



Writing the Next Chapter of DDI-Connect

2014 DDI User Group Meeting
April 22-23, 2014



Serving those who serve others





What is Usability?

the ease of use and learnability of a human-made object --wikipedia.org



DDI-Connect Wishes

- Types of Comments
 - General look and feel of the screens
 - Naming conventions
 - Anything DDI-Connect

- Describe
 - Likes
 - Dislikes
 - Dreams

DDI-Connect Wishes 1

DDI Demo for Church Extension Funds

File Window Help

New Edit Delete Save Undo Processes Accounts View Actions Options Exit

Name/Address **Status** **Relationships** **Memos**

PIN: 001533264 **The Reverend Mickey Adams** **Active**

Name Personal Professional Clergy Education Alt ID DBA

Prefix	First name	Middle name	Last name	Suffix	Sex
Rev	Mickey		Adams		

AI codes: IN,EG03

Name 2: Tax ID: Source: EVENT

Created 10/01/2003 Updated 10/01/2003 Salutation: Dear Rev. Adams:

Contact Home

Contact Information

Addresses
Home: 8854-A Pelican Creek Crossing, Indianap...

Phone
Home: (317) 672-8100

Constituent Window Menu

Name	Rel.
Adams Mickey	

Contact Details

Type: Preferred

Comment

Correspondence preference: Paper only

NA100UPD Org: 901 DEMOCE Business dt: 03/17/2014 FY: 2013 CAPS

DDI-Connect Wishes 2

The screenshot shows a software window titled "DDI Demo for Church Extension Funds". The window has a menu bar with "File", "Window", and "Help". Below the menu bar is a toolbar with icons for "New", "Save", and "Exit". The main area is titled "Information Queries" and contains a series of tabs: "File", "Name", "Address", "Donor/Gift", "Other forms", "Reports", "Outputs", and "View Results". The "File" tab is active, showing a "Select:" section with radio buttons for "Accounts" (selected) and "Constituents", and a checkbox for "Include deleted". Below this are five text input fields with labels: "Select constituents:", "AI codes to include:", "AI codes to exclude:", "Denom. to include:", and "Denom. to exclude:". Each input field has a small icon to its right. At the bottom of the window, there is a status bar with the text "EX001INQ Org: 901 DEMOCE Business dt: 03/17/2014 FY: 2013" and a "CAPS" button.

DDI Demo for Church Extension Funds

File Window Help

New Save Exit

Information Queries

File Name Address Donor/Gift Other forms Reports Outputs View Results

Select: Accounts Constituents Include deleted

Select constituents:

AI codes to include:

AI codes to exclude:

Denom. to include:

Denom. to exclude:

EX001INQ Org: 901 DEMOCE Business dt: 03/17/2014 FY: 2013 CAPS

DDI-Connect Wishes 3

DDI Demo for Church Extension Funds

File Window Help

View Exit

Loan Add/Maintenance

Create a New Loan

Loan #: (Leave blank to select next available number)

Loan Type:

Account:

Next >

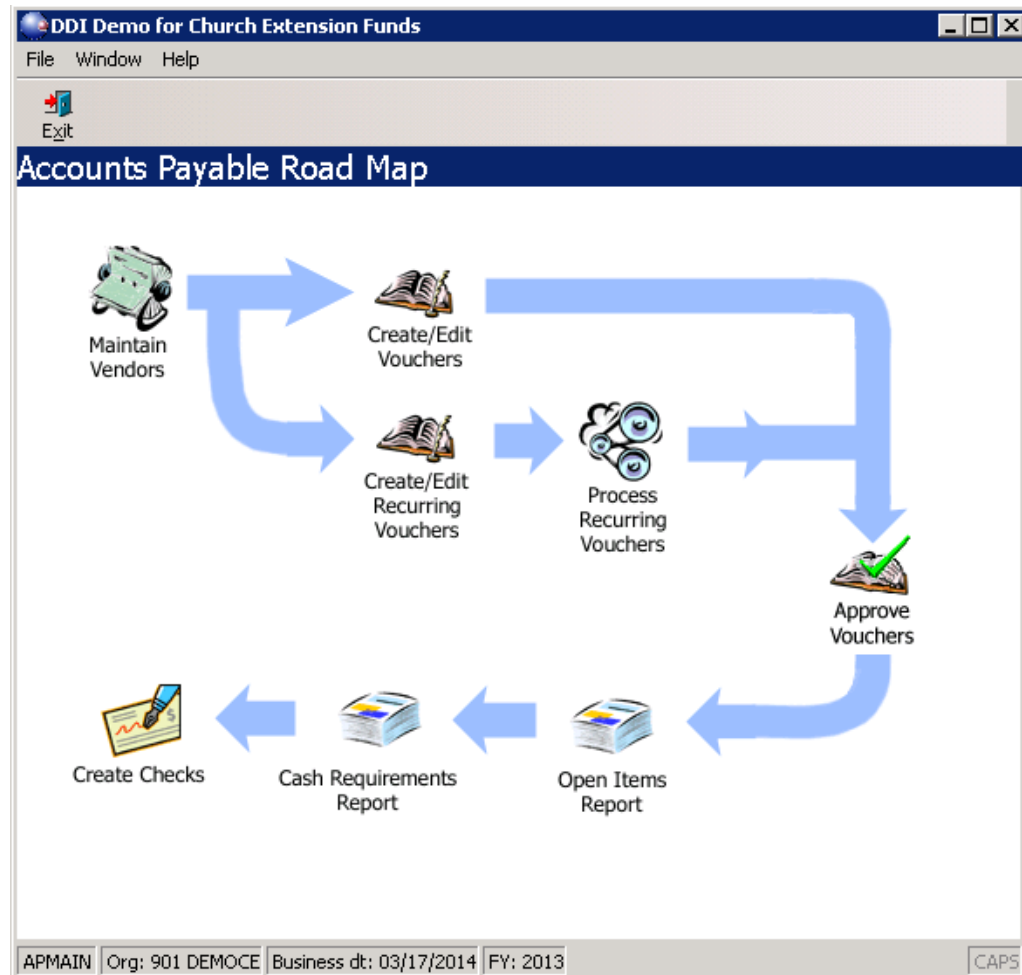
Existing Loan Maintenance

Loan #:

Next >

IL410 | Org: 901 DEMOCE | Business dt: 03/17/2014 | FY: 2013 | CAPS

DDI-Connect Wishes 4



DDI-Connect Wishes 5

DDI Demo for Church Extension Funds

File Window Help

Search Clear Print Exit

Gift Search

Master ID: PIN:

Gift date: thru:

Amount: thru:

Desig. descr.:

Gift memo:

G/L account:

Gift state:

Promo type:

Promo src:

Desig 1:

Desig 2:

Fund #:

Appeal:

Check #:

Year	Gift #	Date	Amount	PTYP	P...	DC1	DC2	Donor name	S..

FR012INQ Org: 901 DEMOCE Business dt: 03/17/2014 FY: 2013 CAPS

DDI-Connect Wishes 6

IL172 - Batch Items Entry / Scan

File Item Import Scanner Deposit Printer Help

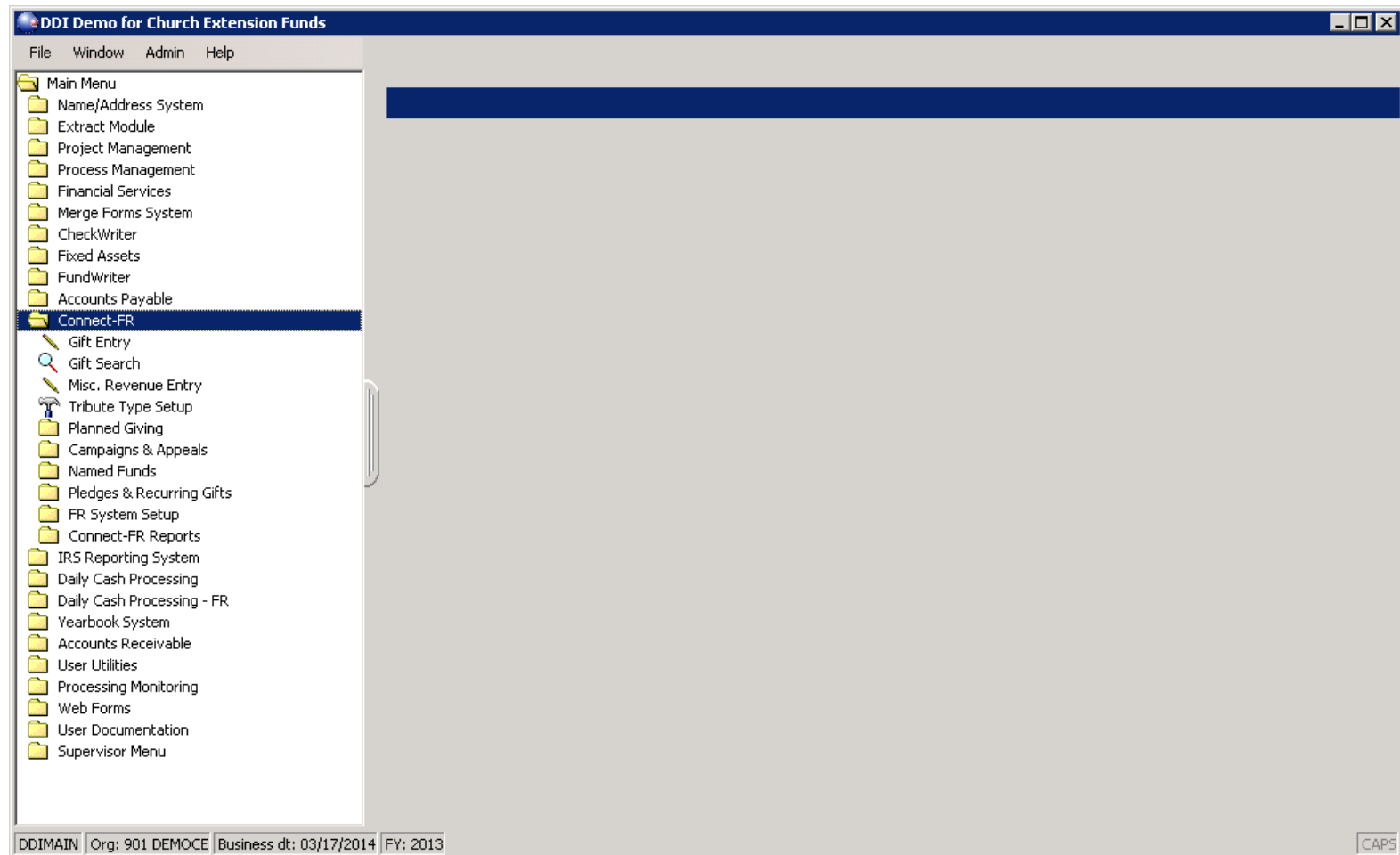
Bank acct: (none) Batch: 0
Suspense: (none) Date: 03/17/2014
Batch type: Church Extension Deposit:
Control total: 0.00

Batch Dt	Batch #	Reference	Deposit	Type	Open

Type	Count	Amount
------	-------	--------

Image ID:
Deposit:

DDI-Connect Wishes 7





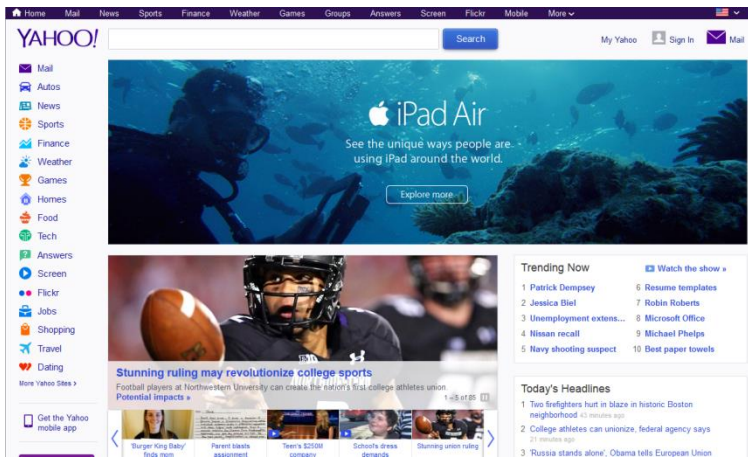
Application Usability

Preference

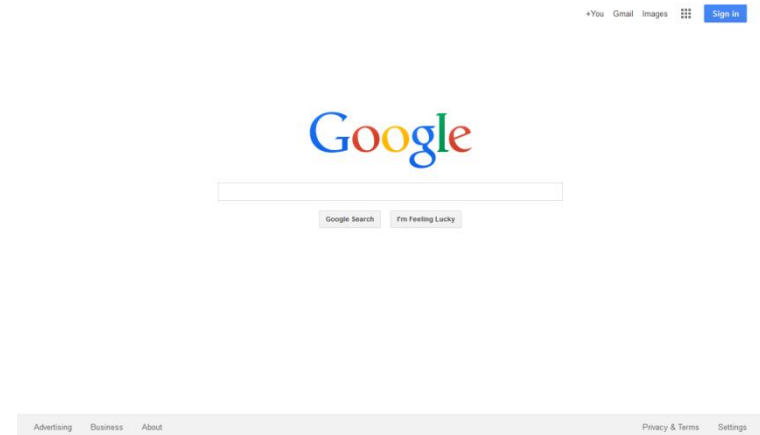
Reason

Application Usability 1

A.



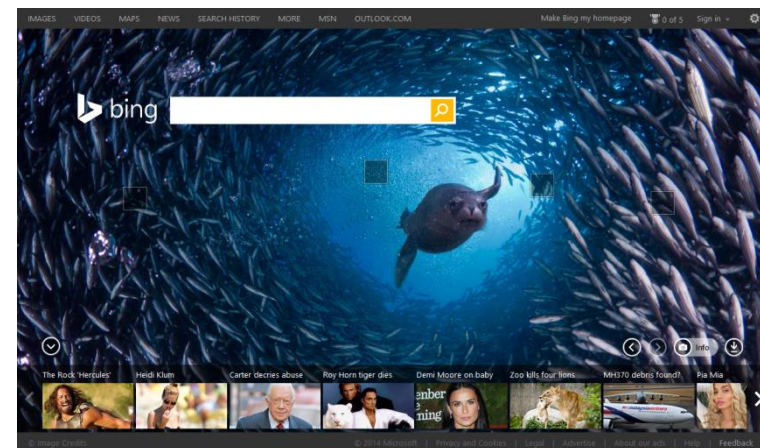
B.



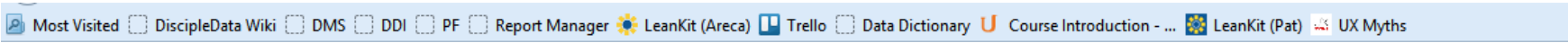
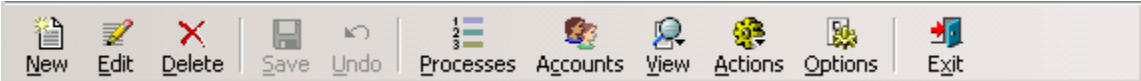
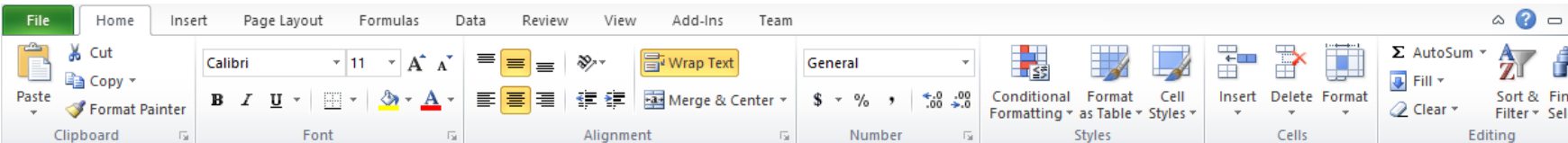

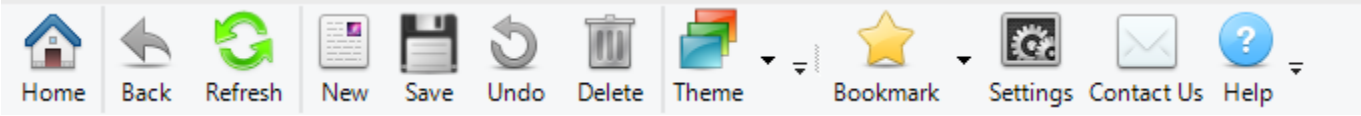

C.



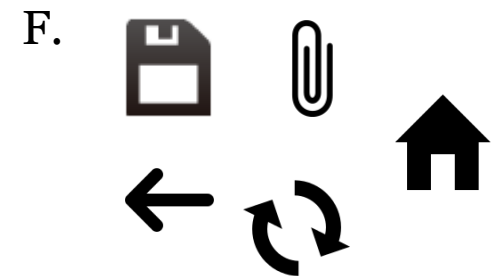
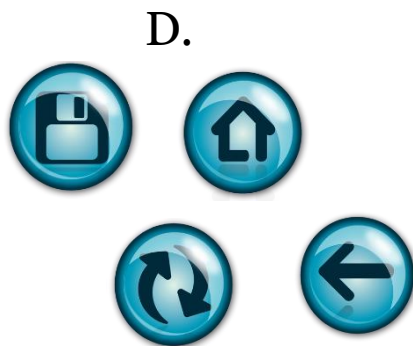
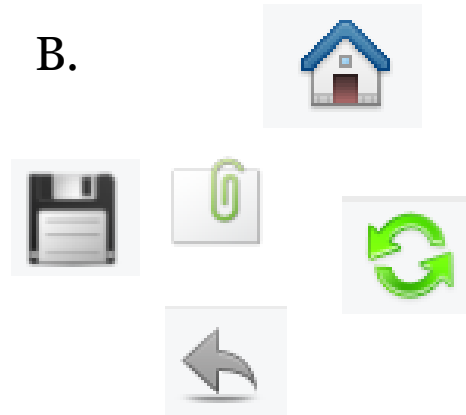
D.



Application Usability 2

- A. 
- B. 
- C. 
- D. 
- E. 
- F. 

Application Usability 3



Application Usability 4

A.



B.



Are there any other icons that specifically mean something to you?

Application Usability 6

A. Where should we display the business date?

B. Where should we display organization/entity information?

C. Where would you want to see your logo?

D. What additional information should be displayed on every screen?

E. What other customizable options should be included?

Journal Entry GL05

Ribbon Bar, Reverse, Print, Add line items, Save, New Journal, Cancel, Edit

Journal #74 for Entity DCEF Status: Unapproved

Transaction Date: Journal Memo:

Occurs: Post to GL Expires: Never

Reverse this document at a later date After date

Reverse on: After count

After amount Created by: Tom Ambler
Last changed: 3/15/2014
Status: Approved and Posted
Posted: 4/22/2014
Canceled: 5/1/2014

Line #1

GL Account: Amount: Debit Memo:

Credit

Due: Entity: Fund:

Line #	GL Account	Debit	Credit	Memo
1	100-00-12345	45.76	0.00	Memo for Line 1
2	100-00-12355	0.00	45.76	Memo for Line2
		45.76	45.76	

Application Usability 7

A.

Filter

Title

Use With All ▼

Category All ▼

Class All ▼

Availability

Current

Future

No Longer Available

Clear Search

Title	Use With	Category	Class
Moves Management	names	Develop Donor	Development Funding
Event Schedule - Meetings	frevent	Example proce...	Example process class code
Event Schedule - Correspondence	frevent	Example proce...	Example process class code
Event Schedule - Materials Plan	frevent	Example proce...	Example process class code
Event Schedule - Local Allocations	frevent	Example proce...	Example process class code
▶ Ac112 processing, AC105, check received, check to event.			
Moves Management	names	Develop Donor	Development Funding
Moves Management	names	Develop Donor	Development Funding
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Moves Management	names	Develop Donor	Development Funding
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Moves Management	names	Develop Donor	Development Funding
Moves Management	names	Develop Donor	Development Funding
Moves Management	names	Develop Donor	Development Funding

⏪ ⏩ ... 1 2 3 4 5 ... ⏪ ⏩

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Functionality

1. Cash Processing: Keep two stages or go to one
2. Batches: Keep batches or get rid of batches
 - Journals
 - Cash Processing
3. Transactions: All in one place or in the modules



Q & A

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