

The Birthday Special Occasion Reminder application is a program that can be installed on a mobile device such as an Apple iPhone, Android phone, Windows Phone, iPad or other mobile devices that are capable of installing applications from Google Play, Apple AppStore or Windows Phone store.

Special Occasions Process Book

jQuery Mobile Application

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DESIGN PLAN

Concept Introduction

The Birthday Special Occasion Reminder application is a program that can be installed on a mobile device such as an Apple iPhone, Android phone, Windows Phone, iPad or other mobile devices that are capable of installing applications from Google Play, Apple AppStore or Windows Phone store.

There are many programs out there that allow one to set a reminder for a birthday or special occasion but there are none that can send a message on the user's behalf. Other reminder programs require the person to log in before they can use the program. Facebook and Amazon have a special occasion reminder application but still need the user to act on the reminders.

Some online greeting cards allow one to send cards for a specified date but they do not allow the user to keep a personalized list of dates for future use. Or they charge a fee to the user to have access to those features and they need to log into the site to be reminded of those events and to send a greeting.

By utilizing the memory on the mobile device's phone this program will allow the user to create a list of upcoming dates and tie them to the contacts in their phone's contact list. The program will then use the provided information to send a message on the user's behalf to the recipient on their special occasion or birthday. The program will also remind the user a week before the event to let them plan for that event. The user can choose to increase or decrease the amount of time between the events for them to be reminded of it.

User Goals

- Remind the user about the special occasion or birthday a week before the event.
 - The reminder time can be increased or decreased by the user.
- Send a text message, tweet (if they use twitter.com), post, or an email on their behalf to the person who is having the birthday or special occasion.
 - Users usually can select what method, such as text message, tweet (a post to twitter.com), Facebook post, or email, that they would like the application to send their friends or family.

Target Audience

Age Range: 15-60

Education Level: High School/College

Tech Comfort Level: Beginner to Intermediate

Other Products Used: Smartphones, tablets, home computer or laptop, Facebook

Personas

Persona #1



Name: Maria Gonzales

Age: 34

Occupation: Working Mom

Income Level: 45,000

Education Level: Associates Degree

Personal Background Information: Maria is the type of woman who has a full schedule and tries her best to remember her families and myriad collection of friends' birthdays or special occasions. However, sometimes her calendar gets so full that it is difficult to keep the dates straight. Maria does not like buying applications needlessly for it clutters her mobile device. But, she is willing to try an application to see if she likes it and to see if it helps her maintain her busy schedule.

Reason for Using the Product:

1. Clear up her calendar from birthdates and special occasions.
2. Ability to plan ahead for upcoming occasions.
3. Peace of mind knowing she will not forget anyone's birthday or special occasion.

Persona #2



Name: Dale Smith

Age: 48

Occupation: Client Representative

Income Level: 58,000

Education Level: Bachelor's Degree

Personal Background Information: Dale Smith is the kind of guy that works late because he loves his job. He works at an AD agency that has late hours and which can take away time from his family. He uses his iPhone's calendar to help keep track of meetings and other miscellaneous appointments. He is a busy man. Dale sometimes gets so involved in his work that he misses calling the family member that has a special event. He's the type of guy that would appreciate something to send a note on his behalf to the friend or family member with the special occasion.

Reason for Using the Product:

1. Let family or friends know that he still remembers them by sending them a special text message.
2. Reminders about the upcoming special occasion.
3. De-clutter his iPhone's calendar.

Persona #3



Name: Sally Jenkins

Age: 16

Occupation: Student

Income Level: Allowance

Education Level: High School







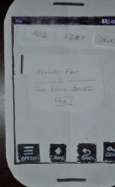



Personal Background Information: Sally is an avid texter, person who sends and receives text messages, and is constantly in contact with her friends or family via text on her phone. She babysits on the side to earn a little more income to add to her allowance.

Reason for Using the Product:

1. Keep family and friend's special occasion dates organized to prevent embarrassing situations where she would wish the wrong person a happy occasion.
2. Be able to wish her family and friends a happy occasion by text, tweet, Facebook post or email on her behalf.

Paper Prototype

Paper Prototype Pictures

 <p>A paper prototype of a mobile app home screen. It features a large empty rectangular area with a small blue square in the top-left corner. At the bottom, there is a navigation bar with four icons: a list, a plus sign, a refresh, and a search.</p>	 <p>A paper prototype of a welcome screen when there are no records. It displays the text "Welcome to the app" and "No records found" in the center. The bottom navigation bar is visible.</p>	 <p>A paper prototype of a welcome screen when records are present. It displays the text "Welcome to the app" and "You have 1 record" in the center. The bottom navigation bar is visible.</p>
 <p>A paper prototype of a screen for adding an occasion. It contains a form with fields for "Occasion Name", "Date", and "Time". There are "Add" and "Cancel" buttons at the bottom. The bottom navigation bar is visible.</p>	 <p>A paper prototype of a screen for choosing a time to remind. It shows a list of time slots (e.g., 10:00, 11:00, 12:00) with radio buttons next to them. The bottom navigation bar is visible.</p>	 <p>A paper prototype of a screen for choosing a message type. It displays a list of message types (e.g., Text, Image, Video) with radio buttons. The bottom navigation bar is visible.</p>
 <p>A paper prototype of a screen showing a record has been added. It displays the text "Record Added" and "You have 2 records" in the center. The bottom navigation bar is visible.</p>	 <p>A paper prototype of a screen to view a record. It displays the text "See Record" and "Record Details" in the center. The bottom navigation bar is visible.</p>	 <p>A paper prototype of a confirmation screen for deleting a record. It displays the text "Are you sure you want to delete this record?" and "Yes" and "No" buttons. The bottom navigation bar is visible.</p>
 <p>A paper prototype of a screen showing a record has been deleted. It displays the text "Record Deleted" and "You have 1 record" in the center. The bottom navigation bar is visible.</p>		

Paper Prototype Test Results



Chuck (age 35)

Overall ease of use for the app: Easy.

Chuck had no problems going through the application; though he did remark that the device was rather large. It was explained that it is for testing purposes only to allow for larger screens of the application.

While going through he remarked that he would love for the application to hook into his contacts so that he could pick and choose people instead of entering them in one by one. He also requested the ability to hook into the social media.

An additional request was to specialize the greeting that the application would send on your behalf to the recipient.

Chuck also remarked that use of "reminder" set his expectation that the application was going to be like a calendar that would allow him to set other type of reminders instead of sending texts to friends about their birthday or anniversary. He suggested the word event would be better to use for this application.



Patricia (age 33)

Overall ease of use for the app: Easy.

Patricia was able to use the application with no issues and actually named a couple of "nice to haves" while going through the test. Suggested the ability to add their own categories for the occasion when they chose the type of occasion. It was pointed out that a mobile device cannot have infinite pop-ups and that the adding/editing of a record should be its own page that returns you to the list after you are finished.

Ginger (age 34)

Overall ease of use for the app: Easy.

The wording of elements on the adding an occasion page needs to be clarified for the date portion didn't have years but has been requested. Also need to label what fields in the date section pertain to what portion of the date.

They dynamic fields were a little hard to deal with since we were using paper and had to move names and occasions to the different screens.

Findings

1. Did paper prototyping reveal any unexpected problems?

Yes. It revealed the issue with the date field. Also it revealed that if its only one record then it should be highlighted or chosen automatically for the edit/delete action. The use of words needs to be considered carefully or it will cause confusion as to what the application is capable of doing.

2. Did paper prototyping confirm any of your existing concerns about your interface design?

About the dates it did for I was unsure as to whether or not to include the year field with the occasion. One thing I did not think of was the constant or infinite popups so necessary pages will be added to avoid the infinite popups.

3. Do you feel that working with a paper version of your interface helped you organize your content and navigation?

It did help to figure out where things needed to go in the app. It's easy to overlook things on the computer. Where by doing it by hand it makes us think about all the required steps for the application.

4. Did responding to the user's actions during testing help you "think like a computer"? Did it help you find a hole in your design that left you wondering, "So, what happens now? How do I (as the computer) respond to this?"

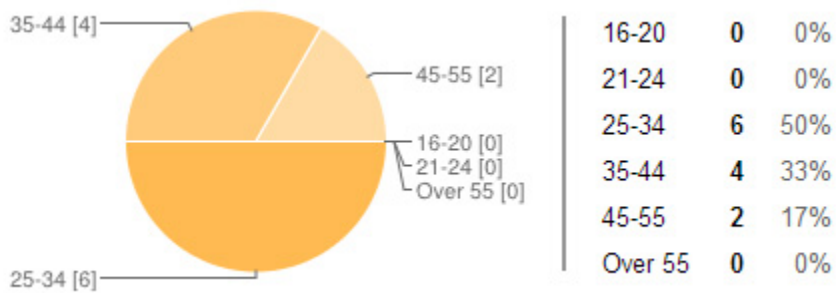
I'll be honest and say that "think like a computer" was difficult. I wanted to give more information than necessary when the user was testing my application. There were no holes from what we could find while running through the usability test.

Usability Test Results

Project Summary:

Special Occasions is a mobile application that will allow you to set reminders for birthdays and anniversary. It will also allow you to have it send a text or email on your behalf to the person(s) that is having the birthday or anniversary. It is currently in the early stages and needs your feedback to make it into an easy to use application.

Age Group:



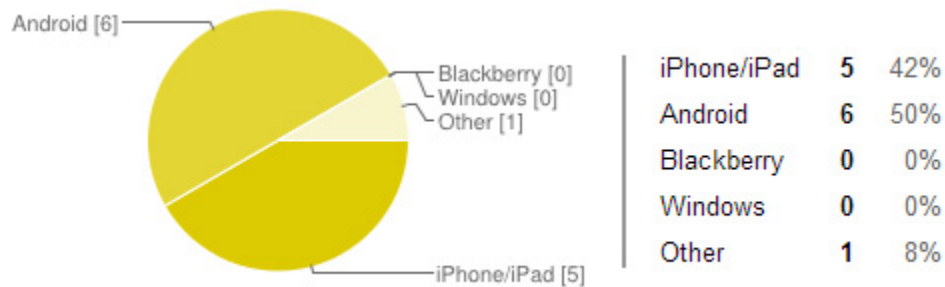
The majority of the age group that tested this application is in their early thirties. Following that age group was the mid to late thirties and early forties. The trend of difficulties with the application correlated with the tester's age revealing issues that need to be addressed to make it easier for them to use the application.

Mobile Device ownership:



All test users owned a mobile device of some type.

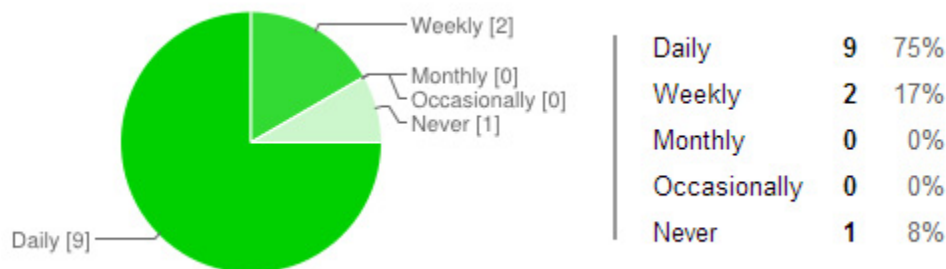
Type of mobile device:



Many of the test users owned either an Android device or an iPhone/iPad. There was only one that had a device with a different platform on it.

By knowing which device OS I will need to target will help with building the app and addressing issues that are localized on that type of mobile device.

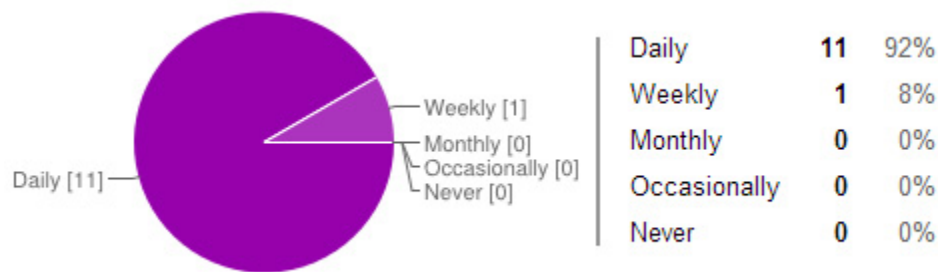
How often applications on the mobile device are used:



The app usage on the mobile device was mostly daily but there are a few users that said that they use them on a weekly basis. Only one said that they do not use apps on their device.

The usages of applications on the mobile device determines how likely they will be able to intuitively know where things are in an application. For the ones that are rare to use an app then it is their feedback that need to be paid attention to more because it should be easy for someone to use an app no matter how many times they use it. A user should not have to remember how to use an app on their device.

How often is the internet used on either a computer or other devices?



By knowing how often the user uses the internet helps determine if additional features or modes of communication should be added to the application.

Most of the users were a daily basis use for the internet where there were some that only used it on a weekly basis due to other activities.

The kind of applications used on a mobile device compared to what they do on the internet:

Emails, games, social media, calendar, keeping track of sports or the news and shopping were both recorded as usually activities on mobile device applications and the internet.

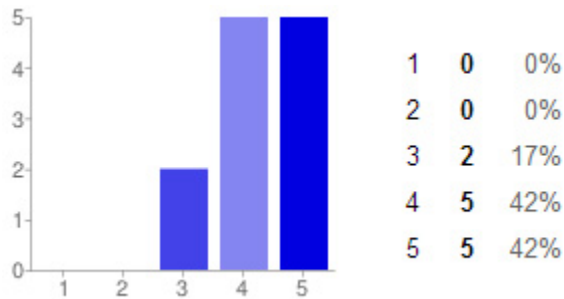
For the internet the use of chatting was recorded but texting could be an equivalent.

It is apparent that mobile device applications are streamlining and mirroring our everyday internet usage activities.

Requested Tasks of the user when they performed the usability test:

1. You just remembered that you need to add your best friend Jane's birthday that is on the 8th of March and to set a reminder so that you can send her a nice birthday gift.
2. You realized that the occasion is not Jane's birthday but it is her wedding anniversary instead so you need to go back and change it to be reflected as an anniversary special occasion.
3. You have received word that your Uncle Jay's birthday party will be on April 18th but you want to send him a text automatically with the app because you will not be able to make it to his party due to work or get him anything because of lack of funds.
4. You just met Jim and found out that his birthday is September 25th. You want to send an email greeting to him automatically with the following message: "Happy Birthday Jim! Have an awesome birthday!"
5. You and Jane just had a falling out and are no longer friends. You now want to remove her from your special occasion's reminder list.

Did the user find the requested tasks to be easy?



Many found the tasks to be easy while some found them to be hard and frustrating due to the labeling on some of the application's form fields.

Responses about the requested tasks and if they had any suggestions on making them easier:

Good

- They all seem cut and dry and all user friendly to use.
- It was very user friendly. It was all easy to enter very clean
- None of the tasks seemed that hard.
- It was all a breeze
- None of the required tasks were difficult to do.
- Everything else was easy to do - I especially liked the popup calendar for choosing dates.

Neutral

- Adding a reminder if you don't have contact information for the person. This might be easier if these were only required if you wanted to send a message.
- One thing that would have made it easier is to indicate that the fields in the tasks refer to the recipient vs the user; when creating my first event I was uncertain of whether it wanted the recipient information or my own.
- After seeing the notification options though it made more sense.

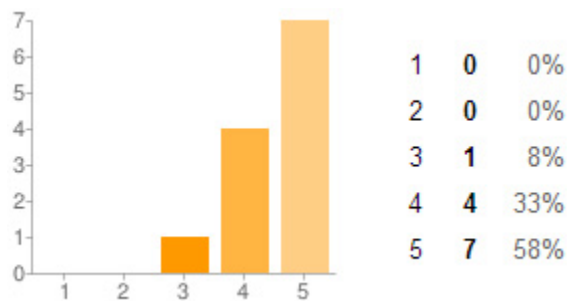
Issues

- After selecting DELETE to delete Jane, the app defaults to the first person on the list. It was indeed Jane, but it wasn't super obvious that was the situation. However, you do offer a confirmation message, which Facilitated the user being made aware and then I

could easily select CANCEL and go back to confirm the proper contact/reminder was deleted properly.

- The **prefilled message had to be manually deleted**. Is there a way to automatically have it disappear when it is clicked upon?
- **Entering the personal message and phone#, it said not a valid msg or number**
- The required phone number and email address for a friend. Prompt the user to enter the necessary information when they choose the type of message.
- **It would not accept the phone number I keyed in and I could not go past the first task.**

Did the user find the navigation of the mobile application to be easy?



Responses in regards to the application's navigation:

Good

- very user friendly and easily learned
- Unlike a lot of mobile applications, I liked the flow of this one... Seems written from a user point of view than programmers point of view.
- Simple to use and well labeled
- The simplicity and clean-ness of the app was evidenced by very simple navigation and helpful pop-up windows. Those were a definite value-add.
- very smooth nav and simple
- Seems intuitive

- It easy to modify if needed and to enter new information. I found that once I entered Jane's information and then entered Uncle Jay that the date changed on both. Jane's was not in April instead of the March date that I had originally entered. So when you change the date in one it changed all the was entered.
- easy to navigate and understand without looking at the instructions
- I thought that navigation was very straightforward and clear...I realize that this is not a finalized UI but I liked the lack of clutter on the main screen as well as the linear process for adding events. That made it easy to tell what I was about to do.

Neutral

- I don't like that you have to enter an email or phone number for the entry. If it is just a reminder function why would I need this information? Maybe this pops up only if you have entered "yes" to the send a greeting.
- It's simple but there are a few elements that I would change such as the screen that popups after you click on the radio button. I think that should be a button that takes you to another page.

Issues

- didn't get past first page

Responses about vague or confusing elements within the Special Occasions app:

- There wasn't anything that was vague or confusing, just as stated above I think information is being entered that may not be needed all the time.
- It would be nice if the phone number can be converted behind the scenes somehow. I entered it with dashes only to have to go back and take them out because there wasn't enough room for the last two numbers.
- How to edit/delete. User should be able to double-tap on a name to edit or delete.
- Where I would update the message for the automated message to be sent on my behalf.
- I mentioned the fields - at first I was not sure if the app wanted my information (for instance to send me reminders via email/text) or whether it wanted recipient info. That was clear as I set the reminders though. That was the only thing that I found confusing.

Additional elements that should be included in the Special Occasions app:

- I think the main screen should indicate what the event or occasion is for, currently it only states the person's name.
- What if I have 5 things happening with Uncle Jay? How will I know what is what on what day? I think it should show the date as well. So it would be Uncle Jay - 4/18 – b'day party or something similar. When it is sending a message does it send it on the date you entered for the occasion? Say if it was for Uncle Jay's b'day party maybe your RSVP should go a day early. Maybe a date sent for message would be nice.
- Ability to set a location for a gathering on the event day might be useful
- The ability to add different categories.
- Who is your service provider? (AT&T, Verizon, Clear, T-Mobile)
- Ability to define the time of the event. I would not want to wake someone up by telling them happy birthday at 12:01am. :)

The elements that were liked best about Special Occasions:

- I like it because you have less to remember
- Hopefully, it will work on both iPhone and Droid OS
- It was nice very easy to use. I like that it will send the message for you.
- Automated text messaging is a nice feature.
- Ease of navigation and pop-up windows/confirmation windows
- Very simple to navigate

- It seems fairly easy to use.
- It is a simplistic design
- Very simple; thought it was pretty simple to enter the first task
- Easy functionality and flow
- I like the idea in general - I have always thought that there should be an easy way to schedule and auto-send SMS and email. Again, I liked the simplicity as well.

The aspects of Special Occasion that were not liked and requested to be altered responses:

- I know this is nitpicky but I'd use symbols (like + for add and the trash can for delete).
- The required fields are a slight issue.
- The color scheme
- telling me not valid phone number
- How to edit/delete. User should be able to double-tap on a name to edit or delete.
- I think icons determining what type of event is saved would help.
- Couldn't get past the number entry issue and it was frustrating
- Possibly make it a little less aesthetically bland?
- One thing that I would like in a final product would be the addition of basic information about the timing of the events on the main screen. Like maybe 'Jim' in larger letters and then a string describing the basics, e.g. 'Birthday on Sept 28th, Email msg scheduled.' or something along those lines.

- It would also be cool if the event list was ordered based on event date, so that I could more easily see what was coming up first.

Plan of action in regards to the responses:

- Better validation that informs the user of how to resolve the issue.
- Mask the phone number field so that the user only needs to enter numbers and does not try to add dashes.
- Also need to put the word “phone” before the word “number”.
- Example of input will be added so that they have an idea of what the field is expecting.
- Change the required fields to ask information based on their choices. Email and phone numbers will no longer be required unless the user choose to send an automated greeting to their friend.
- Delete will no longer have the first item in the list selected and will prompt the user to choose an occasion to delete.
- Allow scheduling of greeting so that the recipient does not get a text at an inconvenient time.
- Add icons that show what type of event it is on the list page.
- Ability to order the list by which event is closest.
- Use symbols for the navigation.
- Make it clear to the user that the information being added will be about the friend and not their own information.
- Make the color scheme less bland.

Project Summary and Resolutions

Based on the Usability Test Results the following list was made for improvements on the Special Occasions Mobile Application

- Better validation that informs the user of how to resolve the issue.
- Mask the phone number field so that the user only needs to enter numbers and does not try to add dashes.
- Also need to put the word “phone” before the word “number”.
- Example of input will be added so that they have an idea of what the field is expecting.
- Change the required fields to ask information based on their choices. Email and phone numbers will no longer be required unless the user choose to send an automated greeting to their friend.
- Delete will no longer have the first item in the list selected and will prompt the user to choose an occasion to delete.
- Allow scheduling of greeting so that the recipient does not get a text at an inconvenient time.
- Add icons that show what type of event it is on the list page.
- Ability to order the list by which event is closest. – Added a search function instead.
- Use symbols for the navigation.
- Make it clear to the user that the information being added will be about the friend and not their own information.
- Make the color scheme less bland.

The highlighted elements were implemented in the revised application. Two of the suggestions were not completed due to the complexity and additional time required.

Such as scheduling the greeting would require proper time zone to ensure that the message was sent at an appropriate time.

Masking the phone number field would have been a nice to have but not necessary with the improved error messaging and input field examples.

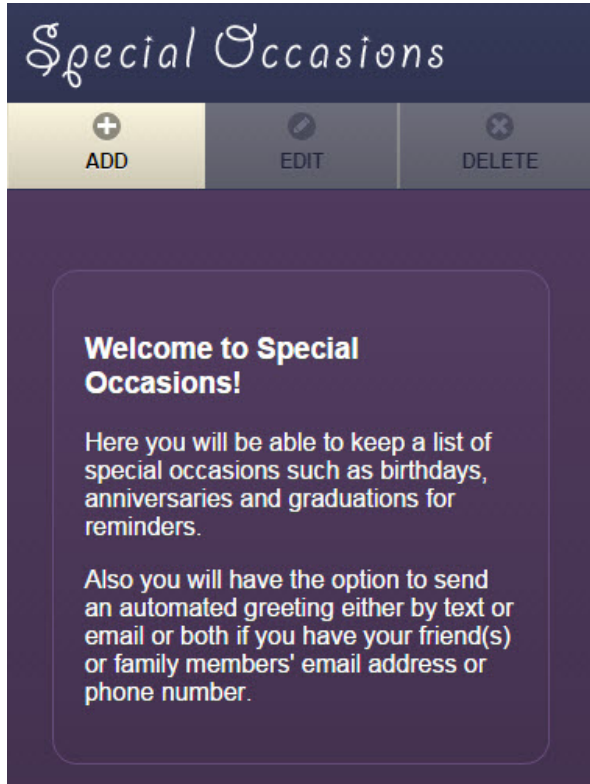
The ability to order the list by which event is closest only works if the events are hidden based on the time of year which requires additional time to configure the list to hide those items. Instead a search box was implemented to allow for quick search of a certain person or event.

Device Showcase



Screenshots

Start Screen



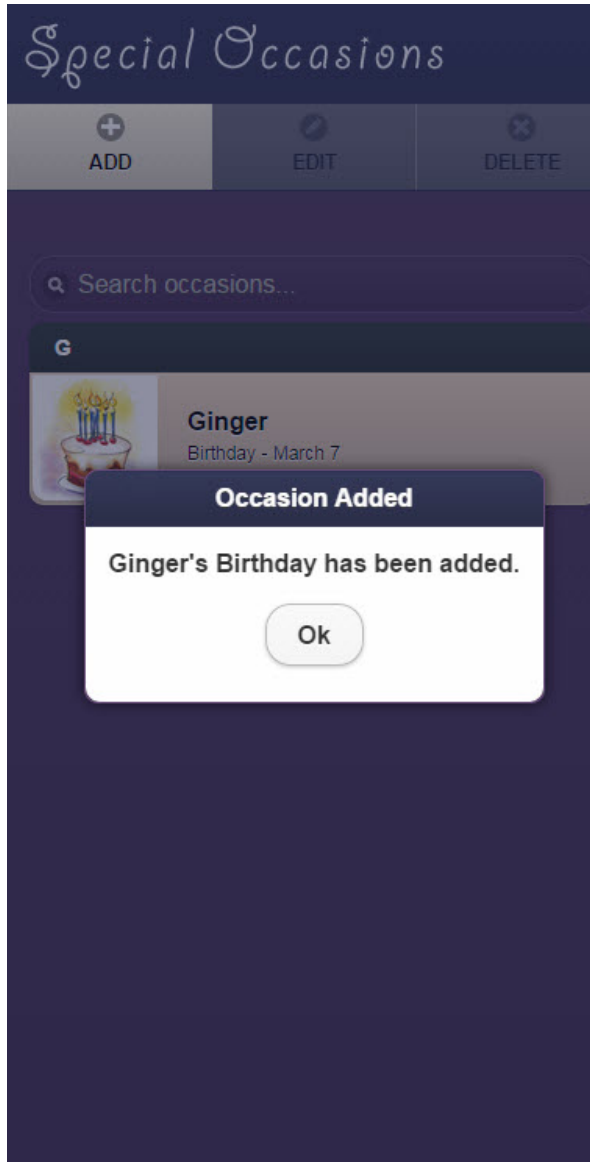
Add/Edit Screen

The add/edit screen has a dark purple header with 'Special Occasions' in white cursive. Below the header is a dark purple box with white text: 'Enter your friend(s) or family members' information below to add their special occasion'. A note '(*) Required' is shown below. The form is divided into sections:

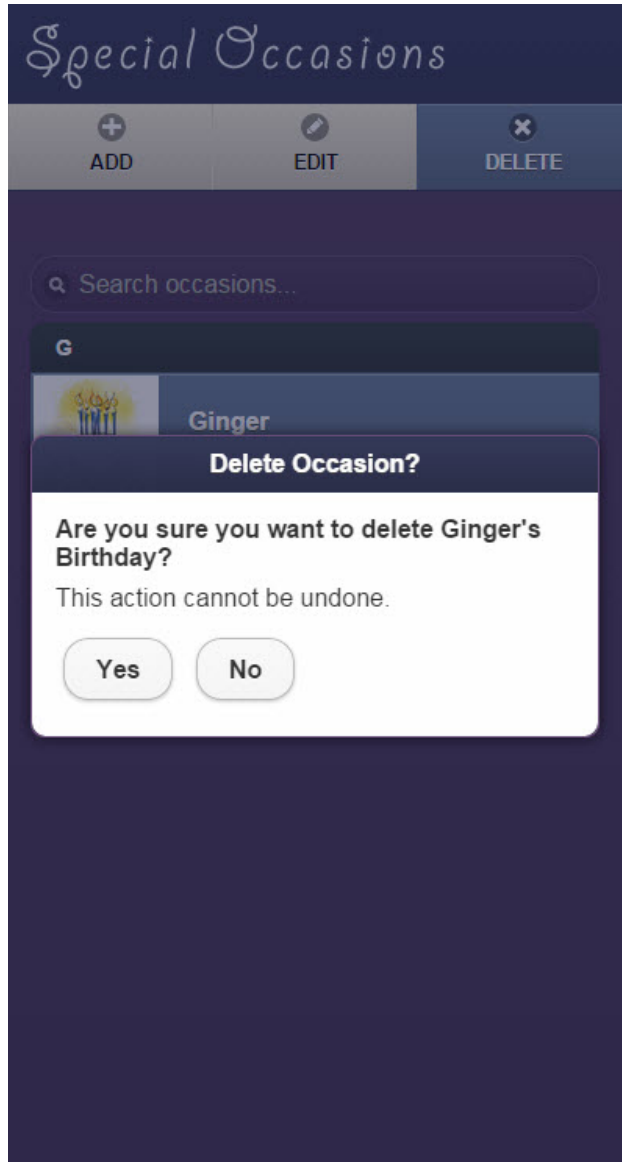
- Person's information:**
 - Name: * (text input: Enter their name...)
 - Email: (text input: Enter their email...)
 - Phone Number: (text input: 000-000-0000)
- Special Occasion:**
 - What is this special occasion?* (dropdown menu)
 - What is the month of this occasion?* (dropdown menu)
 - What is the date of the day for this occasion?* (text input: e.g. 31)
 - What year did or does this occasion happen? (text input: e.g. 1990)
- Optional Settings:**
 - Set a reminder for this occasion
 - Set an automated greeting for this occasion

At the bottom are two buttons: 'Save' (yellow) and 'Cancel' (white).

Record Added Screen



Delete Record Confirmation Screen



Record Deleted Screen

