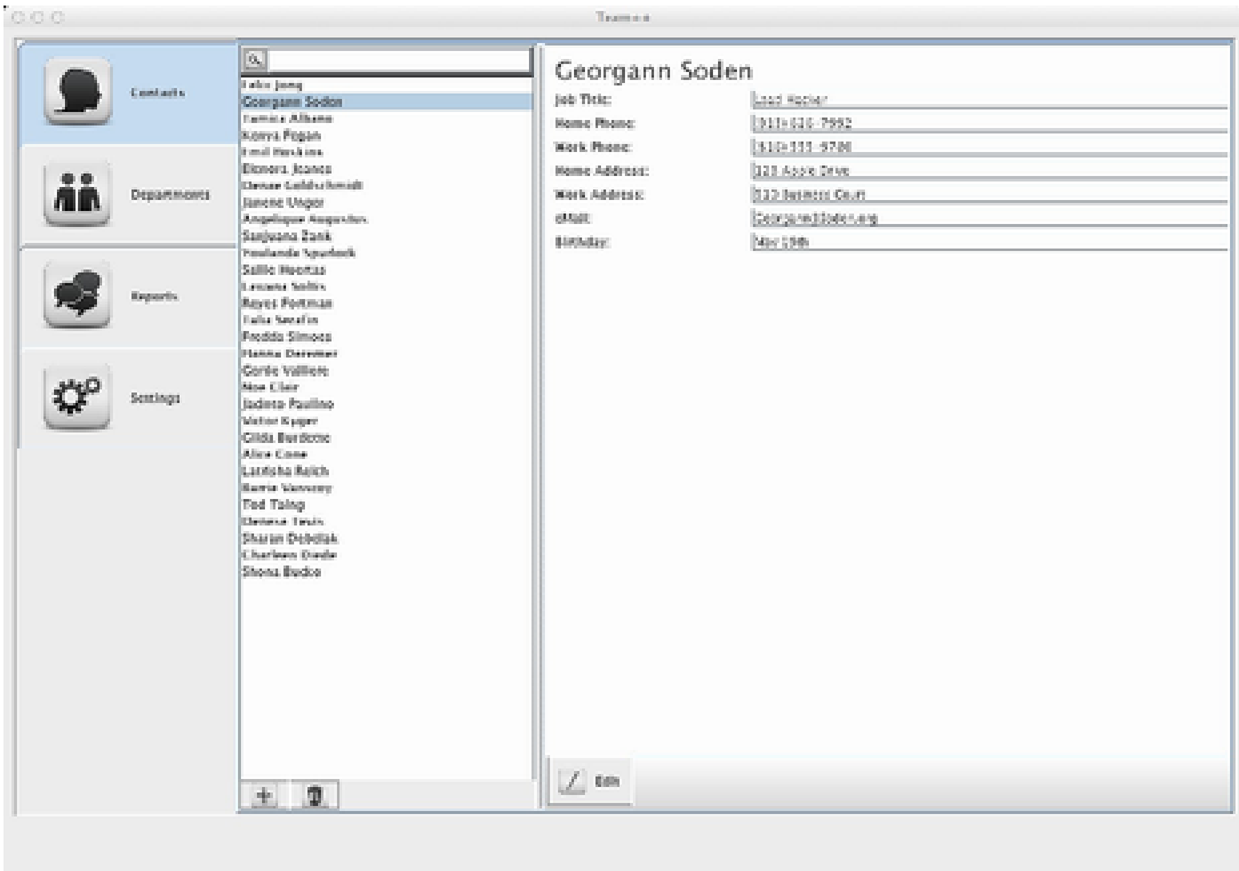

Figure 2. The “Contacts” tab when viewing a contact

The “Contacts” tab presents users with a list of contacts. A user may select a contact from the list directly or use the search feature across the top of the list, which will dynamically load results as the user types. Once a selection is made, the selected contact’s information is displayed on the right side, in the details pane.

The details pane shows all of the stored information for a given contact. This includes the contact’s name, job title, home phone, work phone, home address, work address, eMail, and birthday. When only viewing a contact, these fields are unchangeable. Selecting “Edit” allows the user to edit the contact.

The “+” allows the user to create a new contact. When clicked by the user, the details pane is populated with editable fields, which can be used to enter contact information. When in this editing mode, the “Edit” button is replaced by “Cancel” and “Save” options, allowing the user to abort the creation of a new contact or save the new contact. The trash bin allows users to permanently delete the currently selected contact.

IV. Departments Tab

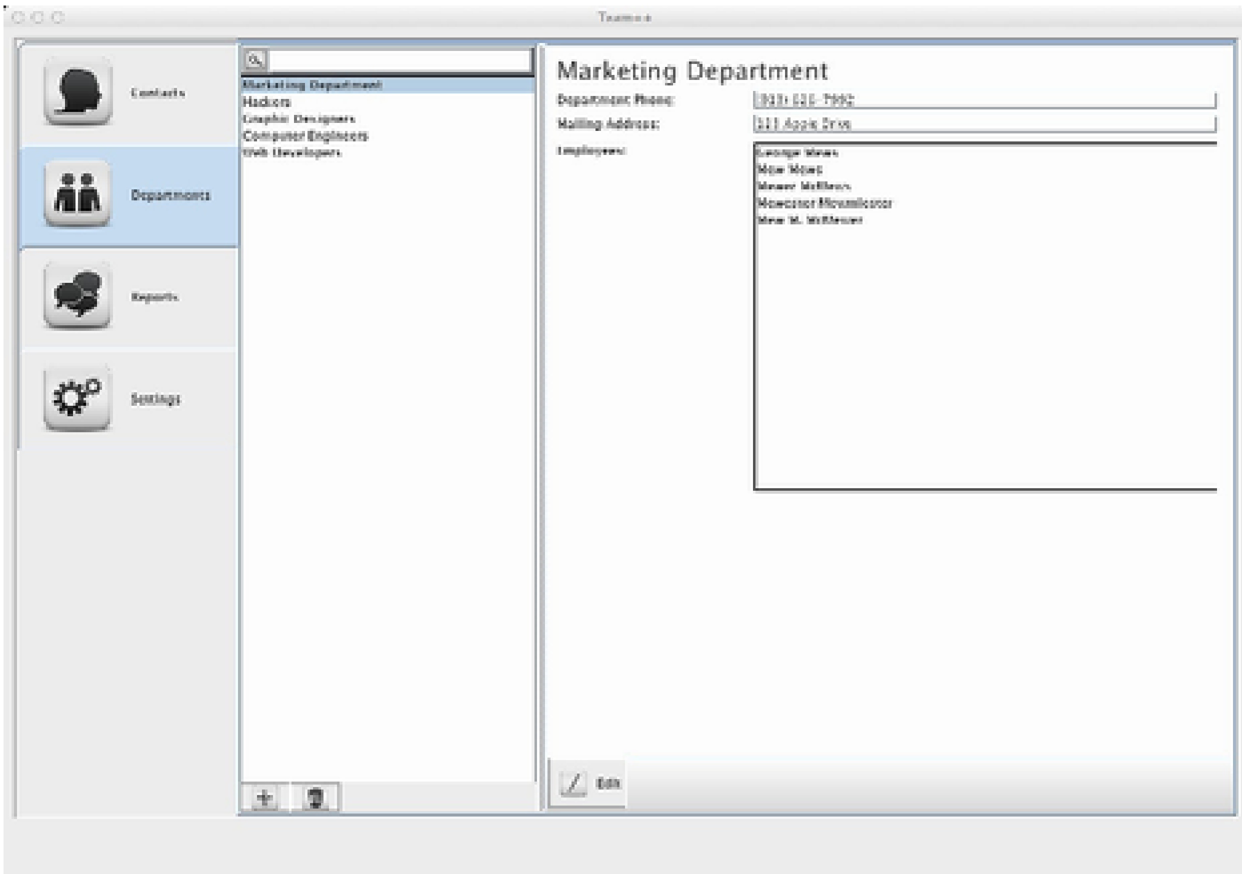

Figure 3. The “Departments” tab when viewing a department.

The “Departments” tab demonstrates the similarities between the different tabs. When selected, the list pane shows only the departments. Selecting a department will give detailed information about that department. This includes the department’s name, phone, and mailing address.

A new section of the details pane for departments is a field containing the names of all employees inside a department. This field is populated with contacts’ names. Selecting the “Edit” button makes two new buttons appear: “Add” and “Remove” (not shown as Figure 3 shows viewing a department only). The “Add” button allows the user to select contacts from a pop-up window and add them to the department. “Remove,” as expected, will remove the selected contact from the department, but it will not delete the contact.

To create a new department, the user may select the “+” button, and to delete the currently selected department, the user should click the trash bin.

V. Reports Tab

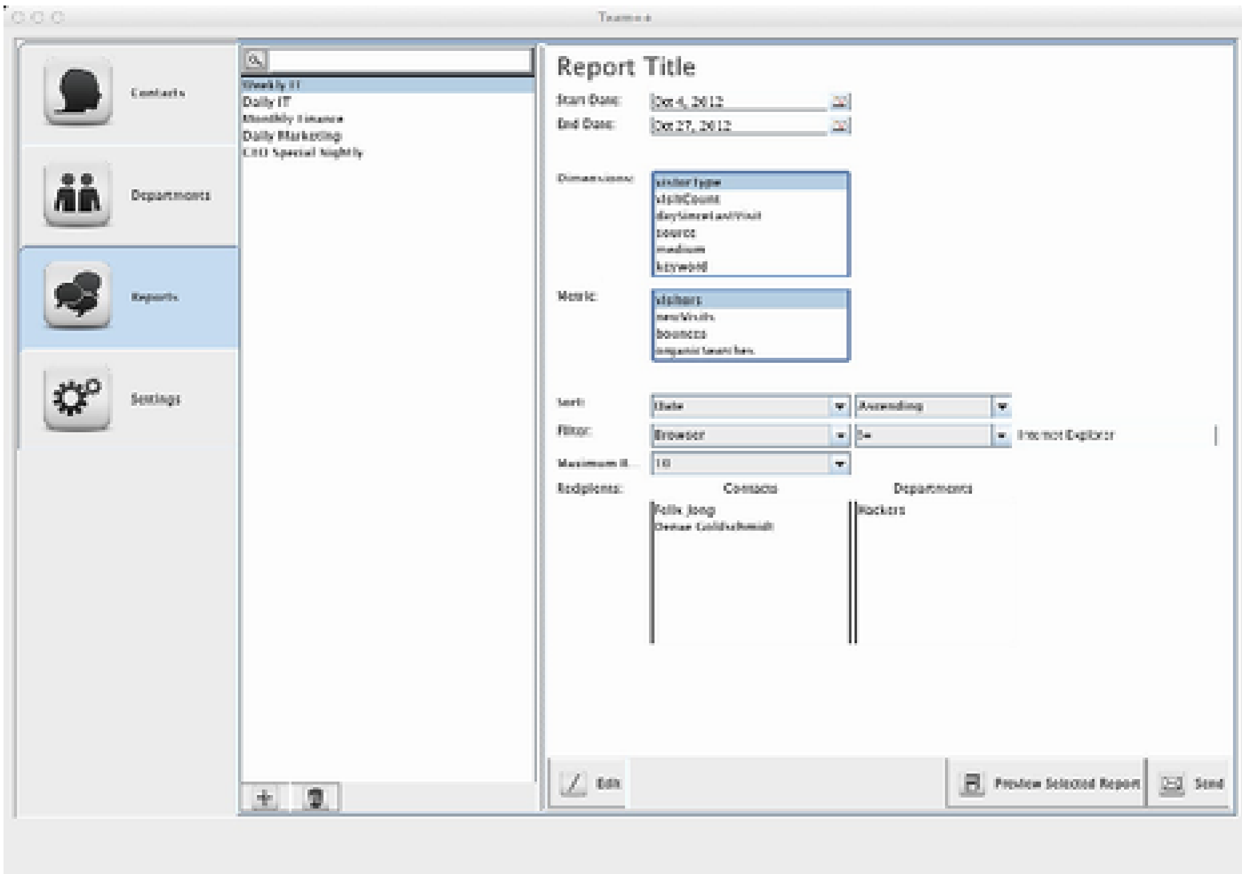

Figure 4. The “Reports” tab when viewing a report.

The “Reports” tab contains saved reports in the list pane. Selecting a saved report allows the user to view and edit the report. Figure 4 shows the appearance of the interface when viewing a report.

For a selected report, the details pane will show the dates, dimensions, metrics, and other specifications of the report, such as filters. Additionally, the user may specify recipients who will automatically receive copies of the report results when the “Send” button is pressed. As with editing a department, when the user selects “Edit” on a report, “Add” and “Remove” buttons appear under the specified recipient’s fields that allow management of the recipients list.

Figure 5 shows the interface for editing a list item. In this case, a report is being edited. If the “Add” button is pressed under the “Contacts” field, a pop-up window appears showing the available contacts to add to the specified recipients. Figure 6 shows an example of this window. Also note the appearance of “Cancel” and “Save” buttons in place of the standard “Edit” button while editing an item.

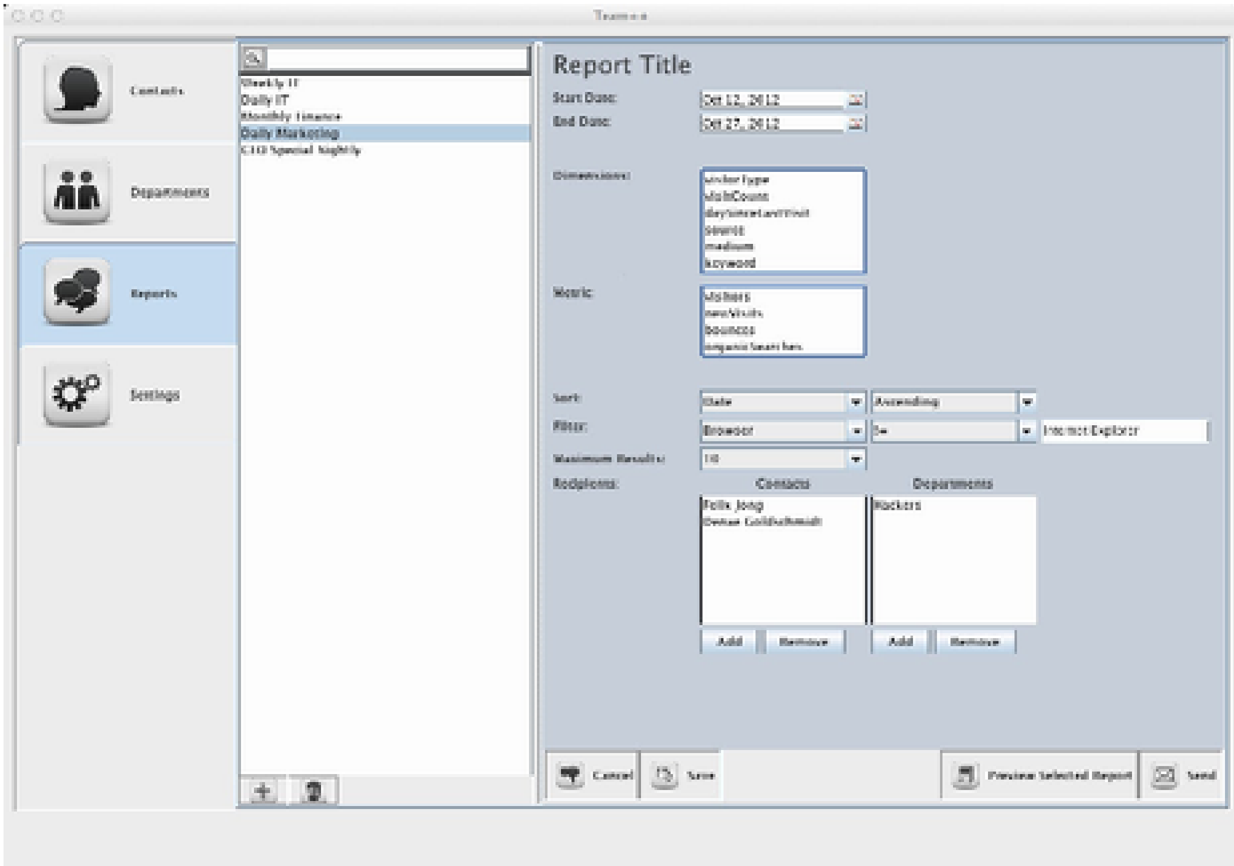

Figure 5. The “Reports” tab when editing a report.

The “+” button will create a new report, and the trash bin will delete the currently selected report. The other two noteworthy buttons on this tab allow the user to preview or send the report results associated with the current report. Previewing report results runs the query generated from the report’s dimensions, metrics, etc. and displays a pop-up window containing the report results.

Sending the report results generates an email containing the results of the report to the specified recipients. If no recipients have been specified, they may be added at send time using the same pop-up window shown in Figure 6.

Figure 6. An example of the pop-up window displayed when pressing “Add” under one of the recipients fields on a report. A similar window would appear when pressing “Add” to add a contact to a department.

VI. Settings Tab

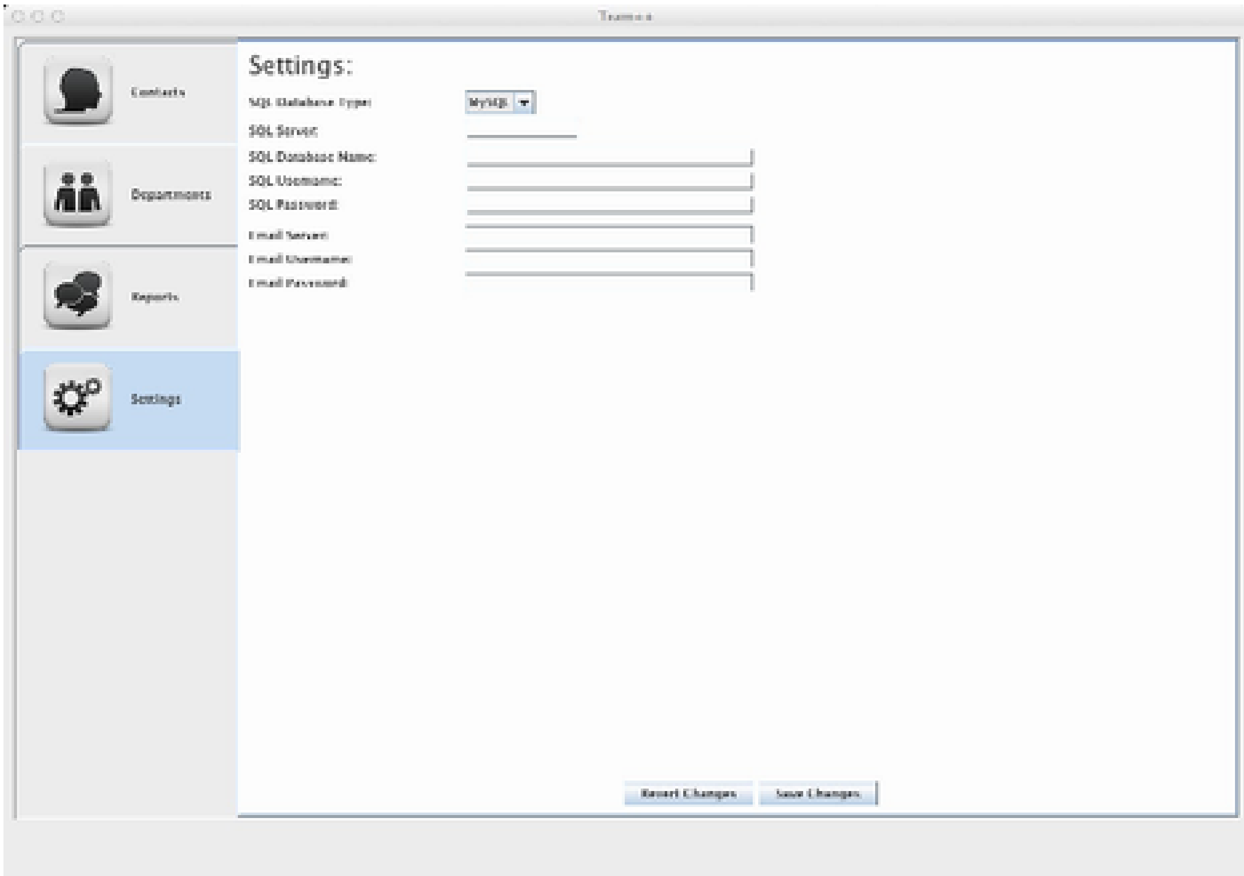

Figure 7. The “Settings” tab.

The “Settings” tab is the most distinct. Unlike the other tabs, there is no list or details pane; the settings pane is entirely self-contained. This tab provides a convenient interface for editing the settings located in the program’s configuration file. It allows the user to change the SQL database type, name, and authentication credentials as well as SMTP server name and credentials.

At the bottom are the "Revert Changes" and "Save Changes" buttons. “Revert Changes” will restore the settings to the previously saved state. This button should be used if the user enters information but does not wish to update the settings. “Save Changes” will store the new settings in the program’s configuration file.