OPENTEXT

886576591 – EW2017 Agenda Builder

Functional Design

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Introduction

This Functional Design document is in support of project **886576591 – Enterprise World 2017 Agenda Builder**. The document contains all of the design elements required to provide solutions including those related to technical, functional, and business processes. See the Business Requirements document for details on specific functionality that must be included in the design.

Design Overview

Existing integrations with Cvent and middleware for Agenda Builder functionality delivered in previous projects and OTRs remains unchanged. The requests that are part of this project focus on front-end interaction and design changes that the team will address with WEM development updates supported by updates in HTML and CSS from the Marketing Web Team.

The EW2017 Agenda Builder is an integration with the "Sessions", "Training" and "My Agenda" pages on the EW2017 website that allows users to select sessions for a personalized agenda and a way to view and update those selections. This solution focuses on two personas:

- Prospective EW2017 attendees, mainly customers, who want to build a case for attending the conference

- Registered EW2017 attendees who want to create an agenda of sessions they want to attend while at the conference

Users must have or create an OpenText Connect (OT Connect) account and sign in to the EW2017 site in order to add sessions to their agendas. Users do not need to register for the conference to use the agenda builder.

Each user's session selections are stored in OT middleware and displayed on the website, delivered using WEM. The only user-specific integration with the registration site—Cvent—is with paid training sessions during conference registration, and syncing which training sessions users have paid for.

Marketing is able to get reports on which users have created agendas but not registered for the conference; see how many times users have added each session to their agendas in order to gauge interest; and how many people in total have created agendas.

Design Details

Each business requirement listed numerically reflects those agreed to in requirements documentation. The *Solution* stated for each business requirement is the functional requirement proposed to address the business need. Once reviewed by the technical team, we will created JIRA issues, with JIRA IDs used for technical requirements during development.

This document incorporates selected wireframe screen shots to demonstrate functionality. The project workspace contains the full wireframes.

The latest project development updates are available in ITAPPS-2481: Enterprise World 2017 Agenda Builder, the epic used for tracking functional to technical requirements.

Requirements

1. Environment

All requirements are updates to the existing Enterprise World Agenda Builder application.

Solution

WEM is the delivery method for the Agenda Builder with data pulled from Cvent via middleware. Each subsequent requirement is a feature request and is a modification to the current code base and capabilities.

2. Add to Agenda Performance

The Agenda Builder "add to agenda" function must meet a performance target of six-second response time.

Solution

Minimize the number of calls to the agenda builder service with each requested action:

- Add to agenda
- Remove from agenda
- UI updates indicating which sessions are in a user's agenda
- Display of any system messages, e.g. user has paid for the training session

3. My Agenda Performance

The Agenda Builder "view my agenda" function must meet a performance target of six-second response time.

Solution

Minimize the number of calls to the agenda builder service with each requested action:

- Load user’s agenda
- Download PDF
- Clear agenda

The current iteration of the Agenda Builder has a message overlay when the system is attempting to return the user’s agenda. This remains.

4. Update Agenda Builder Environments for EW2017

Link the EW2017 Cvent event code to existing Agenda Builder application to facilitate testing using the existing functionality.

Solution

QA Environment

In QA, update the sandbox site for QAT/UAT and ensure the agenda builder service is working.

Production Environment

In Production, configure the “Sessions”, “Training” and “My Agenda” pages and components for the 2017 content. Update middleware queries to use this year’s event code: 8VNY2FTR3WR

5. Retire the EW2016 Site

The EW2016 site shall be retired once the EW2017 site becomes active.

Solution

Create a web server redirect to send any traffic requests for http://www.opentext.com/campaigns/enterprise-world-2016/* to http://www.opentext.com/campaigns/enterprise-world-2017

In order to unpublish the EW2016 site and provide the correct file paths for the “Create your agenda” link and “View your agenda” link, two generic resource variables in WEM must be updated in the Config Console in production for both *Management* and *Production* Content Delivery Services:

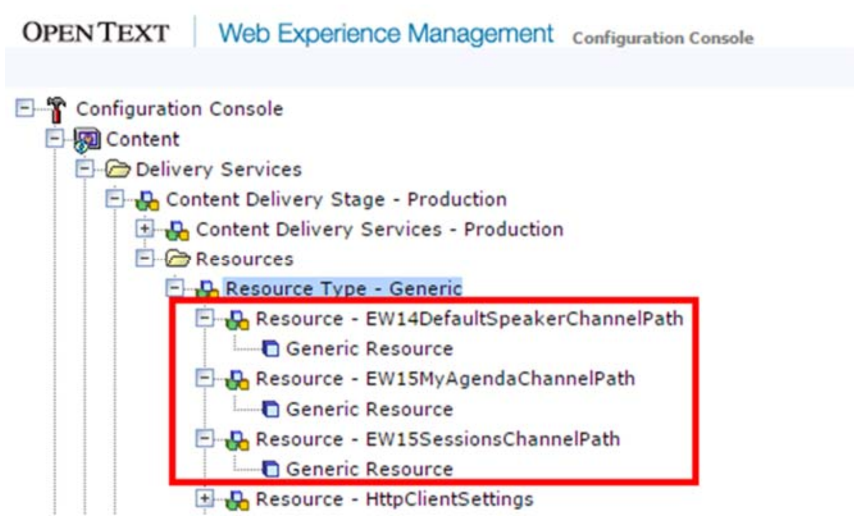

Figure 1: Screenshot of config console

Note: EW14DefaultSpeakerChannelPath is no longer used.

Update the Run Values as follows:

- EW15MyAgendaChannelPath
  /Campaigns/enterprise world 2017/program/my agenda

- EW15SessionsChannelPath
  /Campaigns/enterprise world 2017/program/sessions

6. Sessions Page Mobile View

The Sessions page shall have a mobile-friendly view (responsive design).

Solution

Responsive design is supported generally through CSS but also requires clean HTML code as defined by Web Marketing and as supported by the existing EW2017 site design. We must engage Web Marketing to ensure compliance. Pat Mullins is the project's front-end resource and UI consultant.

Figure 2: Sessions page mobile layout

7. Improve Legibility of Sessions Page

The “Sessions” page shall be updated to improve information legibility and ease of use.

Marketing wants the “Sessions” page to look like the current “My Agenda” page with sessions taking up the full width of the content area.

There is some visual design flexibility here to accomplish goal. Error messaging might have visual updates.

Solution

Restructure the “Sessions” page faceted search results to imitate existing use of space employed on the “My Agenda” page design.

Note that any UI design updates to the “Sessions” page must also be reflected on the “My Agenda” page and “Training” page.

Specific UI elements are defined in the next several requirements.

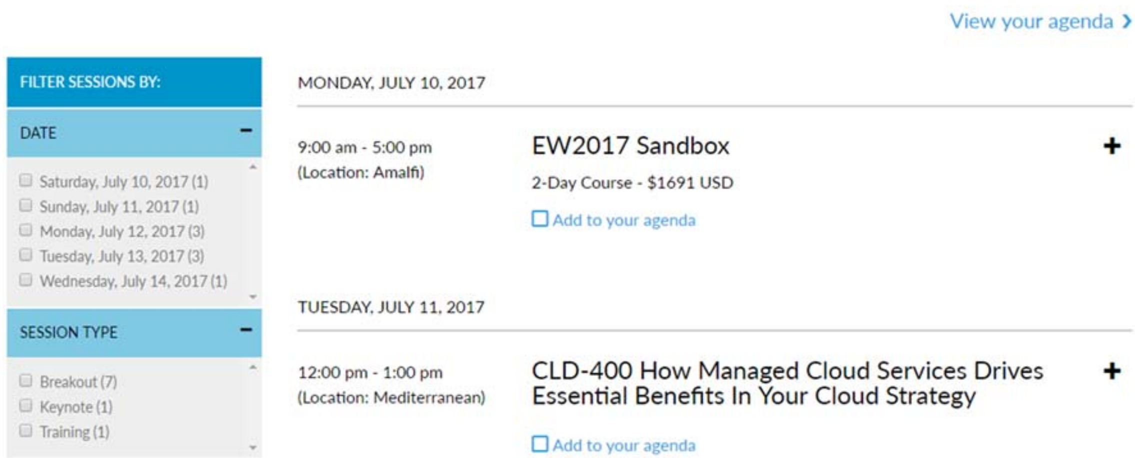

Figure 3: Screenshot of the current "Sessions" page faceted search display

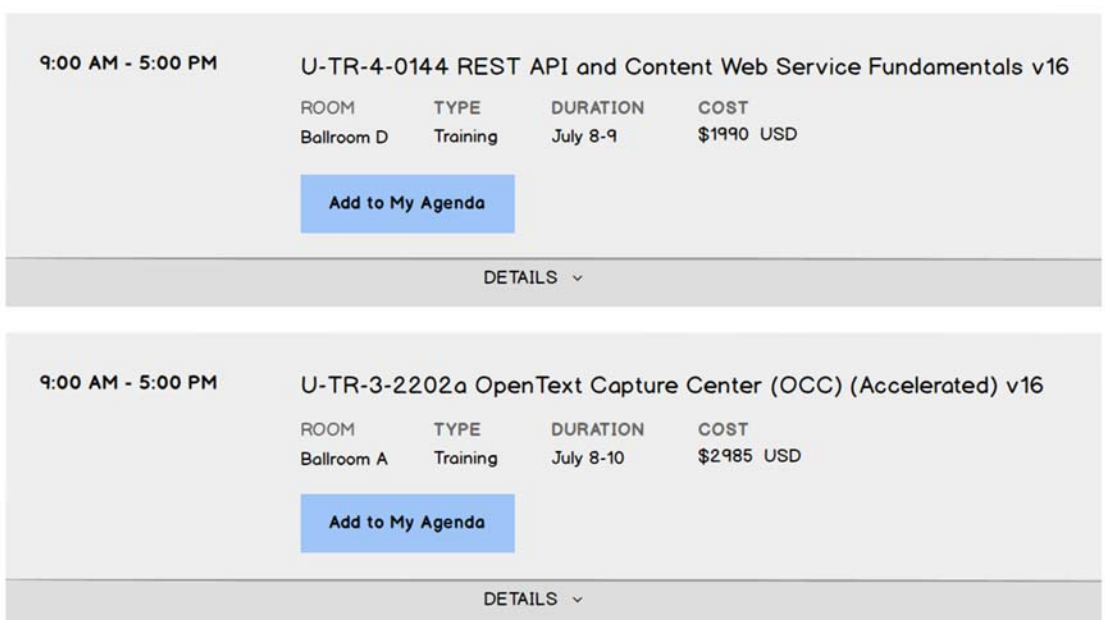

Figure 4: Updated “Sessions” page faceted search results

8. Update Location Display

Remove brackets around the location and replace 'location' with 'room'.

Solution

Update this value in the code. Additionally, this field should move from the left underneath session time into the center content area beneath the session title.

Figure 5: Screenshot of the current 'Location' data field

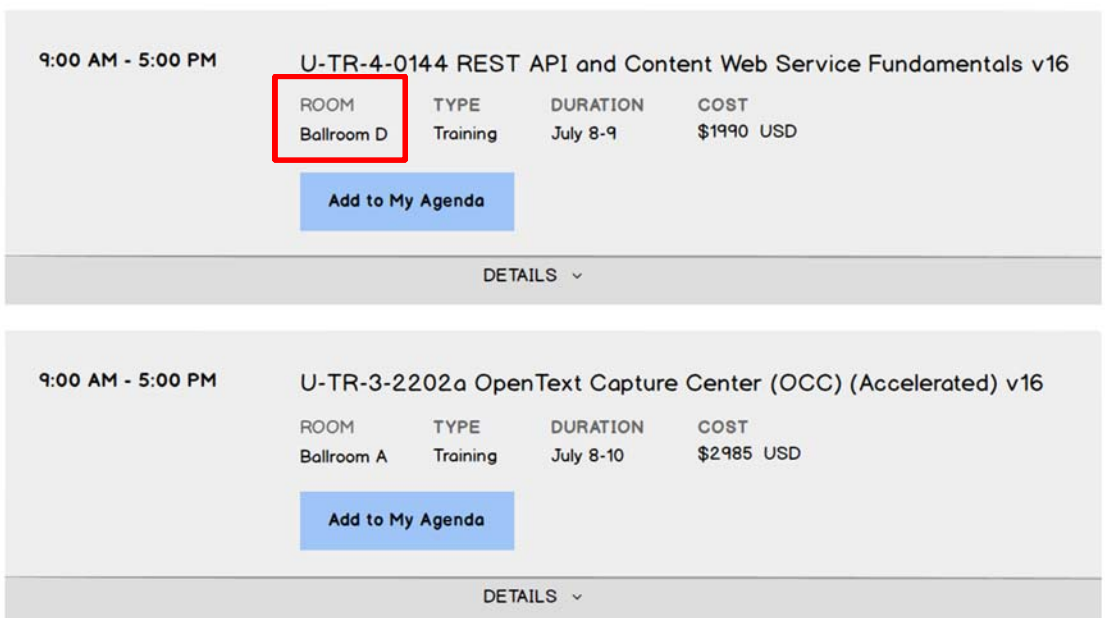

Figure 6: Updated 'Location' data field

9. Improve Legibility of Session Titles

Heading is taking up too much space. Field Marketing wants more sessions to appear on the screen at one time.

Solution

General styling like headings are part of a larger style guide from Web Marketing. Pat will need to evaluate and adjust CSS styles if necessary.

10. Update Sessions Layout

Maximize available horizontal layout space to improve legibility of sessions listing.

Solution

Move the faceted search filters from the left side to across the top of the search results. Layout will be able to use the full width of the content area and the session descriptions will not take up as much space vertically compared to the current page layout.

The “Sessions” page faceted search results area should match the “My Agenda” sessions listing with full-width sessions.

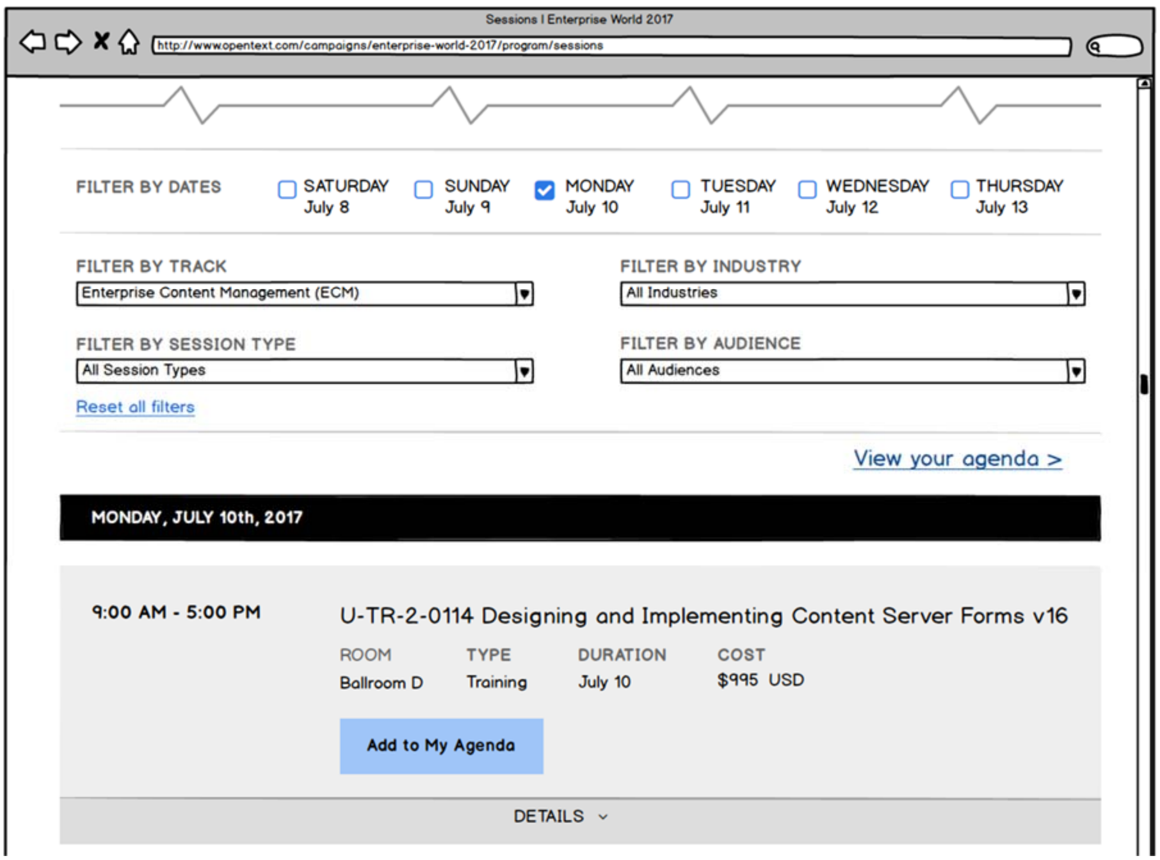

Figure 7: Updated "Sessions" page layout

These filters are required for the faceted search:

- Dates
- Track
- Industry
- Session Type *(“Sessions” page only)*
- Audience

This information is entered in Cvent and already available in the service calls.

Changes to the sessions layout also affects the layout of the “Training” page which uses a different faceted search display view without the agenda builder functionality.

Figure 8: Training page

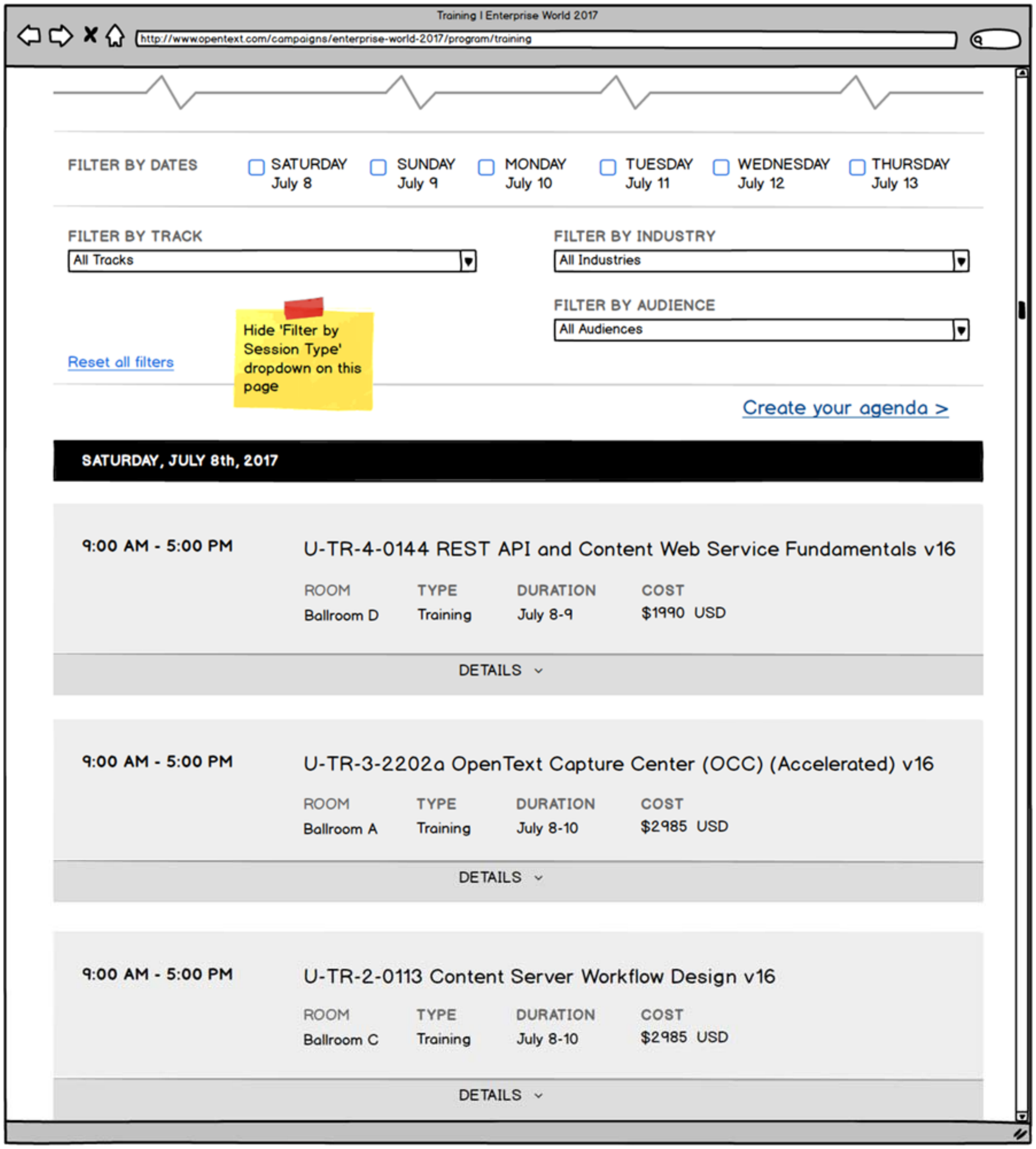

Figure 9: Training page layout updates

11. Clear Selected Filters

There shall be a 'clear filters' action which resets the filters to default values.

Solution

The current faceted search has a “Deselect All” link that un-ticks any selected checkboxes in the filters. That functionality must now

- Un-tick any selected Date filter checkboxes; and
- Reset the value of remaining filters to the “All” values

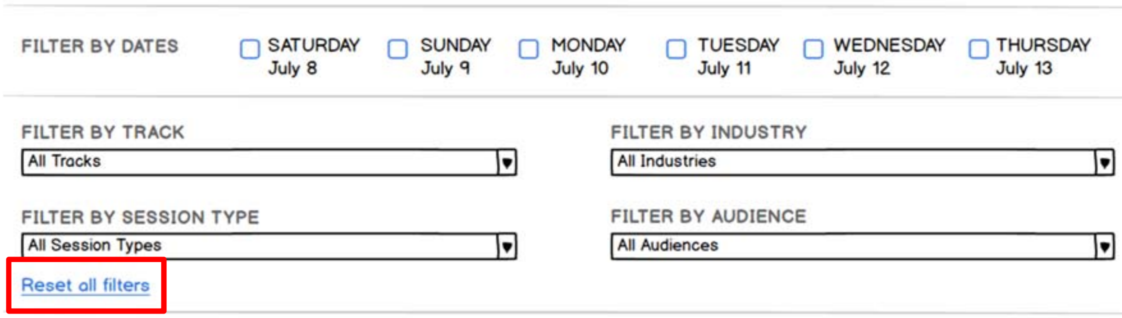

Figure 10: Reset all filters in faceted search

12. Remove Session Counts from Filters

The filter count shall not be displayed for the filters.

Solution

The current faceted search filters display a count number in parentheses to the right of each filter option. These counts change dynamically depending upon which filters are ticked.

None of the filters should display such counts.

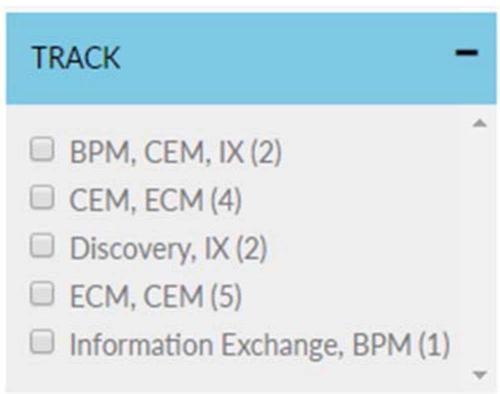

Figure 11: Screenshot of filter counts

13. Display All Sessions per Filter Value

Filter selections should return results for **any session** containing the selected value in the session data.

Solution

Use cases:

- A Training session spans July 8 – July 10. The session must be included in the search results if the user ticks *July 8, July 9* and/or *July 10* in the 'Filter by Dates' facet.

- A Keynote session has 'Audience' values of *Practitioner* and *Developer*. The session must be included in the search results if the user selects either *Practitioner* or *Developer* in the 'Filter by Audience' facet.

- A Breakout session has an 'Industry' value of *ALL*. The session must be included in the search results if the user selects any option in the 'Filter by Industry' facet.

For each session result, display headings and values for

- Type
- Tracks
- Audience

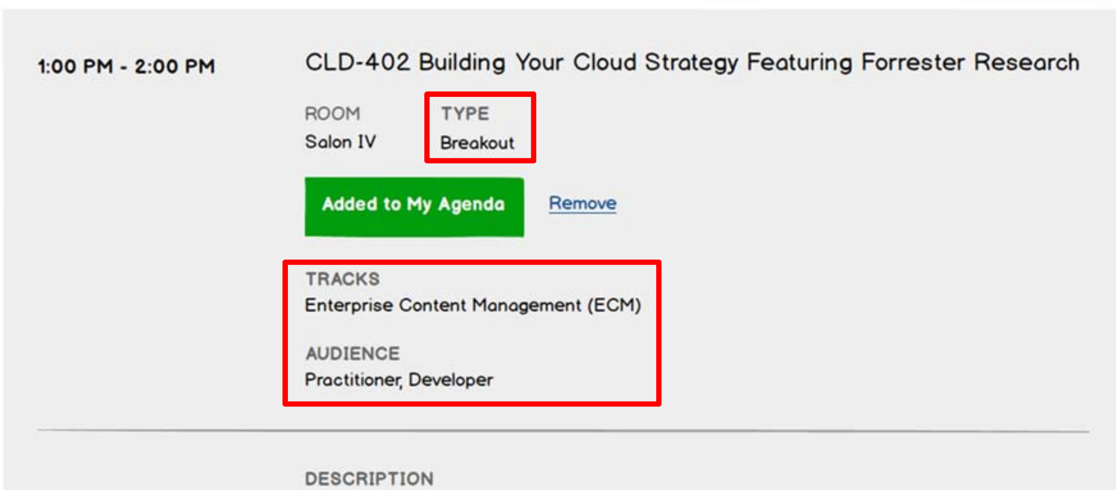

Figure 12: Example search result

14. Show Dates for Training Session Results

Pull the dates for Training and include within each Training session result.

Currently, the date range is manually included in the session's title but this is not ideal. Sessions can be either 1, 2 or 3 days in length.

Solution

The current session results list the duration of a Training session instead of its dates, e.g. 2-Day Course.

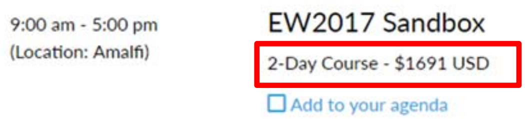

Figure 13: Duration and cost values

For Session Type *Training* only

- Remove the duration value and replace it with a 'Duration' heading and date range, e.g. July 8, July 8-9, July 8-10
- Add a heading of 'Cost' to the dollar value

For all other session types, do not display 'Duration' and 'Cost' headings.

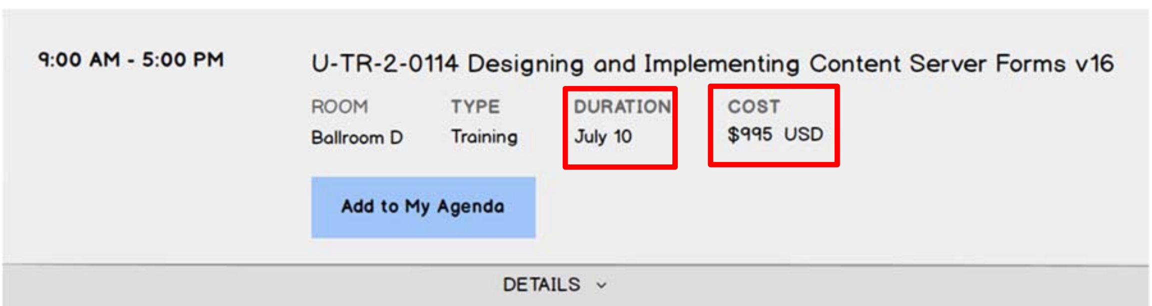

Figure 14: Training session duration and cost

15. Improve Legibility of Data Values in Session Results

Change the size of the text on the "Sessions" page to be smaller than the description text and possibly in italics.

Solution

Make headings clear and visible:

- Display headings above data value
- Offset headings from data values, e.g. with a lighter color (gray) than the default font color (black)
- Group Room, Type, Duration (training only) and Cost (training only) field
- Multiple values must be comma separated and can wrap to the next line if necessary.

- Headings **should not display** if there is no value associated. This applies to ***all*** fields used in a session.
    - Breakout sessions do not have 'Duration' or 'Cost' information. Do not display these headings.
    - If a Training session does not have a 'Room' (location) value, do not display the 'Room' heading.

Figure 15: Session headings and values in current design

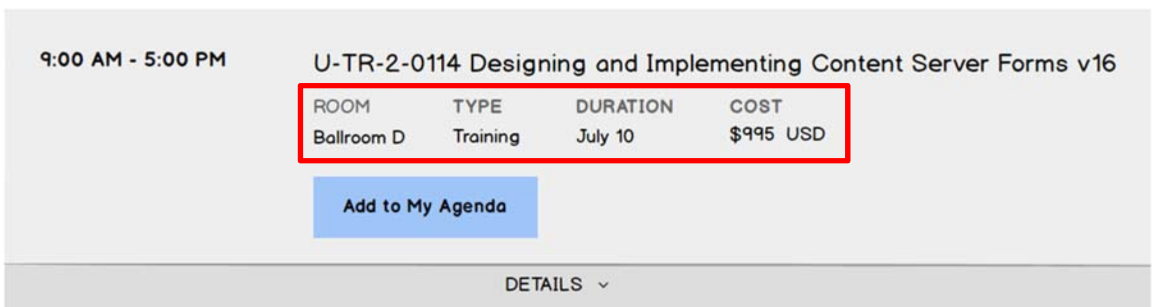

Figure 16: Session headings and values in updated layout

16. Dates Filter

Keep date selection as checkboxes so you can select all the days you will be at the conference.

Solution

The 'Dates' filter consists of a checkbox for each date, allowing users to select 0 to 6 date options. The default is no checkboxes ticked.

The search results update immediately when any date checkbox is ticked or un-ticked.

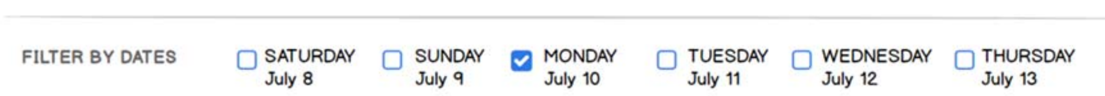

Figure 17: Dates filter checkboxes

17. Reduce Filter Options

Simplify the large list of checkboxes as drop downs.

Solution

Reduce the Track, Industry, Session Type and Audience filters to select lists instead of checkboxes. Users may select only one option per filter. The default value should return all sessions for each filter.

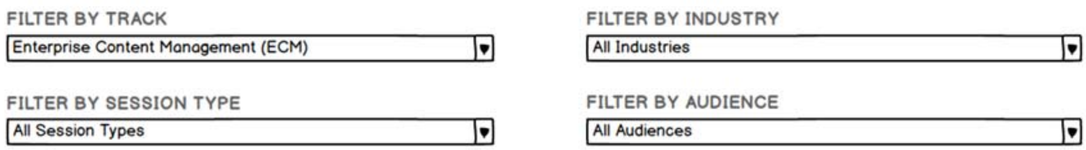

Figure 18: Updated filters as select lists

18. Update Search Results

Each search result should provide fewer search results to improve navigability.

Solution

Use cases for each of the search facet filters using select lists

- Track
- Industry
- Session Type
- Audience

Users are able to choose one value per select list only. Therefore, as a user makes a selection from one of these four filters, the number of search results should decrease.

Use case 1:

- User selects 'Session Type' *Training*; the results reduce to Training sessions only
- User selects 'Track' *Enterprise Content Management*; the results reduce again to Training sessions for ECM
- User selects 'Audience' *Developer*; the results reduce again to ECM Training sessions for Developers
- User selects 'Industry' *Life Sciences*; the results reduce to just three ECM Training session for developers in the life sciences industry

The 'Dates' filter could either increase or reduce the number of search results.

Use case 2:

- A user wants to see ECM Breakout sessions
- She chooses *ECM* from ‘Track’ and *Breakouts* from ‘Type’; the results reduce
- She then ticks checkboxes for July 10 and July 11; the results reduce again
- She then un-ticks July 11; the results increase

Use case 3:

It is possible for no session results to return for some filter combinations. When that occurs, the system must alert the user and direct her to change the filter selections, or clear them entirely.

19. Change ‘Add to Agenda’ Action

Switch the location of the ‘add to agenda’ button and use different states to communicate if a session has been added to the agenda.

Requirement Change*: Per final scope meeting on 3/3, link location will not move.*

Solution

Currently, the ‘add to agenda’ and ‘remove from agenda’ actions display as text beneath each session title.

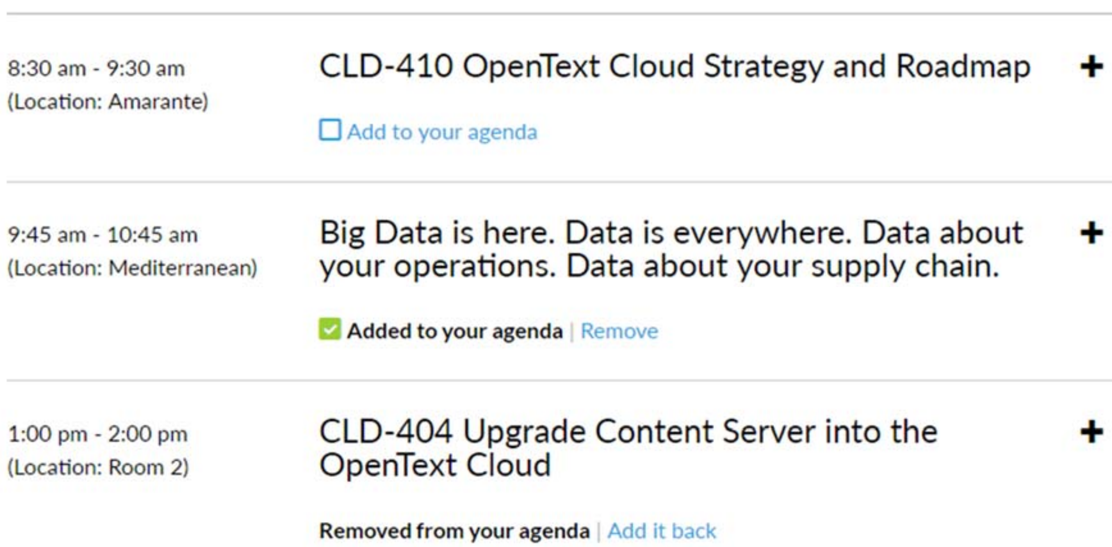

Figure 19: Agenda action states

On the “Sessions” page, the ‘add’ action becomes a button-like link.

Users must be logged in to the site (CAMS) to be able to add sessions to an agenda. If the user is not logged in, clicking the 'Add to My Agenda' button redirects the user to the log in page. The user is redirected back to the "Sessions" page after authentication.

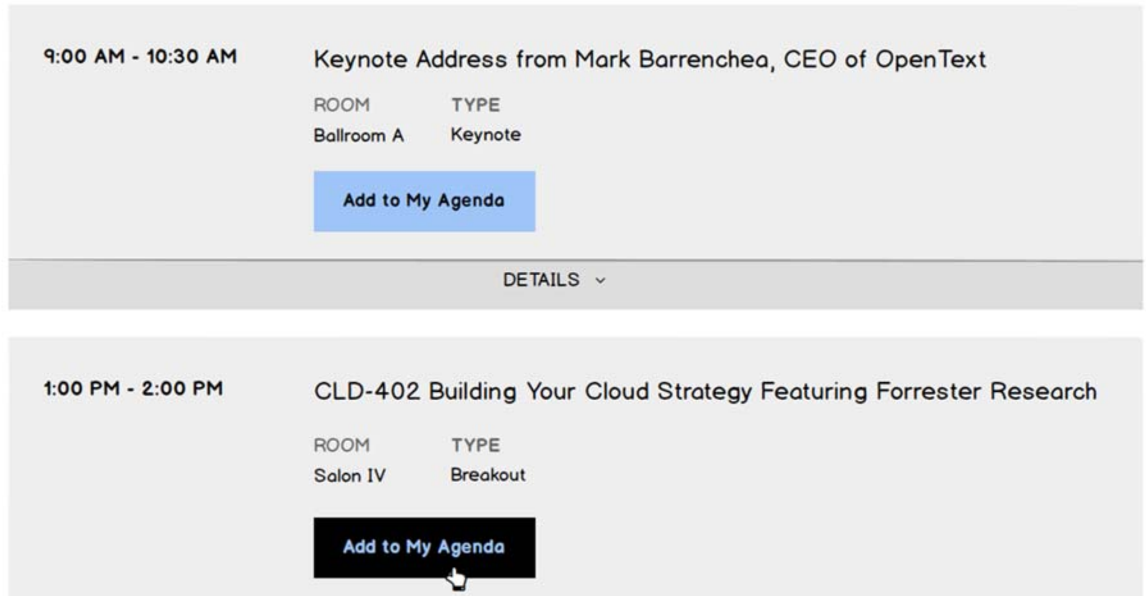

Figure 20: Add to agenda button

When a session is in a user's agenda, the action button becomes a system message; it is no longer a button. A 'Remove' link appears next to the system message.

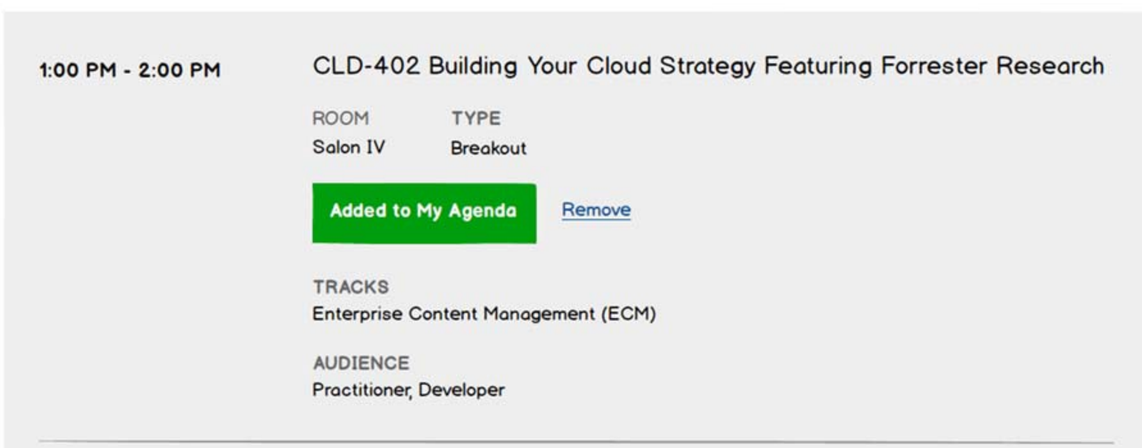

Figure 21: In my agenda system message and remove from agenda link

Clicking the 'Remove' link replaces the system message with the 'Add to my agenda' button.

20. Update Description Accordion

Change the + icon to expand to a button along the bottom that expands the full description. (This way we don't have an add button and another plus sign which is confusing.)

Solution

Currently, users click a session's title, which includes a + icon, to show the description information.

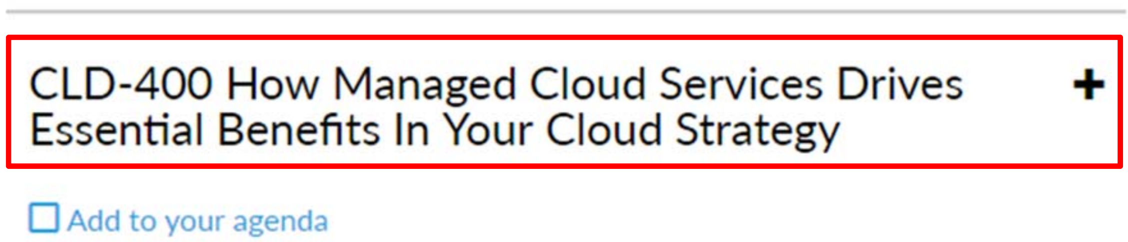

Figure 22: Expand session description

Once expanded, the + icon changes to a – icon and the user must click the session title to hide the description.

Figure 23: Collapse session description

Remove the click action on session title for expand/collapse and replace with a 'details' bar beneath the session information. Clicking the 'details' bar displays the hidden session information as an accordion action.

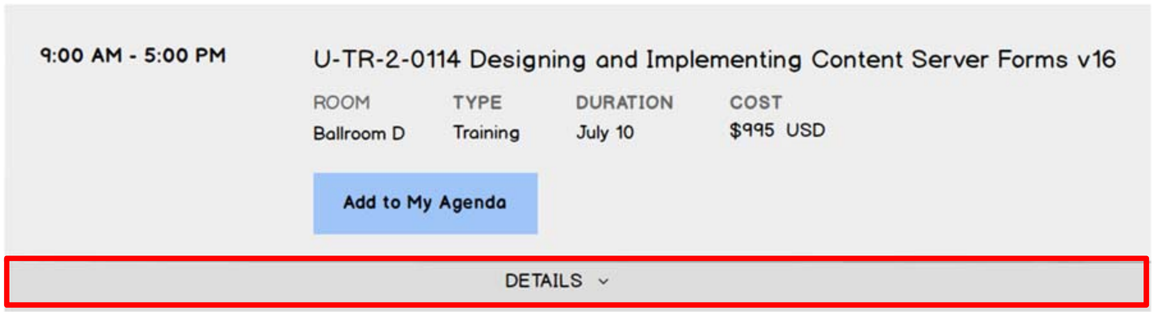

Figure 24: Show details bar

Once expanded, the user clicks the ‘details’ bar again to hide the details area.

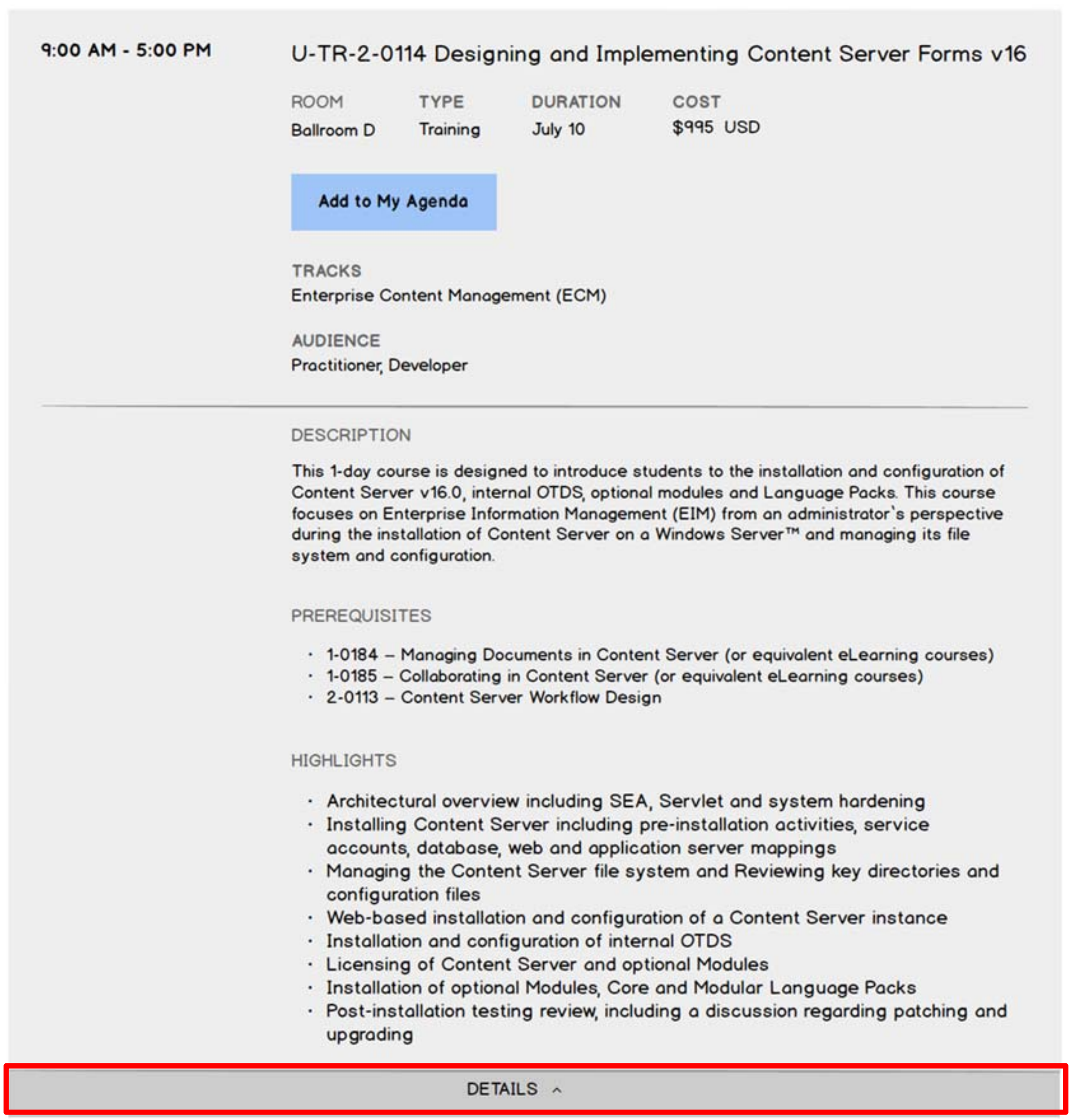

Figure 25: Hide details bar

21. Improve Legibility of Session Descriptions

Using the full width of the page for the descriptions is too wide to make reading comfortable. (If we can get them to build 2 columns that you can divide your text into, that would help reduce scrolling and keep the width of the text measures at a more comfortable reading width.) Would like to prevent excessive scrolling.

Solution

Requirement Change: *Per final scope meeting on 3/3, text will not be divided into two columns for "Training" sessions.*

Display the description text left aligned with the session title in a single column.

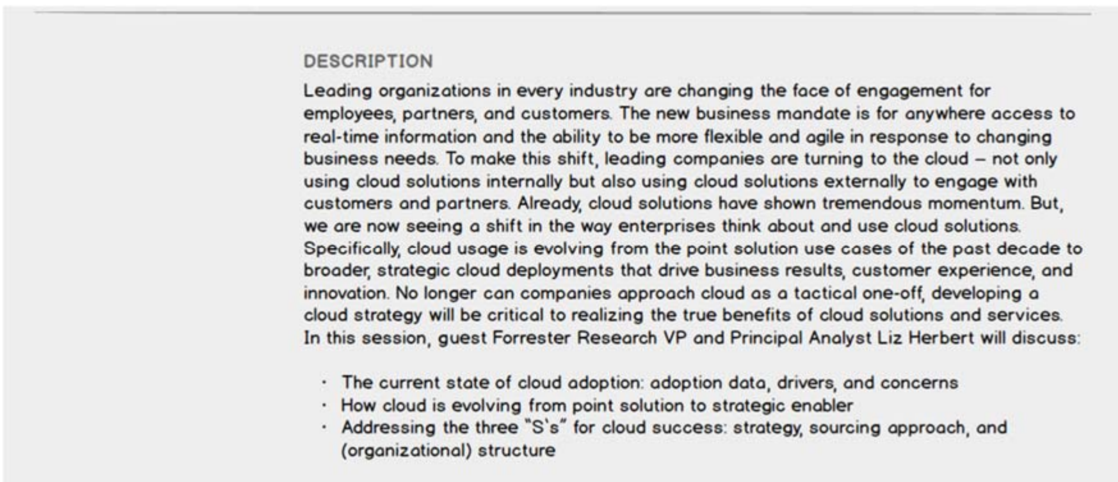

Figure 26: Breakout session description text

22. My Agenda PDF Cover Page

The My Agenda PDF export shall display the OpenText logo, Enterprise World 2017 copy text, EW dates, address, Innovation lab time, developer lab times, enterprise expo times.

Solution

The layout for the cover page is not changing from the current layout. Update all text with EW2017 information.

Figure 27: My Agenda PDF cover page

23. My Agenda PDF QR Code

The My Agenda PDF export shall display a QR code, which shall request a meeting at EW2017.

Solution

The position of the QR is not changing. Update the image.

24. My Agenda PDF Session Data

The My Agenda PDF export shall display user's agenda: created date, headers for date, individual sessions including title, location, track, and type.

Solution

The PDF export already includes created date before the session list.

Data values currently displayed in the session list:

- date headers
- session time
- location
- session title
- *Training sessions only*: duration
- *Training sessions only*: cost
- Applicable system messages, e.g. user is registered for a paid training class; a course spans multiple days; the day, time or location of a session changes
- Indicate when a session is marked as 'favorite'

Updates

- Change layout to match the session changes described in previous requirements
- Include 'Tracks' header and value
- Change 'Location' to 'Room'
- Do not display 'Duration', 'Cost' or 'Tracks' if values are empty

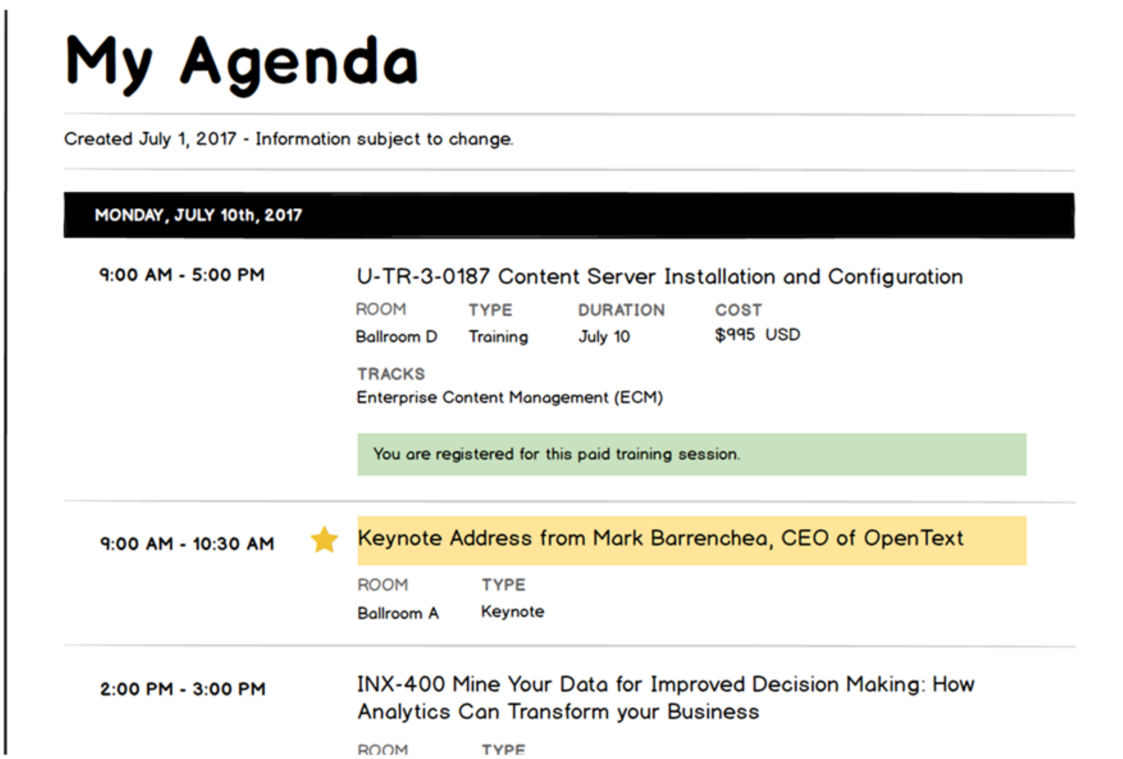

Figure 28: My Agenda PDF sessions list

25. My Agenda Page Layout

Design changes applied to the "Sessions" page shall also be applied to the "My Agenda" page view as required to maintain a common look and feel.

Solution

The goal here is to ensure the two page views feel like they are related. The user should experience a seamless change from browsing for sessions and viewing their agenda selections.

If the user is not logged in to the site (CAMS) upon visiting the "My Agenda" page, a 'sign in' link is visible in place of an agenda. After signing in with this link, the user is redirected back to the "My Agenda" page and his agenda displays.

Requirement Change*: Per final scope meeting on 3/3, the 'remove from agenda' action will remain a link below the session title.*

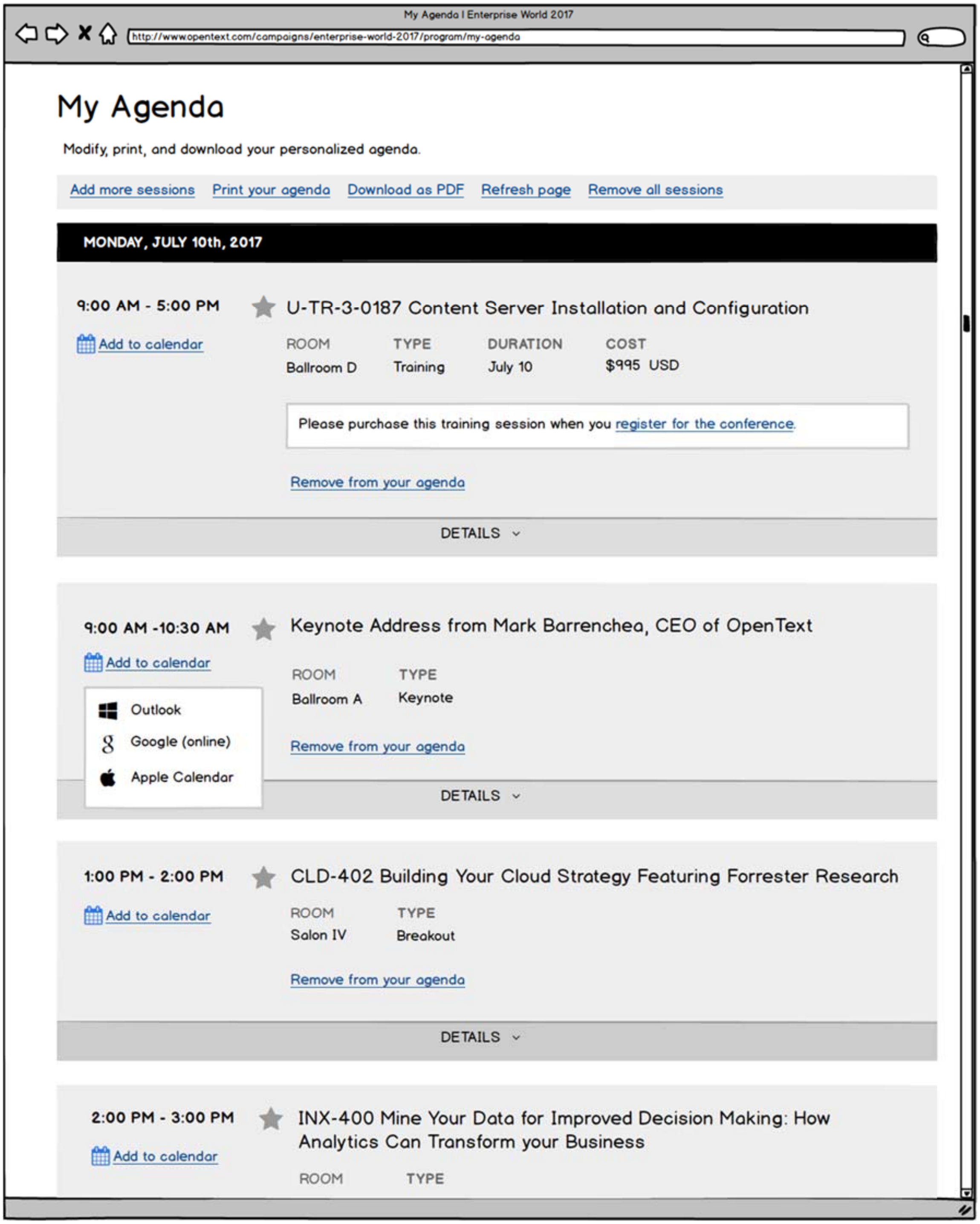

Figure 29: My Agenda page

Once a user removes a session, it becomes grayed out with a system message overlay giving the user the option to add the session back. Once the page the page refreshes, the session no longer appears on the user's agenda.

Similar system messages display below the default session information.

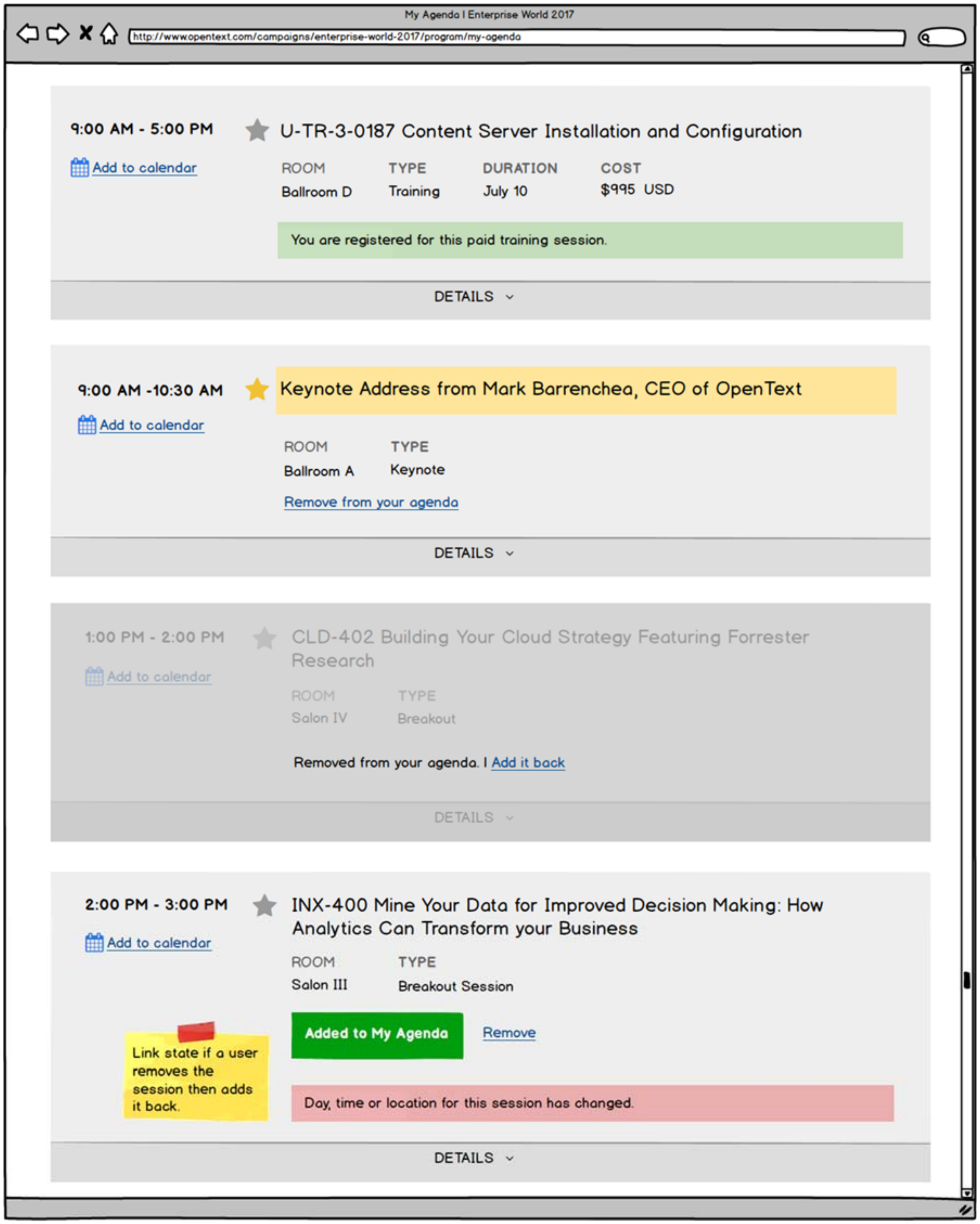

Figure 30: My Agenda page system messages

No changes to

- Action links in the menu bar
- ‘add to calendar’ feature
- ‘favorite’ session feature

For additional information, please contact:
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