



Hive4.com

Frontline “My Project” Functional Requirements

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1 Introduction

1.1 My Project

“My Project” will be presented on the Hive4frontline site as a way to “explore the steps of common project implementations and discover solution providers.” “My Project” is a web-based decision tree tool that will assist individuals in making decisions on a variety of tasks. The tool asks a series of questions that may either narrow down a broad range of options to the choices that best meet the individual’s needs, or bring together a broad range of individual choices to create a holistic “solution.” Additionally, the tool can help the individual to define the decision being made via a sort of “meta-my-project” that helps the person choose which set of project-specific questions to answer. Finally, the tool will offer a “simple” path in case the user needs quick advice that does not require him/her to go through a longer “My Project” process.

Although “My Project” is being developed initially for Hive4Frontline, it must be designed with maximum flexibility and scalability so as to be adaptable across all Hive4 verticals.

1.2 Frontline

Frontline’s magazine and trade show are in transition, having recently changed name and broadened scope. Getting information about the frontline (cutting edge, outer fringe) to the supply chain is the key idea behind *Frontline*. *Frontline* does not focus on a specific industry. The focus is on “process”—on integrating the frontline with the back end, putting all the pieces together, showing how all of the parts integrate with each other to form whole solutions.

2 Audience Assessment

2.1 *Frontline’s* audience (treeware)

- 2.1.1 Who: *Frontline’s* treeware audience is made up primarily of IT people, including engineers and people in charge of warehouse logistical operations. The ideal reader is more of a strategic person than a tactical one. Typically, they are looking at the “big picture” rather than at individual products or industries.
- 2.1.2 Why and when they read: the audience’s interest is extremely practical and solutions-oriented: the audience reads the magazine while working on a project, then quits reading until the next project comes along. They read in order to solve a specific problem.
- 2.1.3 What they like: *Frontline* readers most appreciate product comparisons and case studies.
- 2.1.4 Where readers are: although *Frontline* has both US and European offerings, solutions are highly localized: European readers are not interested in US solutions, and vice-versa. A key issue for the Hive4frontline web site will be how

the localized audiences are addressed and whether “mixed” US/European solutions will be of interest to globalized companies.

2.2 Hive4frontline’s audience

It is assumed that the online audience will be comparable to *Frontline’s* existing readership. In particular, it is expected that the web audience will be especially interested in WAP technology.

2.3 Recommendations

Above all else, the “My Project” tool must make the user feel intelligent and in control. The end product must provide a feasible frontline solution along with a clear course of action.

2.3.1 No assumptions: Given that Frontline’s treeware audience is “transient” and solutions-oriented, the Hive4 site in general and the “My Project” tool in particular should make no assumptions about the user’s familiarity with web site conventions (including site organization, navigation, and nomenclature) nor with specialized jargon and frontline technologies. Users will be coming to the Hive4frontline site and the “My Project” tool, presumably, to find information and/or solutions they do not already possess. The goal of the site and the “My Project” tool, therefore, will be to provide the information and solutions users are looking for. Since we can be sure that every user will come to the site and tool with different knowledge sets, we should make available information that will empower the user. However, we also need to present information in an unobtrusive way so as to promote the user’s sense of mastery and control while avoiding overwhelming the user with too much detail.

2.3.2 Globalization: “My Project” has the potential to be a wonderful test case for globalized solutions if the Q&A’s for individual projects are globalized. However, it will be necessary to qualify results as US or European unless there is absolutely no distinction.

2.3.3 WAP: design of the “My Project” tool, as with the site design as a whole, should anticipate development for future WAP offerings.

3 Usability Requirements

3.1 Navigation & Orientation

3.1.1 User must be able to find the “My Project” tool easily from anywhere in the web site. This means it should be available using global navigation, search, and browse tools (appropriate search/browse keywords will need to be defined). Promotional buttons may also be used.

3.1.2 User should be able to get to the “My Project” tool via multiple paths. In addition to menu navigation, content throughout the web site should include hyperlinks to “My Project.”

- 3.1.3 When in the “My Project” area, the user must be able to tell exactly where s/he is within the overall structure of the site. This may be accomplished with breadcrumbs, hierarchical menus, or other means that indicate the user’s position within the overall context of the site. (Note that the existence of menus is not sufficient if the menus do not indicate the current position of the user.)
- 3.1.4 When in the “My Project” area, the user must be able to navigate backwards at will to review or change previous questions/answers. Unless the user makes changes, “My Project” must remember the user’s previous answers as the user navigates forward again to his/her previous location.
- 3.1.5 While in the “My Project” area, the user’s forward navigation is constrained by the decision tree. The user may not “skip ahead.”
- 3.1.6 At every part of “My Project,” the user must be provided with an overview of the specific “My Project” s/he has selected and know at all times where s/he is in this process. Minimally, the overview should display an overall picture of the process (“This Project has four steps”) and specify exactly where the user is in the process (“You are in Step 2”).
- 3.1.7 It is a good idea to encourage the user to explore hyperlinks whenever possible. When hyperlinks are used within “My Project,” there must always be a clear path back to “My Project.” If the user explores a hyperlink, s/he must be able to return to the exact place where s/he left off.

3.2 “My Account” Functionality

As a rule, whatever the user accomplishes in “My Project” should be saved in “My Account” if the user says so. The “save” option should be reinforced with failsafes.

- 3.2.1 The results of “My Project” should be available to be saved in “My Account” throughout the process. This must be optional: the user must be asked, “do you want to save your results in your account?”
- 3.2.2 If the user clicks out of “My Project” without finishing the process, a window should pop up asking the user if s/he wants to save his/her work in his/her account to finish later. A second confirmation and/or undo option must be available in case the user says no then changes his/her mind.
- 3.2.3 The final recommendations and choices arrived at in a “My Project” process can be converted automatically to an RFP. The user should be asked, “would you like to create an RFP?”
- 3.2.4 Preliminary results can also be converted automatically into an RFP if the user desires.
- 3.2.5 When the user has completed a “My Project” to the point of an RFP, both the RFP and the results should be saved in “My Account,” allowing the user to return

to either at a later time.

- 3.2.6 An RFP resulting from a “My Project” process should be distinguishable from other RFPs.

3.3 Registration

- 3.3.1 If the user must be registered and logged in to complete a “My Project” session, this fact must be stated up front, before the user begins a “My Project” session.
- 3.3.2 The user must be able to register/login at any point in the “My Project” session without losing any information.
- 3.3.3 The registration/login process must return the user to precisely the same page they left off.
- 3.3.4 If the user does not wish to register or login, s/he must be able to download and/or print the results of a “My Project” process.

3.4 Access to Auxiliary/Supportive Materials

- 3.4.1 From anywhere on the web site, including inside “My Project,” the user must be able to access information that establishes the authority of the web site to provide advice on the specific task addressed by “My Project.”
- 3.4.2 User must be provided with a clear overview of the project so that s/he knows what s/he is getting herself into, including the benefits. The purpose of each “stage” of the process should be explained. User must be able to access this at any time in the “My Project” process.
- 3.4.3 User should have access to at least one representative example “My Project” that illustrates how the tool works, what it’s for, and what kind of information will be delivered if the user completes the process. Ideally, there should be more than one example illustrating a range of “My Projects” so that the user can select the example most relevant to his/her needs.
- 3.4.4 Within the “My Project” tool, a topic-specific explanation/tip/hint/etc. must be provided for each question so the user understands why the question is being asked. The explanations should restate the question, then indicate why the information is being requested and how the information will contribute to the final result of the process.
- 3.4.5 All topic-specific explanations should be available via keyword search/browsing. They should also be compiled into general “help” or “FAQ” areas available from anywhere in the web site. (Hence, topic-specific explanations are available both individually and in compilation form.)
- 3.4.6 All technical jargon and specialized terminology must be defined/explained in a

glossary that is accessible from anywhere in the web site, including via keyword search/browsing.

- 3.4.7 All technical jargon and any other specialized terminology used in “My Project” must be linked to a glossary entry.

4 Primary Functional Areas

4.1 “My Project” Welcome Page

The Welcome Page is the first page a user sees if they are coming to the “My Project” tool via main menu navigation or a general link. The Welcome page must include the following:

- 4.1.1 Verbiage that explains how the tool works: why the user wants to use the tool, what the tool will accomplish, what information will be provided, and instructions about what the user must do to begin.
- 4.1.2 Choice of “Project Type”: categories of project types (e.g. “Tasks” and “Tools”). Each category will provide a list of specific projects. The user will also be able to select “I need help defining my project” to help him/her determine which category/project to choose. *The options available here will be defined by the ontology.*
- 4.1.3 Access to all global navigation, “top-level section” menu navigation, and all help, tutorial, glossary, and FAQ pages.
- 4.1.4 Clear instruction on what action the user must take to continue the process.

4.2 “Kind of Advice Needed” Pages

- 4.2.1 It is possible for a user to land directly on a “kind of advice needed” page via a hyperlink or reference from a search engine. Therefore, it is necessary to provide verbiage that explains how the tool works: what the project is, why the user wants to use the tool, what the tool will accomplish, what information will be provided, and instructions about what the user must do to begin. However, it is undesirable for a user who started on the Welcome page to see the same information twice. Ideally, this information should be inserted dynamically to accommodate “drop-in” visitors.
- 4.2.2 The “kind of advice needed” page gives the user an opportunity to specify the kind of advice s/he needs depending upon the project selected. *[The options available here may need to be defined according to the ontology, but it may be useful to define them as who, what, when, where, why.]* One option should always be available: *all of them.*
- 4.2.3 Again, the user has access to all global navigation and “top-level section” menu navigation and to all help, tutorial, glossary, and FAQ pages.

- 4.2.4 The user must be told that help is available throughout the process via links to explanations, tips, hints, glossary entries, FAQs, help pages, etc. The user must also be informed that help is available via searching/browsing.
- 4.2.5 A “kind of advice needed” page must provide clear instruction on what action the user must take to continue the process.

4.3 Project Pages

- 4.3.1 It is possible for a user to land directly on a “Project” page via a hyperlink or reference from a search engine. Therefore, it is necessary to provide verbiage that explains how the tool works: what the project is, why the user wants to use the tool, what the tool will accomplish, what information will be provided, and instructions about what the user must do to begin. However, it is undesirable for a user who started on the Welcome page or “kind of advice needed” page to see the same information twice. Ideally, this information should be inserted dynamically to accommodate “drop-in” visitors.
- 4.3.2 A “Project” page must explain what the project is, exactly what kind of results will be provided, an overview of the process, and information about navigation and how the in-progress results will be displayed. This should be a sort of itinerary and map so the user knows what to expect.
- 4.3.3 A “Project” page must tell the user that s/he will receive feedback throughout the process. (Feedback is provided via the “in-progress results” and recommendation summaries.)
- 4.3.4 A “Project” page must tell the user that help is available throughout the process via links to explanations, tips, hints, glossary entries, FAQs, help pages, etc. The user must also be informed that help is available via searching/browsing.
- 4.3.5 A “Project” page must provide clear instruction on what action the user must take to continue the process.
- 4.3.6 CAUTION: be careful not to overwhelm the user with too much text. While it is important that the user have sufficient information, it is equally important that the user know what course of action is required. Too much text can make the course of action unclear. Crucial information should be presented on the page; as-needed information should be presented in clearly defined, clickable links.

4.4 In-Progress Results

The user must receive feedback throughout the “My Project” process. As the user answers questions, “In-Progress” results are displayed. As the user continues through the process, the “In-Progress” results are modified based upon the user’s answers.

- 4.4.1 In-progress results will be displayed on every page as the user works through a “My Project” process.

- 4.4.2 In-progress results will update as the user continues through a “My Project” process.
- 4.4.3 In-progress results are presented in a hierarchy from general to specific, reflecting the decision process. This allows the user to explore his/her full range of options from general to specific, giving the user freedom to accept the recommendations made by the tool or pursue other avenues. It is also a “value added” feature that provides a sort of personalized navigation structure for exploring the site.
- 4.4.4 In-progress results must present clear descriptions of recommendations and links to detailed information (product details, tutorials, articles, etc.)
- 4.4.5 In-progress results can be saved in “My Account” at any time in the “My Project” process.
- 4.4.6 In-progress results must be printable. This may be accomplished by a link to a printer-friendly page.

4.5 Preliminary Results Pages

At the end of each set of questions, the user is presented with a Preliminary Results page that summarizes, explains, and justifies the “In-Progress” results.

- 4.5.1 A Preliminary Results page summarizes the user’s progress and offers preliminary recommendations customized based upon responses provided by the user.
- 4.5.2 The user must receive feedback throughout the “My Project” process. Results will be displayed as they are established, and be fine-tuned (changed) as the user proceeds through the process. Longer processes will be divided into phases, with summaries provided at the end of each phase to explain the results-in-progress.
- 4.5.3 The Preliminary Results must provide more than a list of products or titles. Results must explain what the products/titles are, why they are the best solutions for the user’s project, and encourage the user to take action. The action may be “buy now,” “compare items,” read more on this subject,” “back up and try again,” etc.
- 4.5.4 Information on a Preliminary Results page will include:
 - Summary of the user’s answers to all preceding questions
 - Option to change answers to preceding questions
 - Context-specific help for preceding questions
 - Summary of preliminary recommendations with explanation of bases for recommendation.
 - Context-specific help for recommended items
 - Explanation of how choices have narrowed/changed

- Explanation of next steps in process, with an invitation to continue
- 4.5.5 The user must be able to save, print, or download his/her results at any stage in the process. If the user saves an incomplete “My Project” process to his/her Account, s/he may later return to continue the process.
- 4.5.6 Results must provide links to more information on specific recommendations as well as broader categories.

4.6 Final Results Page

- 4.6.1 The Final Results Page summarizes the entire “My Project” process.
- 4.6.2 Final results must be customized based upon responses provided by the user.
- 4.6.3 Final results must provide more than a list of products or titles. Results must explain what the products/titles are, why they are the best solutions for the user’s project, and encourage the user to take action. The action may be “buy now,” “compare items,” read more on this subject,” “back up and try again,” etc.
- 4.6.4 The in-progress results hierarchy will remain in place when final results are displayed. This provides an at-a-glance overview of the process as well as a personalized navigational structure that encourages the user to explore further.
- 4.6.5 Final Results must provide links to more information on specific recommendations as well as broader categories.
- 4.6.6 Final Results offer “what if?” option: user can choose a scenario, such as “what if I want to spend more money,” or “what if I want to specify the manufacturer.” These results allow the user to obtain modified final results and recommendations based on different criteria.
- 4.6.7 The user must be able to save, print, or download final results.

4.7 Final Recommendations Page

- 4.7.1 The Final Recommendations page will display recommendations (products, services, information/tutorials/articles). Display should include (as appropriate) the name of the item, a brief description, a photo, a link to a detailed product description, price, and buying link. Where results include more than one item in a category, the results should mark the best choice (as with a “best choice” icon), and user will be able to compare items in detail.
- 4.7.2 The in-progress results hierarchy will remain in place when final recommendations are displayed. This provides an at-a-glance overview of the process as well as a personalized navigational structure that encourages the user to explore further.

- 4.7.3 The Final Results page will also be available for the user to obtain summary information and explanatory details.
- 4.7.4 The user must be able to save, print, or download final recommendations.
- 4.7.5 Final Recommendations offer “what if?” option: user can choose a scenario, such as “what if I want to spend more money,” or “what if I want to specify the manufacturer.” These results allow the user to obtain modified final results and recommendations based on different criteria.

4.8 Explanation/Tip/Help Pages

- 4.8.1 Each Explanation/Tip/Help “note” (popup windows) must have a title that clearly identifies the content of the note
- 4.8.2 Explanation/Tip/Help notes should provide links to additional information (which, when followed, allow user to return to where s/he left off in My Project)
- 4.8.3 All popup windows must be resizable, scrollable, and printable (i.e., they must have toolbars). They must also provide a “close window” function.

5 General Functionality

5.1 Project Selection

- 5.1.1 The “My Project” tool will offer multiple categories of project types, each containing a variety of specific projects. The categories and project offerings must be highly flexible and scalable to allow “My Project” to grow and change (and also to provide maximum adaptability across verticals).
- 5.1.2 “My Project” tool project selection can be modified by the kind of advice needed. For example, one process may involve selection of the best products for a given task; another process may locate tutorials and other information that will help the user learn how to do a task; and another project might provide a complete solution that integrates a variety of products and offer a full range of tutorials and other information.

5.2 Dynamic Decision Tree

- 5.2.1 Unless the project is small, “My Project” divides the process into sections, each concluding with a summary of Preliminary Results.
- 5.2.2 Questions can be presented all at once, in sets, or one at a time.
- 5.2.3 The decision tree can be dynamic: the answer to *Question A* determines what question will be presented next as *Question B*.

5.3 Results (in-progress and final)

- 5.3.1 “My Project” results are customized according to the user’s choices throughout the process. If the user changes an answer, the results will also change.
- 5.3.2 The results generated by a “My Project” process should draw upon content from the entire site as well as from content created specifically for the tool.
- 5.3.3 Results should also present “related” items, providing an opportunity for upsell.
- 5.3.4 “My Project” results can be saved in the user’s Account for later use.
- 5.3.5 “My Project” final results can be automatically converted to an RFP.

5.4 Automatic RFP Creation

5.5 Auxiliary Pages: “More Info” and Previews

- 5.5.1 Additional information will be available throughout “My Project” in the form of explanations, tips, glossary entries, help pages, etc. All such information will be presented in popup windows. Links will be provided for more information.
- 5.5.2 “My Project” results will consist of recommended products, suppliers, tutorials, articles, etc. A preview will be provided for each recommended item. Previews will be presented in popup windows with a link, button, etc., that allows the user to go to the item.

5.6 Graphical Display

- 5.6.1 Images (of products, etc.) can be shown with questions, in auxiliary pages (help, etc), and in results.
- 5.6.2 It should be possible for “My Project” to display a graphical decision tree, with the graphic being a chart or other visual representation in which the user pursues a decision-making path by clicking on “hot-linked” areas of the graphic.

5.7 Simple Path

- 5.7.1 A “Simple Path” must be provided wherever possible. A “Simple Path” may be a non-customized, non-dynamic solution, or it may be a simplified yes/no decision tree. The main goal is for the Simple Path to be quick and easy.
- 5.7.2 Simple Path solutions will provide access to all auxiliary information, links to dynamic “My Project” decision trees, and access to “My Account” functions, including automatic creation of an RFP.

6 Content Design Requirements

Content design for “My Project” needs to be carefully considered so as to make the best use of the tool’s functionality and ensure optimum usability.

6.1 General instructions

- 6.1.1 At every part of “My Project,” it must be extremely clear to the user what action is to be taken. Instructions must be provided for each step. For example, a question in “My Project” will say, “put a check mark next to as many options as apply to your task, then click the ‘next’ button.” At the end of the process, it must be even clearer what actions the user should take next. What if the user is not ready to purchase anything now? What are his/her options? Everything must be explained, including:
- What “My Project” is, how it works, etc.
 - What is the specific project (task, tool, etc)
 - How to answer question
 - How to submit question (“next” button)
 - Why question is being asked
 - How to use explanation/tip/help links
 - In explanation/tip/help pages, where to go for additional information
 - What results are and how to use them
 - How recommendations were arrived at
- 6.1.2 Hyperlinks must be clear and unambiguous. The user must get a very good idea what s/he will find when s/he follows any link.

6.2 Questions

- 6.2.1 Questions need to be as modular as possible. Every question must be freestanding, so that a person reading the question in any context will be able to understand it. If a condition is necessary before a question can be presented to the user, the condition must be included in the question.
- 6.2.2 Questions must be phrased to include instructions on how the user is to respond to the question.
- 6.2.3 All jargon and potentially unfamiliar language must be defined, with all such language being entered into a comprehensive glossary.
- 6.2.4 An explanatory note must be written to accompany each question.

6.3 Tutorials

- 6.3.1 Tutorials should be as modular as possible to facilitate delivery of customized content. Ideally, the user should be able to access a generic tutorial on “widget-making” as well as a customized tutorial that specifies the exact widget-making products, services, etc., that have been recommended by “My Project.”

7 Blue Sky Functionality

7.1 Graphical Display

It should be possible to show results in a graphical way. For example, the project is shown as an image, and with each choice the user makes, the image changes. For example, user selects a color, and the image becomes that color.

7.2 Localized Offerings

7.3 WAP version for palm/wireless users.