

Story UFC-209: Transactions Summary

The following document will go over the design of the transactions summary view, as outlined in Story ticket UFC-209.

Acceptance Criteria

For reference, the following are the acceptance criteria for this ticket:

- I want to see a breakdown of my transactions (for the current date range) that shows the amounts for each income/expense account.
- I also want to see my total cash flow (i.e. income - expenses) for the current date range.
- On a large enough desktop screen, I should be able to see the summary alongside the table of transactions.
- On any screen that is smaller, the summary should be shown in a separate tab (where there are 2 tabs, 1 for the Transactions, 1 for the Summary).

Design Brainstorming

Shouldn't be too complicated; most of the work will come with making the animations work.

Otherwise, the calculations are all basically already done, just gotta apply them in a new context.

Percentage Calculations

Basically, I just wanted to discuss how to go about calculating the width of the bars for the account summaries.

The first (and original) idea I had was to just calculate them all based as a percentage of the total amount for the type (i.e. given 3 accounts of 50, 100, and 150, they would have percentages of $50/300$, $100/300$, $150/300$ respectively).

This is, in fact, the calculation that I currently have implemented.

However, something keeps bothering me: I want the bars to fill up more of the width of the card! If there's a lot of accounts, then even the top account can have a small bar, dropping off very quickly as you run down the list.

So then I thought, "well, what other way could we possibly calculate the bar lengths that isn't misleading?"

And that's when I had it: we calculate the lengths of each account relative to the top account, and the top account gets the full width.

I mean, this'll be slightly more misleading (especially when taking into account the fact that the title tooltips explicitly call out the percentage as being relative to the total amount), but it'd look better! Hmm...

Yeah, I think that'll be better. I'm sure users will understand...

Yep, definitely looks better.

Component Breakdown

Atoms

- N/A

Molecules

- TransactionTypeSummary

Organisms

- TransactionsSummary

Scenes

- [modification] Transactions (add the TransactionsSummary)

Tasks

- Build the damn thing.