Web Portal Design v2

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# Storyboards

The following storyboards represent the primary user experiences with the product.

## Landing Page – New User

A new user navigates to the product landing page and is greeted with a clean, consistent product introduction page which conveys the brand and image, describes the product to encourage the user to register, and easily allows user to register and create an account.

* Professional, consistent logo, tagline, visual theme that conveys the product brand and image
* Clear explanation of what the product does and how it benefits the user
* Clear call-to-action in the form of a sign-up button
* Sign-up requires minimal information (email and password) in order to create an account

## Landing Page – Existing User

An existing user navigates to the product landing page and is easily able to login by providing their registered email address and password. Previously authenticated users will be issued an authentication cookie. Existing users entering the site with an unexpired authentication cookie are automatically redirected to the Activities dashboard.

## Activities Dashboard – First login

After a new user has created an account, they will be directed to the Activities dashboard which will be pre-populated with a set of “getting started” Activities to help the user understand the product.

### Learn About Zaplify

The first activity will contain a set of “special” Tasks designed to help the user learn about the product, optionally connect to other information sources, configure their user profile, and suggest standard Activity templates which may be applicable to their lifestyle.

#### Connect to Google Calendar, Tasks, and Contacts\*

This task will prompt the user to give consent for accessing a Google Calendar and Task list. It will provide a clear explanation of why the product is requesting access to their Calendar and what benefits the product will provide. Zaplify will push appointments to the Google Calendar and keep those appointments synchronized (whether modified in Zaplify or Google). Zaplify will push tasks to the Google Task list and keep those tasks synchronized (whether modified in Zaplify or Google). Zaplify will utilize Google contacts when adding contacts to an appointment or task. Once consent is provided, the task will be marked complete and the user will be directed to the Calendar settings to configure features for managing appointments and tasks on their Google Calendar.

* Indicate which Calendar will be used to place appointments on (MH)
* Allow user to select which Calendar will be used to place appointments on (RNH)
* Allow product to create a new “Zaplify” Calendar for placing appointments on (RNH)
* Allow product to create Task lists for each activity and add tasks to Task list (RNH)
* Allow product to access Google contacts for use in appointments and tasks (NH)

**Note**: By creating lists which correspond to each activity folder, Zaplify can easily keep tasks created in Google a task list synchronized with Zaplify. A similar convention will be required for identifying appointments created in Google Calendar which should be synchronized into a Zaplify activity folder.

#### Connect to Facebook

This task will prompt the user to give consent for accessing their Facebook account. It will provide a clear explanation of why the product is requesting access to their Facebook and what benefits the product will provide. Facebook information will be used to initialize their user profile and provide a list of contacts for using in tasks and appointments. Once consent is provided, the task will be marked complete.

#### Get the Phone App

This task will tell the user about the phone application(s) and the benefits one can get by using a mobile device with “Zaplify”. This task will allow an email to be sent to the registered email which contains a link for downloading the phone application to their device.

#### User Profile

This task will describe the benefits of providing user profile information. This can be used to help suggest Activity templates appropriate for their life-style. The task can direct the user to the User Profile settings, which have been pre-populated with as much information as possible if previously connected to Google or Facebook. If the user navigates to the User Profile settings, the task will be marked complete.

* First and last name (MH)
* Picture (MH)
* Gender (MH)
* Birthdate (RNH)
* Address (RNH)
* Married (RNH)
* Number of children (RNH)
  + Provide wizard for identifying spouse and children and assigning colors or icons
* Occupation (NH)
* Education (NH)

#### Activity Gallery

This task will tell the user about gallery of standard Activities and how to add them to their Activity dashboard. If sufficient user profile information has been acquired the gallery can be customized to best suit the life-style of the user. This task can direct the user to the gallery selection page. If the user navigates to the activity gallery the task will be marked complete.

#### How To …

This task will contain a set of sub-tasks which each direct the user to a specific help topic on how to use the product. This same information is accessible via the help pages, but these highlight the primary topics for learning how to use the product.

* What are activities, tasks, and appointments?
* How to create an activity, task, and appointment
* How to rename, reorder, and delete an activity, task, and appointment
* How to associate contacts, locations, and web links with tasks and appointments
* How information is organized around an activity or task
* How information for an activity or task can be utilized on your mobile device
* How activities, tasks, and appointments are synchronized with Google Calendar & Task lists
* How to create lists for an activity
* How to share an activity
* How to utilize the activity gallery
* How to configure Google Calendar and Task connection

### Personal Care

This activity will contain a set of tasks relating to personal care. These tasks are universally applicable to nearly every user and provide useful pre-populated content to avoid the “blank-slate” syndrome.

#### Exercise (3 times per week)

#### Haircut (every 2 months)

#### Dentist (every 6 months)

#### Doctor (every year)

### Shopping

This activity will contain a set of tasks and lists relating to recurring shopping tasks. Again, these tasks are universally applicable to nearly every user and provide additional pre-populated content.

#### Grocery Shopping (weekly)

* Grocery List

#### Holiday Shopping (every December)

* Gift List

# Features

The web portal will be designed to support the following set of features.

## Activities

An activity is the primary organizing principle for the product. An activity is a named container for organizing tasks, appointments, and lists related to a specific user activity (e.g. Kids Sports). An activity is also the unit of sharing for the initial version of the product.

**Implementation Note**: An activity will be represented by a folder in the data model. A folder does not support field values; hence data must be associated using an entity reference. If the data associated with an activity folder is required by the client, then the entity reference must be a child of either the $Client folder or perhaps the activity folder itself. For data not required by the client, the entity reference item should be a child of the $User folder.

The following are the list of features that **MUST** be supported for managing activities.

* view the list of currently defined activities
* create a new activity
* delete an existing activity
* rename an existing activity
* reorder the list of currently defined activities
* select a current activity
* add a new task, appointment, or list to an activity
* view list of tasks, appointments, and lists within an activity
  + sort tasks and appointments by date
  + sort completed tasks to bottom of list
  + filter aged appointments out of list (based on setting)
  + filter aged completed ‘one-time’ tasks out of list (based on setting)
  + sort lists in natural order (in a separate list view)
* delete a task, appointment, or list from an activity

The following are the list of features that **SHOULD** be supported for managing activities.

* manage contacts, locations, and web links associated with an activity
* integrate with Google task lists (see Google Integration)
* reorder the lists contained within an activity
* share an activity (and its contents) with other registered users

## Tasks

A task is an item that defines something that needs to be done. The primary fields for a task are the name, due date, completed flag, completed-on date, and frequency. The frequency indicates how often the task is typically performed. There are two primary types of tasks, ‘one-time’ and ‘recurring’. A ‘one-time’ task is performed and completed once and then no longer relevant. A ‘recurring’ task has a frequency and when it has been completed, the completed-on date is noted and a duplicate task is added with the complete flag cleared and the due date set based on the frequency.

A task supports additional fields for associating contacts, locations, and web links with the task. This allows one to organize the people, places, and links relevant to a given task.

A task supports child tasks and appointments. This allows one to define sub-tasks and appointments relevant to the larger task. Contacts, locations, and web links associated with a given child task or appointment will automatically be associated with the parent task.

**Implementation Note**: For the initial implementation it is recommended that only a single-level of nesting be supported for sub-tasks.

Field values supported by a task:

* Name, Due date, Complete flag, Frequency, Description
* Completed-on date (not set by user)
* Contacts, Locations, Web Links

The following are the list of features that **MUST** be supported for managing tasks.

* list view for a task and primary field values
* edit view for the fields of task
  + edit name, due date, complete flag, frequency, description
  + add or remove contacts, locations, web links
    - support auto-complete for contacts and locations
    - associate with parent task or activity
    - auto-complete with parent associations first
  + link to detail view for an associated contact or location
  + link for each web link
* set completed-on date when complete flag is set
* create ‘next’ task when complete flag is set for a ‘recurring’ task
* select a current task
* add a new task, appointment, or list to a task
* view list of tasks, appointments, and lists within a task
  + sort tasks and appointments by date
  + sort completed tasks to bottom of list
  + filter aged appointments out of list (based on setting)
  + filter aged completed ‘one-time’ tasks out of list (based on setting)
  + sort lists in natural order (in a separate list view)
* delete a task, appointment, or list from an task
* allow a task (that does not have children) to be converted into an appointment

The following are the list of features that **SHOULD** be supported for managing tasks.

* integrate with Google tasks (see Google Integration)
* associate contacts, locations, and web links with parent activity

## Appointments

An appointment is an item that defines an event that starts at a specific time and ends at a specific time. The primary fields for an appointment are the name, start time, and end time.

**Note**: Do we need support for recurring appointments in initial implementation?

An appointment supports additional fields for associating contacts, locations, and web links with the appointment. This allows one to organize the people, places, and links relevant to a given appointment.

Field values supported by an appointment:

* Name, Start time, End time, Description
* Contacts, Locations, Web Links

The following are the list of features that **MUST** be supported for managing appointments.

* list view for an appointment and primary field values
* detail view for the fields of appointment
  + edit name, start time, end time, description
  + add or remove contacts, locations, web links
    - support auto-complete for contacts and locations
    - associate with parent task or activity
    - auto-complete with parent associations first
  + link to detail view for an associated contact or location
  + link for each web link
* select a current appointment
* allow an appointment to be converted into a task
* integrate with Google calendar (see Google Integration)

The following are the list of features that **SHOULD** be supported for managing tasks.

* associate contacts, locations, and web links with parent activity

## Lists

A list is an item container for holding list items. A list can be defined within an activity or task. A list can be used to define a list of items associated with an activity or task (e.g. grocery list or gift list).

The following are the list of features that **MUST** be supported for managing lists.

* select a current list
* add a new item to a list
* rename a list
* view items within a list
  + sort items in list by natural order
  + reorder items in a list
* delete an item from a list

### List Items

There will be support for several item types which can be added to a list. The most basic consists of only a name and description.

The following are the list of features that **MUST** be supported for managing basic list items.

* list view of item with primary fields
* detail view for fields of an item
  + edit name, description

### Shopping Items

The following are the list of features that **MUST** be supported for managing shopping items.

* list view of shopping item with primary fields
* detail view for fields of a shopping item
  + edit name, description, quantity, price

### Grocery Items

The following are the list of features that **MUST** be supported for managing grocery items.

* list view of grocery item with primary fields
* auto-assign category for new or modified grocery items using grocery service
* auto-assign picture for new or modified grocery items using grocery service
* detail view for fields of a grocery item
  + edit name, category, description, quantity, price
  + support auto-complete of category using grocery service

## Web Links

A web link is a url to a relevant web page, with an optional display name. A web link may be associated with a Task or Appointment to reference information relevant to that task or appointment. Web links are associated with each instance of a task or appointment.

**Implementation Note**: A list of web links is stored as a JSON array of records in a WebLinks field value.

The following are the list of features that **MUST** be supported for managing web links.

* view and navigate currently defined web links associated with a task or appointment
* add, delete, and edit one or more web links for a task or appointment
  + allow optional display name

## Contacts

A contact is an item which refers to a person and contains relevant information about a person. A contact may be associated with a task or appointment. Contact information is already present in numerous digital sources. The product will simplify the process of associating a contact and managing contact details by importing contact information from sources like Facebook, Google Contacts, phone contacts, or imported contact files. This will provide a source for all possible contacts that may want to be associated with a task or appointment.

Field values supported by a contact:

* Name, Email, Mobile Phone, Home Phone, Work Phone, Birthdate
* Address (as a Location reference)

The following are the list of features that **MUST** be supported for managing contacts.

* import and maintain a list of possible contacts from sources
* maintain list of contacts associated with tasks and appointments
* detail view for the fields of contact
  + edit name, email, phone numbers
  + add location for address
    - support auto-complete of locations
  + link to detail view for address location

The following are the list of features that **SHOULD** be supported for managing contacts.

* a user profile wizard for identifying family contacts
* a dedicated contact management list for viewing and managing all associated contacts

**Note**: Do we need a relationship field for contacts?

## Locations

A location is an item which refers to a place and contains relevant information about a place. A location may be associated with a task, appointment, or contact. Location information will be retrieved using the Google Places API to support auto-complete and retrieve addresses and lat-long information.

Field values supported by a location:

* Name, Address, Email, Phone, Description
* Web Links

The following are the list of features that **MUST** be supported for managing locations.

* use Google Places API to auto-complete places and addresses
* maintain list of locations associated with tasks, appointments, and contacts
* detail view for the fields of location
  + edit name, address, email, phone, description
    - support auto-complete of address
  + add web link for map of address
  + optionally add web link for website of place (if provided)

The following are the list of features that **SHOULD** be supported for managing contacts.

* use location bounds calculated from user profile address or device location
* a dedicated location management list for viewing and managing all associated locations

## Google Integration

The product is designed to integrate and enhance the existing tools and digital information that a person currently uses. Integration with an existing calendar and task list is essential. The initial implementation will focus on integration with Google calendar and tasks.

### Consent

The product must clearly state what services it is requiring consent for and explain the benefits of providing that consent. The initial implementation will request consent for three services:

* calendar, offline access (MH)
* task list (RNH)
* contacts (NH)

The initial consent will be retrieved using OAuth2 protocol via the browser. During the consent process a renewal token will be requested, such that future access tokens may be acquired without the browser. This will be necessary for managing the calendar and tasks via background workflows in the future.

It would be preferable if the user could opt into each of the three services during the consent process. In addition, there should be a means for the user to revoke consent to one or all of the services.

### Settings

A calendar settings interface will be required to allow the user to configure access to their Google services.

* enable (and disable) calendar management (MH)
* display calendar instance being managed (MH)
* select an existing calendar instance to manage (RNH)
* create a “Zaplify” calendar instance to manage (RNH)
* enable (and disable) task management (MH)
* create task list for each activity (RNH)
* enable (and disable) access to contacts (NH)

### Calendar

When calendar management is enabled, any appointments created in the product will be pushed to a designated Google calendar instance. The product requires a calendar instance that has ‘owner’ access for the user, and will by default attempt to identify and use the primary calendar based on the user email address. Optimally, the calendar settings interface will allow the user to select the calendar instance to manage, and optionally have the product create a dedicated “Zaplify” calendar instance.

When pushing an appointment to the calendar, the calendar event id will be stored with the appointment item, while the item id will be stored with the calendar event. This allows the product to correlate appointments with calendar events. Any changes made to either the appointment item or calendar event will then be synchronized between the correlated item and event.

It would be really nice to allow new calendar events to be pulled into the product as an appointment. There are two requirements necessary to do this:

* a convention that indicates which calendar events should be added as an appointment
* a convention that indicates which activity or task the appointment should be contained in

**Implementation Note**: Define conventions for determining which calendar events should be pulled into the product as appointments, and which activity or task they should be pulled into.

### Task Lists and Tasks

When task management is enabled, the activities and tasks created in the product will be pushed to the Google task list. Each activity will be created as a separate task list, while each task will be added to the appropriate list as a task. When a sub-task is created under another task, it will be added to the appropriate task list (corresponding to parent activity) and indented under the parent task in the list.

**Implementation Note**: Google tasks require a date defined as a day, so tasks due on a particular week, month or year will be set to the first day of that week, month, or year.

New tasks created in a Google task list which corresponds to an activity, will be pulled into the product a task item and placed in the appropriate activity folder. If the new task is also indented under another task, it will be pulled in as a sub-task of the appropriate parent task.

New task lists created in Google will NOT be pulled into the product as a new activity folder. A new activity must be explicitly created in the product (which will automatically create the corresponding task list in Google).

**Implementation Note**: Should product support an explicit import mechanism for pulling existing task lists and tasks from Google into the product.

### Contacts

## Facebook Integration

### Consent

### User Profile

### Contacts

## User Profile

### Settings

## Activity Gallery

### Suggested Activities

## Landing Page

## User Registration & Login

## Help

# User Interface & Interaction Design

TBD