

IPREO MOBILE | OFFLINE FUNCTIONALITY

SCOPE STATEMENT

Created By	Mobile Product
Created On	1/11/2013
Updated On	2/25/2013
Status	DRAFT
Version	0.5

APPROVAL SECTION

Name	Date	Signature

1. TABLE OF CONTENTS

1. Table of Contents	2
2. Revision History	3
3. Background	4
3.1 Purpose	4
3.2 Project Stakeholders	4
3.3 Reference (Related Documentation)	4
4. Functional Decomposition Diagram	5
5. Dynamic Itinerary Workflow	6
5.1 Diagram	6
5.2 User Story	9
6. In Scope: BD	10
7. In Scope: Mobile	11
7.1 Login	12
7.2 Itinerary Screen (Home Screen)	14
7.3 Add Itinerary	16
7.4 View Itinerary	23
7.5 Itinerary Updates	28
7.6 Delete Itinerary	34
7.7 Offline Sync Manager	37
7.8 Contacts	39
7.9 Contact Matching	47
7.10 Calendar	51
7.11 View Activity	53
7.12 Add Activity	56
7.13 Settings	59
7.14 Coachmarks	63
7.15 Help	64
7.16 Related Use Cases	65

2. REVISION HISTORY

Version	Date	Revised By	Revision Description
0.1	1/11/2013	Rachel Harrison-Gordon	Draft Created
0.2	1/28/2013	Rachel Harrison-Gordon	Revision based on WebEx meeting with Dan and Herb. Introduced concept of itinerary and discussed storage dependencies. Added Mockup of Contact Matching.
0.3	2/15/2013	Rachel Harrison-Gordon	Revision based on discussion with Corporate Access. Discussed shared itineraries, relevant permissions, associating a new activity to an existing itinerary, documents hosting (PDF), and naming itineraries "Events."
0.4	2/20/13	Rachel Harrison-Gordon	Revision following LOE meeting with Dan, Herb, and Patrick. Discussed creating itinerary reports in BD, the ability to extract Travel Information, and where Institution Information, Activity History, Focus Information, and Ownership Information is stored and can be accessed for itinerary purposes.
0.5	2/22/13	Rachel Harrison-Gordon	Revision following meeting with Dan, Herb, and O'Hara. Discussed implications for going with Hybrid approach. Allows offline storage of more data (potentially detailed Contact and Institution profiles). Edited contact reconciliation process, edited available data points for add itinerary workflow, added Globalization in Settings.

3. BACKGROUND

3.1. PURPOSE

This document provides information to be used in Level of Effort (LOE) estimates.

3.2 PROJECT STAKEHOLDERS

Name	Role	Company
Manish Patel		
Jerome Joe		
Herb Carroll		
Dan Allison		

3.3 REFERENCE (RELATED DOCUMENTATION)

Document Description	Link/Attachment
Mobile Phase 1 FRD	https://echo.ny.ipreo.com/product/Mobile/Shared%20Documents/Forms/Plus%20Check%20In%20Comment.aspx?RootFolder=%2fproduct%2fMobile%2fShared%20Documents%2f2%2e%20Requirements%20Definition%2fFRD&FolderCTID=&SortField=LinkFilename&SortDir=Asc&View=%7b7A56EA50%2d891B%2d48A2%2d8077%2d208203C26315%7d
Offline Wireframes	https://echo.ny.ipreo.com/product/Mobile/Shared%20Documents/Forms/Plus%20Check%20In%20Comment.aspx?RootFolder=%2fproduct%2fMobile%2fShared%20Documents%2fPhase%202%2f01%2e%20Artifacts%2fOffline%20Functionality%2fOffline%20iPad%20Prototype&FolderCTID=&View=%7b7A56EA50%2d891B%2d48A2%2d8077%2d208203C26315%7d Open the file named "Start."
Book of the Day –Provided by Christoph Freitemann at Deutsche Telekom	https://echo.ny.ipreo.com/product/Mobile/Shared%20Documents/Phase%202/01.%20Artifacts/Offline%20Functionality/Book%20of%20the%20Day_Telekom.pdf
Ipreo Internal Itinerary Report - Screenshot	https://echo.ny.ipreo.com/product/Mobile/Shared%20Documents/Phase%202/01.%20Artifacts/Offline%20Functionality/Ipreo%20Internal%20Itinerary%20Report.png
Ipreo Itinerary Report Generation for JPMC – Screenshots of steps	https://echo.ny.ipreo.com/product/Mobile/Shared%20Documents/Phase%202/01.%20Artifacts/Offline%20Functionality/Ipreo%20Itinerary%20Report%20Generation%20for%20JPMC.pdf
Ipreo BD Corp IReport Output	https://echo.ny.ipreo.com/product/Mobile/Shared%20Documents/Phase%202/01.%20Artifacts/Offline%20Functionality/Ipreo%20BD%20Corp%20IReport%20Output.xls

4 FUNCTIONAL DECOMPOSITION DIAGRAM

The FDD illustrated the functional areas that are affected by this product initiative.

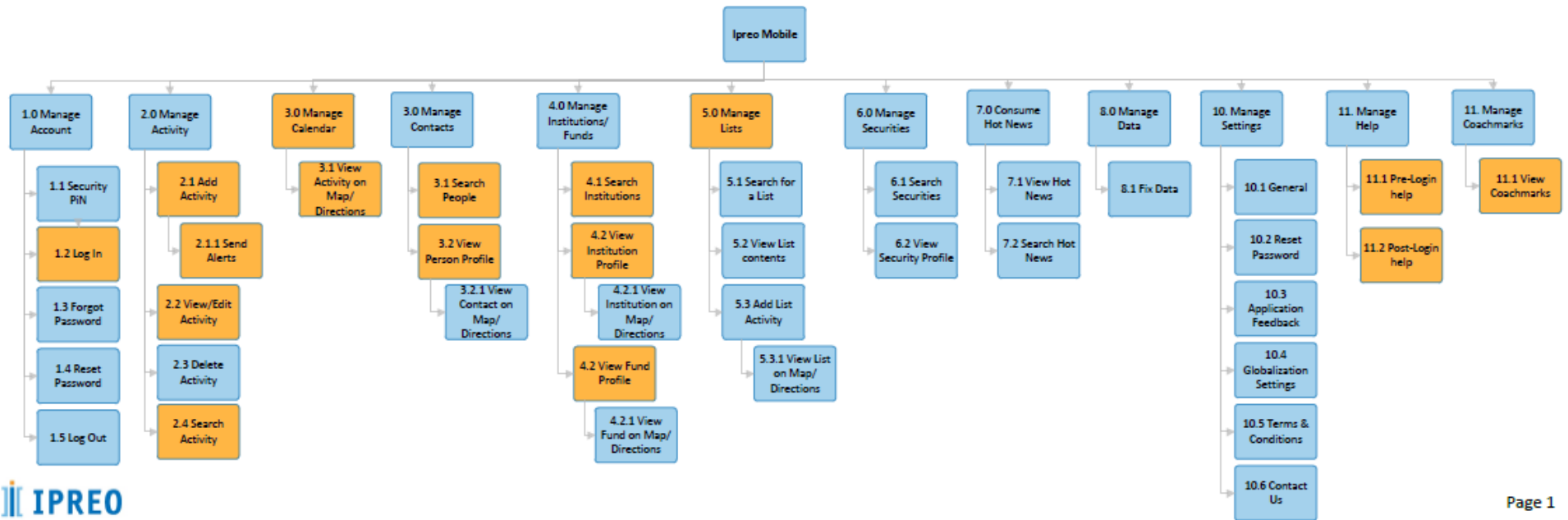


Figure 1: Functional Decomposition Diagram

5 DYNAMIC ITINERARY WORKFLOW

5.1 DIAGRAM

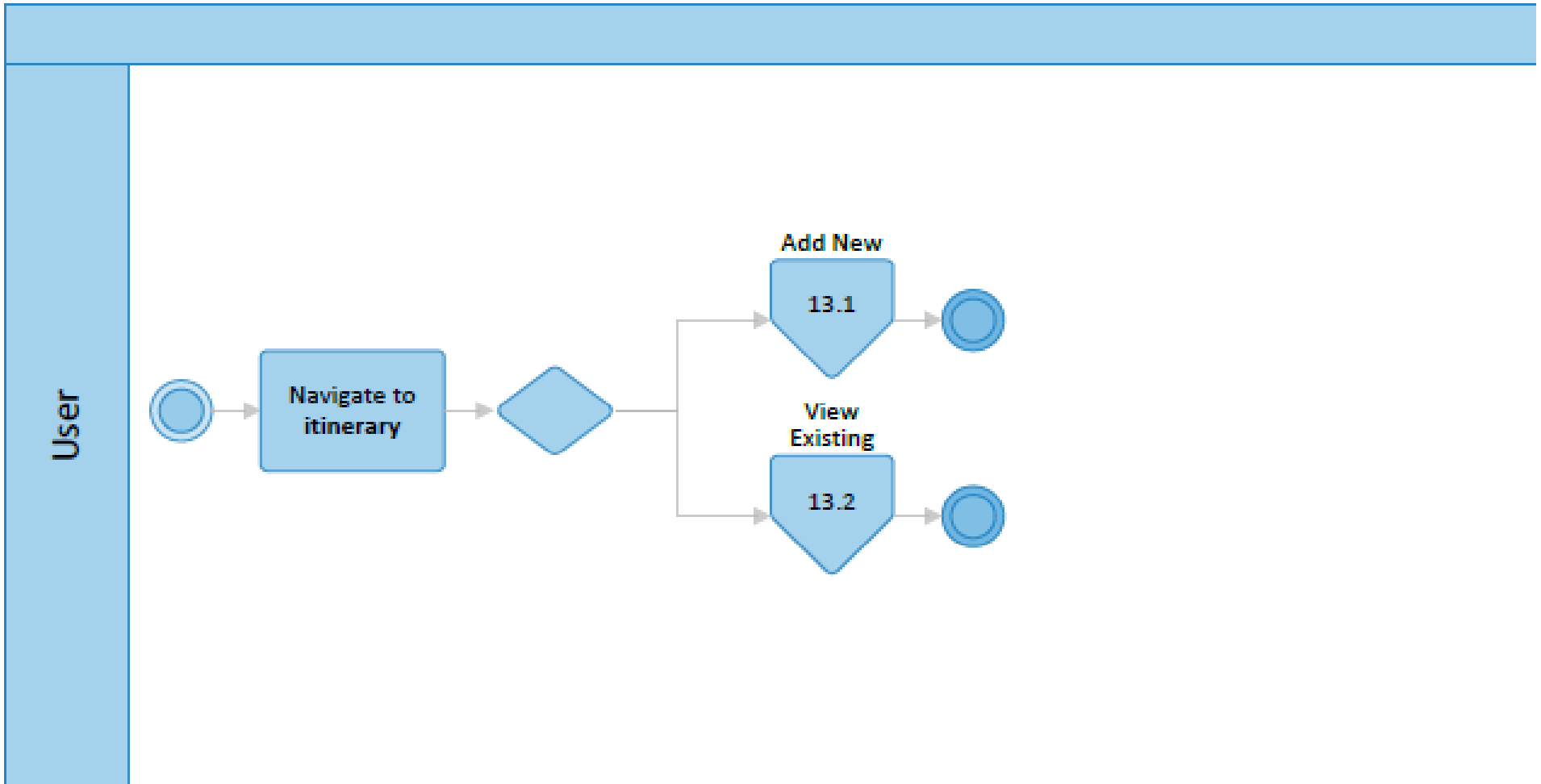
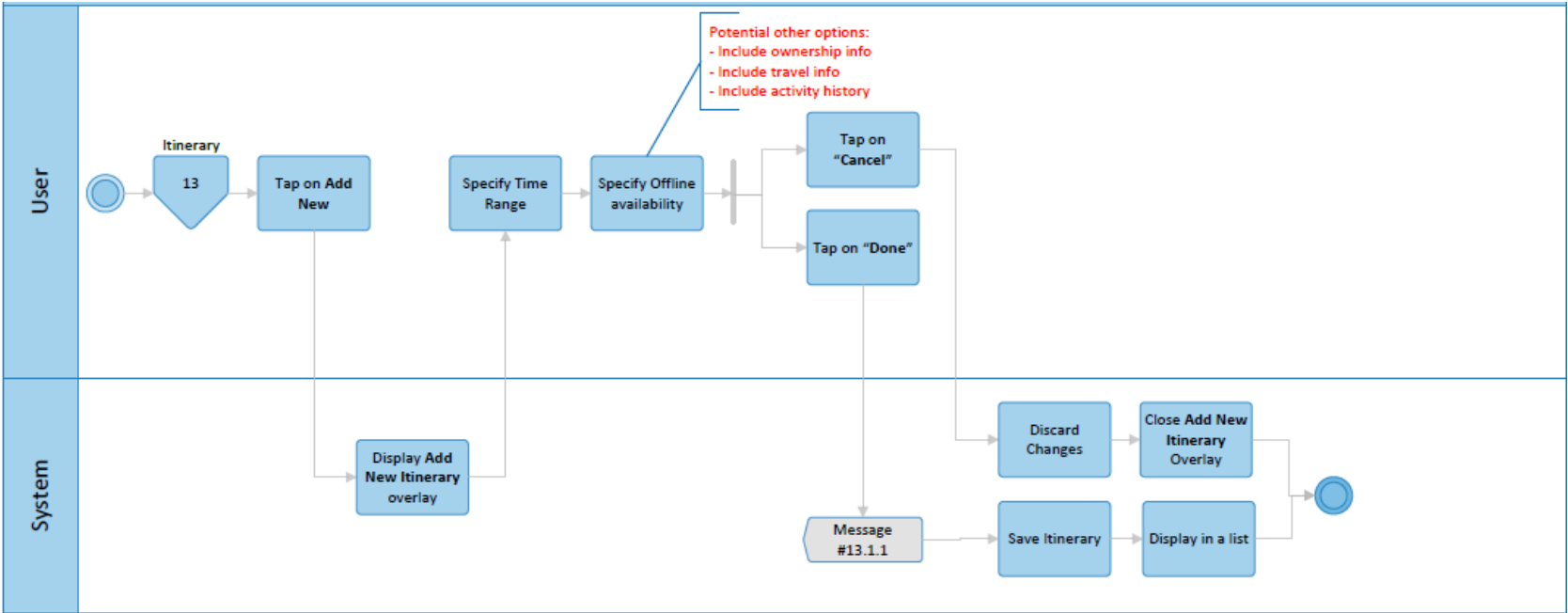


Figure 2: Dynamic Itinerary Workflow Diagram (1/3)

5.1 DIAGRAM

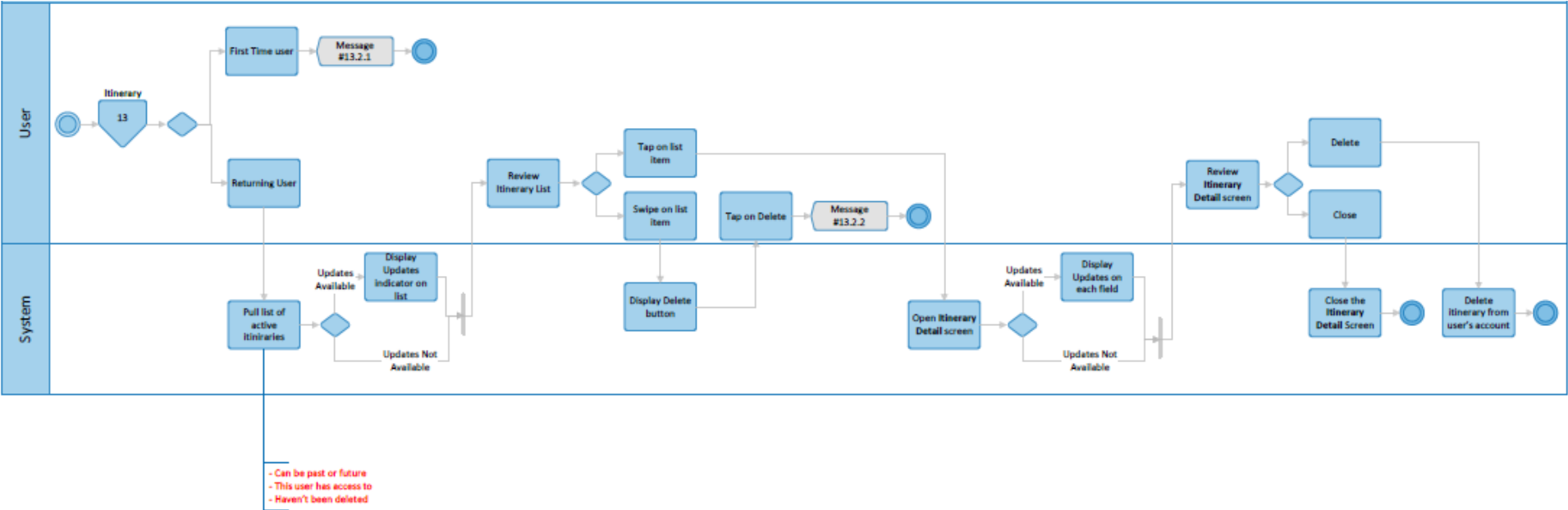


Messages

Message #13.1.1: "Your itinerary for <start date> - <end date> has been created and is now available within the itineraries section of the app" [FADING].

Figure 3: Dynamic Itinerary Workflow Diagram (2/3)

5.1 DIAGRAM



Messages

Message #13.2.1: "You don't have any itineraries available. To add a new itinerary, tap on Add icon above" [ON SCREEN].
Message #13.2.2: "Your itinerary for <start date>-<end date> has been deleted" [FADING].

Figure 4: Dynamic Itinerary Workflow Diagram (3/3)

5.2 USER STORY

User Story: As a mobile user, while attending a Roadshow, Conference, business trip, or regular meeting, I want to be able to access my upcoming activities, their details, and significant elements of the related Contacts and Institutions/Funds, especially in the absence of a network connection.

Online

Users can create an itinerary from the Itinerary / Home Screen on their mobile device. Once the user selects a desired Start and End Date, the itinerary will contain all of their activities within the specified date range, in addition to selected Activity History, Focus Information, Ownership Information, Targeting Information, and Travel Information (if the user has both BDA and IPIC). Any Contacts and Institutions/Funds that relate to items on the itinerary will be made available Offline.

Offline

Icons representing the user's itinerary will be displayed on the **Itinerary Screen** with their Subject and Date Range. Upon selection, the interactive, scrollable itinerary will appear. Items within the listing can be selected, at which time related details are displayed to the right. Within an item's details, users can select Contacts or Institutions and view the elements of those profiles that were made available Offline.

6 IN SCOPE: BD

7 IN SCOPE: MOBILE

The following items are considered in scope for Offline Functionality Implementation during Phase 2 of Mobile development.

The **wireframes** that illustrate the functionality being described are located here:

<https://echo.ny.ipreo.com/product/Mobile/Shared%20Documents/Phase%202/01.%20Artifacts/Offline%20Functionality/Offline%20iPad%20Prototype/start.html>

If the above link does not work, proceed to the link below and open the file named “Start.”:

<https://echo.ny.ipreo.com/product/Mobile/Shared%20Documents/Forms/Plus%20Check%20In%20Comment.aspx?RootFolder=%2fproduct%2fMobile%2fShared%20Documents%2fPhase%202%2f01%2e%20Artifacts%2fOffline%20Functionality%2fOffline%20iPad%20Prototype&FolderCTID=%26View=%7b7A56EA50%2d891B%2d48A2%2d8077%2d208203C26315%7d>

7.1 LOGIN SCREEN



Figure 5: Login Screen (Online Mode)

- **Login Screen**
 - PIN screen only, no Username/Password screen
 - Remove “Forgot Pin” button / Disable Functionality



Figure 6: Login Screen (Offline Mode)

- Visual indicator for **Online/Offline** Mode in upper left corner – Persistent throughout the application
 - **Online** – Icon is blue. Blue “Online Mode” overlay appears upon tapping, and fades **[Figure 5]**
 - **Offline** – Icon is grey. Grey “Offline Mode” overlay appears upon tapping, and fades **[Figure 6]**
- Move Pre-Login Contact Us and Help buttons to PIN screen
 - **Contact Us** – *No anticipated changes from Online*
 - **Help (Pre-Login)**
 - Add “When online,” to the “If you would like to see additional features...” text within the “What can I do on the mobile application” section
 - Remove CallMeNow@Ipreo.com from “Have a question?” section OR add “When online,”
 - Remove “Forgot Password” section
- *What happens if the user loses their connection randomly? What happens to what they were working on? - TBD*
- *When the user goes **Online**, should they be prompted for their username and password? - TBD*

7.2 ITINERARY SCREEN (HOME SCREEN)

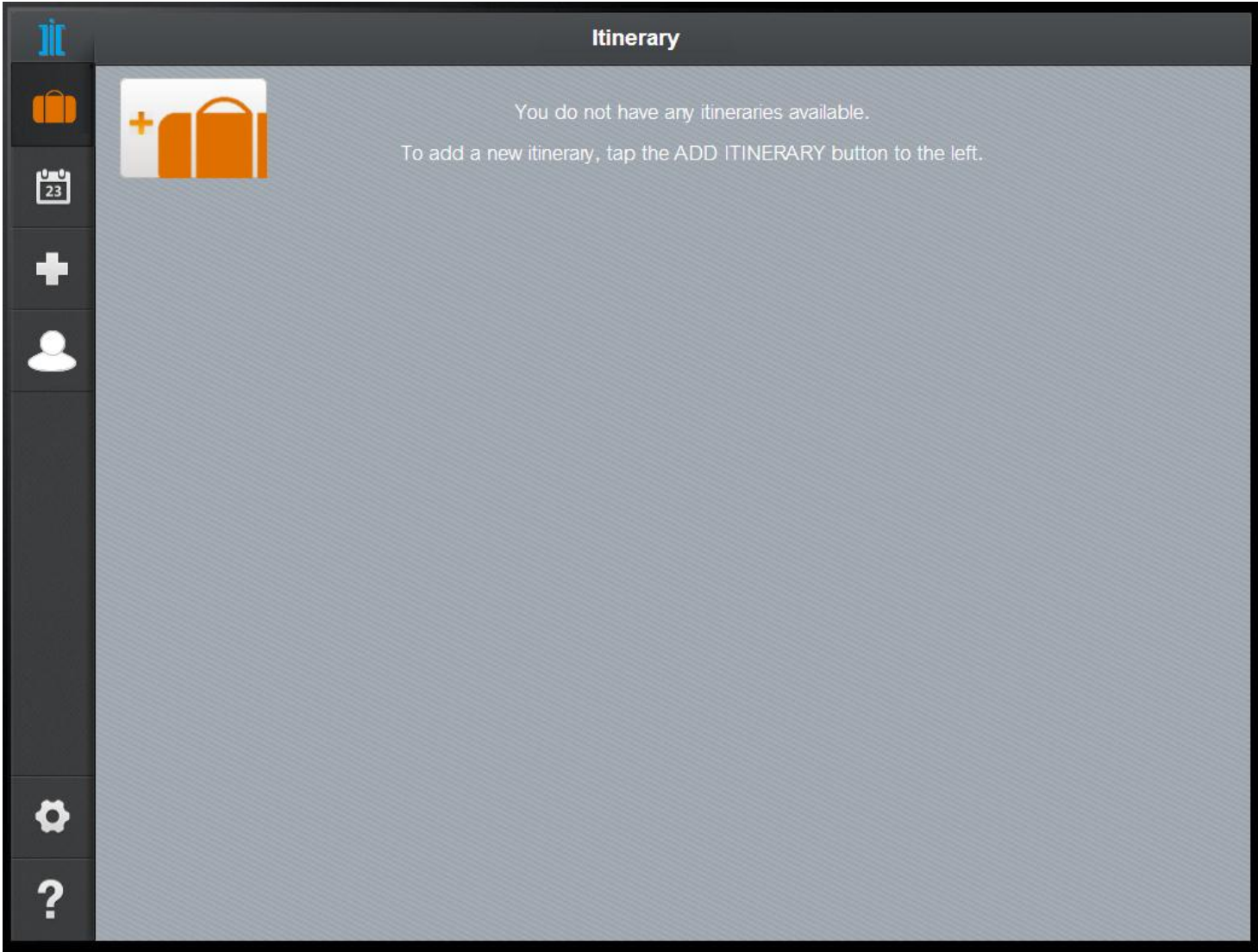


Figure 7: Itinerary Screen: User without itineraries

- **Itinerary Screen (Home Screen)**

- **Global Navigation Bar**

- Itinerary / Home
 - Calendar
 - Add Activity
 - Contacts
 - Settings
 - Help

- **Itinerary Listing**

- New User – “You do not have any itineraries available. To create a new itinerary, tap the ADD ITINERARY button to the left.” **[Figure 7]**
 - Icons representing each itinerary will appear here
 - *Should icons differ visually to indicate whether the user created that itinerary themselves, or whether their manager or other member of the attending team shared it with them? – TBD*
 - Icon to Add New Itinerary will follow itinerary icons **[Figure 12]**
 - Add New Itinerary button available **Online Only**
 - *Should users be able to create an itinerary offline? – TBD*
 - Refresh button to search for updates **[Figure 12]**
 - Display dialog warning about data charges **[Figure 17]**

7.3 ADD ITINERARY

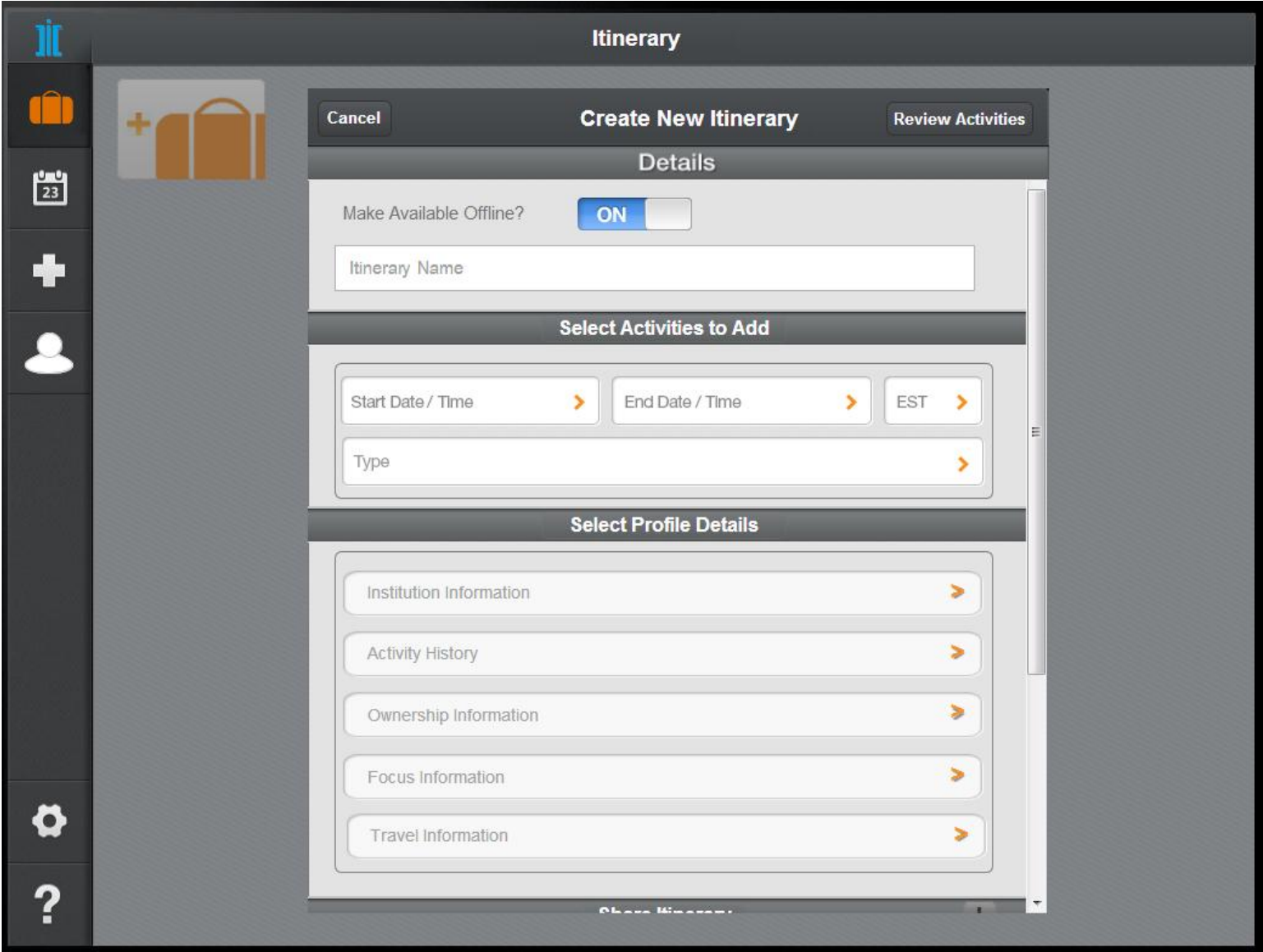


Figure 8: Create New Itinerary: Details, Select Activities, Select Profile Details

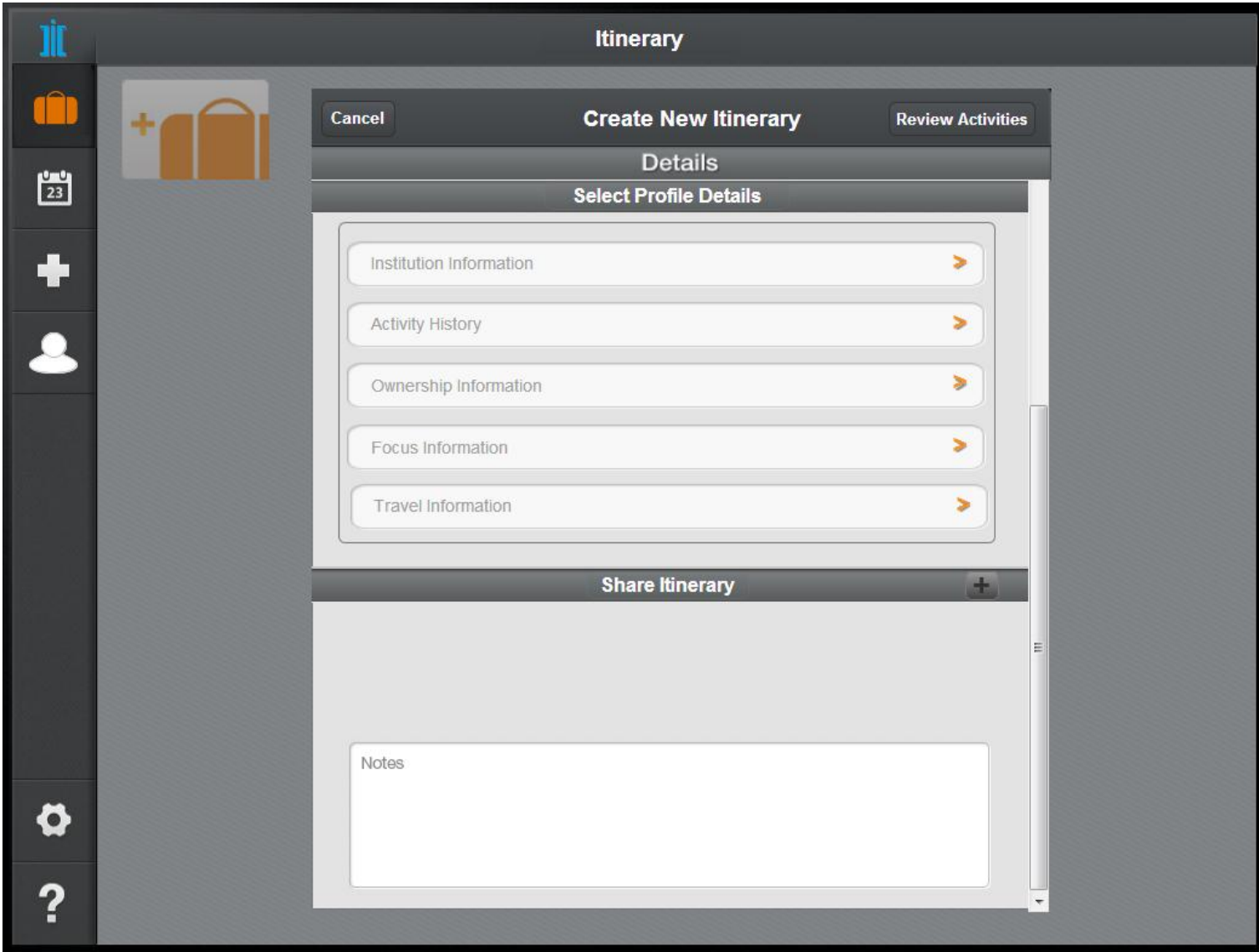


Figure 9: Create New Itinerary: Share Itinerary, Notes

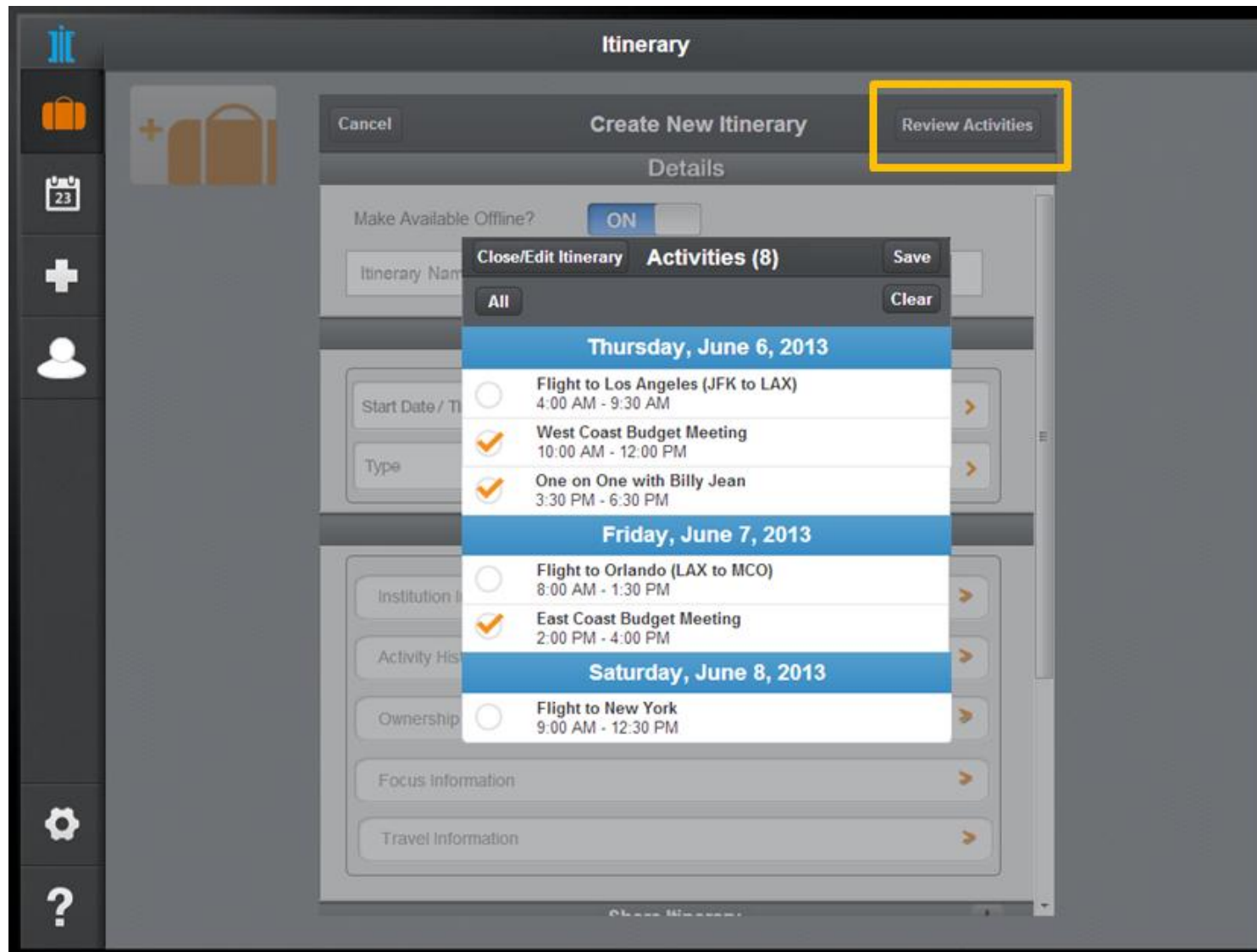


Figure 10: Preview activities generated by the itinerary search. Select activities to include in itinerary.

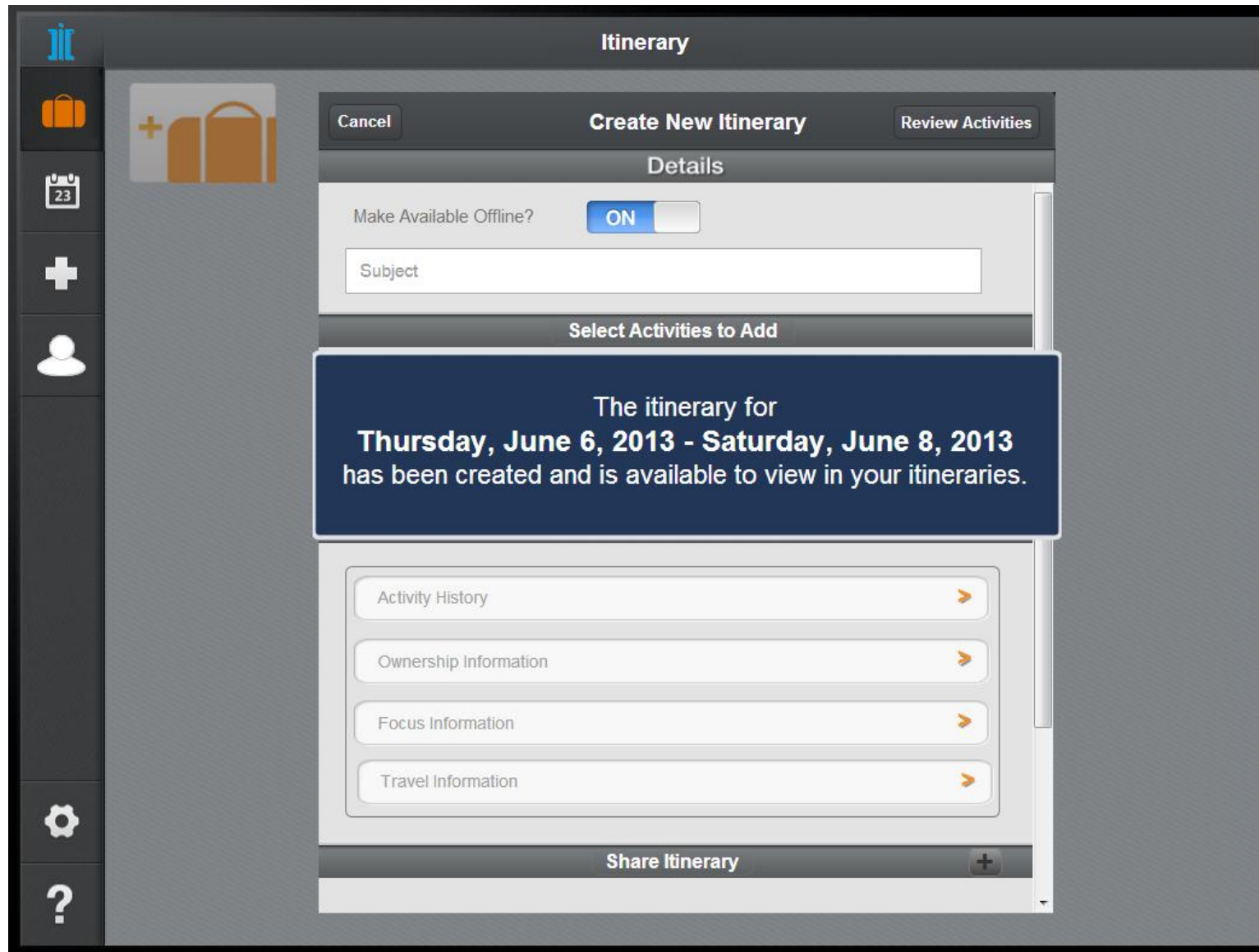


Figure 11: Fading dialog confirming saved new itinerary

- **Add Itinerary – Online Only**

- Make Available Offline? Toggle
- Subject
- Start/End Date/Time
- Time Zone
- Type
- Institution Information – *Which options need to be provided TBD*
 - Type
 - Location
 - Style
 - Orientation
 - Total Assets
 - Equity Assets
 - Strategy
 - Activist
 - EQ Instrument
 - Turnover
 - Contact Bio
- Activity History – *Which options need to be provided TBD*
- Focus Information – *Which options need to be provided TBD*
 - Country
 - Region
 - Market Cap
- Ownership Information – *Which options need to be provided TBD*
 - Shares
 - Value
 - %S/O
 - %Port
- Travel Information – *For clients that have both BDA and IPIC (or take external client travel information)*
 - Hotel
 - Location
 - Contact Information

- Booking ID
- Flights
 - Airport Name
 - Terminal
 - Check In (Until) Time
 - Departure Time
 - Arrival Time
 - Flight Number
 - Airline
 - Seat
 - Transfer Times
 - Transfer Flight Number
 - Booking ID
 - Pilot's Phone Number
- Ground Transportation
 - Driver's Name
 - Driver's Contact Information
 - Car Type (Taxi)
- Share Itinerary
 - User searches for contact by name
 - All contacts in BD are available since the user is **Online**
 - *Should there be a differentiation between primary recipients (ex: team members attending the business trip) and secondary recipients (ex: managers who wouldn't necessarily attend the trips but would like to be notified of the meetings taking place)? - TBD*
 - *Alerts/automatic updates*
 - *Primary attendees – automatic pull for updates, with or without a network connection? - TBD*
 - *Secondary attendees – tap the refresh button to pull for updates? - TBD*
 - *Editing permissions*
 - *Primary attendees – permitted to add notes to itinerary (able to make changes to other fields?)*
 - *Secondary attendees – not permitted to edit*
 - **Users who receive shared itineraries** – have the option to automatically retrieve updates to the itinerary
- Notes
- **Review Activities Button**

- Reveals overlay displaying list of activities that meet the requirements of the Add Itinerary “search.” The user can select which activities they would like to be made available **Offline**. **[Figure 10]**
 - Close/Edit Itinerary
 - Save
 - All
 - Clear
- Saved Itinerary Dialog
 - Appears after tapping Save button on the **Review Activities Overlay**
 - Fades
 - “The itinerary for [Date Range] has been created and is available to view in your itineraries.”
- **Add Itinerary from BD – TBD [See Section 6 - In Scope: BD]**
 - **Online** - Itineraries added from the Desktop will be automatically added to the user’s mobile device
 - **Offline** - Itineraries added from the Desktop will be added to the user’s mobile device after a manual update push, and/or once the user successfully connects to a network
- **Limited Number of Itineraries Permitted - TBD**
 - *Based on total size of activities and institution/contact profiles (X MB)*

7.4 VIEW ITINERARY

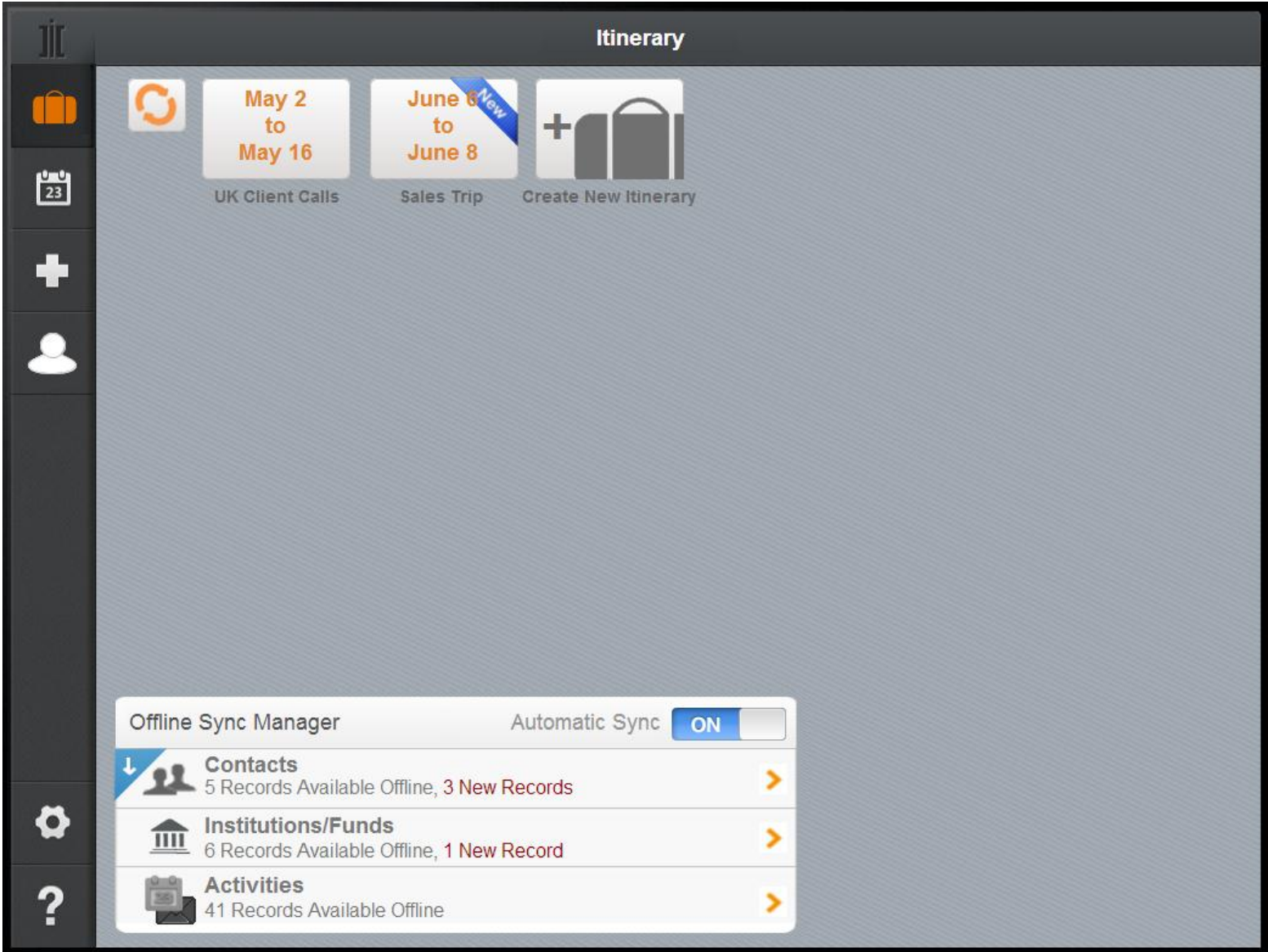


Figure 12: New Itinerary icon

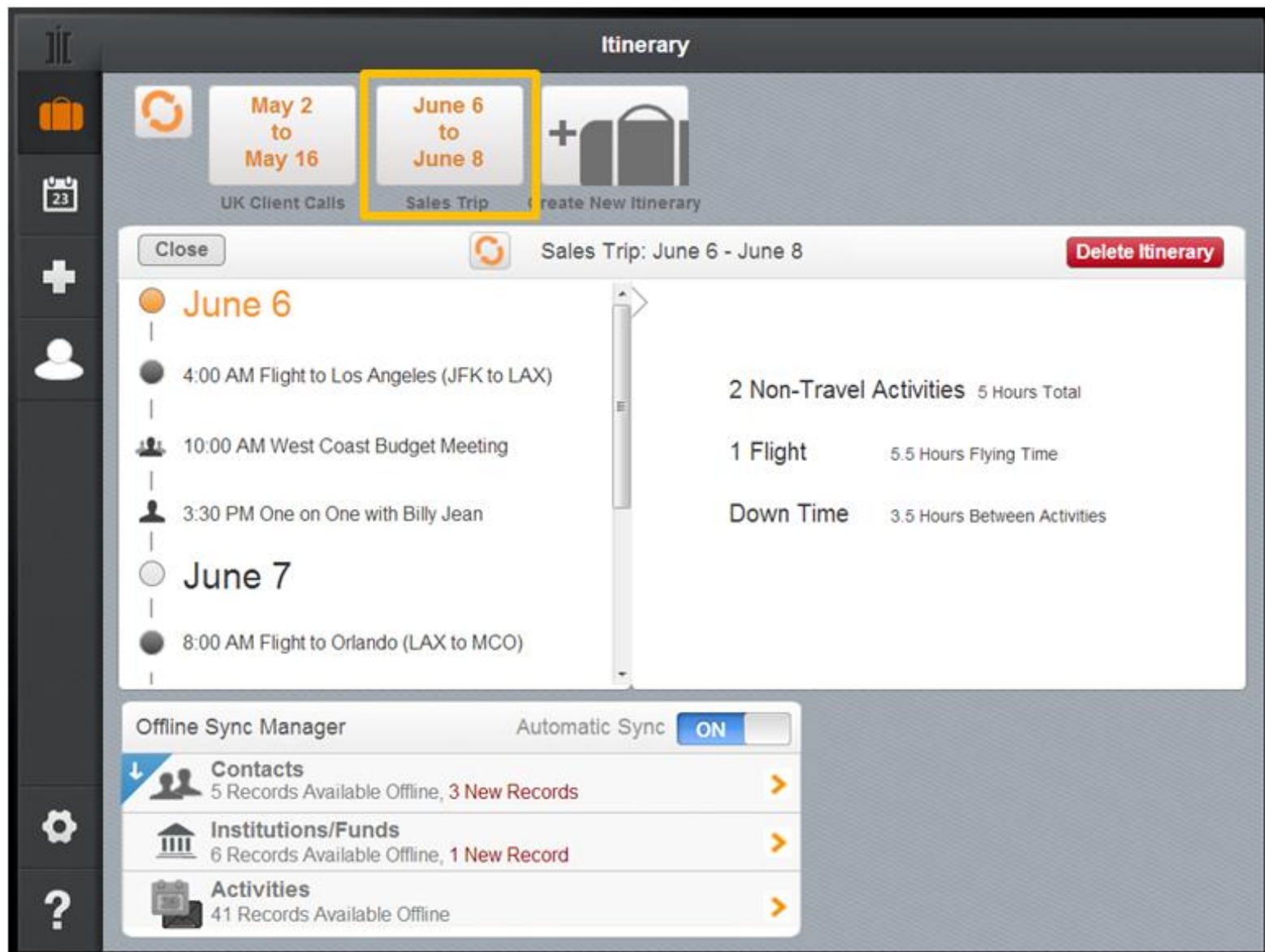


Figure 13: View Itinerary after tapping that itinerary's icon

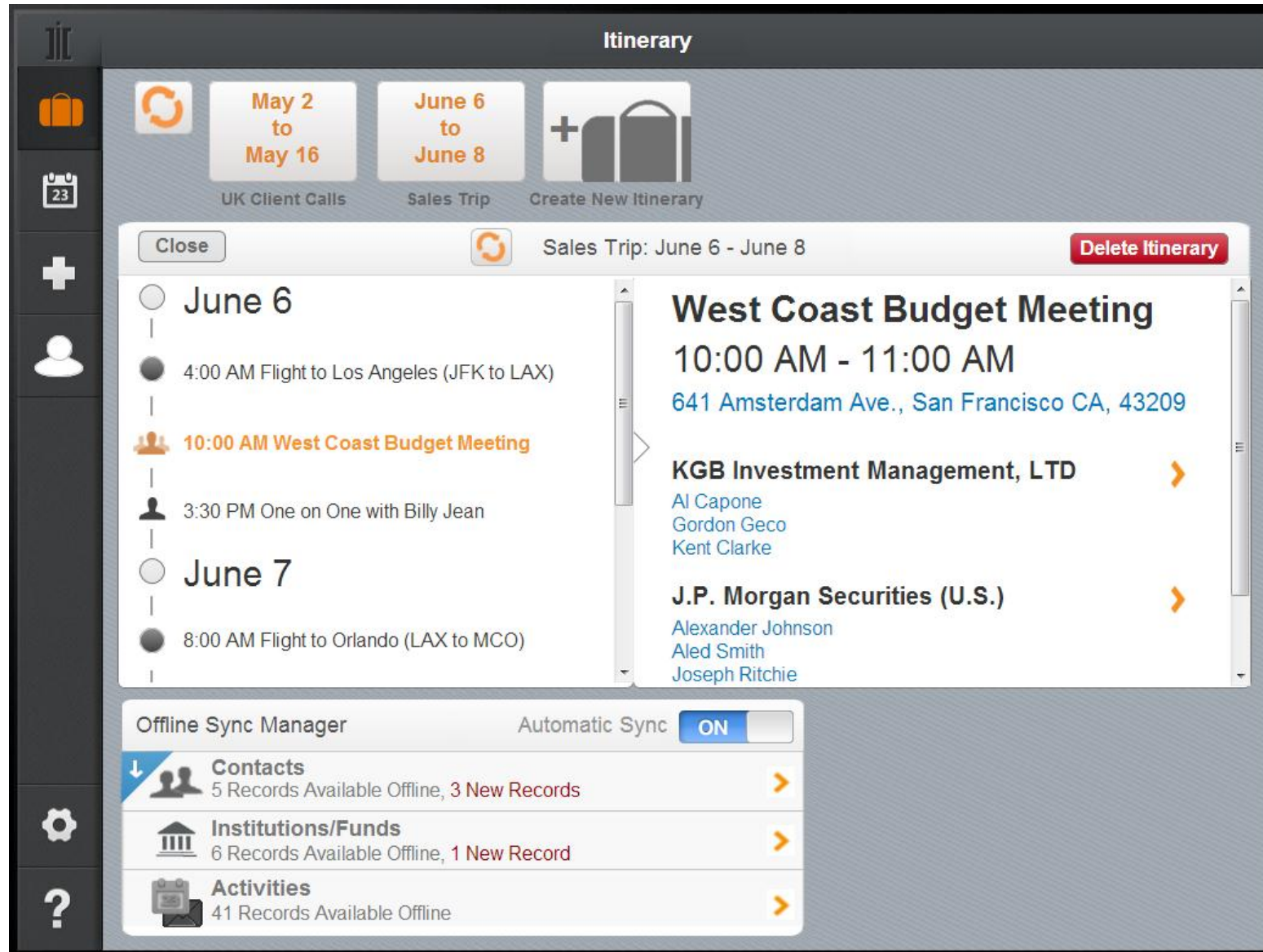


Figure 14: View Itinerary: After tapping on a meeting, the related details appear to the right.

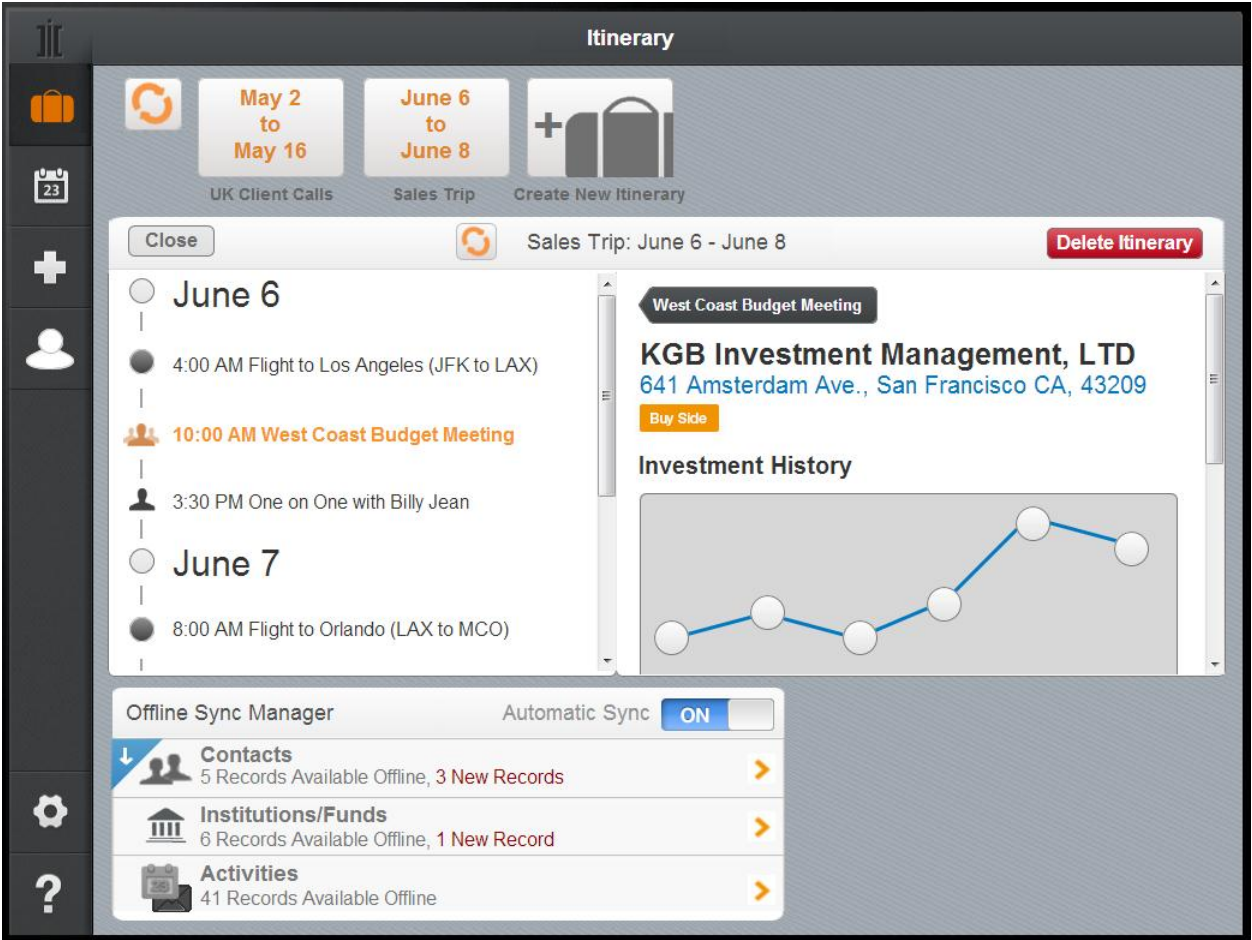


Figure 15: View Itinerary: After tapping the name of an Institution mentioned in the meeting details, the profile appears in the right panel.

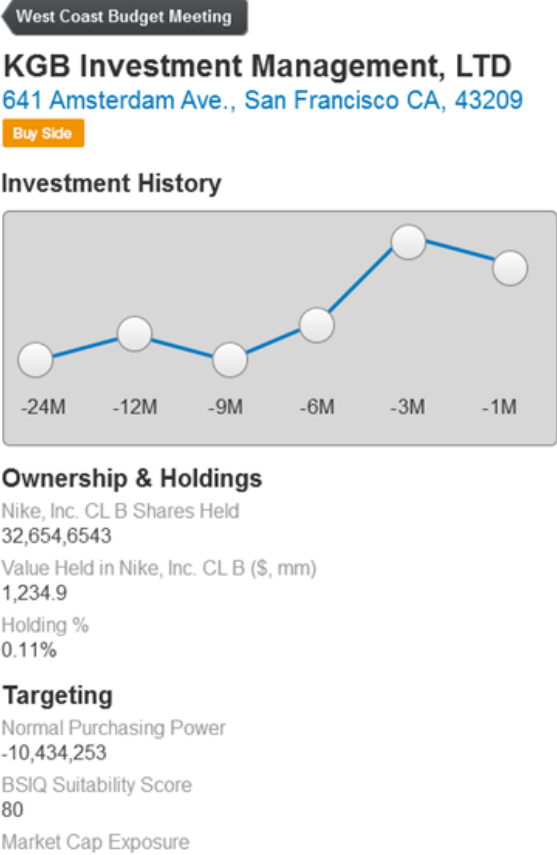


Figure 16: Institution Profile - TBD

- **View Itinerary**

- **Left Panel**

- Scrolling list displaying itinerary's activities, grouped by date, with the date as a header
 - Header automatically set to first date of itinerary
 - Text of selected section appears in a different color (Ipreo Orange)

- **Right Panel**

- Upon loading, displays summary of first day's activities **[Figure 13]**
 - Non-Travel Activities - Total number of activities (excluding travel information) and total duration of those activities
 - *Travel Activities - Total number of flights (or other travel information) - TBD*
 - Downtime – Greatest amount of time between 2 activities
 - *If multiple intervals of down time, only display time where the time between the 2 activities is the greatest? - TBD*
 - **Left Panel** – When user taps on an item, the **Right Panel** will display the available details of the activity (Title, Time, Location, Institution/Fund Name, Contact Names...etc.) **[Figure 14]**
 - *This might change if we provide full **Institution Profiles** in a location in addition to (or instead of) within the itinerary - TBD*
 - **Right Panel** – When user taps on an Institution Name or Contact, the **Right Panel** will change to display the available details of those **Institution Profiles**. **[Figure 15, Figure 16]**
 - Back Button – Given title of meeting name
 - *Items included in the **Institution Profile** (Title, Location, Bio, Ownership and Holdings, Primary Contacts, etc.) - TBD [Figure 13]*

- **Header**

- Close Button
 - Refresh Button – separated from the Refresh button on the Home Screen, only looks for updates related to this individual itinerary - **See Section 7.5**
 - Delete Itinerary Button – **See Section 7.6**

7.5 ITINERARY UPDATES

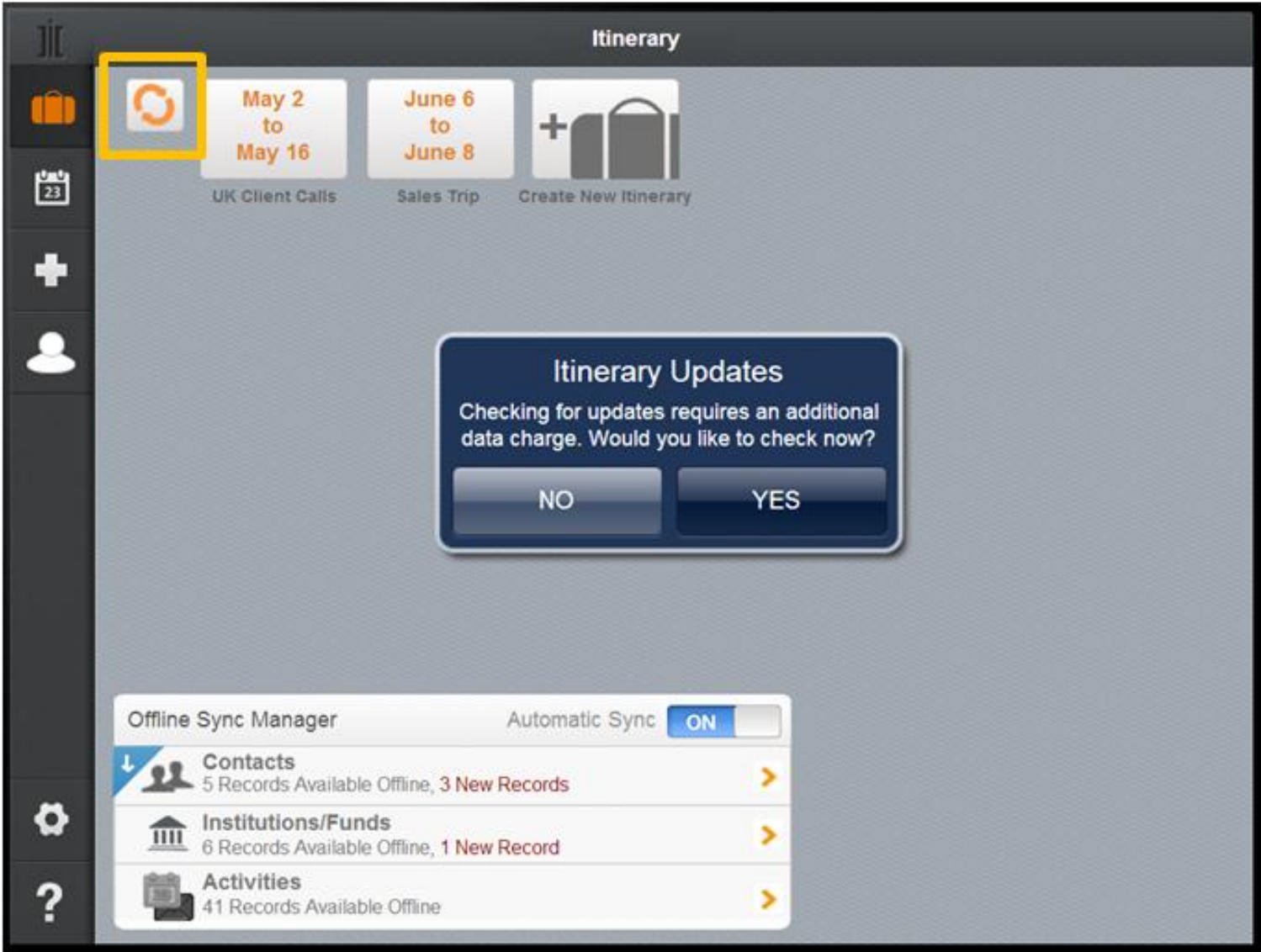


Figure 17: After tapping on the Refresh button, the user is notified of the additional data charge to check for updates.

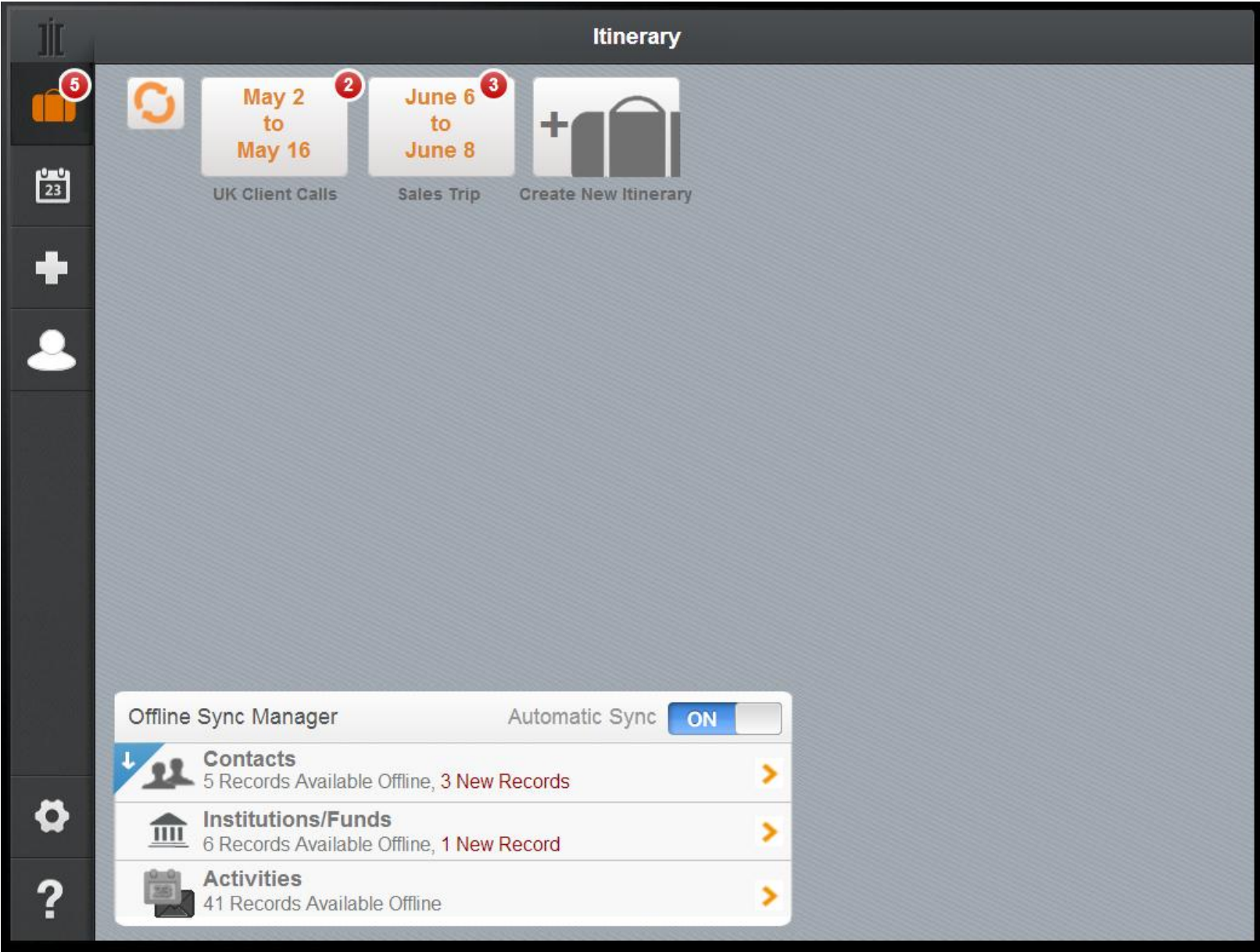


Figure 18: Badges appear when there are updates to the available itineraries.

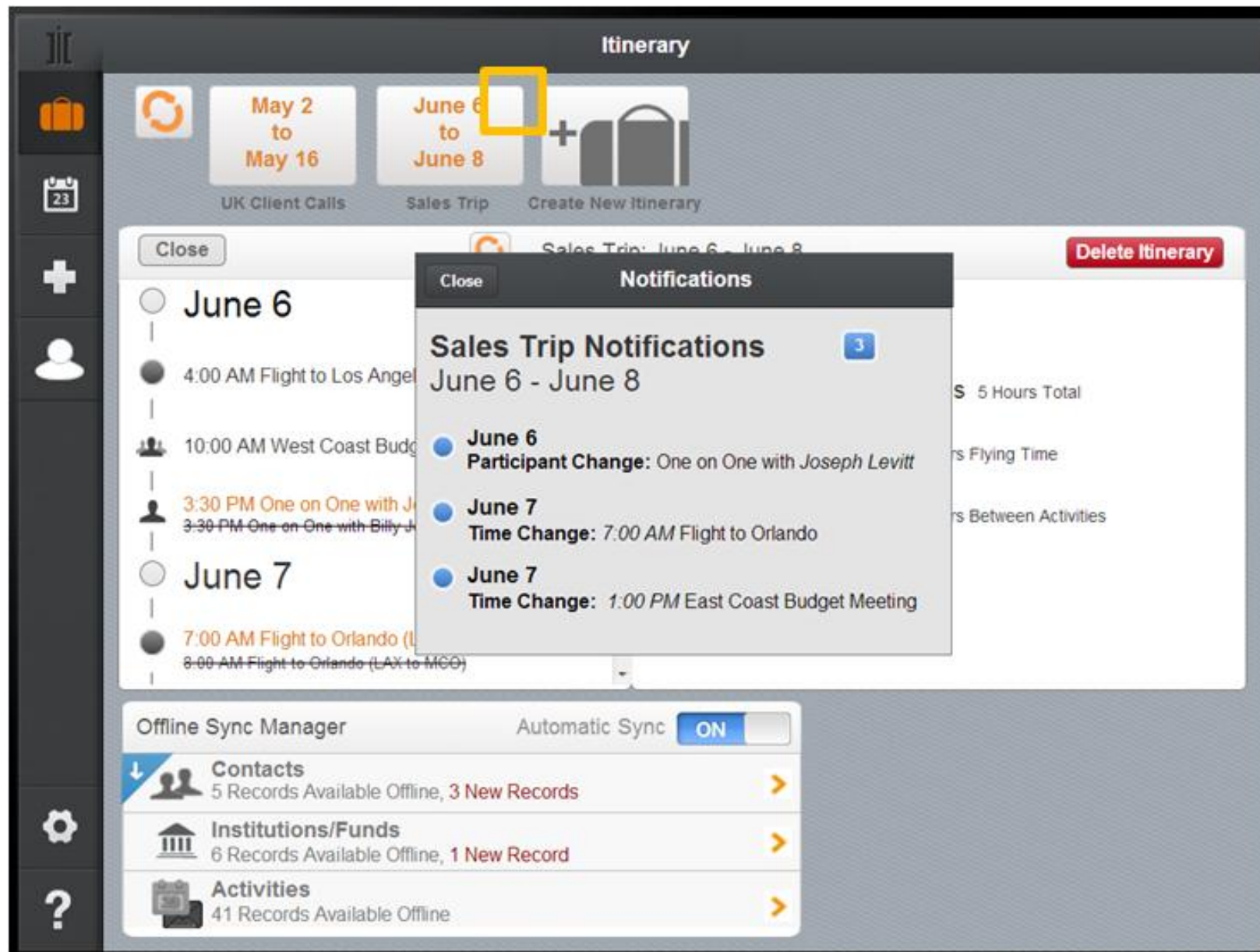


Figure 19: Notifications Overlay appears after tapping the badge over the itinerary's icon. Updated itinerary appears behind Notifications Overlay concurrently.

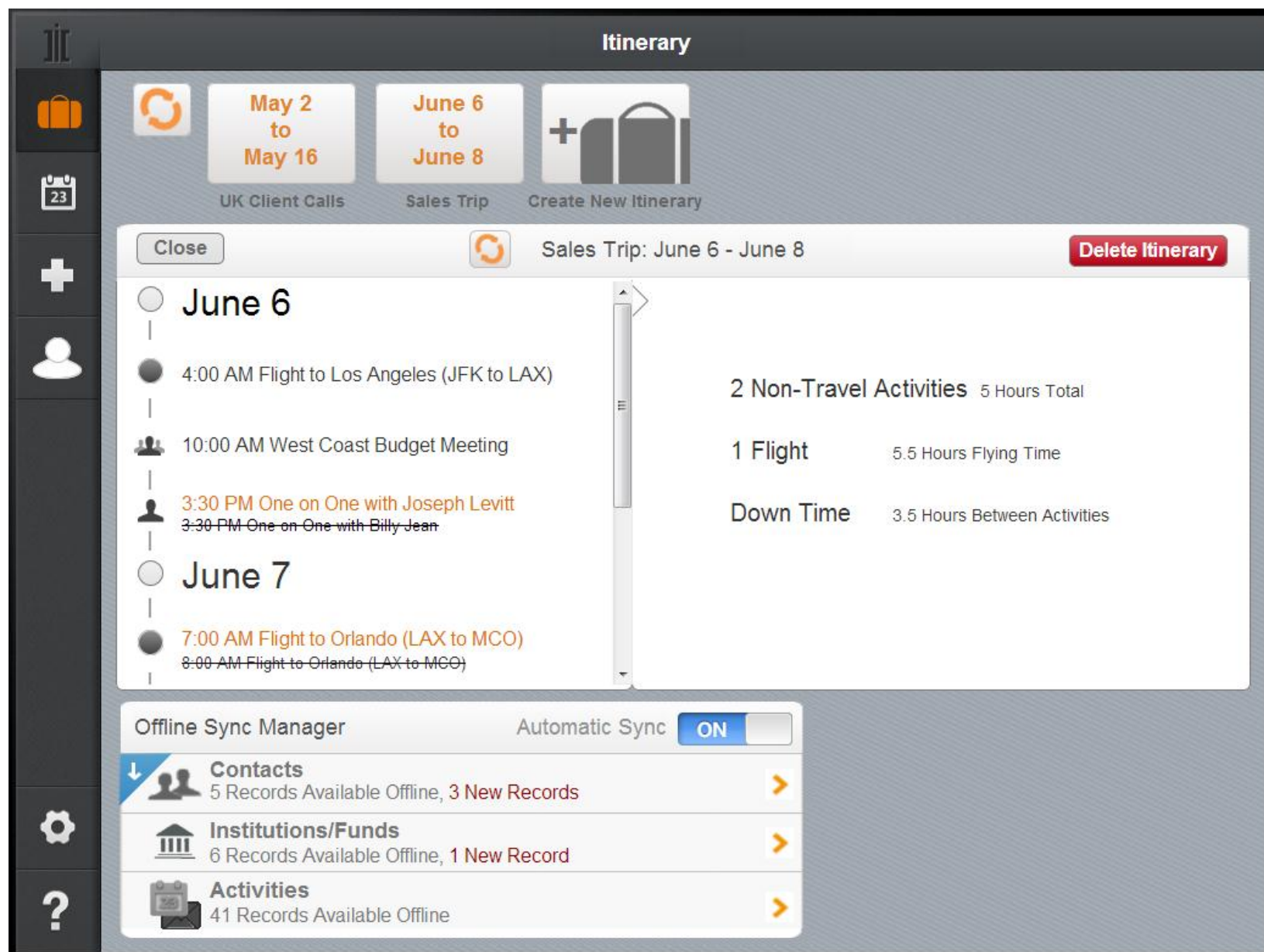


Figure 20: Updated itinerary appears with changes in Ipreo Orange.

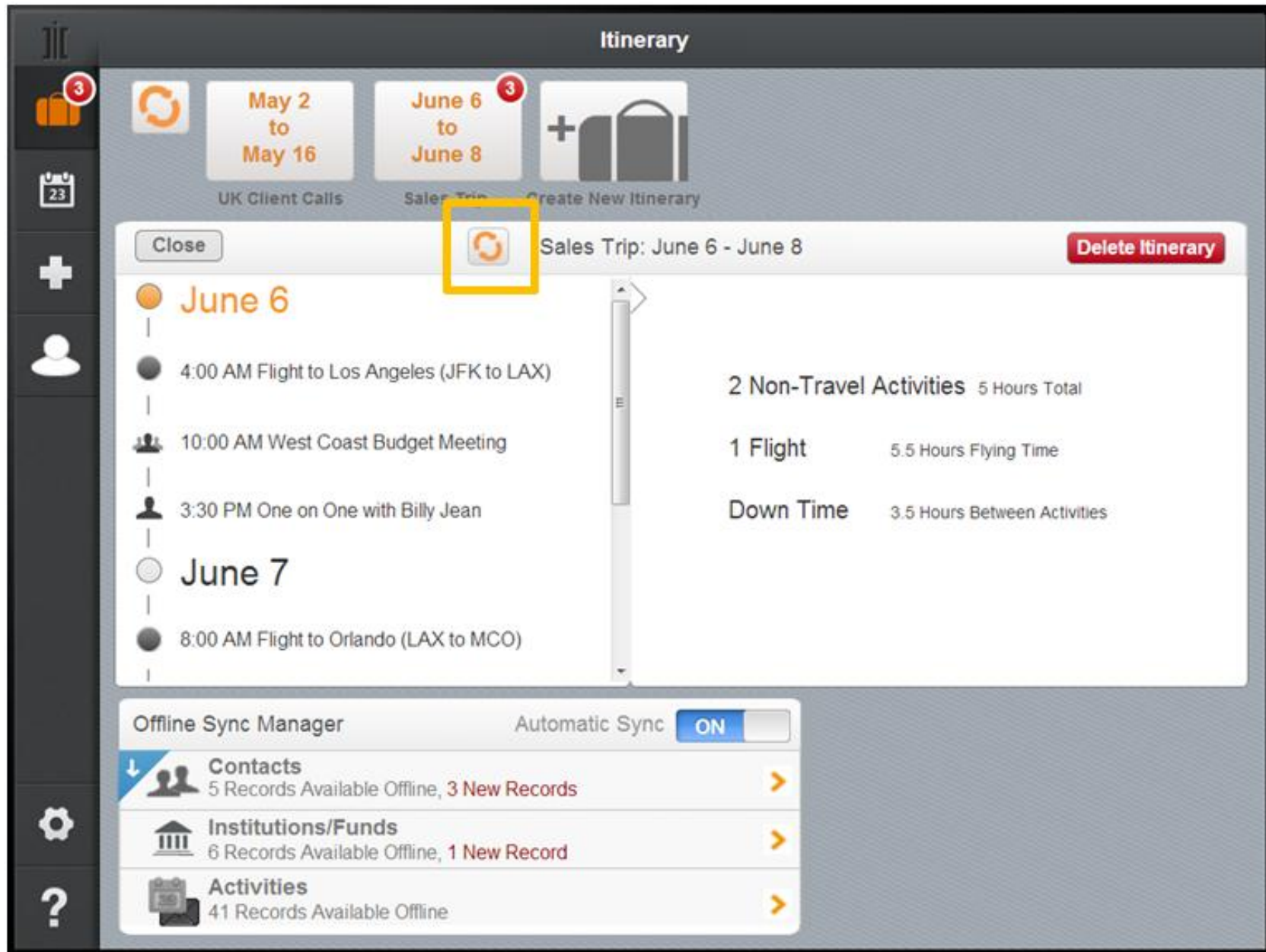


Figure 21: Itinerary-specific Badges appear when user taps the Refresh button from within the View Itinerary overlay

- **Itinerary Updates**

- **Offline** – Refresh button to check for itinerary updates
 - Existing User - Only appears if user has an itinerary
 - Data Usage Dialog – “Checking for updates requires an additional data charge. Would you like to check now?” **[Figure 17]**
 - *Message verbiage and data charge dependent on carrier. - TBD*
- **Online** – Automatic push for updates
- **Badges [Figure 15]**
 - Global Navigation Bar > Itinerary / Home button - total number of updates received across all itineraries on the device
 - Itinerary Icon – Number of updates to that specific itinerary, located on corresponding itinerary’s icon
 - When user taps the Refresh button from within the itinerary view, the badges will only appear on the **Global Navigation Bar** and the related itinerary’s icon **[Figure 21]**
- **Notifications Overlay [Figure 19]**
 - Appears when user taps badge on the itinerary’s icon at the top
 - Notifications grouped by Type (*examples below - TBD*)
 - *Venue Change*
 - *Date Change*
 - *Cancellation*
 - *New Participants*
 - *Additional Participants*
 - *New Event*
- **View Notifications within Itinerary [Figure 19]**
 - List of updates appears after data pull
 - Badges disappear after user views **Notifications Overlay** and itinerary (which appear on screen concurrently after tapping the badge)
 - Updates to itinerary appear within itinerary in Ipreo Orange

7.6 DELETE ITINERARY

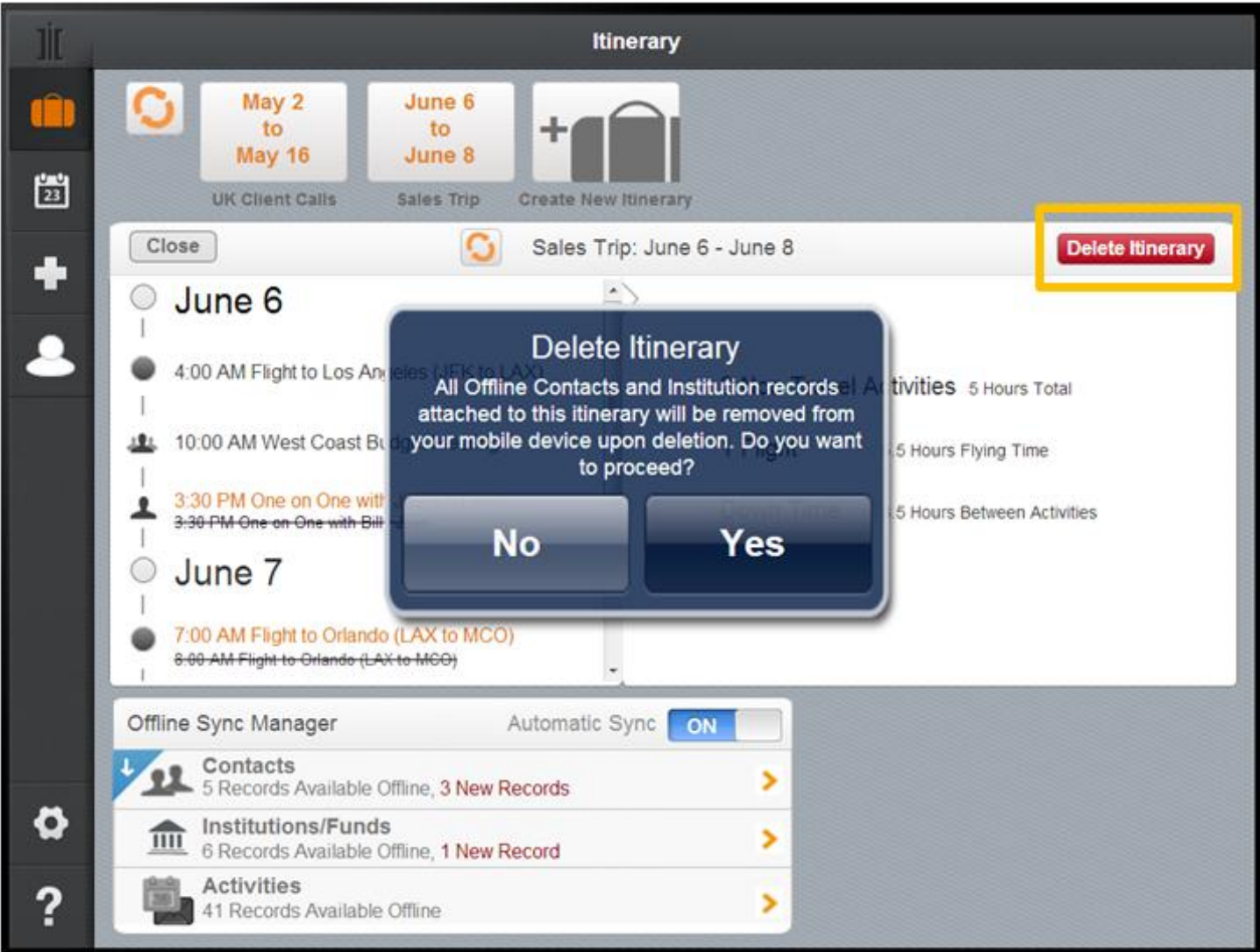


Figure 22: Delete Itinerary Dialog

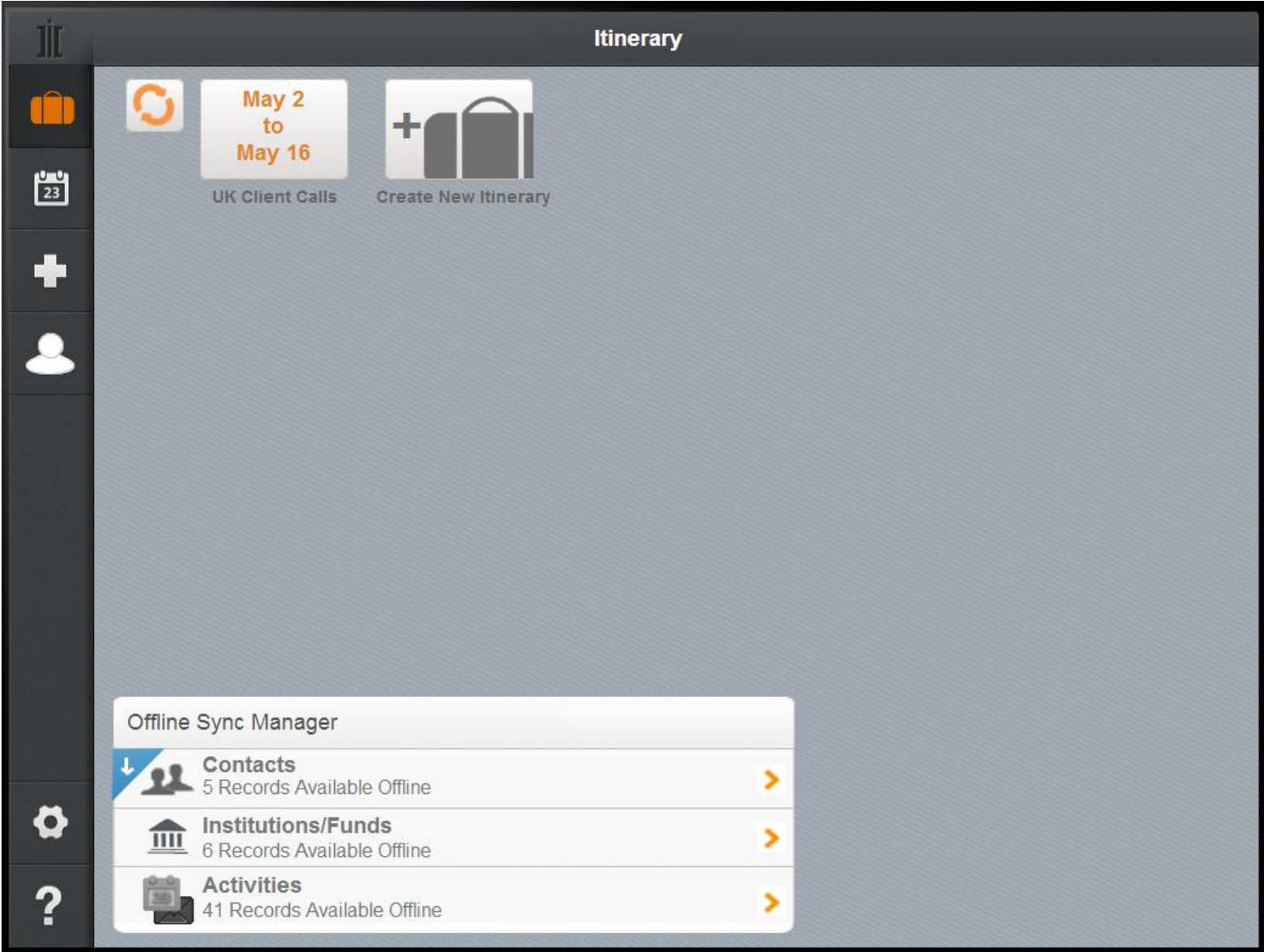


Figure 23: Home Screen with removed itinerary icon

- **Delete Itinerary**

- *Ability to delete shared itineraries is permissions based - TBD*
- Delete Itinerary button on the header of the itinerary
- Upon tapping the Delete Itinerary button, an overlay appears with the text “All Offline Contacts and Institution Records attached to this itinerary will be removed from your mobile device upon deletion. Do you want to proceed?” **[Figure 22]**
 - *Is the itinerary deleted from both the device and the server? – TBD*
 - *If the server as well, won’t take effect until user connects to a network.*
 - *The activities/contact profiles/institution profiles attached to the itinerary will only be removed from the device.*
- Once the itinerary is deleted, the icon previously representing that itinerary will be removed from the Home Screen **[Figure 23]**
- The Contacts and Institution Records attached to the deleted itinerary will be removed from the application, and **Offline Sync Manager** will update **[Figure 23]**

7.7 OFFLINE SYNC MANAGER

After tapping on **Contacts (Institutions/Funds and Activities** will have similar layouts):

Offline:

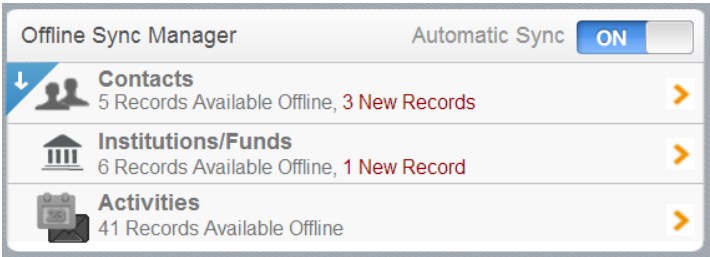


Figure 24: Offline: Displays total number of records available, and new records that were added during the Offline session

Online:

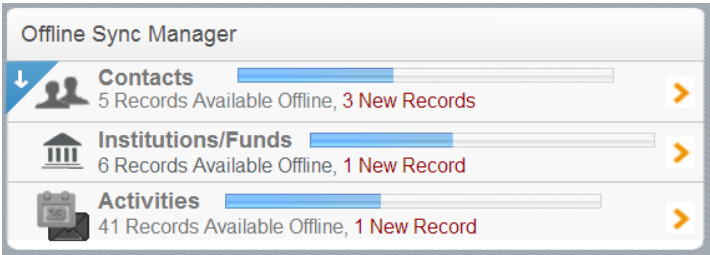


Figure 25: Online: Syncs new records added during Offline session

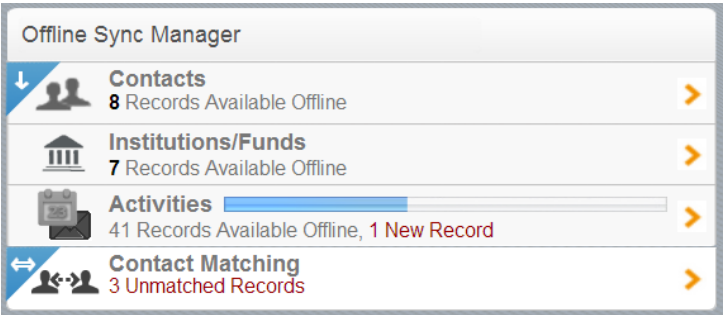
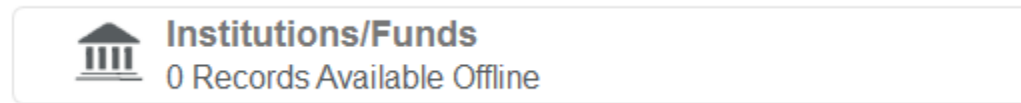


Figure 26: Online: When sync is complete, the record counter updates. When the Contacts sync is completed, the Contact Matching field appears.

- **Offline Sync Manager**

- Only appears if user has an itinerary
 - **Online** and **Offline** - Displays total number of Contacts, Institutions/Funds, and Activities available **Offline**
 - **Online** - Displays **Progress Indicator** for Contacts, Institutions/Funds, and Activities that are currently syncing **[Figure 25]**
 - Example: “X/Y activities synced”
 - When “Y/Y,” the activity counter updates **[Figure 26]**
 - If there are no Contact, Institution/Fund, and/or Activity records available, the bar will appear with the count at 0:



- *Items that get stored offline - TBD*
 - *Any item attached to an itinerary (Contacts, Activities, Institutions/Funds)*
 - *All Primary Contacts from an Institution included in the itinerary?*
 - *If Hybrid solution, we can store all contacts?*
 - *Contact Lists?*
- **Automatic Sync Toggle**
 - Appears when the user is **Offline** and **Online**
 - When the user is **Online**, and had the toggle set to **ON**, cached Offline activities are automatically synced with their **Online** counterparts
- **Offline Contacts**
 - User will be able to access all available Contact Records by tapping on the Contacts section of the **Offline Sync Manager** or tapping the **Contacts** icon within the **Global Navigation Bar** **[Refer to Section 7.8]**
- **Contact Matching with BD – [Refer to Section 7.9]**

7.8 CONTACTS

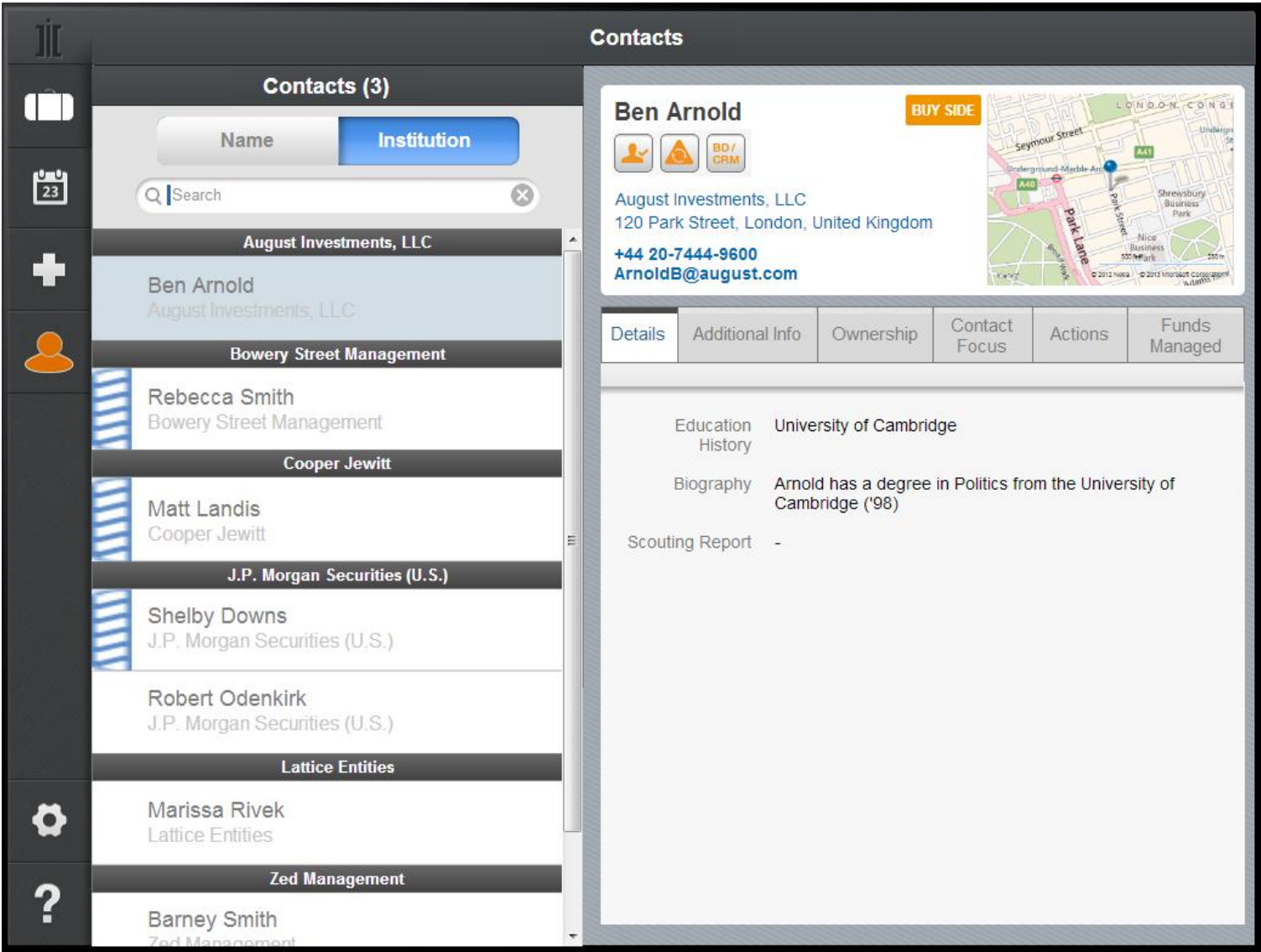


Figure 27: Offline Contacts - Sorted by Institution

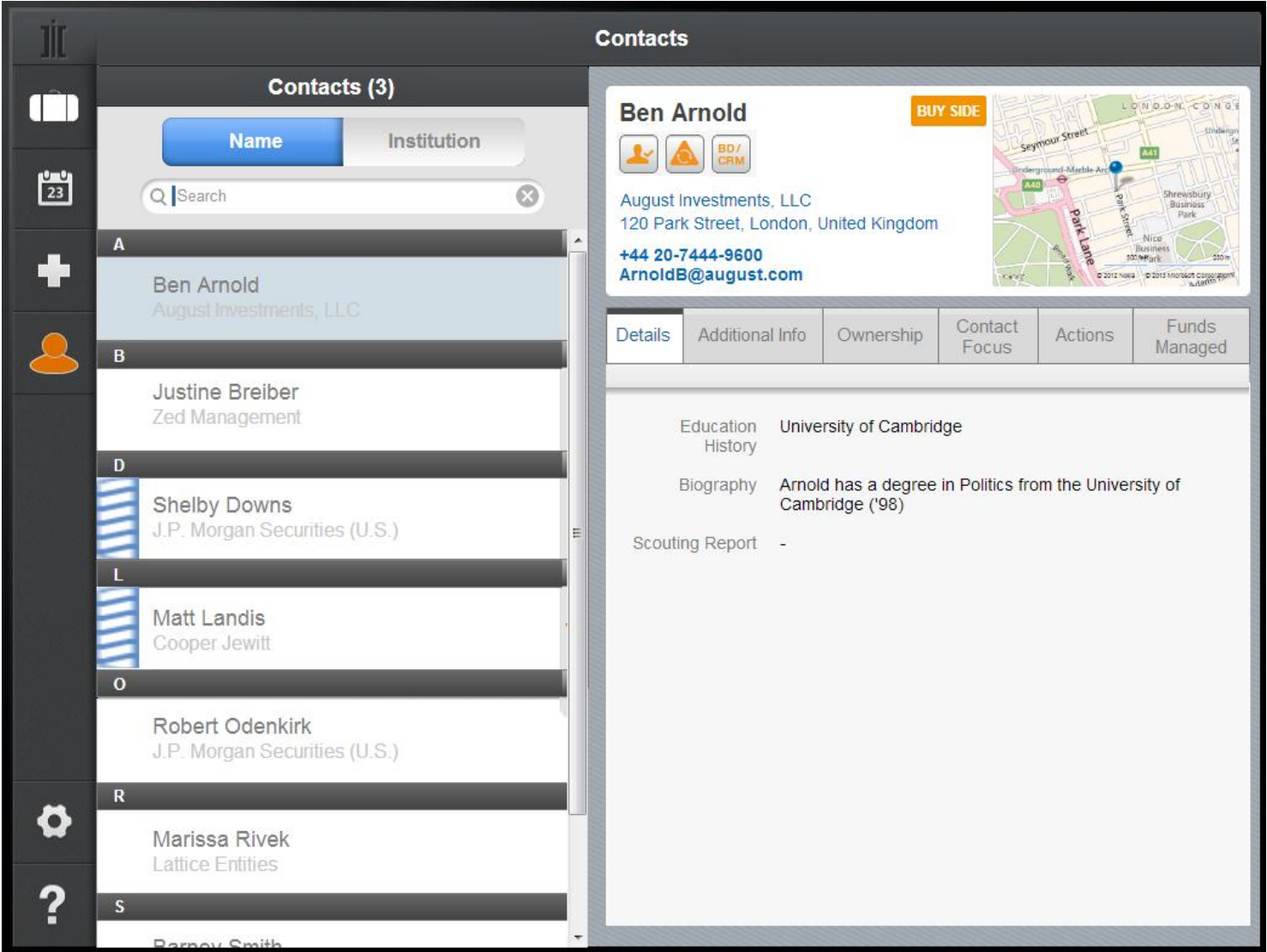


Figure 28: Offline Contacts - Sorted by Last Name

Contacts (3)

Name

Institution

Q

Search

X

A

Ben Arnold

August Investments, LLC

B

Justine Breiber

Zed Management

D

Shelby Downs

J.P. Morgan Securities (U.S.)

L

Matt Landis

Cooper Jewitt

O

Robert Odenkirk

J.P. Morgan Securities (U.S.)

R

Marissa Rivek

Lattice Entities

S

Barney Smith

Contacts

Ben Arnold

BUY SIDE

BD / CRM

August Investments, LLC

120 Park Street, London, United Kingdom

+44 20-7444-9600

ArnoldB@august.com

Details

Additional Info

Ownership

Contact Focus

Actions

Funds Managed

Mobile Phone

+44 20-7444-9600

Assistant Name

Ashley Hinkleman

Home Phone

+44 20-7444-4711

Assistant Phone

+44 20-7444-9601

Secondary Email

Ben.Arnold@gmail.com

Assistant Email

HinklemanA@august.com

Contact Note

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec at mauris id tellus dictum fermentum in eget lorem. Aliquam tincidunt felis id metus aliquet at aliquam erat posuere. Vivamus lobortis volutpat posuere. Ut tortor ipsum, convallis vitae pulvinar ut, faucibus et lorem. Donec ac nunc sed diam bibendum tempor. Integer fringilla tellus eros, in cursus massa. In eu neque dui. Nam laoreet lacinia velit, id scelerisque mauris elementum ut. Aliquam pharetra, quam in euismod auctor, lacus metus sollicitudin enim, id elementum diam sapien et lorem. Aliquam vitae turpis lorem. Nulla at egestas nibh.

Figure 29: Additional Info

Contacts

Contacts (3)

Name | Institution

Q Search

A

Ben Arnold
August Investments, LLC

B

Justine Breiber
Zed Management

D

Shelby Downs
J.P. Morgan Securities (U.S.)

L

Matt Landis
Cooper Jewitt

O

Robert Odenkirk
J.P. Morgan Securities (U.S.)

R

Marissa Rivek
Lattice Entities

S

Barney Smith

Ben Arnold

BUY SIDE

August Investments, LLC
120 Park Street, London, United Kingdom
+44 20-7444-9600
ArnoldB@august.com

Details | Additional Info | **Ownership** | Contact Focus | Actions | Funds Managed

Values	Contact Holdings
Current Position in GOOG - Value/Change	14127743 / 980363
Current Position in GOOG - Shares/Change	8195079882 / 568679165
% Portfolio	1.489029
% of Shares Outstanding	5.281399

Figure 30: Ownership

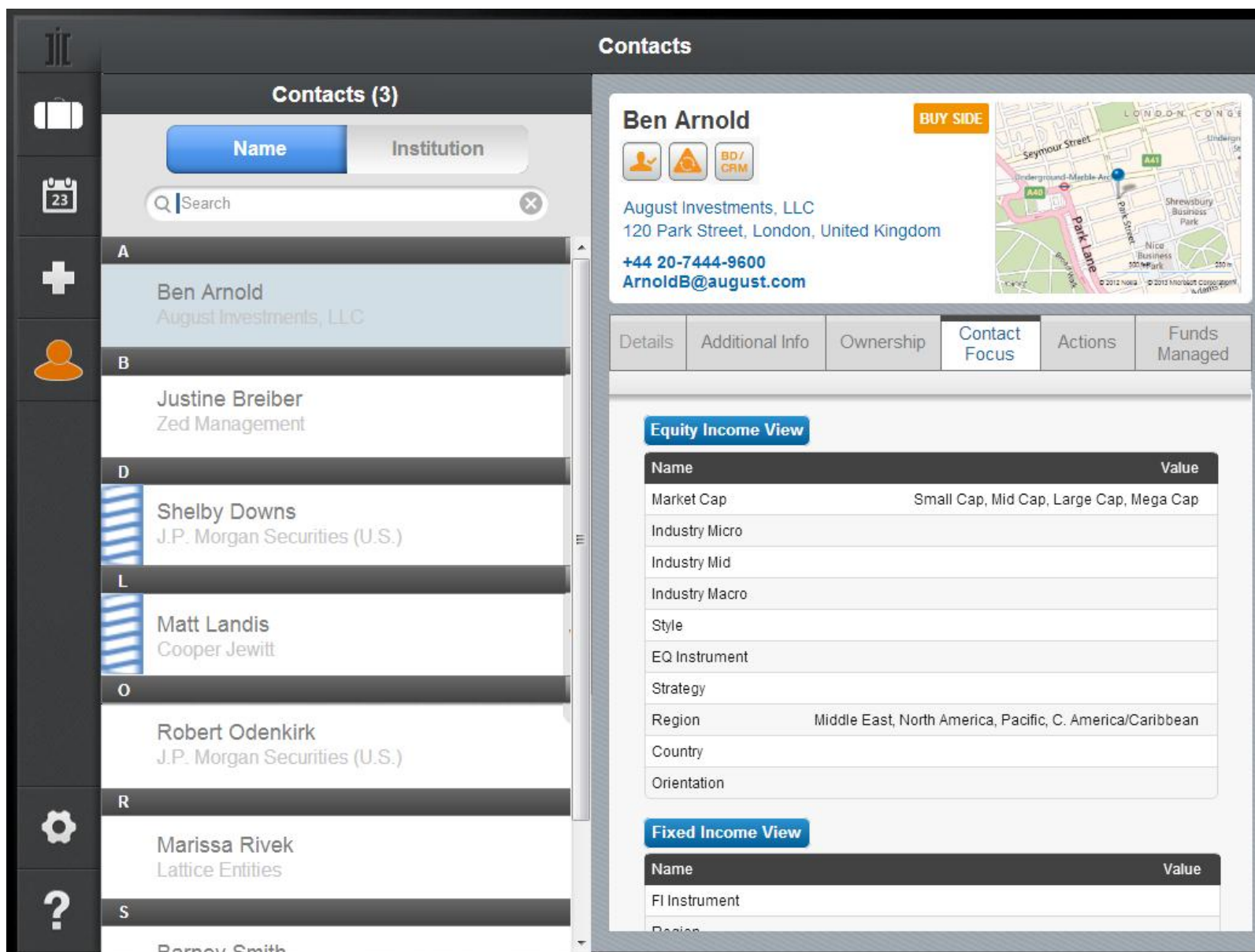


Figure 31: Contact Focus

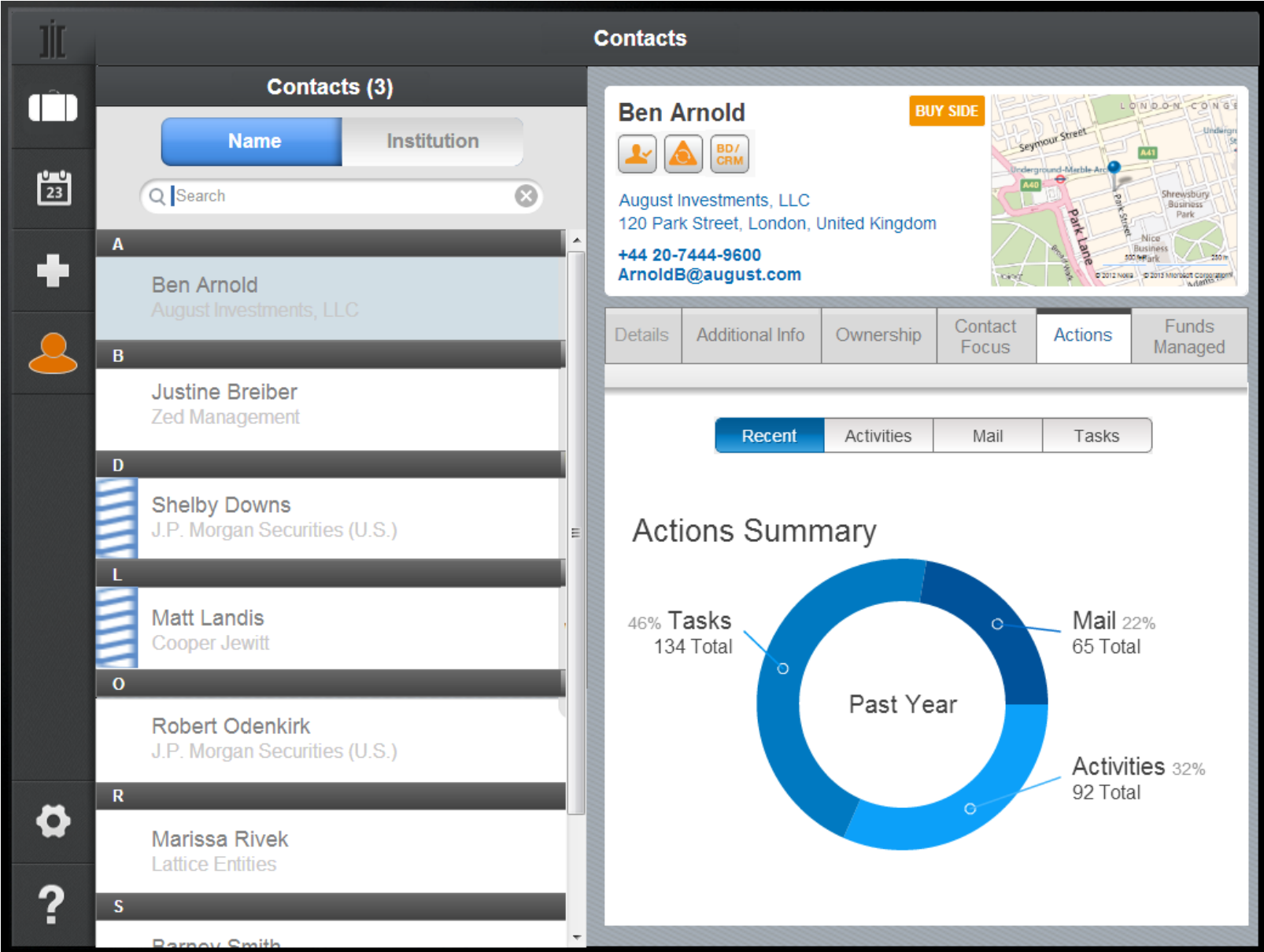


Figure 32: Actions

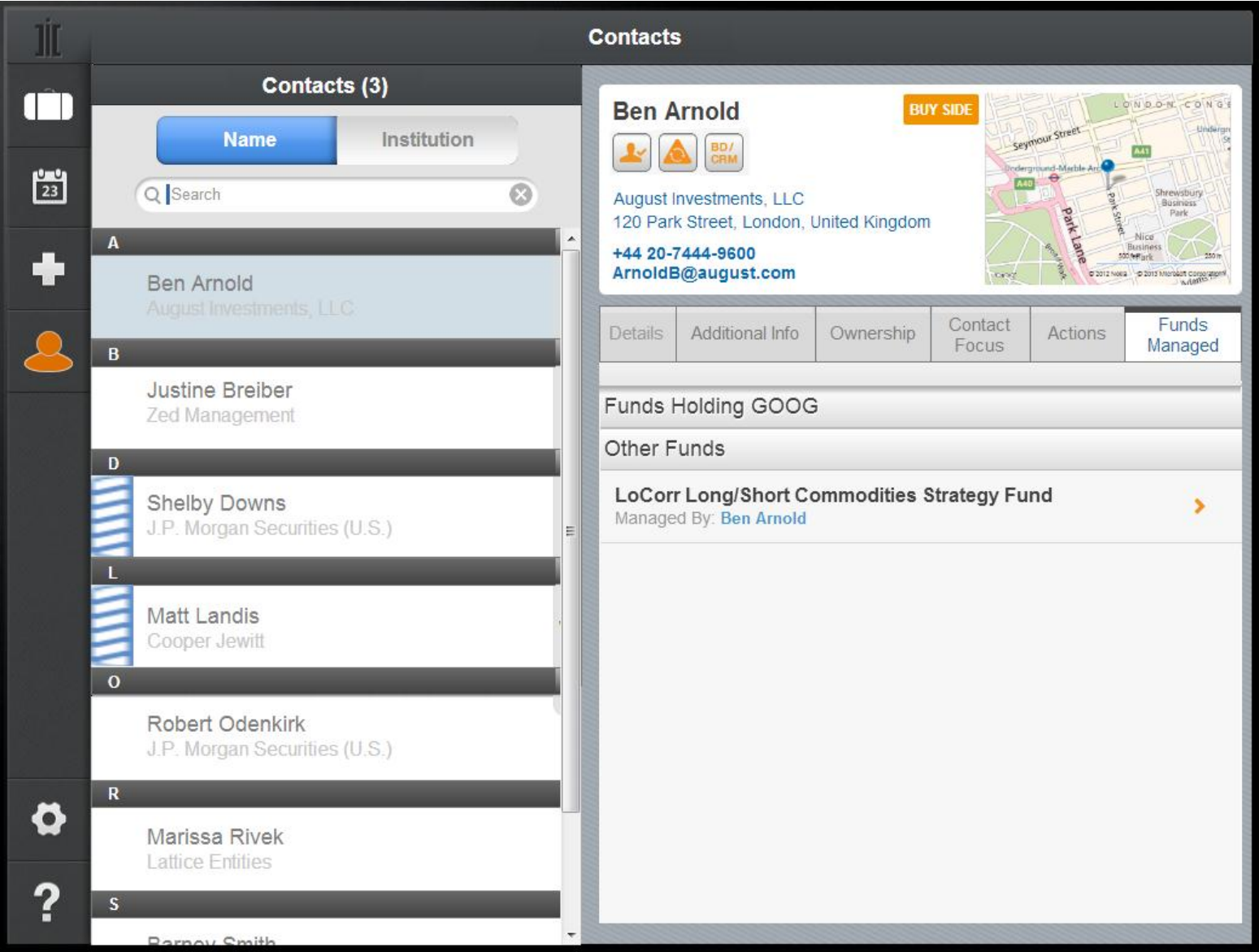


Figure 33: Funds Managed

- **Contacts**

- List of Contacts available **Offline** can be sorted by **Institution [Figure 27]** or by **Last Name [Figure 28]**
- *Details to include from existing Contact Profile - TBD*
 - *Header [Figure 27]*
 - *Name*
 - *Map Snapshot*
 - *Primary Contact*
 - *Subscriber*
 - *BD/CRM*
 - *Primary Phone*
 - *Primary Email*
 - *Details [Figure 28]*
 - *Additional Info [Figure 29]*
 - *Ownership [Figure 30]*
 - *Contact Focus [Figure 31]*
 - *Actions [Figure 32]*
 - *Funds Managed [Figure 33]*
- Striped border indicates that the **Contact** is tentative (has not been synced with its **Online** counterpart)

7.9 CONTACT MATCHING

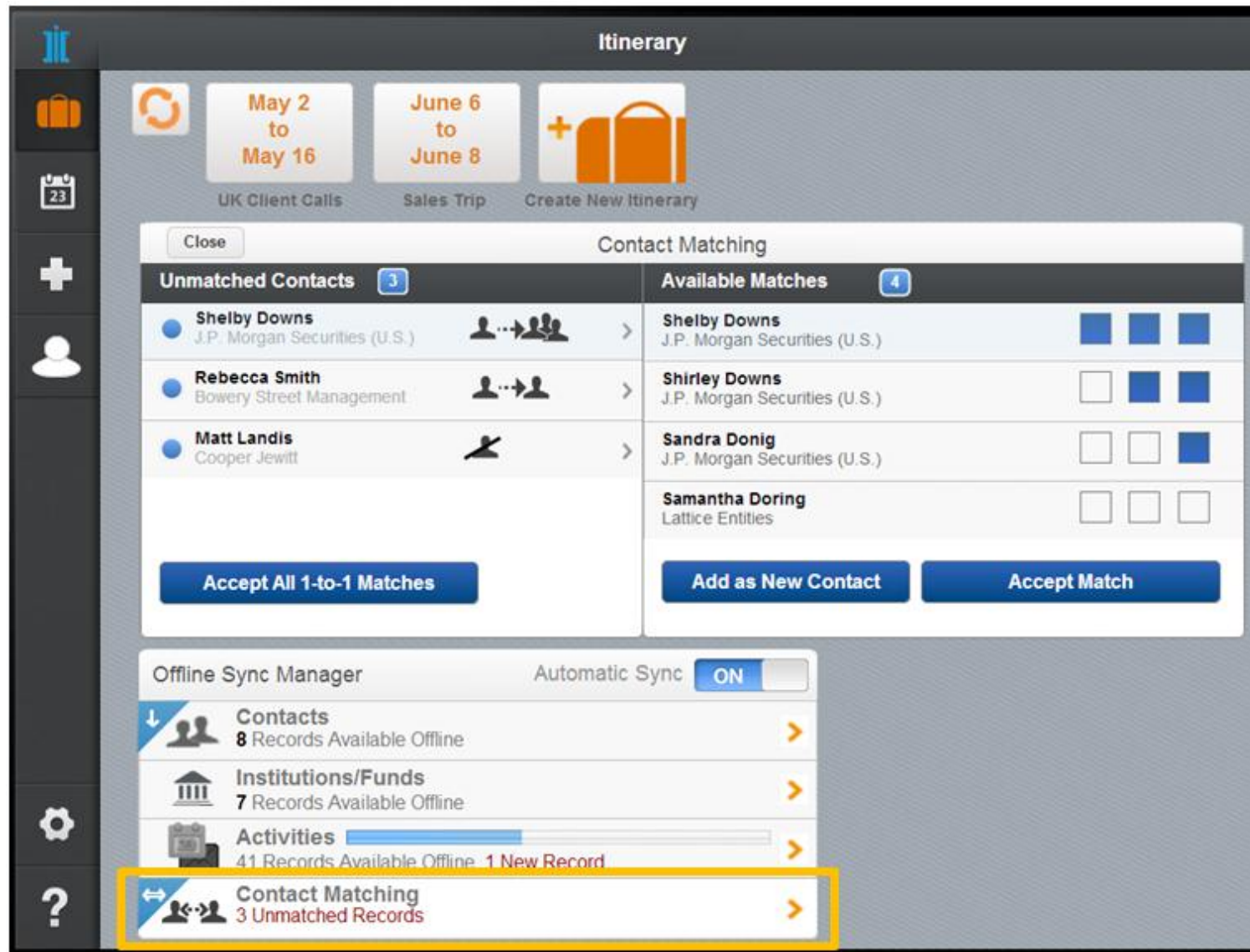


Figure 34: Contact Matching - Multiple Matches. Overlay is revealed when the user taps the Contact Matching section of the Offline Sync Manager.

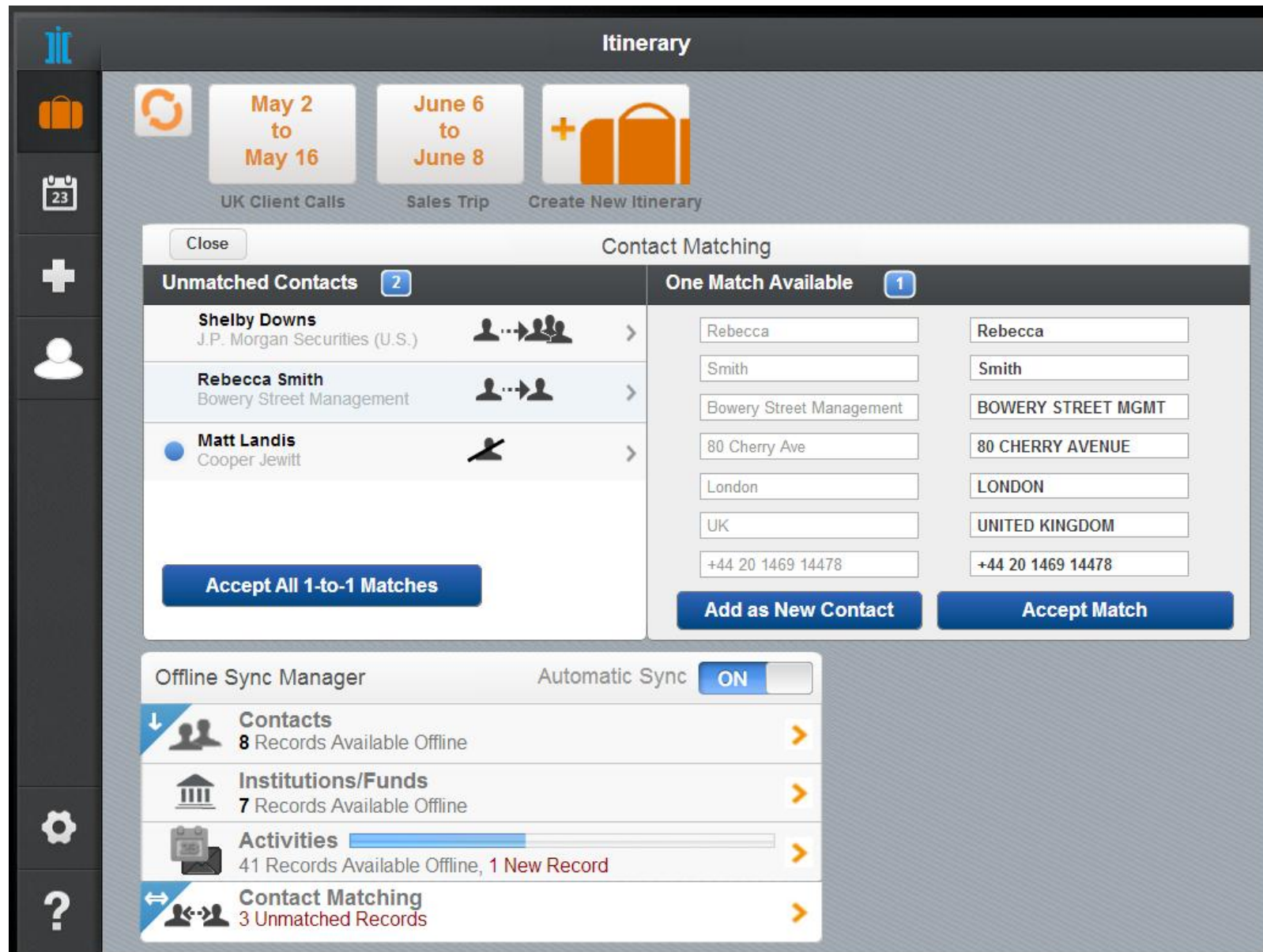


Figure 35: Contact Matching - One Match

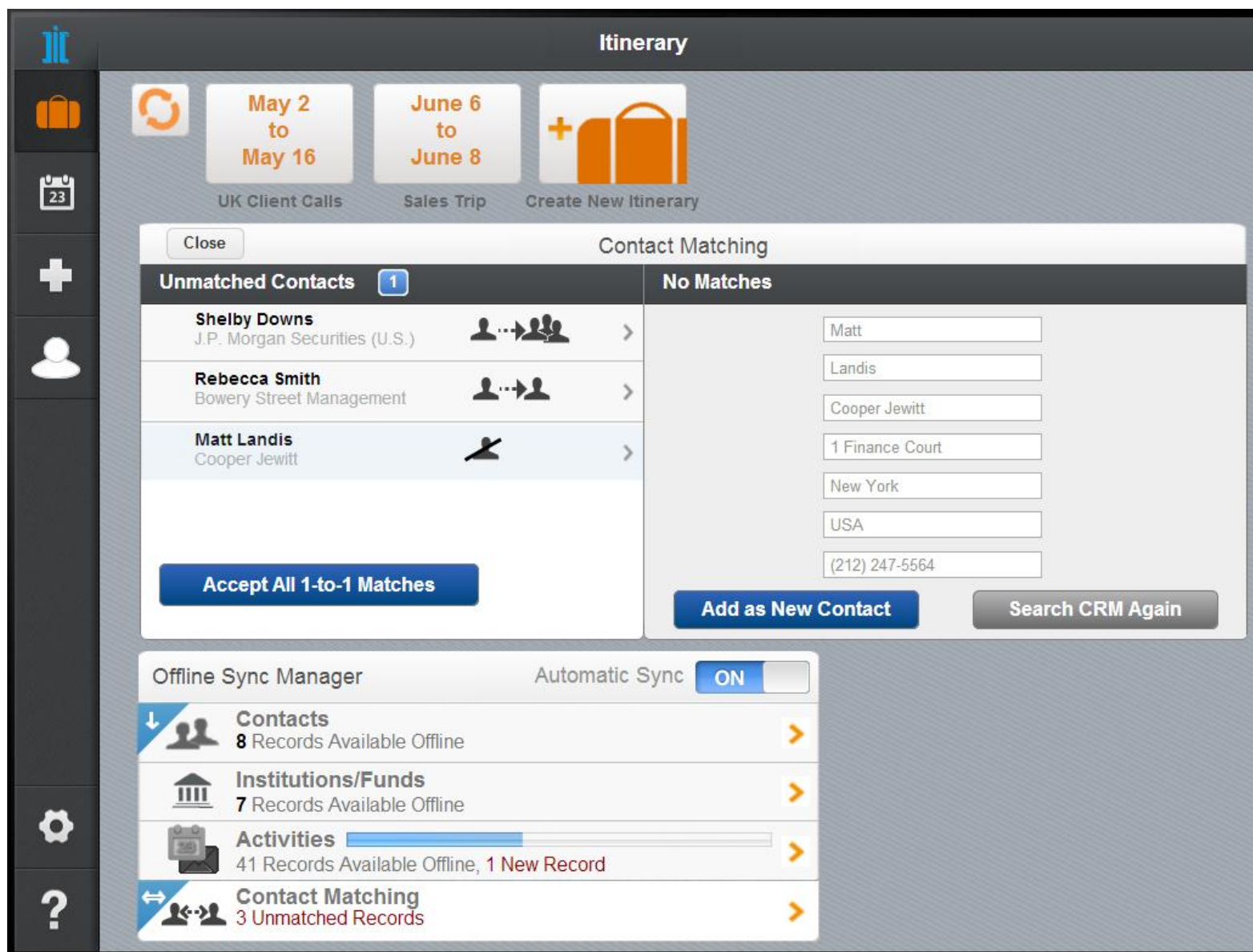


Figure 36: Contact Matching - No Matches

- **Contact Matching with BD**

- **Offline** – Does not appear
- **Online** – Appears after **Contact** sync is complete
- **Online** – Overlay where user can reconcile differences between items added **Offline** and their **Online** counterparts
 - Blue “new” indicator to the left of each contact show that the user has unmatched contact records
 - Blue badge to indicate number of unmatched contact records
 - Badge updates as user matches each contact
 - *Should the contact instead be removed from the unmatched contacts list once it is matched?- TBD*
 - Different reconciling views if there are multiple matches [Figure 34], one match [Figure 35], and no matches [Figure 36]
 - Icons to represent type of match (Multiple, 1-to-1, None)
 - Accept All 1-to-1 Matches Button
 - When tapped, blue “new” indicator disappears from all 1-to-1 matches
 - Search CRM Again Button
 - *Re-executes the sync process for the selected contact incase the contact was not matched because of an issue on the service side, or due to a sporadic network connection - TBD*

7.10 CALENDAR

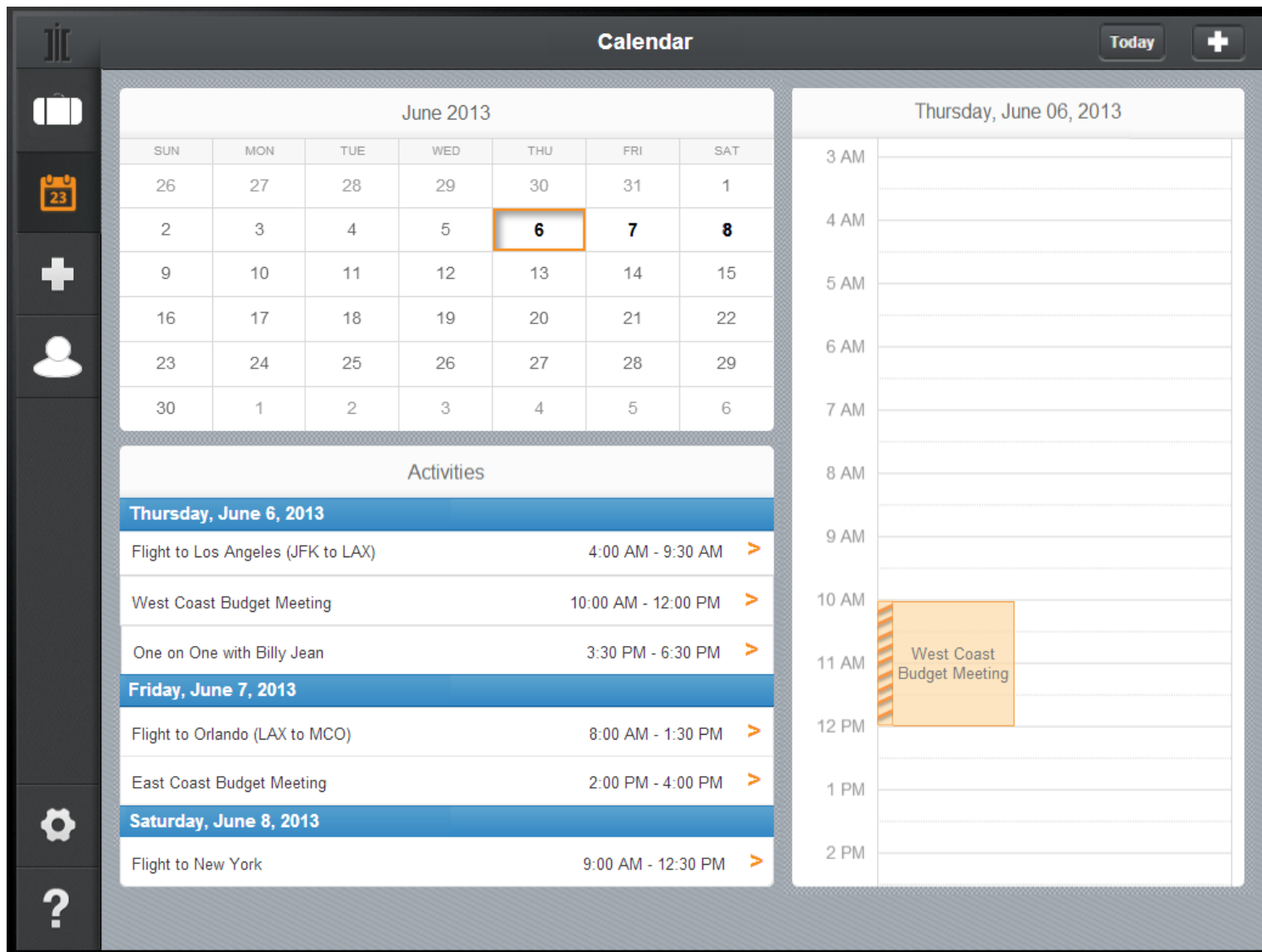


Figure 37: Calendar

- **Calendar**

- Disable **View on Map** functionality in Offline Mode - *Unless we can provide a snapshot of the location on a map. No directions functionality.*
- Activities Listing **[Figure 37]**
 - **Offline** - Displays any activities that are attached to an itinerary that has been made available Offline
 - Activities have a striped border indicating that they are tentative and have not been synced with their **Online** counterparts
 - **Offline** - Displays all activities that were created Offline
 - **Online** – Syncs Offline activities with available updates
 - **Online** – Displays *all* activities tied to the user
- Tapping on an activity in **Month View** or **Day View** will open the activity in an overlay and display details **[Figure 38]**
 - *Should the user be allowed to edit all the fields of an activity that was created Offline given that an activity which is part of an itinerary would only have Notes and Add Participants editable?*

7.11

VIEW ACTIVITY

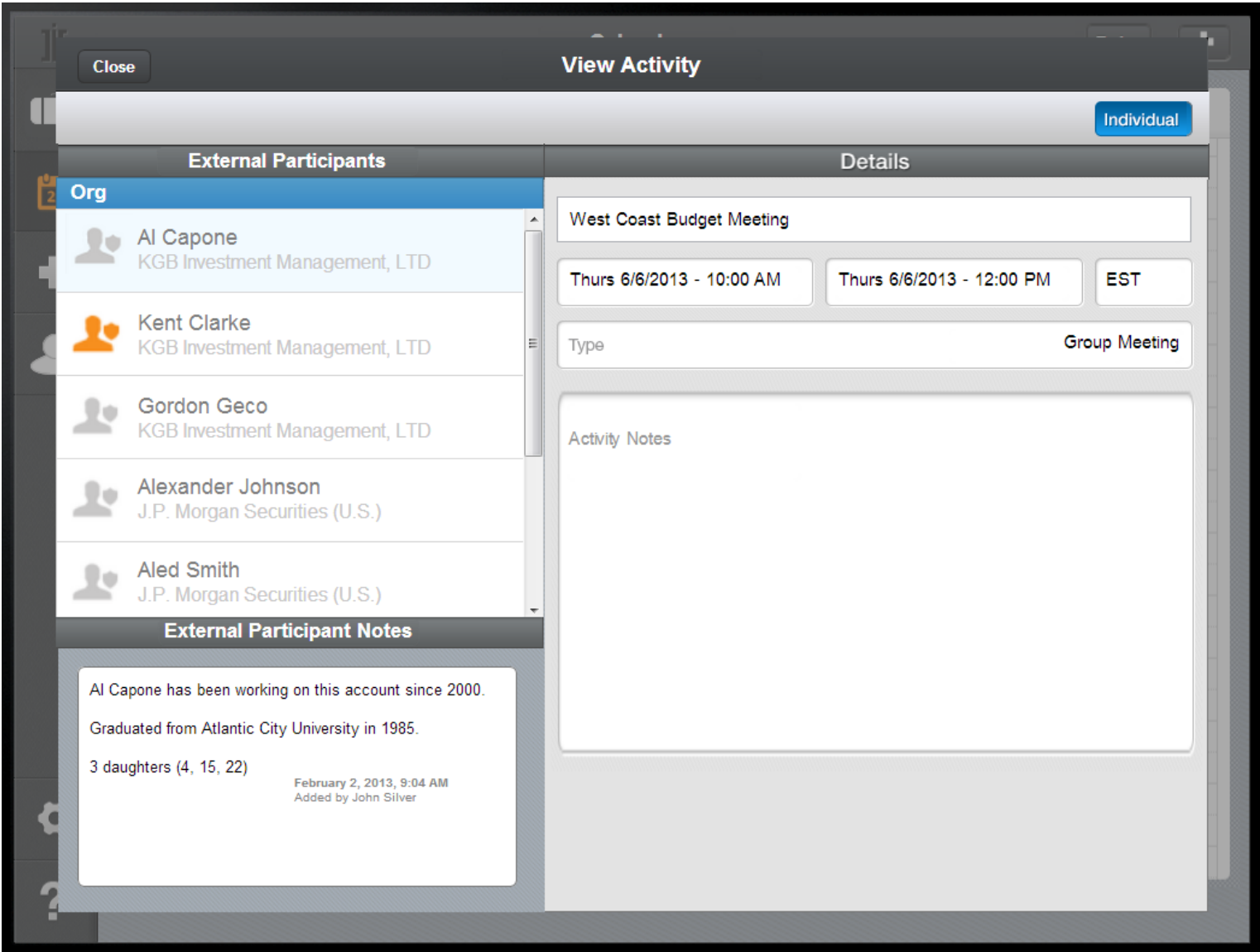


Figure 38: View Activity: After user taps on an event in Calendar or from within the activity listing, a read-only (excluding Notes) view of the activity appears.

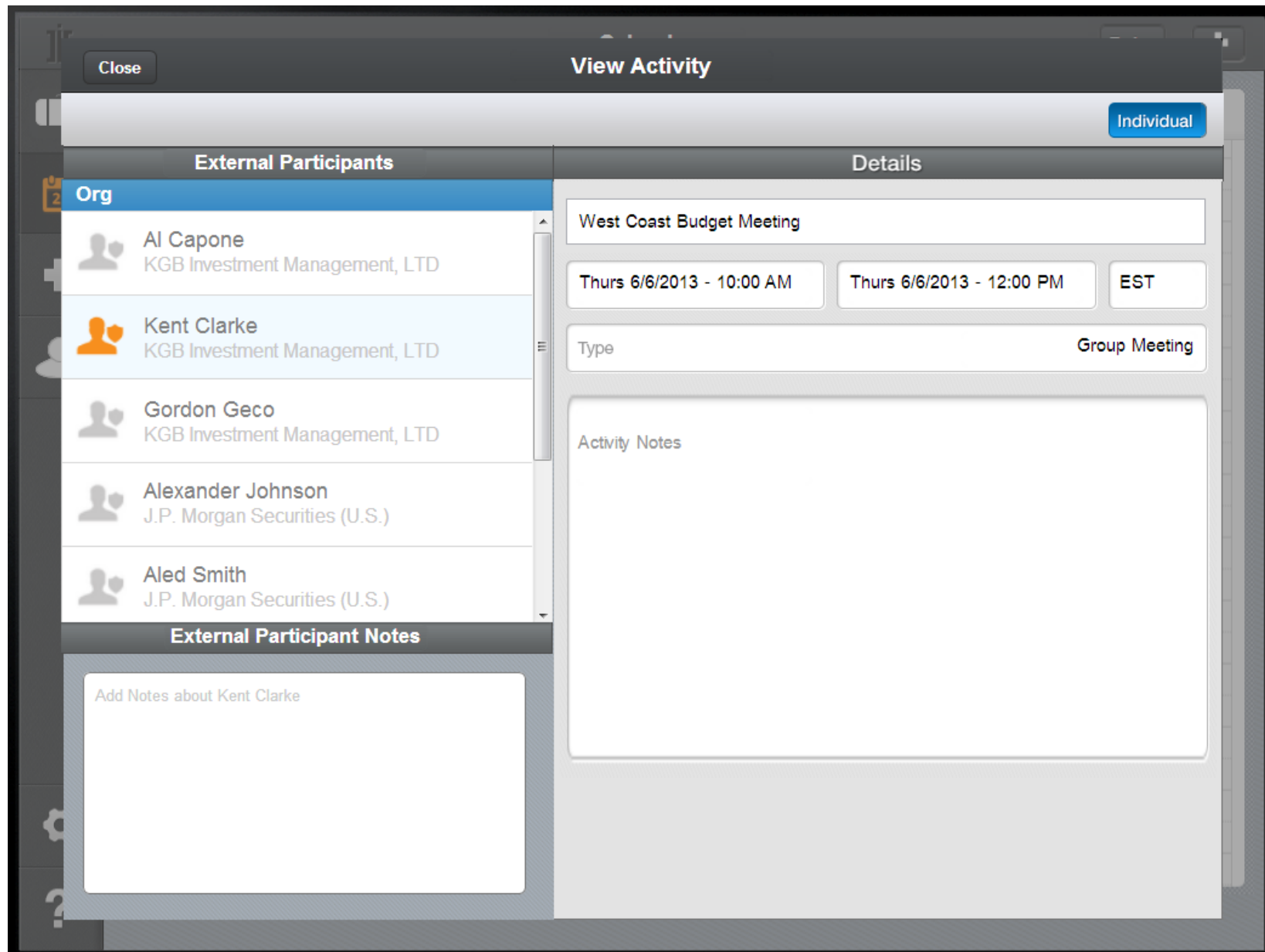


Figure 39: View Activity: External Participant Notes

- **View Activity**

- Overlay

- **Right Panel**

- Subject – Read-only view
 - Start/End Date/Time – Read-only view
 - Time Zone – Read-only view
 - Type – Read-only view
 - Notes
 - **Individual Activity** - Notes box for overall activity **[Figure]**
 - Time stamp with name of user who edited it (especially important for **shared** itineraries)
 - **Group Activity** – Notes box for overall activity (*Group activities are not reflected in mockup*)
 - Time stamp with name of user who edited it (especially important for **shared** itineraries)
 - Replacing Participant with someone else from same Institution – *TBD*
 - *Restrict by office/location?*
 - *Add all contacts within an Institution?*

- **Left Panel**

- External Participants – Scrolling list
 - Contacts
 - Institutions
 - Notes
 - **Individual Activity** - Text input box appears below External Participants list and displays notes related to the selected participant **[Figure 38]**
 - Time stamp with name of user who edited it (especially important for **shared** itineraries)
 - **Group Activity** - No text input box (*Group activities are not reflected in mockup*)

7.12 ADD ACTIVITY (OFFLINE)

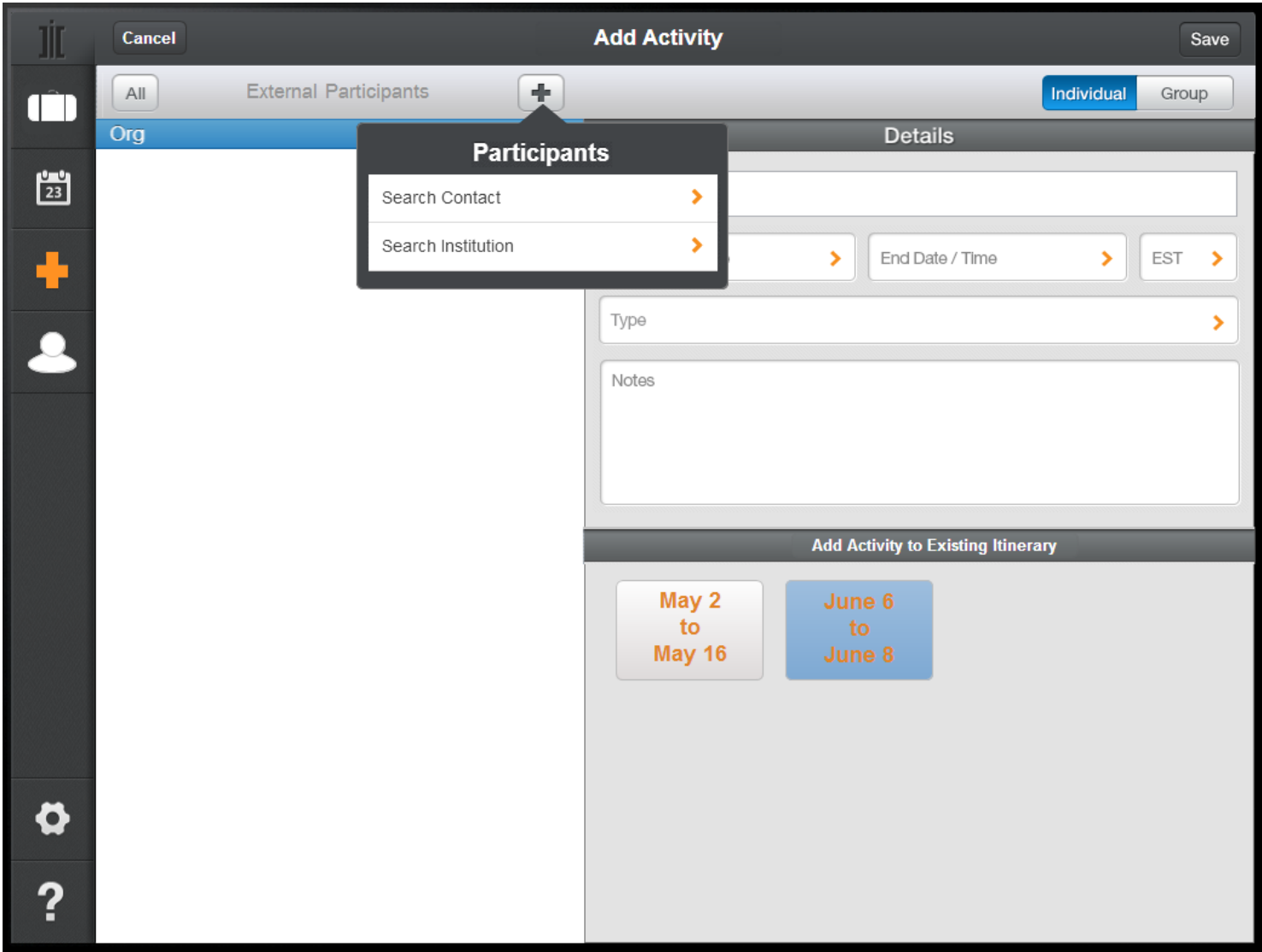


Figure 40: Add Activity, Add Participants, Add Activity to Selected Itinerary

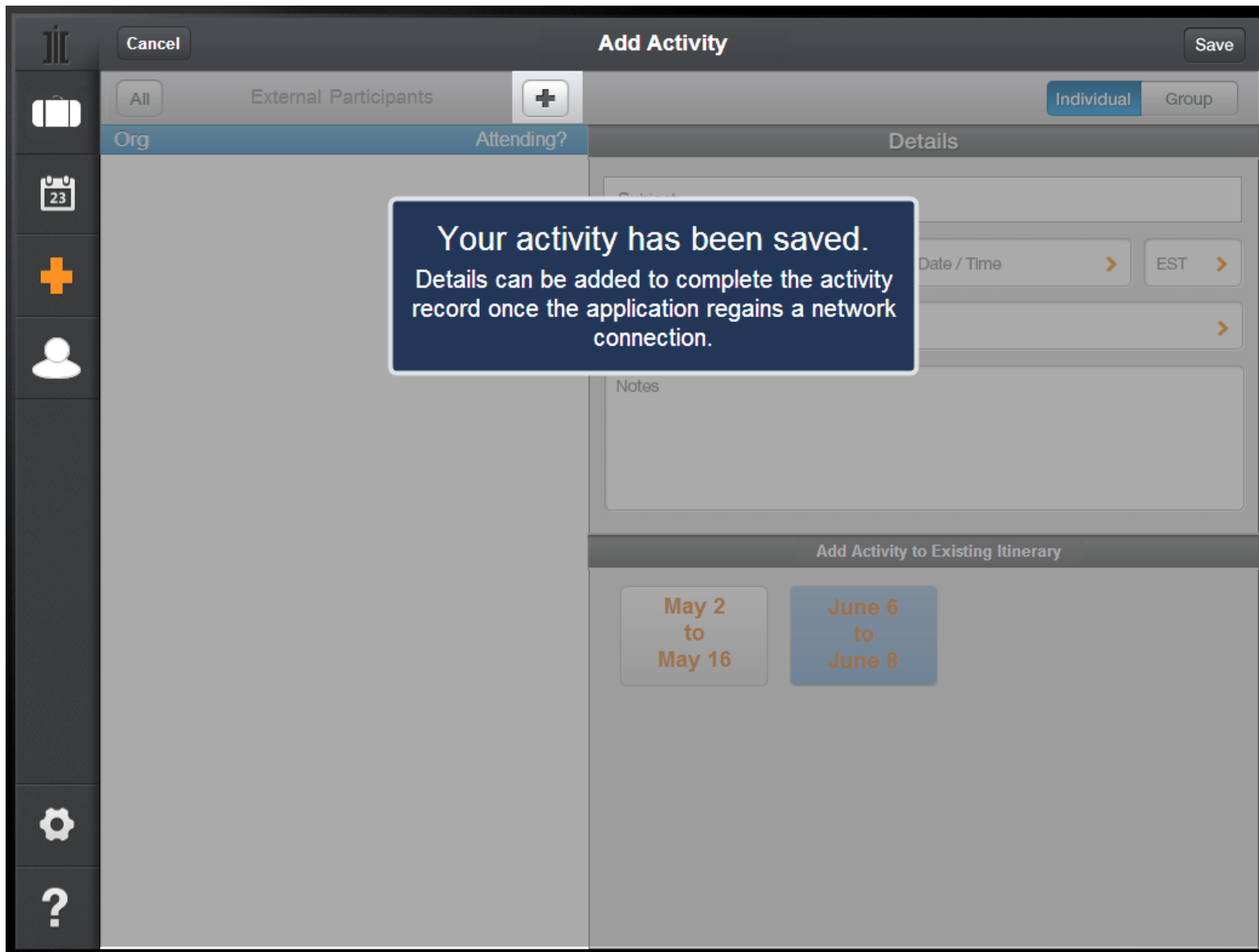


Figure 41: Add Activity: Fading dialog confirming saved new activity

- **Add Activity**

- Subject
- Start/End Date/Time
- Time Zone
- Type
- Notes
- Add Activity to Existing Itinerary
 - All available itineraries will appear here
 - Once tapped on, the icon of the selected itinerary will become blue **[Figure 40]**
 - User can select multiple itineraries
- Individual/Group Toggle
- External Participants – *TBD*
 - Can only search through Contacts and Institutions available **Offline**. No lists.
- Saved Activity Dialog, fades – “Your activity has been saved. Details can be added to complete the activity record once the application regains a network connection.” **[Figure 41]**
- Activities added **Offline** will have a striped border to indicate that they are tentative, and have not yet been synced with their **Online** counterparts. This will demonstrate that the details can be modified. **[Refer to Section 7.10 – Calendar]**

7.13 SETTINGS

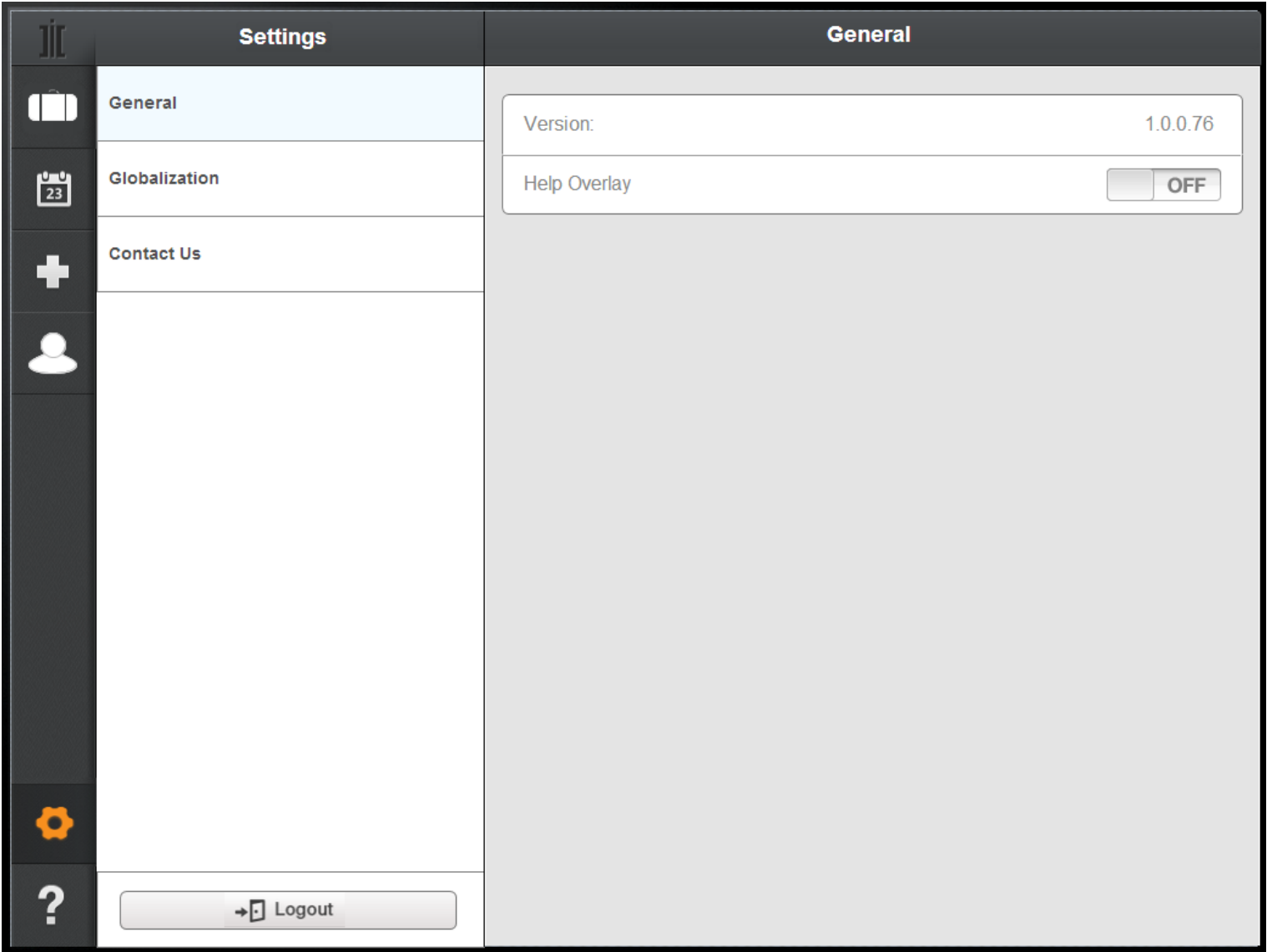


Figure 42: Settings: General

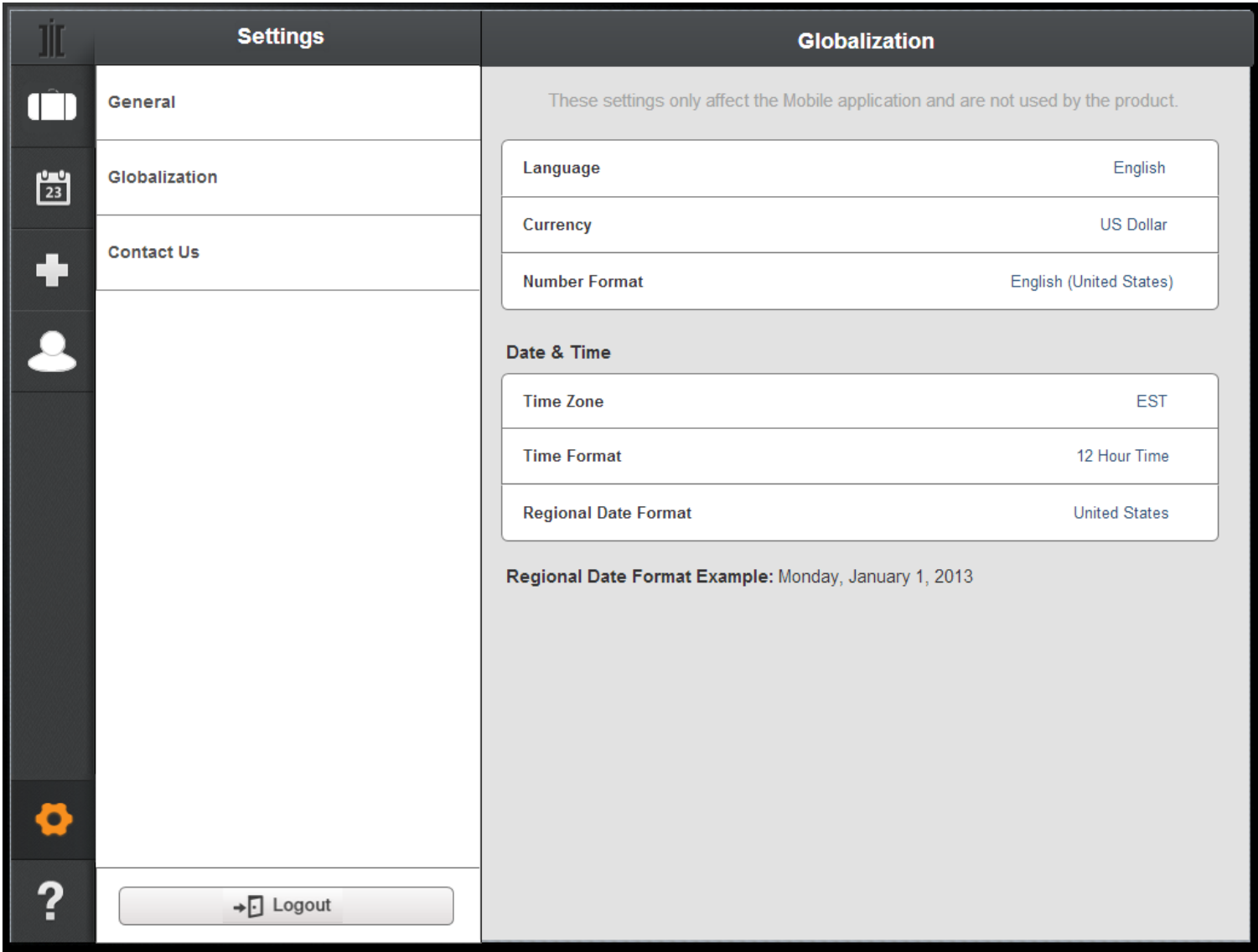


Figure 43: Settings: Globalization

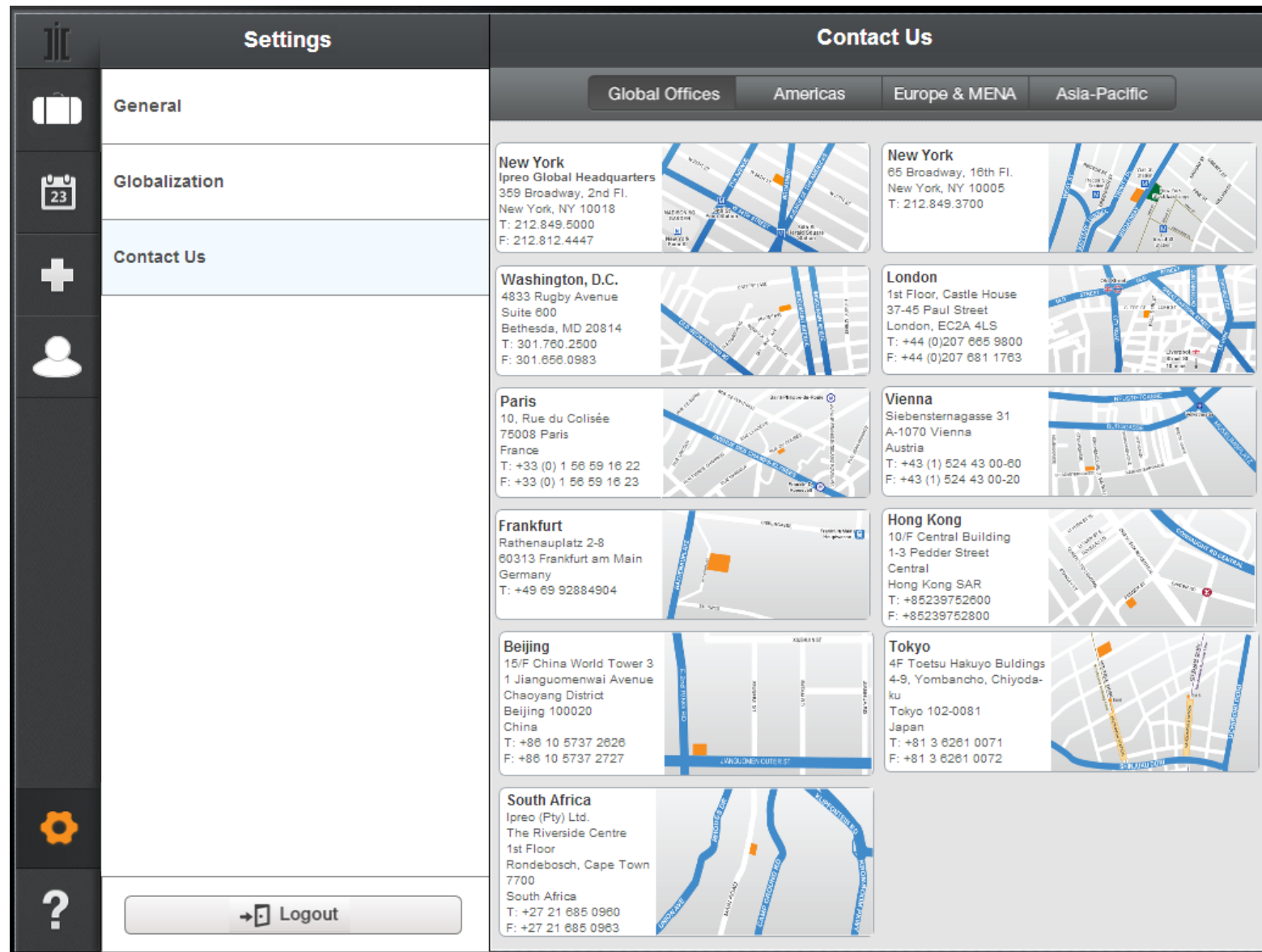


Figure 44: Settings: Contact Us

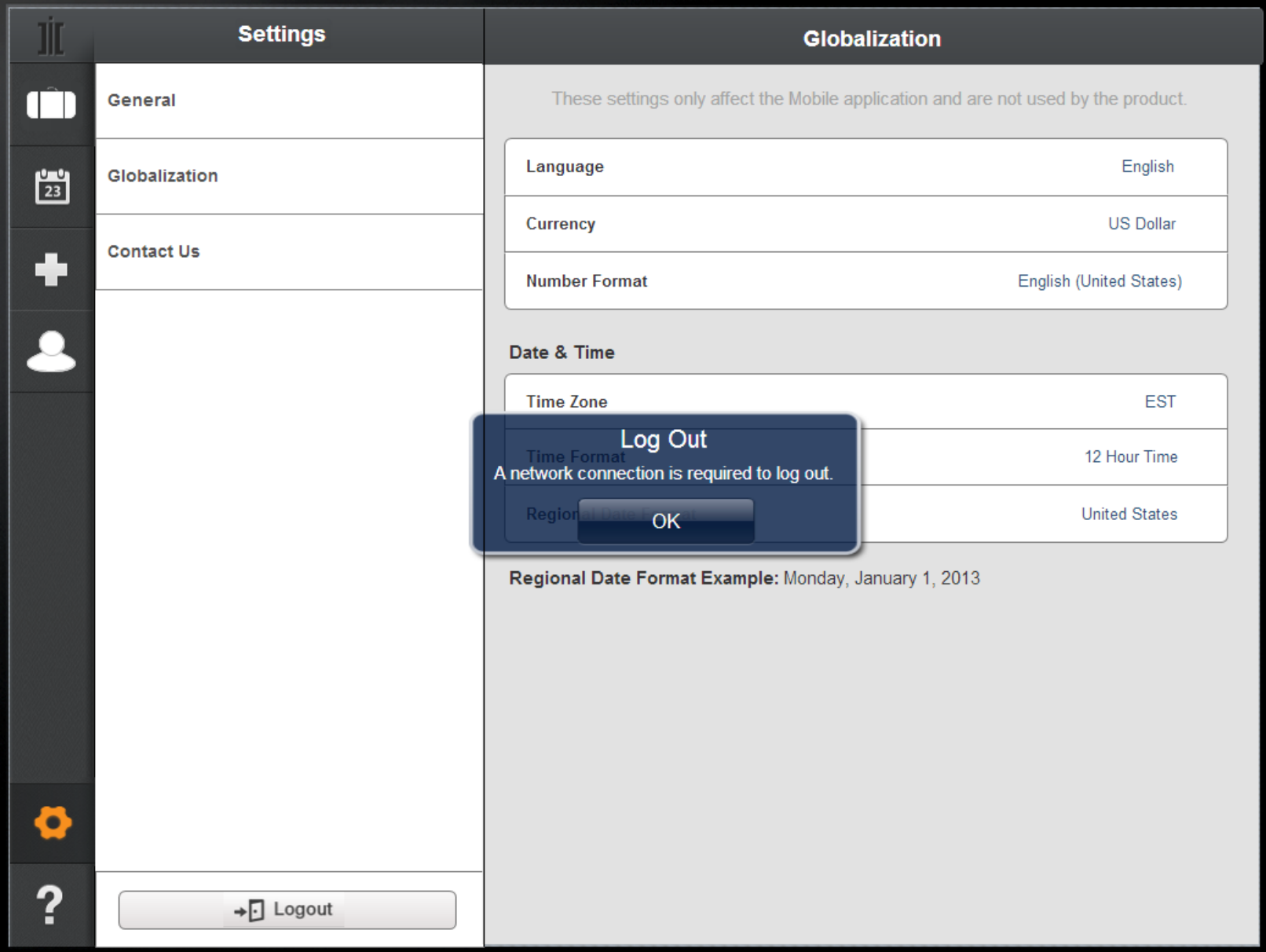


Figure 45: Settings: Logout

- **Settings**

- **General**

- Version
 - Help Overlays Toggle

- **Globalization**

- Read-only view of user's Globalization settings
 - Remove Time Zone > Set Automatically control
 - Remove Date & Time > 24 Hour Time control

- **Contact Us**

- **Log Out**

- **Offline** - User will not be able to Log Out
 - **Offline** – When use taps Log Out button, there is a dialog: “A network connection is required to log out” that is dismissed with an OK button

7.14 COACHMARKS

- **Coachmarks** – *Update existing Online screens to reflect limited Offline functionality*

- **Itinerary Screen (Home Screen)**

- Remove Search coachmark
 - Remove Lists coachmark
 - Remove Recently Viewed coachmark
 - Coachmark to instruct user to “Tap an icon or description within the itinerary to view details.”
 - Coachmark to tap button to Create New Itinerary
 - Coachmark to tap Refresh button to check for updates

- **Add Activity**

- Remove Participant Attendance Status coachmark
 - Remove Tag Broker/Sponsor coachmark
 - Remove Select All Participants for Editing button coachmark
 - Remove Swipe Right-to-Left to Delete Participant coachmark
 - Change “To make updates” to “To view or add notes to individual participants, tap one of the rows to the left to edit.”

- **Calendar**

- Remove Switch Between Calendar/Map View coachmark
 - Edit Swipe Up and Down to see Future and Past Activities coachmark to include “that are part of an itinerary” or “that are available”
 - Edit Swipe Up and Down to see Activities for the Day coachmark to include “that are part of an itinerary” or “that are available”

7.15 HELP

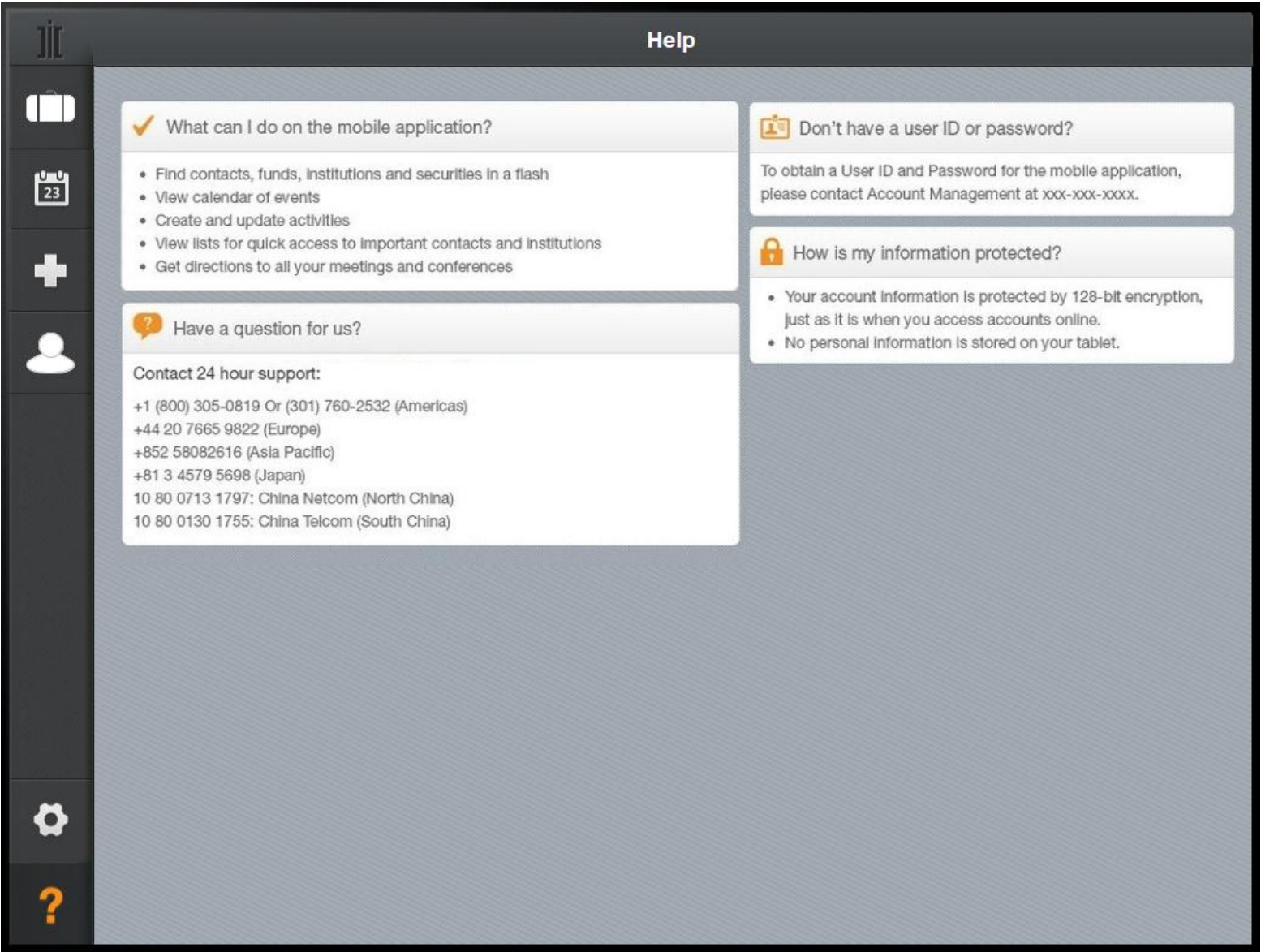


Figure 46: Help (Post-Login)

- **Help (Post-Login)**

- Add “When online,” to the “If you would like to see additional features...” text within the “What can I do on the mobile application” section
- Remove CallMeNow@Ipreo.com from “Have a question?” section OR add “When online,”
 - Remove “Forgot Password” section

7.16 RELATED USE CASES

As a mobile user without a network connection, I want to know what meetings I have scheduled and where, based on my itinerary.

As a mobile user without a network connection, I want to access my activity and view the participants while in a meeting or in transit.

As a mobile user without a network connection, if I am in a meeting and there is a participant who wasn’t originally invited, I want to know what their name is and what Institution they belong to.

As a mobile user without a network connection, I want to add notes to an existing activity during or after a meeting, both to the general activity and individually for each participant.

As a mobile user without a network connection, I want to add an activity that will appear in my calendar, and also have the ability to link it to an existing itinerary.

As a mobile user without a network connection, I want to be able to access all contacts on the device, and view their contact information and significant elements of their profile.

