DESKTOP INTEGRATION:

3 November 2006

1. **INFORMATION ARCHITECTURE: as is**
2. **CONTENT**
3. **ACCESS**
4. **USE CASES/ TASKS**
5. **IMPORTANT TO EMPHASIZE**

1. INFORMATION ARCHITECTURE: as is

(v) = comes from older visio docs. Observations: Some of the previous "Analyze" items are contextual. No longer the case, according to latest.

Act (Work, Actions)
- Create
  - Opportunity
  - Quote
  - Budget
  - Expense Report
  - Time Off Request (v)
- Open
  - Opportunity
  - Quote
  - Budget
  - Expense Report
  - Time Off Request (v)
- Analyze
  - Opportunity
  - Quote
  - Budget
  - A Particular Company (v)
  - Estimated Overhead and others (V)

Research (fusion workbench?)

Know (Watch)
- Alerts
- Rss
- Monitor
- Recently Submitted
- In Mind

Community (Share, People, Communities)
- Network (adv UI viz, contextual)
- Secure Instant Message
- Workplace Blog

Enterprise Search

360 Degree View (of particular company)
       Interactions
             Quote History
             Discount History
             Products Ordered
       Issues
       Related Customers
       Collaborations Summary
       Knowledge Areas
             Relevant Rss feeds (v)
             Relevant blogs (v)
             Relevant Wikis (v)
       Contacts
       Documents Summary

Enterprise Library (to build)
       (Search each below)
       Components
             Templates
             Products
             Contracts (v)
             Visuals (v)
             Tools (v)
             Data (v)

Business Process (guidance)
       (pipeline graphic)

Information (contextual helpers, knowledge bits, policies) (seems like we need this)

Hold That Thought (v)

(My) Space (v)

Tags (v)

2. CONTENT

3. ACCESS POINTS

Applet

Panel

Widget

Browser Toolbar

4. USE CASES/ TASKS

Focus on FMS and HCM

Assumptions:
-The applet is a summarized version of the panel with shared categories of (names subject to change) Act, Know, Community, Enterprise Search. The panel differs that in addition to the above, it contains "contextual" content (though the Act, Know, Community MAY be contextual in the panel realm).
-One can have only an applet and only a panel, or both.
-Widget works as an abbreviated applet.
-Browser toolbar works similar to an applet.

Questions:
-Resizable applet and panel?
-User access to edits, preferences, maintenance?
-Pop up/modal windows?

User opens PIM. OE panel and applet are installed. What is the default info?

Via applet only, in enterprise search *(as navigation),* user finds their saved opportunity file. They open and edit it. *(Opportunity basic or comprehensive?)*

Via applet only, user creates an opportunity from a system generated lead. Saves and goes home.

Later, user wants to finish or add to the saved opportunity. He must do some analyzing while finishing the opportunity. Via applet only.

Via applet only, user wants to generate time off request and delegate responsibilities.

Rss from panel attracts user's eye. He clicks it, reads it, wants further information to save for later.

User wants to create a new quote based on a previous quote. Via applet only.

User's manager wants to check on general stage/process of user's quotes and opportunities in the system. Via Panel.

Using Enterprise Library, user wants to add another item to a quote being built in his Google Spreadsheet.

User wants to delete an Opportunity previously saved.

Through Google search, user searches and finds info on a potential lead/opportunity. User wants to save some of these results for later.

In the middle of analyzing a budget, user decides to check on a lead she sees appear real time in her Alerts area of the Oracle panel. She still wants to continue with analyzing the budget.

User wants to view past leads pushed to him that he wishes he acted on.

While creating a budget in her spreadsheet, the user wants to open another to compare side by side.

User is new to the company. What is the process and timeline for expense reporting and receiving?

User wants to check on status of expense report.

User thinks of a long shot but potentially lucrative lead and wants to save it for future use.

User clicks on a "tag" listed in the panel.

User "tags" an rss feed that came in via her applet.

User wants to add some pertinent information about issues with a client in the 360 View area to warn others about.

While working on a presentation, user wants to share it with "Special" cohorts via blog (?) get their feedback.

5. IMPORTANT TO EMPHASIZE

Search results and how to act on them
Search as navigation
Collaboration - task oriented sharing – wikis, communities
Tags
Visualization of process and analytics

search		
act	know	communicate

applet

may be
contextual
"personally"

search		
act	know	communicate

panel (top)

may be contextual
to main content
area and
"personally"

panel (bottom)

contextual to main
content area