



Internship Summer 2014

Kaila Manca

Industrial Design

Information Architecture

Sociology

User Interface Design

Interaction Design

Tech-Human Mediation

Computer Science

Human Factors Design

Anthropology

Product Engineering

Cognitive Science

Researchers

Visual Design

Ergonomics

Graphic Design

Professional Brainstorming

Content Strategy

UX Design Methods

Step One

Research

Step Two

- Concepting
- Prototyping
- Designing
- Creating
- All of the above

Step Three

Development

Summer Projects

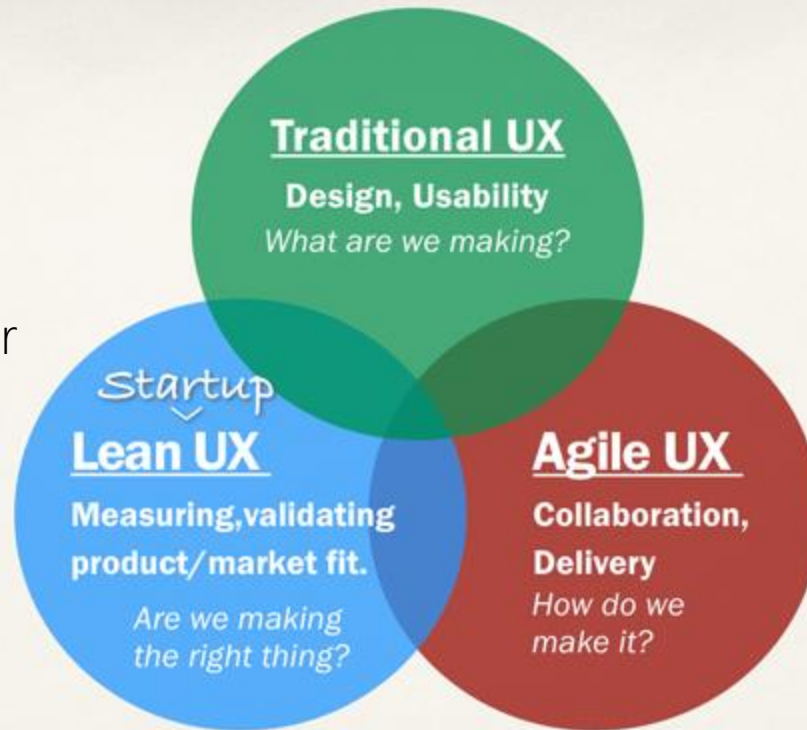
- Financials (Jason Quint)
 - Central Budget Entry
 - Grant Manager
 - Project Central
 - Accounting Entries
 - Milestones
 - Recurring Journal Entry
 - Budget Roll/Factor Merge
 - Chart of Accounts Builder Dev Assistance
- Centrals (Joe Paolino)
 - Budget Scenarios
 - Research
 - HTML/CSS styles for Tyler Pattern Library
- New Technology (Jeremy Randall)
 - Town Council Program

Testing: Lean UX vs. "Quick UX" vs. Traditional UX

Three Approaches to UX Design

Town Council App

Budget Roll Factor
Merge



Financial Apps

B

Bootstrap is the most popular HTML, CSS, and JS framework for developing responsive, mobile first projects on the web.

Download Bootstrap

Currently v3.3.0



Build realtime apps. Store and Sync data in milliseconds with Firebase.

add via Carbon

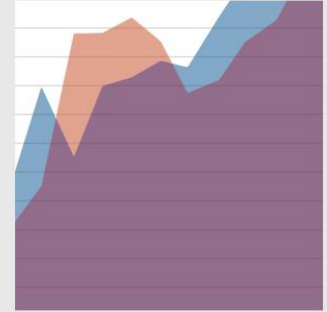
Why develop for Windows?



VERSATILITY



POWERFUL TOOLS



OPPORTUNITY

 Search

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Empowering people
who serve the public

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ABOUT US

- ▶ [Why Tyler](#)
- ▶ [Our Leadership](#)
- ▶ [Client Successes](#)
- ▶ [Speaking From Experience](#)
- ▶ [Corporate History](#)
- ▶ [Technology Partners](#)
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About Us

Our passion is empowering our clients.

From financial management and property taxes to courts and education, we create, deliver and support **software solutions and services** that make it easier for local governments and schools to manage their complex, day-to-day business functions. We have a unique vantage point due to our singular focus on serving the public sector with a broad product portfolio.

From the courtroom to the classroom, Tyler's products serve as the **backbone for core business functions** in the public sector. We are dedicated to helping our local government and school clients streamline the many aspects of their financial management, court case, property tax, public safety, citizen services, public records and education systems.

However, our commitment goes well beyond delivering solutions that work for our public sector clients. It's about **consistently delivering value** for employees and shareholders as well.

Our deep industry knowledge comes from our staff — many of whom held **public sector positions prior to joining Tyler**. They understand what clients want and need to operate more efficiently because they've been there. They transfer their subject matter expertise to new employees who in turn become experts themselves, eventually passing it along to others.

With this knowledge and experience — along with focused innovation and an earnest commitment to our clients — we are positioned better than anyone to anticipate and address the changing technology needs of the public sector.

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Research Step One

Three Approaches to UX Design

1. The “Traditional Approach”

Town Council App

Research: Mental model, Concept model, Persona

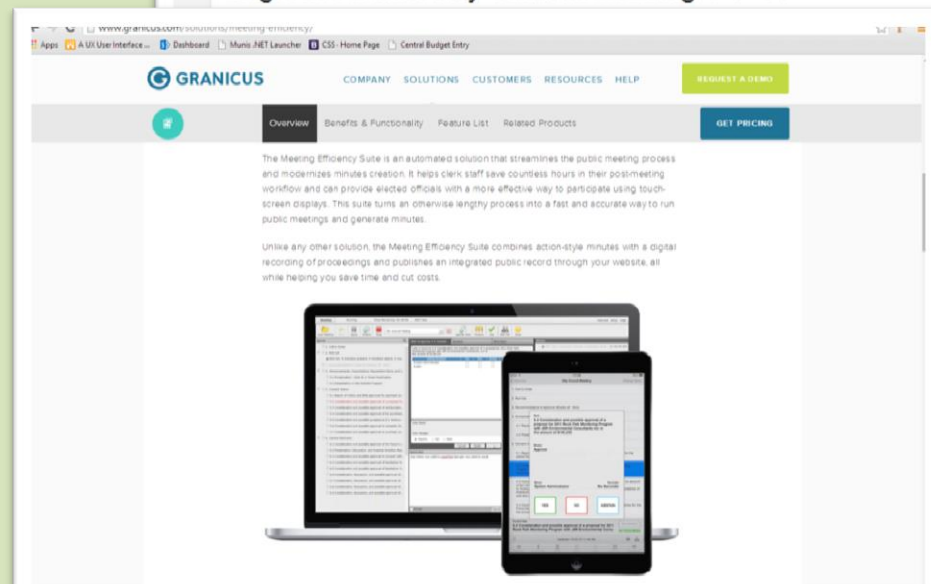
Design: Flows, mockups of sitemap and wireframes.

Low-level prototype, high-level prototype, several iterations.



Research: Town Council Project

- To Understand User Needs:
- Site visit (watch videos)
- Research Competitive Software
 - Analysis of Similar Systems
- Design Principles (Specs)
- Create
 - Mental Model
 - Concept Model
 - Personas (Secretary, Council Members, General Public)



Research: Town Council Project

- Needs



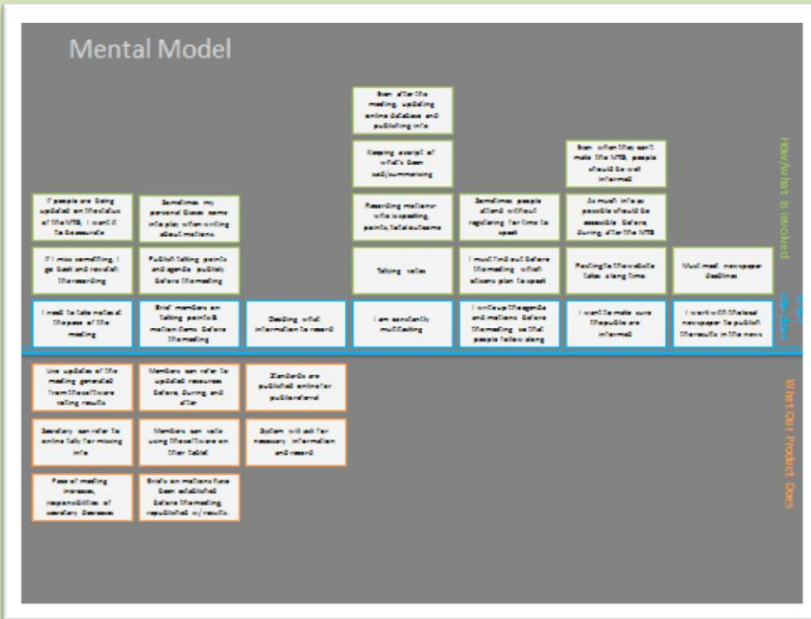
Jenny McCarthy

*Secretary for Local Government Meetings
and Judicial Trials*
Local Government Organization

Serves as admin to the mayor, city administrator, and other officials. Manades, organizes, processes city records, supervises elections, coordinates public meetings, etc.

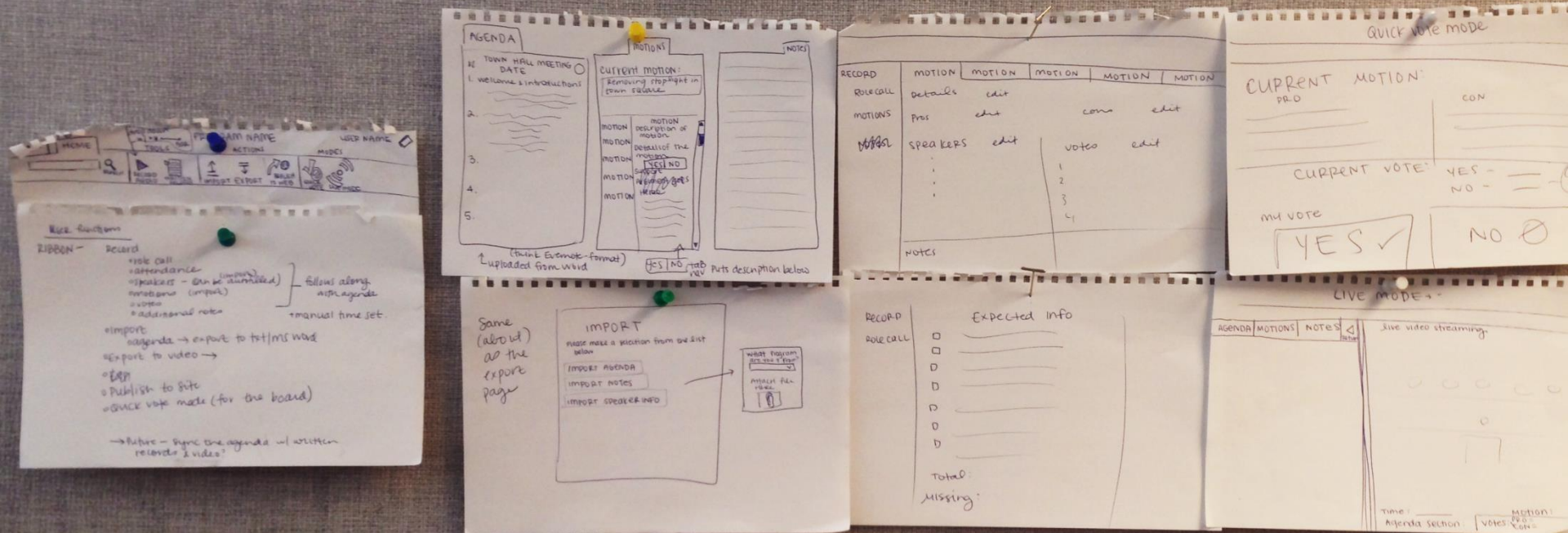
Example of duties:

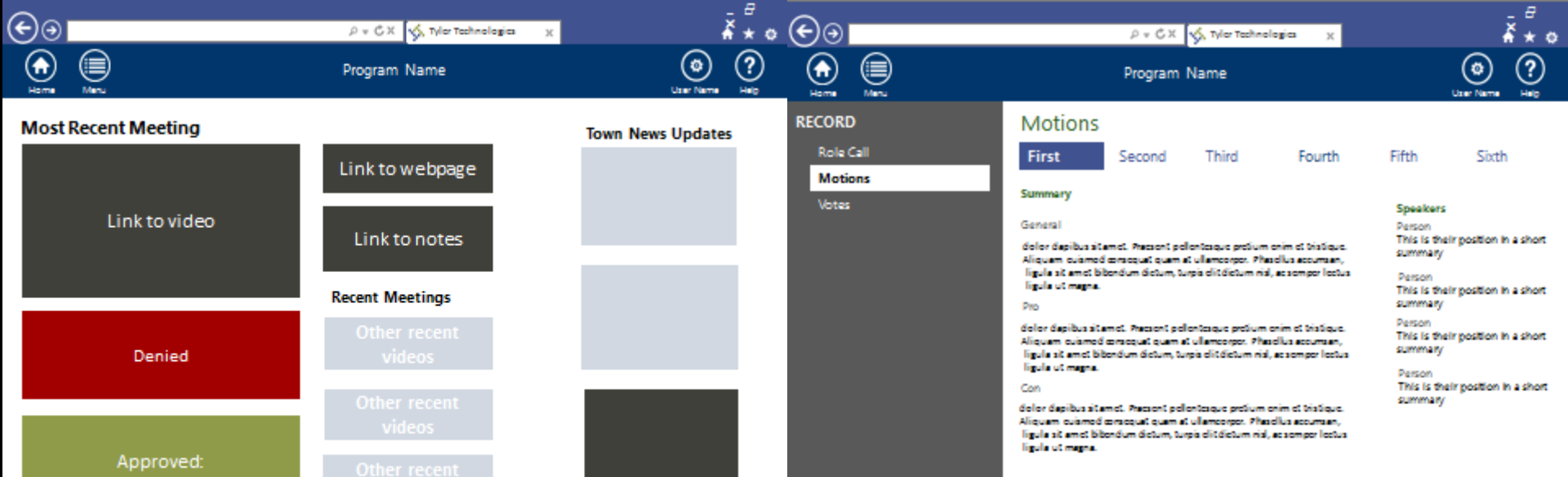
- Prepares and manages agendas
- Compiles supporting documents for agendas, posts meeting notices, including to the City's website.
- Prepares meeting minutes
- Attends evening meetings of the City Council and other Boards and Commissions as the recording secretary.
- Publishes all required legal notices in the official newspaper of the City within the appropriate time requirements
- Responds to requests for information and assistance from Council, staff and citizens.
- Maintains records, filing, drafts and correspondence for Mayor, City Administrator and other city officials
- Maintains custody of city seal and official records of the city including ordinances, resolutions, minutes of the City Council, contracts, agreements, etc. Attests to all official documents of the City.
- Serves as the Official Records Management Officer for all city documents; insures City is compliant with State Law.
- Receives on behalf of the City petitions, initiatives, referendums, recall proceedings and applications for office, and verifies all applications and petitions.
- Coordinates and administers elections and related matters for the City and other agencies as directed.



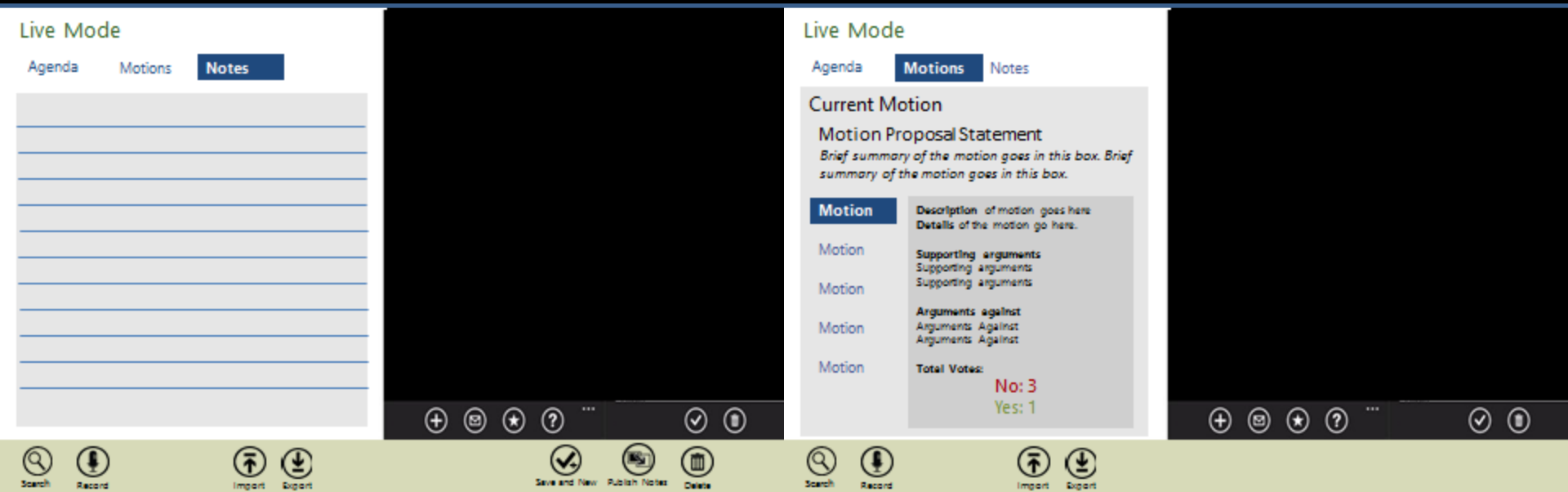
- Town council information
- Job efficiency
- Agendas
- Political history
- Voting ability/tracking
- Town Media
- Roll call
- Ability to take notes
- Export/Import data

Low-Level Prototype





Mid-Level Prototype: Tyler Patterns



Clark County, IA

101 Main Street, Township
clarkcountycouncil@gmail.com
(476) 878-0990

Elected Officials



Bruce Wayne
Town Governor
2078678779



Bruce Wayne
Town Governor
2078678779



Bruce Wayne
Town Governor
2078678779



Bruce Wayne
Town Governor
2078678779



Bruce Wayne
Town Governor
2078678779



Bruce Wayne
Town Governor
2078678779



Bruce Wayne
Town Governor
2078678779



Bruce Wayne
Town Governor
2078678779

Meeting Central

June 2, 2014 >



Board of Directors Meeting

Location: Town Hall, Foreside Room

Topics Covered

00:00:04	New School Building	
00:00:04	Motion Made to Pass	Passed
01:00:09	Extending the Budget	
03:55:00	New Policemen	
00:00:04	Motion Made to Pass	Failed
04:05:06	Re-elections	
00:00:04	Motion Made to Pass	Passed
10:29:22	Sewer Issues	
03:55:00	Stoplight on 4th St.	
00:00:04	Motion Made to Pass	Passed
03:55:00	Stoplight on 4th St.	

Members Present



Recent Meetings >



Town Council Meeting
June 4, 2014



Town Council Meeting
June 4, 2014



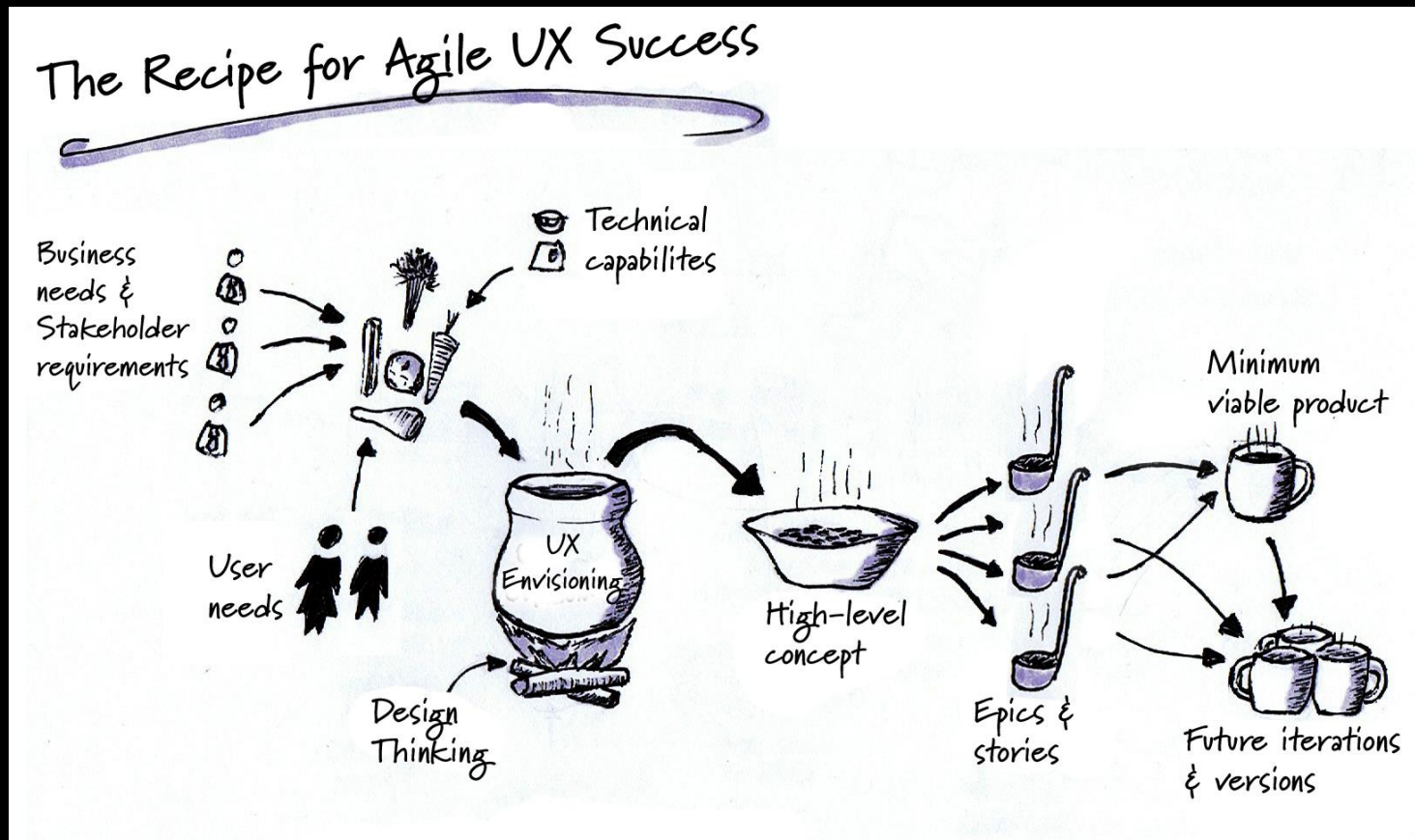
High-Level Prototype: Windows/Tyler Hybrid

2. The "Quick/Agile-Based" Approach Financial Programs

(Joe's Budget Scenarios & Jason's Programs)

Research: Understood background, looked for areas of improvement

Design: Flow, High-level prototype



Financial App Process

Step One: Researching

- Took background research about topic & talked to development and support
- Discussed any further questions with the project manager & development team

Step Two: Designing

- Applied UI design changes
- Reiterated

https://webapps.tylertech.com/INT_DEV/munis/dev/AppHost.aspx?App=glgrantmanager


Grant Manager

Search by Application Number, Grant Number or Grant Name.



Advanced

View All

Export



Actions

Search

Grants

35

Pre-Award

61

Active

18

Warnings

Active Grants

Application #	Grant #	Name	Status	Grant Type	Grantor Type	Start Date	Expiration Date	Entered Date	Entry Clerk	Managed On GL
1	kk'	FIRST GRANT EVER	Active	FRST	Local			4/7/2009	ryan.jacobson	<input checked="" type="checkbox"/>
1010	1010b	FIRST GRANT EVER	Active	FRST	Federal			9/14/2009	tom.nisbet	<input checked="" type="checkbox"/>
111	111	FIRST GRANT EVER	Active	FRST	Federal			5/21/2008	joyce.bickford	<input checked="" type="checkbox"/>
1111	1111	FIRST GRANT EVER	Active	FRST	Federal			7/29/2009	jillian.guillemette	<input checked="" type="checkbox"/>
12345	k2345	MANY TYPES	Active	MANY	Federal			4/15/2009	ryan.jacobson	<input type="checkbox"/>
12347	12347	FIRST GRANT EVER	Active	FRST	Federal			8/4/2008	joyce.bickford	<input checked="" type="checkbox"/>
12468	98777	SCND GRANT EVER	Active	SCND	Federal			12/3/2008	joyce.bickford	<input checked="" type="checkbox"/>
13	13	FIRST GRANT EVER	Active	FRST	Other			4/10/2009	ryan.jacobson	<input checked="" type="checkbox"/>
2	2	TYPE 3 GRANT	Active	T3	Local			4/7/2009	ryan.jacobson	<input type="checkbox"/>
2010	2010	MANY TYPES	Active	MANY	Federal			5/29/2009	david.foster	<input checked="" type="checkbox"/>
3	3	FIRST GRANT EVER	Active	FRST	Federal			5/31/2006	jsilberstein	<input checked="" type="checkbox"/>
4	4	FIRST GRANT EVER	Active	FRST	Federal			5/31/2006	jsilberstein	<input checked="" type="checkbox"/>
5454	5454	FIRST GRANT EVER	Active	FRST	Federal			8/17/2009	ryan.jacobson	<input checked="" type="checkbox"/>
98	98	FIRST GRANT EVER	Active	FRST	Federal			3/29/2007	joyce.bickford	<input checked="" type="checkbox"/>
981	981	FIRST GRANT EVER	Active	FRST	Federal			3/29/2007	joyce.bickford	<input checked="" type="checkbox"/>
98777	98777	SCND GRANT EVER	Active	SCND	Federal			12/3/2008	joyce.bickford	<input checked="" type="checkbox"/>
999	999	FIRST GRANT EVER	Active	FRST	Federal			4/7/2009	ryan.jacobson	<input checked="" type="checkbox"/>
99987	98777	SCND GRANT EVER	Active	SCND	Federal			12/3/2008	joyce.bickford	<input checked="" type="checkbox"/>
BDIG	BDIG	TYPE 3 GRANT	Active	T3	Federal			5/11/2010	jguillemette	<input type="checkbox"/>
BDIG2	BDIG2	FIRST GRANT EVER	Active	FRST	Federal			6/18/2010	iquillemette	<input checked="" type="checkbox"/>

Grants

▼ **Status**

Application No.	Grant No.	Name	Status	Grant Type	Grantor Type	Entered Date	Entry Clerk	Managed
1	KLK	Many types	Active	First	Local	4/7/2009	David.foster	<input type="checkbox"/>
11	1010	First Grant	Active	Many	Local	5/6/2010	Ryan.jacobson	<input type="checkbox"/>
1111	11	Type 3 Grant	Closed	Second	Federal	12/12/2015	Jsilberstein	<input type="checkbox"/>
1	KLK	Many types	Active	First	Local	4/7/2009	David.foster	<input type="checkbox"/>
11	1010	First Grant	Active	Many	Local	5/6/2010	Ryan.jacobson	<input type="checkbox"/>
1111	11	Type 3 Grant	Closed	Second	Federal	12/12/2015	Jsilberstein	<input type="checkbox"/>
1	KLK	Many types	Active	First	Local	4/7/2009	David.foster	<input type="checkbox"/>
11	1010	First Grant	Active	Many	Local	5/6/2010	Ryan.jacobson	<input type="checkbox"/>
1111	11	Type 3 Grant	Closed	Second	Federal	12/12/2015	Jsilberstein	<input type="checkbox"/>



Project Central

Project Central

Welcome, Kaila Manca

Search by project code, project manager, description or department.



Excel

Advanced View All

Search

Actions

Project Summary

0

Planned Projects

0

Active Projects

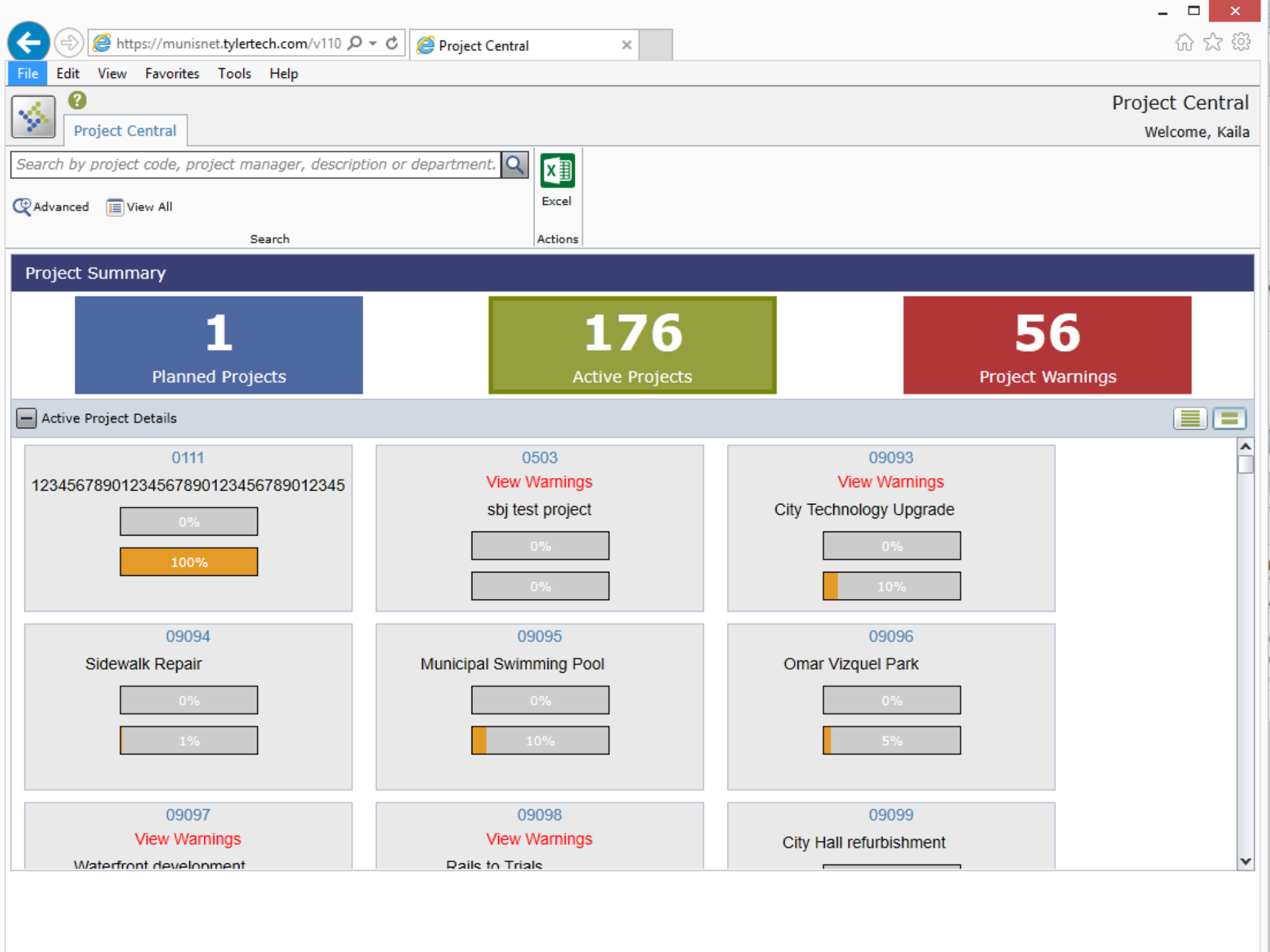
0

Project Warnings

Active Project Details



Project	Description	Dept. Code	% Complete	% Budget Used	Projected Date Range	Project Manager	Revised Budget	Act/Enc	Available Budget	
---------	-------------	------------	------------	---------------	----------------------	-----------------	----------------	---------	------------------	--



Project Central

Status

Planned

15

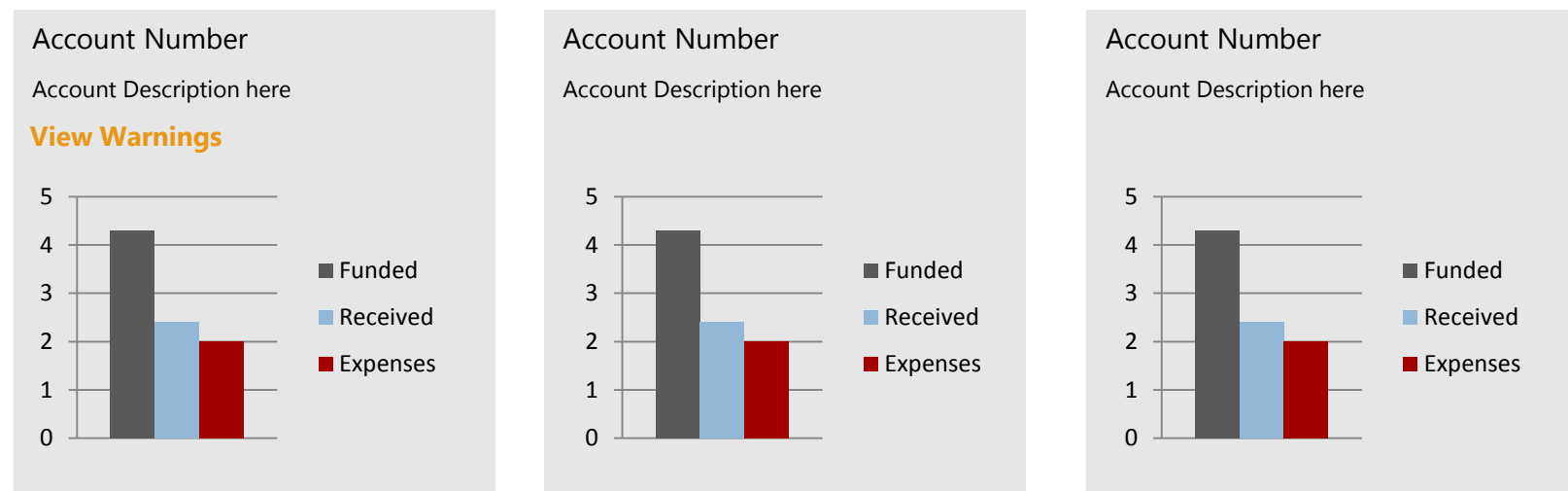
Active

25

Warnings

8

Details



https://munisnet.tylertech.com/v110/dev/AppHos

Project Central

File

Edit

View

Favorites

Tools

Help

Project Central

Search by project code, project manager, description or department.

Excel

Attachments

0

View Warnings

Return To Overview

Advanced

View All

Search

Actions

View

Return

Rails to Trials

- 09098

Project mgr

Projected Date Range

11/11/2013 - 11/11/2017

Expenses paid

0.00

Status

Department

Actual start date:

Project Has Not Started.

Funding received

0.00

Active

Major project

Cash balance

0.00

Expense budget

Funding budget

Expenses

Funding

Milestones

Project Account

Year To Date

Life To Date

> 09098 - Rails to Trials

0.00

1,504.80

Project - 09098 - Rails to Trials

Expense Types (Actuals)

Original Budget

4,000.00

Transfers

0.00

Revised Budget

4,000.00

LABOR EXP

Actuals Paid

0.00

Pending Invoices

1,504.80

Encumbrances

0.00

Requisitions

0.00

EQUIPMENT

Available Budget

2,495.20

▼ Summary

Project MGR		Projected Data Range	09/01/2001-07/19/2012	Expenses Paid	14,209.95
Department	Plan G	Actual Start Date	09/01/2001	Funding Received	0.00
Major Project	34930458490	Status	Active	Cash Balance	-14.209.95

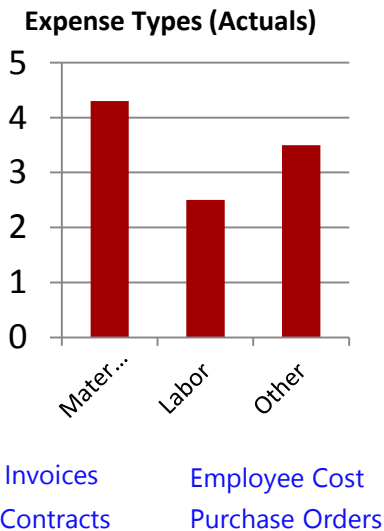
Expenses

Funding

Milestones

Project Account	Year to Date	Life to Date
- 09097-Waterfront Development	0.00	16,497,234
- 100-Planning	0.00	16,497,234
+ 10-Permits	0.00	16,497,234
- 010-Drawings	0.00	16,497,234
09097 .100 .010	0.00	16,497,234

Task 09097	.100	.010
Original Budget		7,500.00
Transfers		0.00
Revised Budget		7,500.00
Actuals Paid		0.00
Pending Invoices		5,530.80
Encumbrances		0.00
Requisitions		0.00
Available Budget		1,962.20



https://webapps.tylertech.com/int_dev/munis/dev/AppHost.aspx?app=glmilestones&e=mo1xbI2VQcjWrT8unK0wiUYos5qVv27n9MsD



Milestones



Add



Update



Delete

Actions



Notes



Year



Month



Day

Display



Milestone Codes

Menu

Milestones Summary: Grant Application # RYAN1

0

Total

0

In Progress

0

Approaching

0

Overdue

Milestones	2014		
	June	July	August

Details

Milestone Code	Responsibility	Initial Schedule Date	Planned % Completed
Type	Missed Reason	Current Schedule Date	Actual % Completed
Description	Missed Comment	Expected Completion Date	Payee

Milestones

#91- STRT Test

Details: Milestone Name #90 STRT

2014 Town Budget Projection 2012 Test Budget Scenarios (71001) Level: Dept


Projection Total	Adjustments Total	Net Totals	Net Change
Revenue	Revenue	Revenue	Revenue
5,816,046.41	67.50	5,815,978.91	2,417,780.61
Expenditures	Expenditures	Expenditures	Expenditures
251,525.00	251,525.00	3,398,198.30	71.15%

Packages

Available

In Play

Posted

- | | | |
|---|------------|---|
| 1 | 250,000.00 |  |
| 1 | 250,000.00 | New Computers |
| 1 | 250,000.00 | New Computers |
| 1 | 250,000.00 | New Computers |
| 1 | 250,000.00 | New Computers |

Apply Package

Expenditures/Revenues

Group by:

Fund


Advanced Grouping

+ Expenditures (34, 759, 876.98)

+ Revenues (34, 759, 876.98)

Scheduled Run

Execute this report

Execute this report 


Journal code

Journal code	<input type="text"/>	Clerk	<input type="text"/>
Source journal	<input type="text"/>	Allocated	<input type="checkbox"/>
Journal reference	<input type="text"/>	Org	<input type="text"/>
Short description	<input type="text"/>		
Journal type	<input type="text"/>	Object	<input type="text"/>
Entity code	<input type="text"/>	Project	<input type="text"/>
Auto reverse journal	<input type="checkbox"/>	Project accounts apply	<input type="checkbox"/>
Due To/Due From fund	<input type="text"/>		
Reset after gen	<input type="checkbox"/>		
Effective dates	<input type="text"/>	to	<input type="text"/>

Months 1 2 3 4 5 6 7 8 9 10 11 12

Weeks 1 2 3 4 5

Browse Journals

Journal Code	Effective Date	Source	Description	Total Debits	Total Credits	Date Created	Actions
75677	01/14/2013-09/29/2015	GEN	Test	0.00	0.00	09/29/2015	
12222	01/14/2013-09/29/2015	AE	more data	90.00	90.00	09/29/2015	
94840	01/14/2013-09/29/2015	GEN	Information here	1,987,000.00	1,987,000.00	09/29/2015	
2222	01/14/2013-09/29/2015	BS	test	0.00	0.00	09/29/2015	
11	01/14/2013-09/29/2015	GEN	Test	90.00	90.00	09/29/2015	
1678	01/14/2013-09/29/2015	AE	more data	1,987,000.00	1,987,000.00	09/29/2015	
0809078	01/14/2013-09/29/2015	GEN	Information here	0.00	0.00	09/29/2015	
12222	01/14/2013-09/29/2015	BS	test	90.00	90.00	09/29/2015	
94840	01/14/2013-09/29/2015	GEN	Test	1,987,000.00	1,987,000.00	09/29/2015	
2222	01/14/2013-09/29/2015	AE	more data	0.00	0.00	09/29/2015	
11	01/14/2013-09/29/2015	GEN	Information here	90.00	90.00	09/29/2015	
1678	01/14/2013-09/29/2015	BS	test	1,987,000.00	1,987,000.00	09/29/2015	

Step 3: Development

Central Budget Entry

Change Projection
Actions

Add Account
Office

Excel
Tools

Account Columns
Tools

Set Up Analysis
Tools

Review Quint's Projection

 t amet, consectetur adipiscing elit. Nunc met erat mollis iaculis. Morbi at molestie leo. sed orci vulputate, ut laoreet dolor laoree...

Current Level: ReviewBd

2014 Salary Amounts
 Budget \$0.00
 FTEs 0.00
 Positions 0.00

ReviewBd Total: (\$11,965.00)

2014 ReviewBd

EXPENSES	\$100,000.00	
REVENUES	\$112,000.00	

07/31/2014

Account Information
 Rollup Ceiling \$18,325.80
 Segment Ceiling \$65,000.00

Analysis
Positions

Project Description	2014 ReviewBd	2015 ReviewBd	2014 Projected	2014 Original	2014 Revised	2014 Actuals	2013 Original	2013 Revised	2013 Actuals	2012 Actuals
AP Cash	35.00	0.00	0.00	-100,000.00	0.00	104,960.88	0.00	0.00	-80,956.00	
JEK Misc revenues	-10,000.00	0.00	0.00	244.64	828.92	0.00	-70,000.00	-66,097.00	-80,095.50	
ing01 Misc revenues	-100,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	-80,000.00	
n231 Misc revenues	-2,000.00	0.00	0.00	507.50	1,522.50	0.00	-13,860.00	-69,300.00	-80,000.00	
nj31 Misc revenues	0.00	0.00	0.00	1,522.50	-9,292.50	0.00	0.00	0.00	-80,000.00	
PRINTING AND COPYING	100,000.00	0.00	0.00	-905,887.54	-1,367,462.62	13,987.82	500,000.00	2,122,780.19	-72,126.45	
000 mts exp obj	0.00	0.00	1,250.00	0.00	0.00	0.00	0.00	0.00	-80,000.00	
CONTRACTUAL SERVICES	0.00	0.00	0.00	98,566.00	98,566.00	11,909.60	5.00	-1,000,594.93	-76,337.33	
mts rev acct	0.00	0.00	0.00	-9.14	-3,900,061.42	-60,035.63	-495,000.00	-545,000.00	-79,945.00	
mts rev acct 2	0.00	0.00	0.00	26,392,182.37	75,176,547.11	0.00	-500,000.00	-474,489.00	-80,000.00	
nts1 mts rev acct 2	0.00	0.00	0.00	-1,045.45	-2,003,136.35	0.00	0.00	0.00	-80,000.00	
mts exp acct no proj	0.00	0.00	0.00	-2,099,769.73	-4,328,281.90	758.50	500,000.00	40,700.20	-76,884.10	
j31 mts exp acct w/proj	0.00	0.00	0.00	-522.73	431.81	0.00	0.00	0.00	-80,001.00	
A231 mts exp acct w/proj	0.00	0.00	0.00	-627.27	1,048,118.19	0.00	0.00	0.00	-80,000.00	
n231 mts exp acct w/proj	0.00	0.00	0.00	-418.18	745.46	0.00	6,510.00	32,550.00	-80,000.00	
nj31 mts exp acct w/proj	0.00	0.00	0.00	-34.51	-103.53	0.00	0.00	0.00	-80,000.00	
nts1 mts exp acct w/proj	0.00	0.00	0.00	-370,773.03	875,294.91	0.00	495,000.00	545,000.00	-80,000.00	

Chart of Accounts Builder

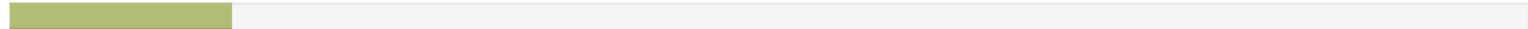


Menu

Chart of Accounts Builder

Home

5 of 34 questions complete.



Questionnaire

Analysis questions used to determine best business practice recommendations.

Task List	Assignee	Status	Due Date	Last Modified
GL Settings	John Jenusaitis	Complete	07/15/2014	07/23/2014 14:15
Funds	Vivien Gray	Complete	08/01/2014	07/17/2014 10:36
Segments	Vivien Gray	Overdue	04/04/2014	04/01/2014 15:17
Objects	John Jenusaitis	Complete	07/18/2014	07/18/2014 10:32
Projects		Overdue	07/19/2014	07/09/2014 16:11
Accounts		Overdue	07/18/2014	07/10/2014 12:58
Organizations		Not Started		
Character Codes	John Jenusaitis	In Progress	08/15/2014	07/23/2014 10:10
Rollup Codes	John Jenusaitis	In Progress	07/31/2014	07/10/2014 10:40
Due To/Due From	John Jenusaitis	Complete	07/03/2014	07/03/2014 09:52
Validation		Not Started		
Export		Not Started		



Post Question



Questions (5)

Home

Central Budget Entry

Kaila Manca

Search Projection Accounts...

Advanced

Search

Change Projection

Add Account

Excel

Account Columns

Set Up Analysis

Office

Tools

Projection 1010 - Jason Quint's Projection

Notes

Current Level: ReviewBd

2014 Salary Amounts

ReviewBd Total: (\$11,965.00)

2014 ReviewBd

07/31/2014

Accounts (50)

Analysis

Positions

Org	Object	Project Description	2014 ReviewBd	2015 ReviewBd	2014 Projected	2014 Original	2014 Revised	2014 Actuals	2013 Original	2013 Revised	2013 Actuals	2012 Original	2012 Actuals
1101	101111	AP Cash	35.00	0.00	0.00	-100,000.00	0.00	104,960.88	0.00	0.00	-80,956.00	0.00	
111	011	DEK Misc revenues	-10,000.00	0.00	0.00	244.64	828.92	0.00	-70,000.00	-66,097.00	-80,095.50	0.00	
111	011	ang01 Misc revenues	-100,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	-80,000.00	0.00	
111	011	m231 Misc revenues	-2,000.00	0.00	0.00	507.50	1,522.50	0.00	-13,860.00	-69,300.00	-80,000.00	0.00	
111	011	mj31 Misc revenues	0.00	0.00	0.00	1,522.50	-9,292.50	0.00	0.00	0.00	-80,000.00	0.00	
111	0111	PRINTING AND COPYING	100,000.00	0.00	0.00	-905,887.54	-1,367,462.62	13,987.82	500,000.00	2,122,780.19	-72,126.45	0.00	6.0
111	0111	1000 mts exp obj	0.00	0.00	1,250.00	0.00	0.00	0.00	0.00	0.00	-80,000.00	0.00	
111	02101	CONTRACTUAL SERVICES	0.00	0.00	0.00	98,566.00	98,566.00	11,909.60	5.00	-1,000,594.93	-76,337.33	0.00	
111	111	mts rev acct	0.00	0.00	0.00	-9.14	-3,900,061.42	-60,035.63	-495,000.00	-545,000.00	-79,945.00	0.00	
111	1110	mts rev acct 2	0.00	0.00	0.00	26,392,182.37	75,176,547.11	0.00	-500,000.00	-474,489.00	-80,000.00	0.00	
111	1110	mts1 mts rev acct 2	0.00	0.00	0.00	-1,045.45	-2,003,136.35	0.00	0.00	0.00	-80,000.00	0.00	
111	1111	mts exp acct no proj	0.00	0.00	0.00	-2,099,769.73	-4,328,281.90	758.50	500,000.00	40,700.20	-76,884.10	0.00	-1.0
111	1111	1j31 mts exp acct w/proj	0.00	0.00	0.00	-522.73	431.81	0.00	0.00	0.00	-80,001.00	0.00	
111	1111	M231 mts exp acct w/proj	0.00	0.00	0.00	-627.27	1,048,118.19	0.00	0.00	0.00	-80,000.00	0.00	
111	1111	m231 mts exp acct w/proj	0.00	0.00	0.00	-418.18	745.46	0.00	6,510.00	32,550.00	-80,000.00	0.00	
111	1111	mj31 mts exp acct w/proj	0.00	0.00	0.00	-34.51	-103.53	0.00	0.00	0.00	-80,000.00	0.00	
111	1111	mts1 mts exp acct w/proj	0.00	0.00	0.00	-370,773.03	875,294.91	0.00	495,000.00	545,000.00	-80,000.00	0.00	

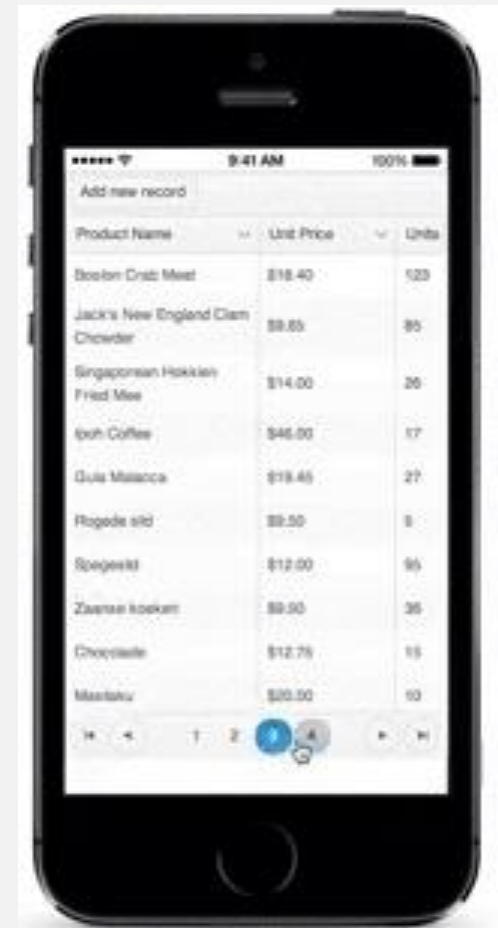
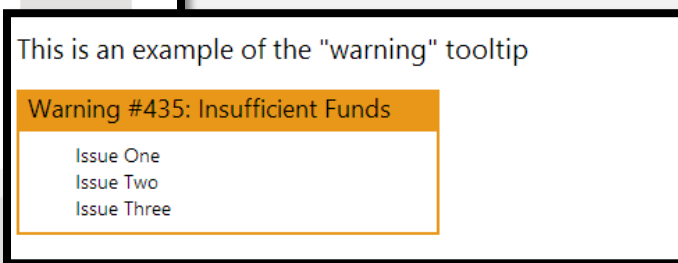
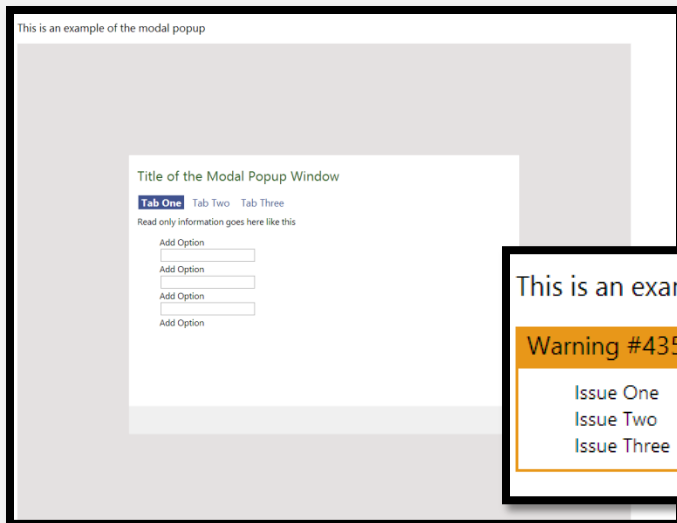
< 1 2 >

Ok Cancel

Central Budget Entry

UX Step 3: Development

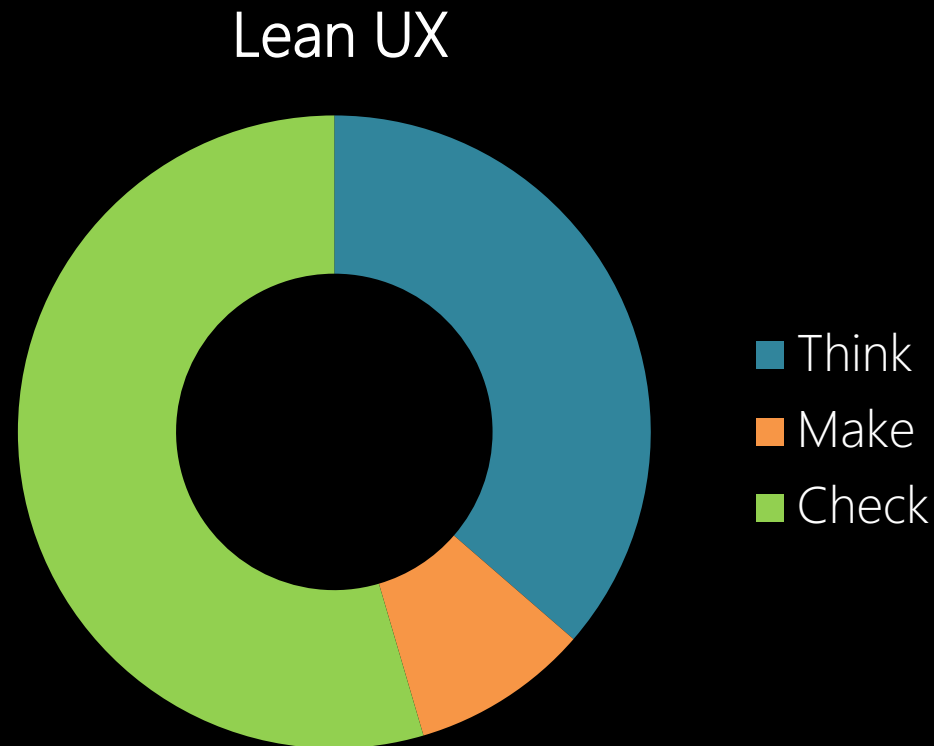
- Code for Tyler PL
- Ionic mobile app
- Financial team design implementation



Three Approaches to UX Design

3. The “Lean UX” Approach

Roll/Factor Merge (and Budget Scenarios)

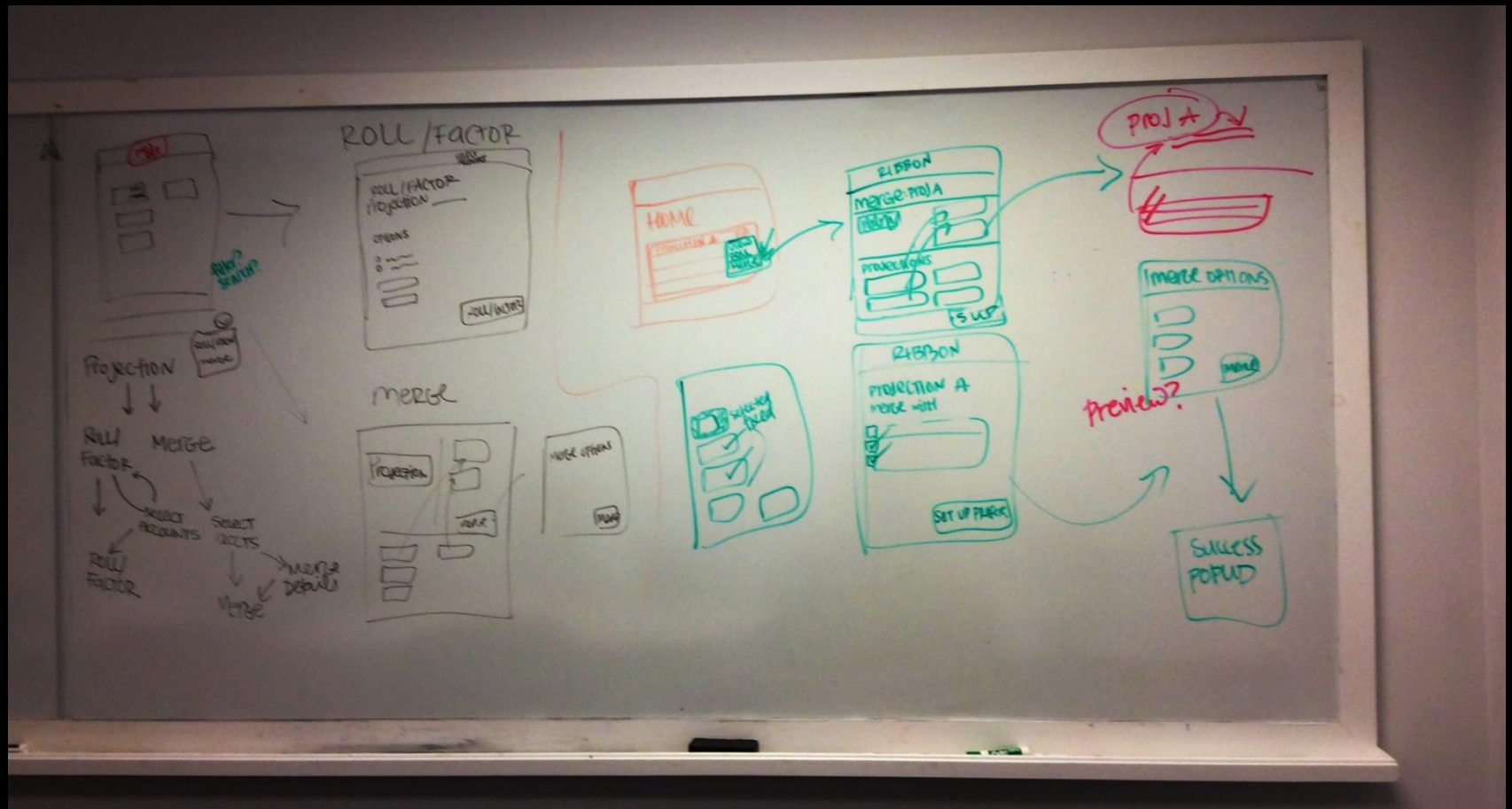


Step One: Research

- Minimal – Thinking comes later
 - No interaction with previous program
 - No personal UI design implemented
- Presented with functionality of program
 - Purpose/what does it do?
 - What does the user expect to gain from it?

Step Two: Prototyping & Testing

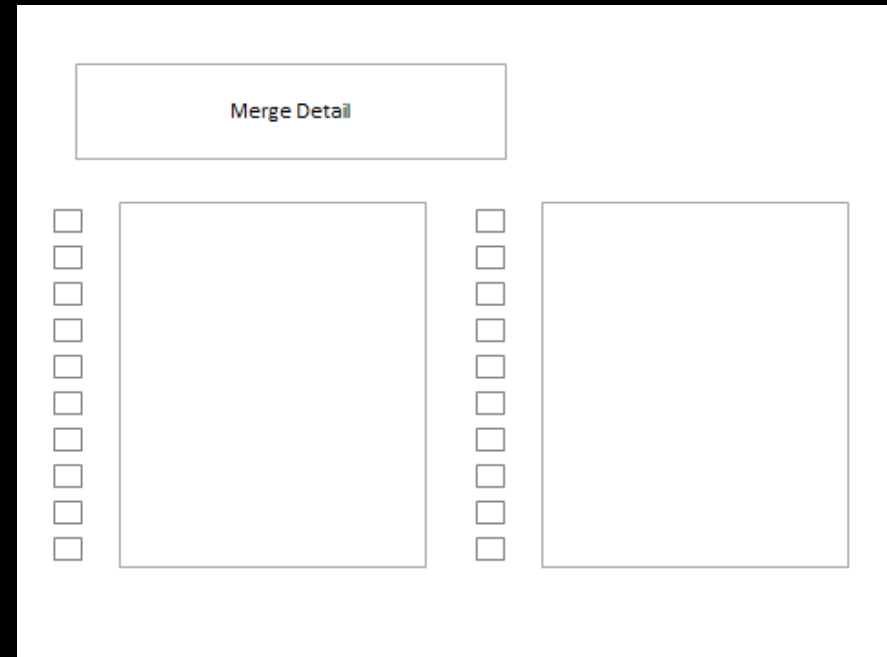
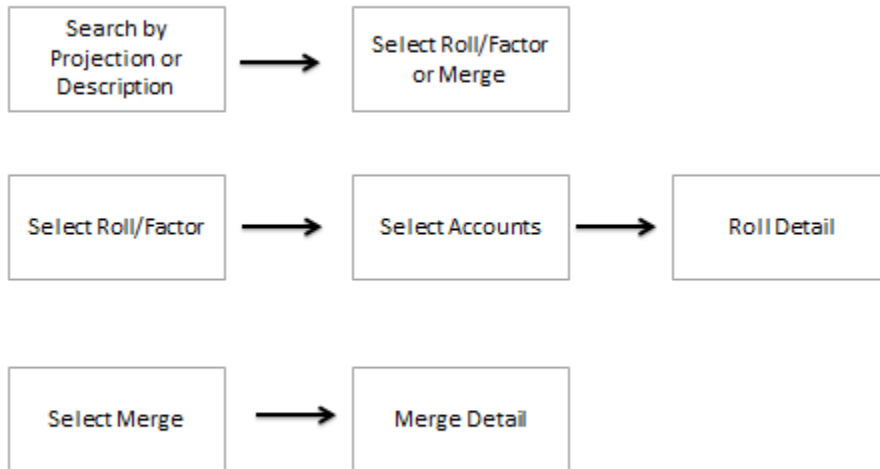
Quick Mockup: Version One



Step Two: Prototyping & Testing

Quick Mockup: Version Two

Future Flow



Version Three

Projection Detail

Merge with Projection A

☒ Projection AA

☐ Projection B

☒ Projection C

☒ Projection D

Projection AA
Projection C
Projection D

Next

Projection Detail

Home

Projection A

Projection B

Projection C

Projection D

View

Roll/Factor

Merge

Projection Detail

Select Specific Accounts

Roll/Factor
Projection A

☐ Checkbox label

☐ Checkbox label

☐ Checkbox label

Form field label (units, format, example answer)

Form field label

Form field label

Form field label

Label

Roll

Version Three

User Quote:

"It feels like it needs a lot of work."

Projection Detail

Merge with Projection A

☒ Projection AA
☐ Projection B
☒ Projection C
☒ Projection D

Projection AA
Projection C
Projection D

Next

Projection Detail

Home

Projection A
Projection B
Projection C
Projection D

View
Roll/Factor
Merge

Projection Detail

Select Specific Accounts

Roll/Factor
Projection A

☐ Checkbox label
☐ Checkbox label
☐ Checkbox label

Form field label (units, format, example answer)

Form field label

Form field label

Label

Roll

Version Six

Budget Roll/Factor Merge Program

Search

Back

Merge

Totals 2 Projections
10 Accounts
\$12,000.00

→

Projection A 987009
343 Accounts
\$980,000.00

[Details](#)

Select Projections to merge into Projection A 987009

- ☒ Projection B 890776
- ☒ Projection C 007869
- ☐ Projection D 0872553
- ☐ Projection E 2665432
- ☐ Projection F 786229
- ☐ Projection G 4500990
- ☐ Projection H 0982276
- ☐ Projection I 0832133
- ☐ Projection J 47826430

Projection B 890776
Projection C 007869

Next

Budget Roll/Factor Merge Program

Search

Projections

Number	Description	Type	Total	Year	Actions
987009	Projection A	Capital	1,552,332.00	2002	⌵
Ceiling Percent					
90 %	Created From Projection	Current Access Level	Fund Ranges In Projection		
	7867	4	Fund Range 1	1 to 1	
			Fund Range 2	2 to 3	
			Fund Range 3	3 to 3	
			Fund Range 4	1 to 5	
View accounts					
+ 890776	Projection B	Capital	-736,332.00	2012	
+ 007869	Projection C	Operating	56,523.00	2013	
+ 0872553	Projection D	Capital	-6,569.36	2011	
+ 2665432	Projection E	Capital	1,552,332.00	2009	
+ 786229	Projection F	Operating	-736,332.00	2005	
+ 4500990	Projection G	Capital	56,523.00	2013	
+ 0982276	Projection H	Operating	-6,569.36	2013	
+ 0832133	Projection I	Capital	1,552,332.00	2014	
+ 47826430	Projection J	Operating	-736,332.00	2016	
+ 88436743	Projection K	Operating	56,523.00	2002	

Budget Roll/Factor Merge Program

Search

Back

Roll/ Factor Projection A 987009

340 of 343 Accounts Currently Selected

[Select Accounts](#)

Select Rolling Year(s) from Available:

- ☒ 2001 ☐ 2004
- ☐ 2002 ☐ 2005
- ☐ 2003 ☐ 2006

Roll/Factor from Level
Level 1 - Description

Roll/Factor to Level
Level 2 - Description

Factor/Percentage
0%

Existing Amounts
Overlay

OK

Version Eight

Overview TAB NAME TAB NAME Budget Roll/Factor Merge John Smith

Search Instruction/Print

Advanced Search

Return Online Help Knowledge Base Help

Merge Projection A 987009

Select Projections to Merge Into Projection A

- ☐ Projection B 890776
- ☐ Projection C 007869
- ☐ Projection D 0872593
- ☐ Projection E 2665432
- ☐ Projection F 786229
- ☐ Projection G 4500990
- ☐ Projection H 0982276
- ☐ Projection I 0832133
- ☐ Projection J 47826430

Merging Projections	Receiving Projection	Total
Projection B	Projection A 987009	Projection A 987009
4 Accounts	343 Accounts	3437 Accounts

OK

Overview TAB NAME TAB NAME Budget Roll/Factor Merge John Smith

Search Instruction/Print

Advanced Search

Filter Size History

Define Start Projections Next Year Budget Reports Next Year Budget Entry Online Help Knowledge Base Help

Projections (5,678)

Number	Description	Type	Total	Actions
+ 987009	Projection A	Capital	1,552,332.00	⌵
+ 890776	Projection B	Capital	-736,332.00	
+ 007869	Projection C	Operating	56,523.00	
+ 0872593	Projection D	Capital	-6,569.36	
+ 2665432	Projection E	Capital	1,552,332.00	
+ 786229	Projection F	Operating	-736,332.00	
+ 4500990	Projection G	Capital	56,523.00	
+ 0982276	Projection H	Operating	-6,569.36	
+ 0832133	Projection I	Capital	1,552,332.00	
+ 47826430	Projection J	Operating	-736,332.00	
+ 88436743	Projection K	Operating	56,523.00	
+ 8649887	Projection L	Capital	-6,569.36	
+ 0150569	Projection M	Capital	1,552,332.00	

Overview TAB NAME TAB NAME Budget Roll/Factor Merge John Smith

Search Instruction/Print

Advanced Search

Return Online Help Knowledge Base Help

Roll/Factor Projection A 987009

Select Accounts

All 343 Accounts Currently Selected

Roll/Factor from Level

Roll/Factor to Level

Factor/Percentage

Existing Amounts

OK

Version Eight

User Quote:

After looking at this... yeah. This is good."

This screenshot shows a software interface for merging projections. The title bar indicates the user is John Smith. The main heading is 'Merge Projection A 987009'. Below this, there are three columns: 'Select Projections to Merge Into Projection A', 'Merging Projections', and 'Receiving Projection'. The 'Select' column contains a list of projections from B to J, each with a checkbox. The 'Merging Projections' column shows 'Projection B' with '4 Accounts'. The 'Receiving Projection' column shows 'Projection A 987009' with '343 Accounts'. The 'Total' column shows 'Projection A 987009' with '3437 Accounts'. At the bottom right, there is an 'OK' button.

Select Projections to Merge Into Projection A	Merging Projections	Receiving Projection	Total
<input type="checkbox"/> Projection B 890776	Projection B	Projection A 987009	Projection A 987009
<input type="checkbox"/> Projection C 007869	4 Accounts	343 Accounts	3437 Accounts
<input type="checkbox"/> Projection D 0872593			
<input type="checkbox"/> Projection E 2665432			
<input type="checkbox"/> Projection F 786229			
<input type="checkbox"/> Projection G 4500990			
<input type="checkbox"/> Projection H 0982276			
<input type="checkbox"/> Projection I 0832133			
<input type="checkbox"/> Projection J 478264130			

This screenshot shows a table titled 'Projections (5,678)'. The table has columns for Number, Description, Type, Total, and Actions. The first row is highlighted in green. The table lists projections from A to M.

Number	Description	Type	Total	Actions
+ 987009	Projection A	Capital	1,552,332.00	⌵
+ 890776	Projection B	Capital	-736,332.00	
+ 007869	Projection C	Operating	56,523.00	
+ 0872593	Projection D	Capital	-6,569.36	
+ 2665432	Projection E	Capital	1,552,332.00	
+ 786229	Projection F	Operating	-736,332.00	
+ 4500990	Projection G	Capital	56,523.00	
+ 0982276	Projection H	Operating	-6,569.36	
+ 0832133	Projection I	Capital	1,552,332.00	
+ 47826430	Projection J	Operating	-736,332.00	
+ 88436743	Projection K	Operating	56,523.00	
+ 8649887	Projection L	Capital	-6,569.36	
+ 0150569	Projection M	Capital	1,552,332.00	

This screenshot shows a software interface for rolling or factoring a projection. The title bar indicates the user is John Smith. The main heading is 'Roll/Factor Projection A 987009'. Below this, there are two sections: 'Select Accounts' and 'All 343 Accounts Currently Selected'. The 'Select Accounts' section has four dropdown menus: 'Roll/Factor from Level', 'Roll/Factor to Level', 'Factor/Percentage', and 'Existing Amounts'. At the bottom right, there is an 'OK' button.

Select Accounts

All 343 Accounts Currently Selected

Roll/Factor from Level

Roll/Factor to Level

Factor/Percentage

Existing Amounts

Wrapping it Up









Lessons from Tyler & My Summer

My Goals:

- Involvement in a variety of UX areas
- Independence, Career-focus
- Potential future workplace
- Opportunity to learn
- Opportunity to build skillset
- Actual, real, applicable... work

Lessons from Tyler & My Summer

My Goals:

- Involvement in a variety of UX areas 
- Independence, Career-focus 
- Potential future workplace 
- Opportunity to learn 
- Opportunity to build skillset 
- Actual, real, applicable... work. 

+ more!



Tyler Tech
&
all of you,
for a
fantastic
summer!

References

1. Neeman, Patrick. "How to Kill It in A UX Interview." *Usability Counts*. N.p., 29 Jan. 2014. Web. June-July 2014.
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