Web Portal Design v2

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# User Experience

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

## 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 allow the 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

## Existing User

An existing user navigates to the product landing page and is 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 dashboard.

## Dashboard – First login

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

### Learn About Zaplify

There will be a category that contains a set of “special” tasks designed to help the user get started and learn about the product. The user will be encouraged to connect to other information sources, configure their user profile, and select standard activity templates which may be applicable to their lifestyle.

### Getting Started

This task list will contain a set of tasks for helping the user get started with the product.

#### 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 in 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 list 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 task list, Zaplify can easily keep tasks created in a Google synchronized with Zaplify. A similar convention will be required for identifying appointments created in Google Calendar which should be synchronized into a Zaplify appointment.

#### 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 assign colors or icons
* Occupation (NH)
* Education (NH)

#### Task Gallery

This task will tell the user about gallery of standard Task Lists and how to add them to their 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 gallery the task will be marked complete.

### How To …

This task list will contain a set of 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 tasks, recurring tasks, and appointments?
* How to create a task, recurring task, and appointment
* How to rename, reorder, and delete a task, recurring task, and appointment
* How to associate contacts, locations, and web links with tasks and appointments
* How information is organized around a task, recurring task, or task list
* How information for a task, task list, or appointment can be utilized on your mobile device
* How tasks and appointments are synchronized with Google Calendar & Task lists
* How to create item lists
* How to publish and share a calendar or list for a category
* How to utilize the task gallery
* How to configure Google Calendar and Task management

### Personal

This category will contain a set of task lists 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.

#### Pampering

#### Haircut (every 2 months)

#### Exercise

#### Workout (3 times per week)

#### Health Care

#### Dental Checkup (every 6 months)

#### Physical Exam (every year)

# Scenarios

The following attempts to categorize activities into a set of standard scenario types. The term *reminder* is used to define an event that is usually a day or longer. The term *appointment* is used to define an event that starts at a specific time and is less than a day.

## Reminder

A reminder is an activity that occurs at some frequency and is intended to remind the user of something. A *reminder* (day or longer) will be generated and added to the calendar. The user will typically want to complete, defer, or cancel the generated *reminder*.

Recurring at some frequency, short or long

Duration is day or longer (duration >= day)

Typically for personal use, not shared or published

Generates reminder appointment

Can generate more than one reminder (count >= 1)

Generated reminder can be completed, deferred, or cancelled

Related information is usually same for all reminders

**Examples**: Take out trash, Mow the lawn, Pay online bills, Pay property taxes

**Notes**: This is can be accomplished by a calendar using all-day recurring appointments. When the related information is the same for all occurrences, the product value is limited. When the related information is variable, the product can reduce friction in setting those.

## Task

A task is an activity that occurs at some frequency and is intended to remind the user to perform some task. A *reminder* (day or longer) will be generated and added to calendar. The user will often create related appointments for completing the task. The user will typically want to complete, defer, or cancel the generated *reminder*.

Recurring at some frequency, usually longer

Duration is day or longer (duration >= day)

Typically for personal use, not shared or published

Generates reminder appointment

Generate only one reminder appointment at a time (count == 1)

Often related appointments are defined by user

Information is often attached to the related appointments

Information for each related appointment is often different

Information wants to be saved with activity for future use

Generated reminder can be completed, deferred, or cancelled

**Examples**: Clean the gutters, Wash the windows, Change the oil

**Notes**: This is primary scenario for the product and one where a calendar and task list is sub-optimal. The product allows one to organize, manage information, and manage appointments for a given task.

## Recurring Appointment

A recurring appointment is an activity that occurs at some frequency and is intended to schedule a confirmed appointment. These appointments occur at the same time each occurrence and usually at the same place with the same people.

Recurring at some frequency, usually shorter

Duration is less than a day (duration < day)

Typically for personal use, not shared or published

Generates confirmed appointments at a given start time and duration

Can generate more than one appointment at a time (count >= 1)

Information for each appointment is usually the same

Often seasonal, where the activity wants to be activated and deactivated

**Examples**: Aerobics class, Piano lessons, Bowling league

**Notes**: This is very close to a standard recurring appointment on a calendar. When the related information is the same for all occurrences, the product value is limited. When the related information is variable, the product can reduce friction in setting those.

## Fuzzy Appointment

A fuzzy appointment is an activity that occurs at some frequency and is intended to schedule a tentative appointment that will later be confirmed by the user. The tentative appointment will be scheduled for the either the day or start of day, and the user will typically modify the exact time and confirm the appointment. Each occurrence is often confirmed for a different time (usually a set of times). Sometimes the user will want the same place and people on each appointment. Usually the user wants to quickly select from a set of relevant places and people.

Recurring at some frequency, usually shorter

Duration is less than a day

Typically for personal use, not shared or published

Generates tentative appointments at start of day with duration

Start time is usually modified and appointment confirmed by user

Information for each appointment may or may not be the same

Often seasonal, where the activity wants to be activated and deactivated

**Examples**: Workout, Haircut, Dentist, Soccer practice

**Notes**: This is primary scenario for the product and one of the most common scenarios for which a calendar is sub-optimal.

## Schedule

A schedule is an activity where the appointments and related information are managed by the user. A confirmed appointment will be created and added to the calendar. Often times the user wants to share the schedule with others. Sometimes the user will want the same place and people on each appointment. Usually the user wants to quickly select from a set of relevant places and people.

Appointments defined by user (frequency == none)

Often shared or published for others

Does not automatically generate appointments

Information for each appointment may or may not be the same

**Examples**: Soccer game scheduler, Bridge club organizer, Seahawks season ticketholder

**Notes**: This is very close to managing appointments on a calendar. The product adds value in aggregating relevant information (or allowing user to attach) and use that information to more easily create the appointments. Each created appointment can also be pre-configured with a default place and people.

# User Model

The high-level user model for using the product is registration, configuration, activity organization, and schedule management.

## Registration

Registration is a one-time process for creating an account given an email address and a password. Registered users will sign-in to their account using email and password and will be issued an authentication cookie to bypass the sign-in process.

## Configuration

There are several areas of the product that require configuration in order to make the product useful. The primary configuration is for integration with a Calendar (Google). The product will integrate appointments associated with activities onto the Calendar. Other features requiring setup and configuration are Facebook integration for contacts, gathering of User Profile information, and display settings and user options.

## Activity Organization

This is where the user defines and organizes the recurring activities they want to schedule. An activity gallery and activity wizards can help in quickly creating and organizing activities relevant to the user.

Activities may be organized in a two-level hierarchy of categories. A category is nothing but a container for activities. An activity is a container for appointments, and can be configured with a frequency at which tentative appointments will be generated. These tentative appointments represent the intent to complete the activity. One may also add appointments directly to an activity. The following represents the user model for organizing activities.

Category // Folder

       Activity // List + Item

              Appointment // Item

       Category // List

              Activity // List + Item

Activity

       Frequency // How often activity occurs

       Duration // Duration for tentative appointments (1 day)

       Count // Number of tentative appointments (1)

Start // Start date or time for tentative appointments

Appointment

       Start // Starting date or time

       Duration // Duration of appointment

       Status  // Tentative, Confirmed, Cancelled, Completed

Both activities and appointments may have additional information attached to them, specifically contacts, locations, and links. Information attached to an appointment will be collected and aggregated on the parent activity. The aggregated information can be used to quickly access information about an activity or used to more easily configure a new appointment within an activity with relevant information. The information attached to an appointment will be synchronized with the corresponding calendar event (contacts as attendees, location as location, links in description or gadget).

**Note**: Should appointment support just a single location (like the calendar event) rather than a list?

## Schedule Management

This is where the user can view and update the status and information on upcoming appointments.

### Refining Time

A common schedule management feature will be to specify the precise time and duration for a tentative appointment that was generated by an activity. The schedule management view should make it quick and easy to refine the tentative appointment or create a related appointment with a specific time and duration.

One may also edit the event on the calendar to update with a specific time. Creating a related appointment on the calendar will require a convention for indicating which activity the appointment should is related to.

### Changing Status

Another common schedule management feature is to modify the status of a tentative appointment that was generated by an activity. The schedule management view should make it quick and easy to complete or confirm, defer, or cancel a tentative appointment.

Multi-day and single-day appointments are typically either a reminder or a task. A reminder is typically resolved by setting the status to complete or cancelled, which should remove the reminder from the calendar. A task is typically resolved by defining one or more specific appointments which are scheduled to resolve the task. As with the reminder, the multi-day appointment for the task is typically resolved by setting the status to complete or cancelled.

**Note**: There is not a good way to resolve a multi-day appointment in the calendar. Using a task restricts the duration to a single day. Perhaps a task can **also** be added on the last day of the multi-day appointment. Marking it complete would be equivalent to setting status to complete in product.

# Examples

The following will describe how an activity is defined to support each of the activity scenarios and how the activity and appointments integrate with a Calendar.

## Reminder

The first example is a reminder activity to take the trash out each Tuesday. One could add the disposal company as a contact on the activity. This contact could be marked as a default, and would be added as a contact to all appointments created within the activity.

Activity

Name: Take out trash

Frequency: Once per week, Tuesday

Duration: All day

Count: 4

Contacts

Disposal Company (default)

While this activity is active, it will generate four future appointments for the next four Tuesdays. When the date for the nearest appointment is past, the next appointment will be generated, such that there are always four future appointments.

Appointment

Name: Take out trash

Start: {date}

Duration: All day

Status: Tentative

Contacts

Disposal Company

The initial status for each generated appointment is ‘tentative’. The user can change the status to ‘completed’ or ‘cancelled’, or the user may defer the reminder (push back a day or more). A ‘tentative’ appointment whose day has passed will automatically have the status updated to ‘completed’.

There are two possible options for integrating all-day appointments with Google calendar. One could add an all-day event to the calendar OR one could create a task. The only advantage to the task, is that is provides a nice checkbox for indicating a status of ‘completed’. A major disadvantage to using a task is that it is not supported by the calendar applications in most mobile devices. For completeness, both options are described, but it is recommended that the calendar integration be utilized.

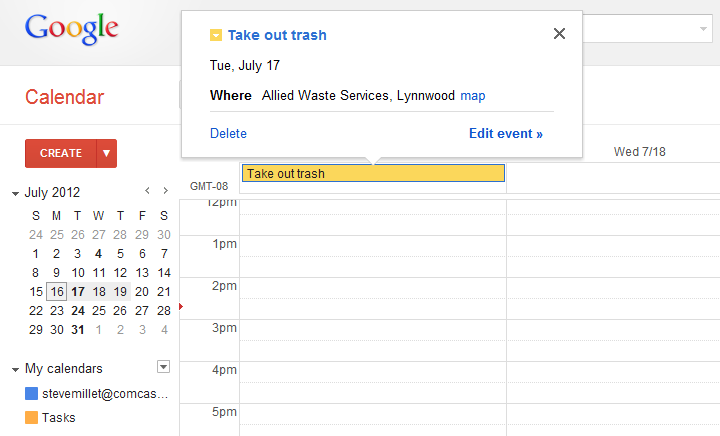
### Calendar Integration

For each appointment added to the activity, an all-day event will be added to the calendar. The event will be given a color to indicate it is associated with an appointment in the product.

Using a calendar event will allow a location to be set. If the appointment has a location, it can be set on the event. If the appointment has a single contact, the location of the contact can be set on the event. This would provide a quick link to a location and information for the disposal company while in the calendar.

Using a calendar event does not provide a means for setting the status to ‘completed’. One can delete the all-day event, which will set the event status to cancelled and remove it from the calendar. The product could interpret deleting the event as a cancellation, and set the corresponding appointment status to ‘cancelled’. It may be possible to implement a calendar event gadget that would allow the status to be changed to ‘completed’ and provide a visual indicator of status.

One can easily drag and drop the event back a day or more to defer the reminder, and the corresponding appointment will be updated.

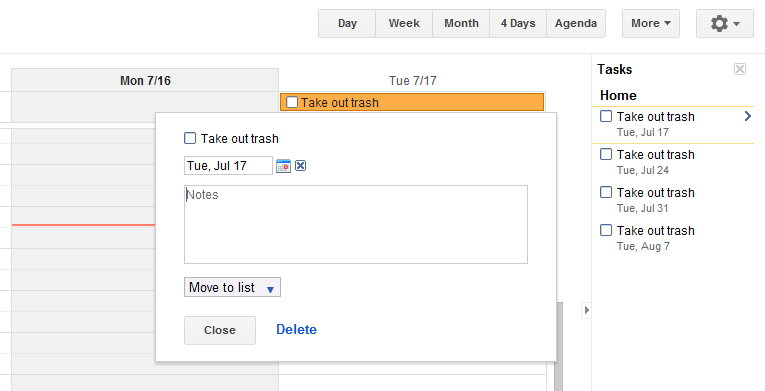


### Task Integration

For each appointment added to the activity, a task will be added to a task list. The Google tasks support a single-level for task lists, so the product would create a task list for each top-level category. In this case, let’s assume the activity was organized within the top-level category, “Home”.

For each appointment, a task named “Take out trash” will be added to the “Home” task list with the date set to the appropriate Tuesday. This causes a ‘task’ entry to be added to the calendar which includes a checkbox for easily marking the task as complete. Checking the task checkbox will set the status of the corresponding appointment to ‘completed’. Deleting a task will set the status of the corresponding appointment to ‘cancelled’. The date of the task can be modified to defer the task a day or more.

The task does include a description field, which could be used for including location or contact information. Unfortunately, when links are added to the description, they are not rendered such that they can be navigated. A user would be required to cut and paste the link into a browser.



# Features

The web portal will be designed to support the following set of features. The schedule manager will be the primary view for tracking and updating tentative appointments. This view should be integrated as tightly as possible with the Calendar user interface.

The activity organizer will focus on organizing the categories and activities one wants to track. As stated in the user model, the product must support at least a two-level categorization for organizing activities.

The product will continue to maintain folders for Contacts and Locations, but these will not be displayed in the organization hierarchy. A dedicated user-interface for managing contacts and locations could be supported.

## Category

A category is an organizing container (folders and lists). The goal is to keep the number of top-level categories a user defines and manages to less than ten. A sub category (list) can be created to further organize activities. Example of categorization:

Personal

Hair & Body

Exercise

Health Care

Home

House Maintenance

Yard Maintenance

Vacation House

Auto

Honda Ridgeline

Mazda 3

Kid’s Activities

Sophie

Beck

Finance

House

Auto

Utilities

Taxes

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

* support two-level categorization (category and sub-category)
* view the list of categories and sub-categories
* create a new category or sub-category
* delete an existing category or sub-category
* rename an existing category or sub-category
* reorder the list of categories
* reorder a list of sub-categories
* select a current category or sub-category
* add a new activity to a category or sub-category
* delete a child activity from a category or sub-category
* view child activities by expanding or collapsing a category

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

* reorder the child activities contained within a category or sub-category
* publish a public Google calendar for all appointments within a category
  + access to calendar can be set in Google
* share a category with a list of email addresses
  + send email with links to published calendar
  + provide read-only access for registered users

## Activity

The activity is the primary concept for the product. It is both a container (list) for managing a set of related appointments and an item with field values and attached data. An activity typically defines an event that occurs at some repeating frequency, where an appointment is the end result of each event for that activity.

The primary fields for an activity are the name, frequency, duration, and count. The frequency indicates how often the activity is performed. This field is used to determine how often an appointment is generated for this activity. The duration is the default value used on the generated appointments. The count is used to determine how many tentative appointments should be generated and maintained within the activity.

An activity can have a frequency of ‘none’ and used to explicitly manage appointments and information related to that activity. An activity can also be deactivated which temporarily stops it from generating tentative appointments and is useful for seasonal activities (e.g. sports or lawn mowing).

Activity

Name

Frequency

Duration

Count

Contacts

Locations

WebLinks

Examples of common activities are:

Personal

Hair & Body

Haircut // every month

Exercise

Workout // 3 times per week

Karate // once per week

Dentist // twice per year

Doctor // once per year

Home

House Maintenance

Clean gutters // every September

Clean furnace // twice per year

Wash windows // every May

Yard Maintenance

Mow lawn // once per week

Water pots // every 3 days

Trim hedges // every year

Auto

Honda Ridgeline

Change oil // every 4 months

Tune-up // every year

Renew Tabs // every year

Mazda 3

Change oil // every 4 months

Tune-up // every year

Renew tabs // every year

Kid’s Activities

Sophie

Soccer practice // twice a week

Soccer game // every Saturday

Beck

Wrestling practice // 3 times per week

Wrestling match // twice a week

Finance

Income taxes // once per year (April 15)

Pay bills online // twice per month

House

Loan // 1st of each month

Insurance // 15th of each month

Property taxes // twice per year (April & Oct)

Auto

Loan // 1st of each month

Insurance // 15th of each month

**Implementation Note**: An activity will be represented by a list item in the data model. In addition to the child appointments, an activity will contain field values for associating data relevant to the activity. For example, there may be a list of relevant contacts, locations, or web links. This relevant data can be used as context for defining field values for child appointments created within the activity.

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

* rename an existing activity
* select a current activity
* modify fields of an activity
  + name, frequency, duration, count
* add a new appointment to an activity
* view list of appointments within an activity
  + sort appointments by date
  + sort completed and cancelled appointments to bottom of list
  + filter aged appointments out of list (based on setting)
  + change status of an appointment in list view ( complete or cancel )
  + defer an appointment in list view

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

* delete an appointment from an activity
* manage contacts, locations, and web links associated with an activity
  + flag those contacts, locations, web links to apply to each new appointment (defaults)

## Appointments

An appointment is an item that defines an event that occurs at some start time and duration. The primary fields for an appointment are the name, start, duration, status, and description.

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

Appointment

Name

Start

Duration

Status

Description

Contacts

Location

WebLinks

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, duration, status, description
  + add or remove contacts, location, web links
    - support auto-complete for contacts and location
    - 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
* integrate with Google calendar (see Google Integration)

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

* automatically add contacts, location, and web links on the parent activity

## 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 an activity or appointment to reference information relevant to that activity or appointment. Web links are associated with each instance of an activity 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 an activity or appointment
* add, delete, and edit one or more web links for an activity 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 an activity or appointment.

Contact

Name

Email

Mobile Phone

Home Phone

Work Phone

Birthdate

Address

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 activities and appointments
* import from sources, information for field values when adding a new contact
* detail view for the fields of contact
  + edit name, email, phone numbers, birthdate
  + 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 an activity, appointment, or contact. Location information will be retrieved using the Google Places API to support auto-complete and retrieve addresses and latitude-longitude.

Location

Name

Address

Email

Phone

Description

WebLinks

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 activities, appointments, and contacts
* detail view for the fields of location
  + edit name, address, email, phone, description
    - support auto-complete of address
  + add or remove web links
  + 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 locations.

* 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 is essential. The initial implementation will focus on integration with Google calendar.

### 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)
* 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 via background workflows.

It would be preferable if the user could opt into each service 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) 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.

### 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