Week 1 - Rough Draft!

Here week1_screens.zip's a quick an dirty clean-up job to the basic flow for adding (building) a portfolio using templates.

As discussed, for now, I've toggles the "design your own portfolio" option. For now, the user is just presented with templates. However, the other option can easily be added into the UI. But I recommend you guys add a config script to toggle this.

Summary

- Removed items that distracted the user from the task at hand (see 1. Before and 1. After)
- Hid the "design your own portfolio" option
- Simplified/humanized the language. Stopped using words like "template" or "forms"
- Added helpful but concise descriptions
- Recommended a step by step title indicator that does not break
- Re-arranged the order in which some screens appear (see 3. Before and 4. Before)
- Reduced the title, name, display name, presentation name chaos! I highly recommend you guys simplify this. One name is plenty. Let the user pick one name, and force the system to pick up the slack of unique identifiers or key field names. That stuff should all be invisible to the end user.
- Reworked the "add items to your portfolio" screen. Now it is simpler and more scalable. If you look closely at 5a. After, you will that I have also suggested an option to <Add New> content that would deep link to a Wizard or a Matrix – or call up a FCKEditor directly. No need to first create content, then make a portfolio – just link them off and loop them back.
- Implied the ability to add more than one form "item" to each portfolio template (See 5c. After).
- Sharing is still incomplete, but will be drastically easier to understand and manage once done (see 7. After). Once a user selects the "Shared" radio, a DIV will slide open to reveal a simplified sharing UI.
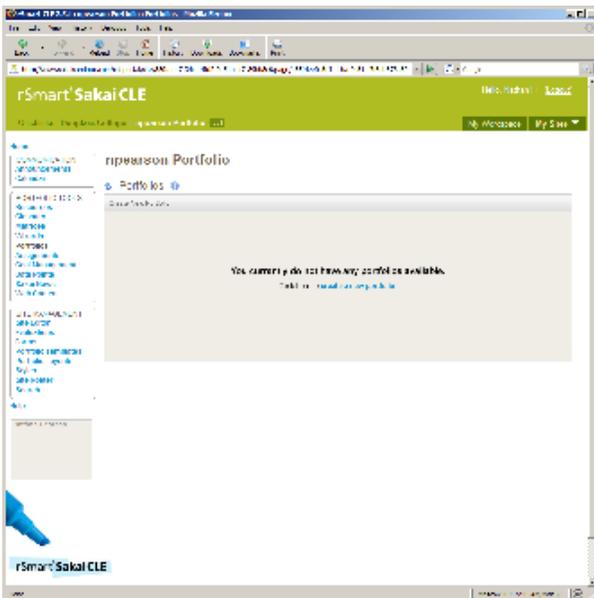
*The screens are just a rough draft to facilitate discussion. There's much work to be done.. so please don't worry that these are the "new designs". They're recommendations for better usability. We can talk more and massage them into the screens you want if you don't like these."

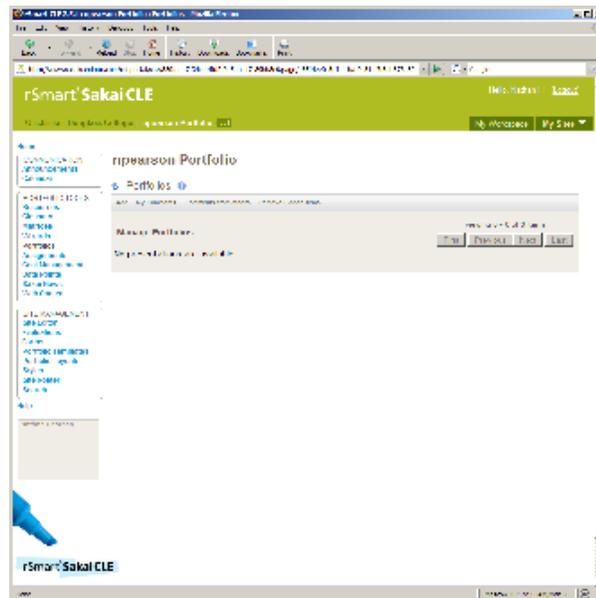I've numbered the screens in sequence. So just start with 1_before.png, then view 1_after.png, and so on.

Enjoy!

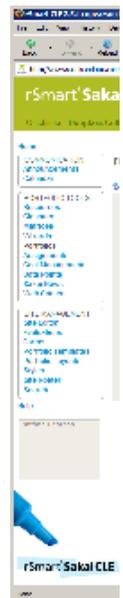
✅ Zip archive of all screens (Week 1)

Click Here to Download
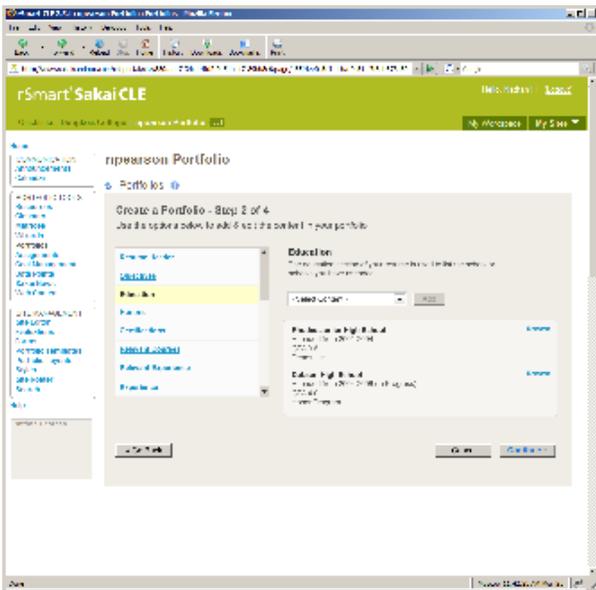

Week 1 Thumbnails

1. After

1. Before

3. After

3. Before

5. After

5. Before

5c. After

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