EP Navigation Model

Microsoft Dynamics AX5 | **CRM Enterprise Portal**

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dynamicsux
REDMOND + FARGO + COPENHAGEN

Persona & Needs

Targeted Persona: Michael Account Manager

Michael deals with current customers. He closes sales brought in by David. He ensures orders are fulfilled to the customer's satisfaction (date, quantity, quality) and engages in up selling activities.

High Level Scenario

Michael is reviewing the active leads. One lead needs updating to reflect a change in the lead's rating after meeting with the prospective customer the day before.

After updating the lead, Michael notices a set of opportunities associated with this lead. Given the change in the lead's rating, wants to drill down to see what the opportunities are. One of the opportunities is interesting, so Michael jots down some details from it on a Post-It note to follow up on it after lunch.

After inspecting this opportunity, Michael then goes back to the lead list to continue reviewing the active leads.

Needs Related to Navigation

Michael needs a seamless integration of two conflicting UX paradigms: web-like navigation and Windows application interaction. Linking from page to page is a standard web model. Moving from lists to list is a very web-like experience.

Michael also needs to be able to view multiple instances of an entity at the same time. Using dialogs as the basis of data collection and display is a very Windows experience.

Enterprise Portal must resolve these two competing paradigms into one experience.

Explorer & Inspectors Model

The "Explorer & Inspectors" Model

To satisfy the needs of the web and Windows interactions, the Enterprise Portal employs an "Explorer & Inspector" screen management model.

There is a single, persistent "explorer" browser instance for list pages (and the like) with full "chrome" to support page-style navigation and multiple task page pop-up "inspectors" to fulfill the dialog role.

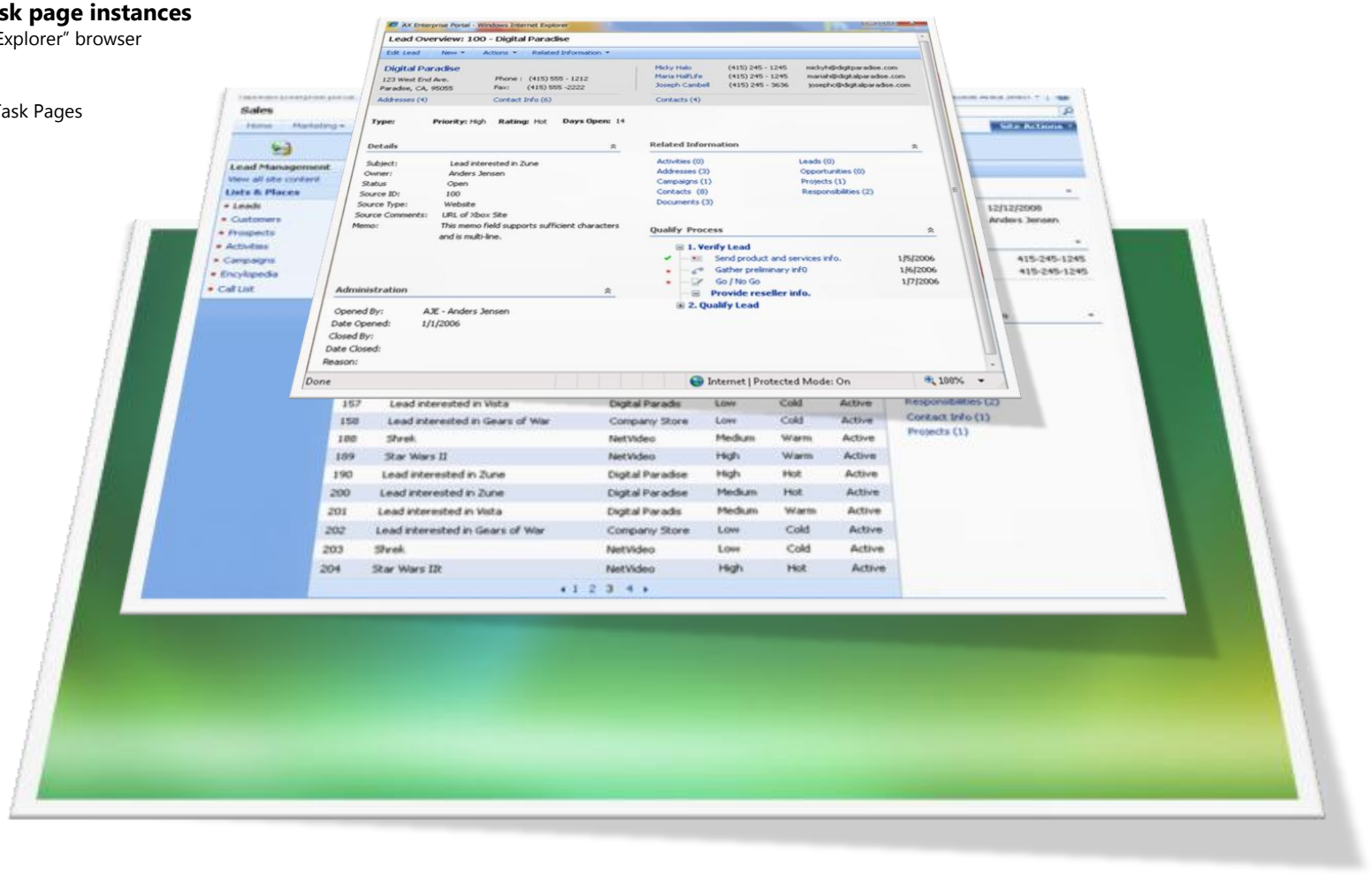
Pop-up "Inspector" task page instances

- User invoked from the "Explorer" browser
- Pop-up
- No browser chrome
- Used for Overview and Task Pages

Main "Explorer" browser instance

- Persistent
- Complete browser toolbars
- Shown for Role Centers, Area Pages, List Pages

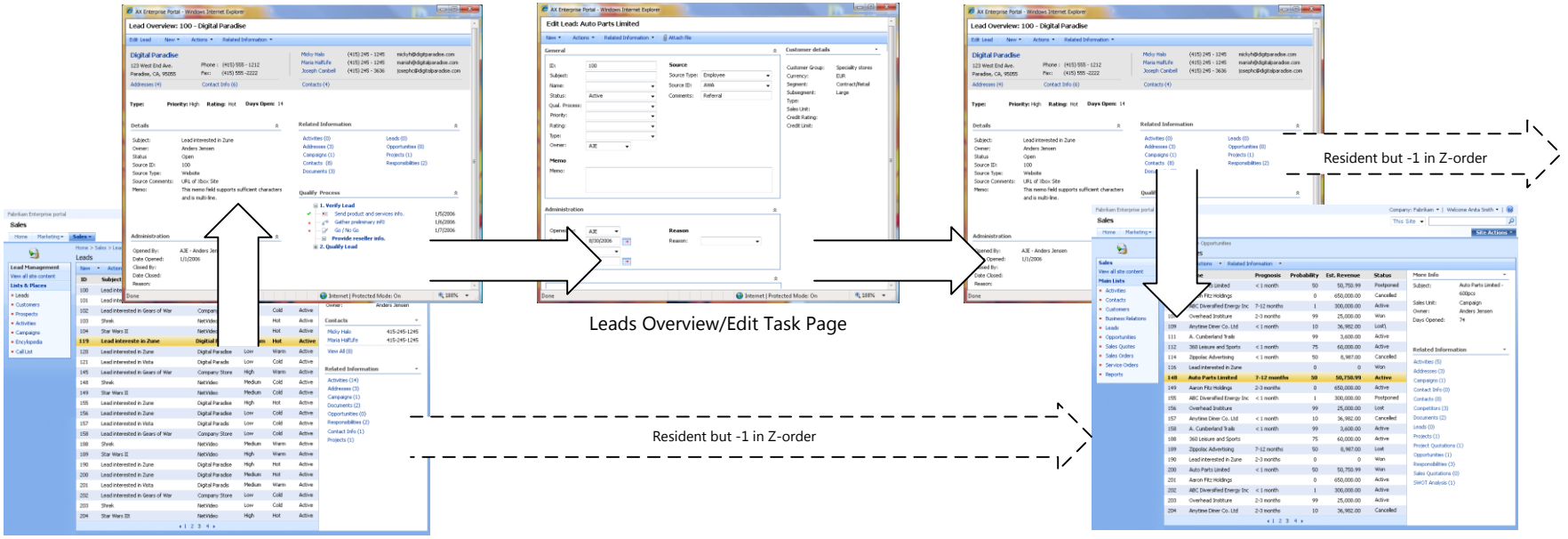
Windows Desktop



Basic Entity Navigation Model

Pop-up "Inspector" task page instances

Main "Explorer" browser instance

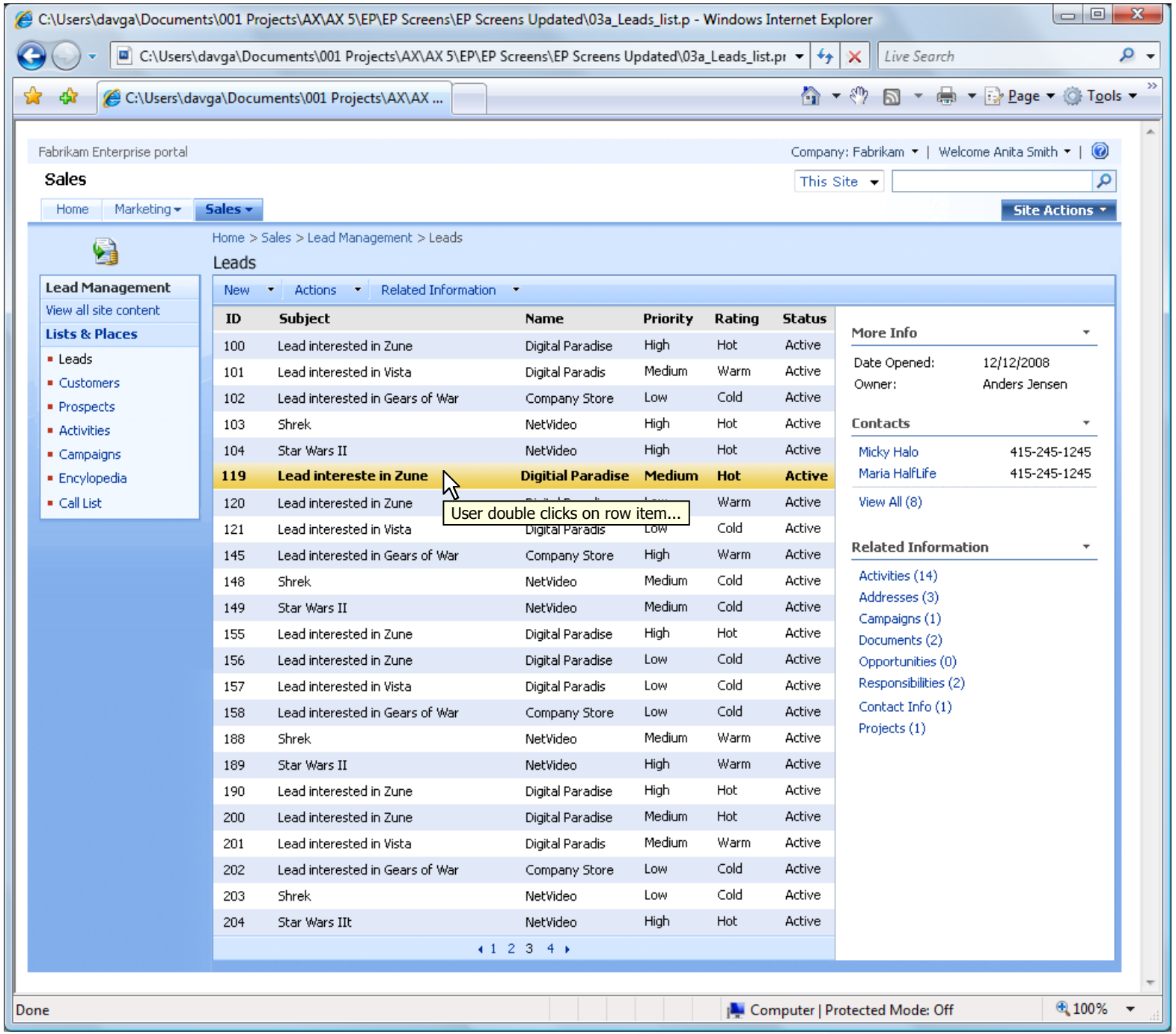


Desktop

Scenario:

S1.1. Michael navigates to the Leads list page.
S1.2. Michael double-clicks an item in the Lead List page. This action opens a Task Page pop-up over the Leads List with the Overview information of the selected Lead.
S1.3. Michael then clicks Edit Lead. The Task Page updates to display the Lead in edit "mode". Michael makes his changes and saves.
S1.4. Saving the modified Lead returns the Task Page back to the Overview "mode". Michael sees a related entity – a set of Opportunities that need review. Clicking on the Opportunities link brings the original main browser instance into focus and refreshes with the Opportunities List page for that Lead.

Dynamics AX5 | CRM Enterprise Portal | Basic Entity Navigation Model



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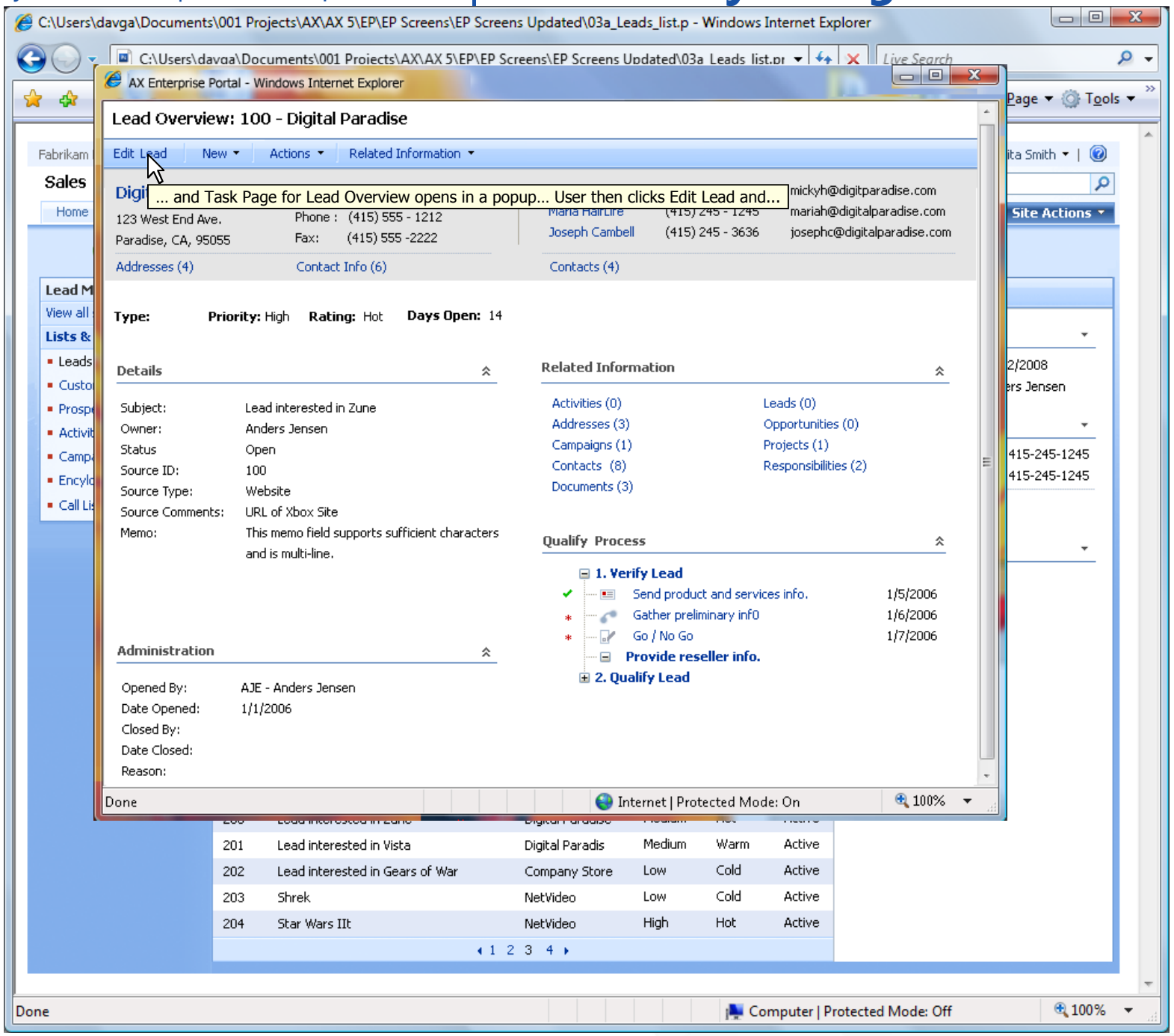
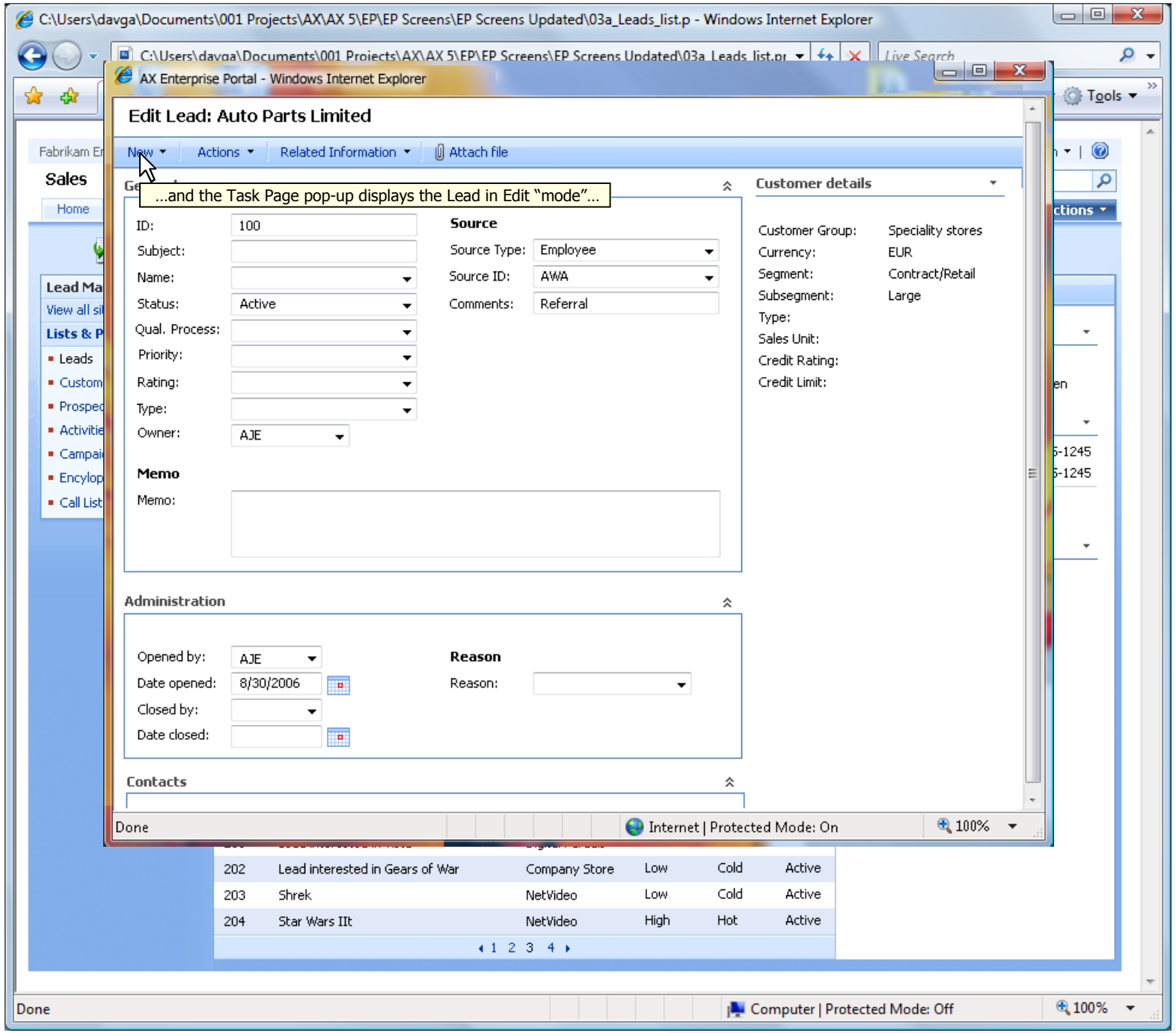
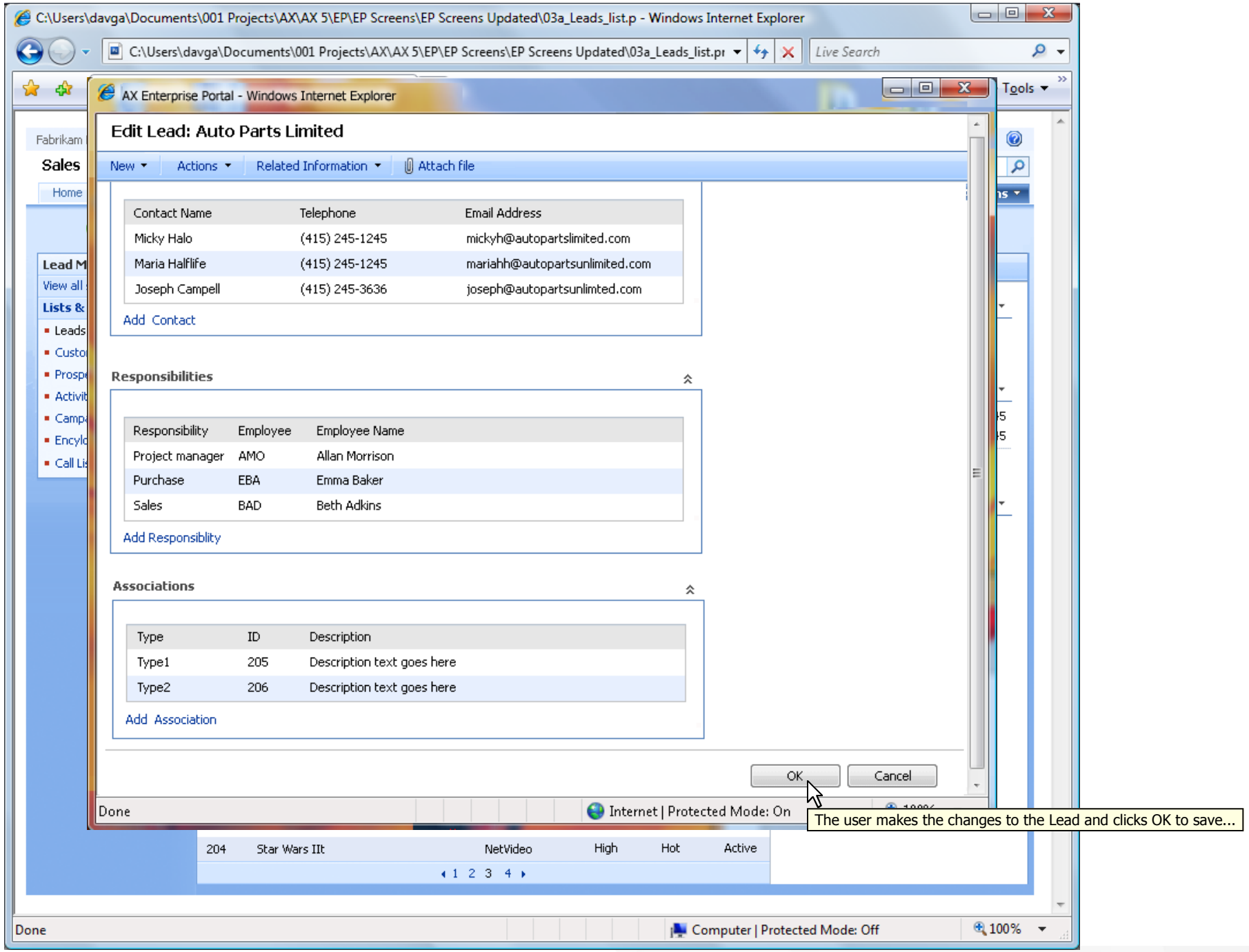


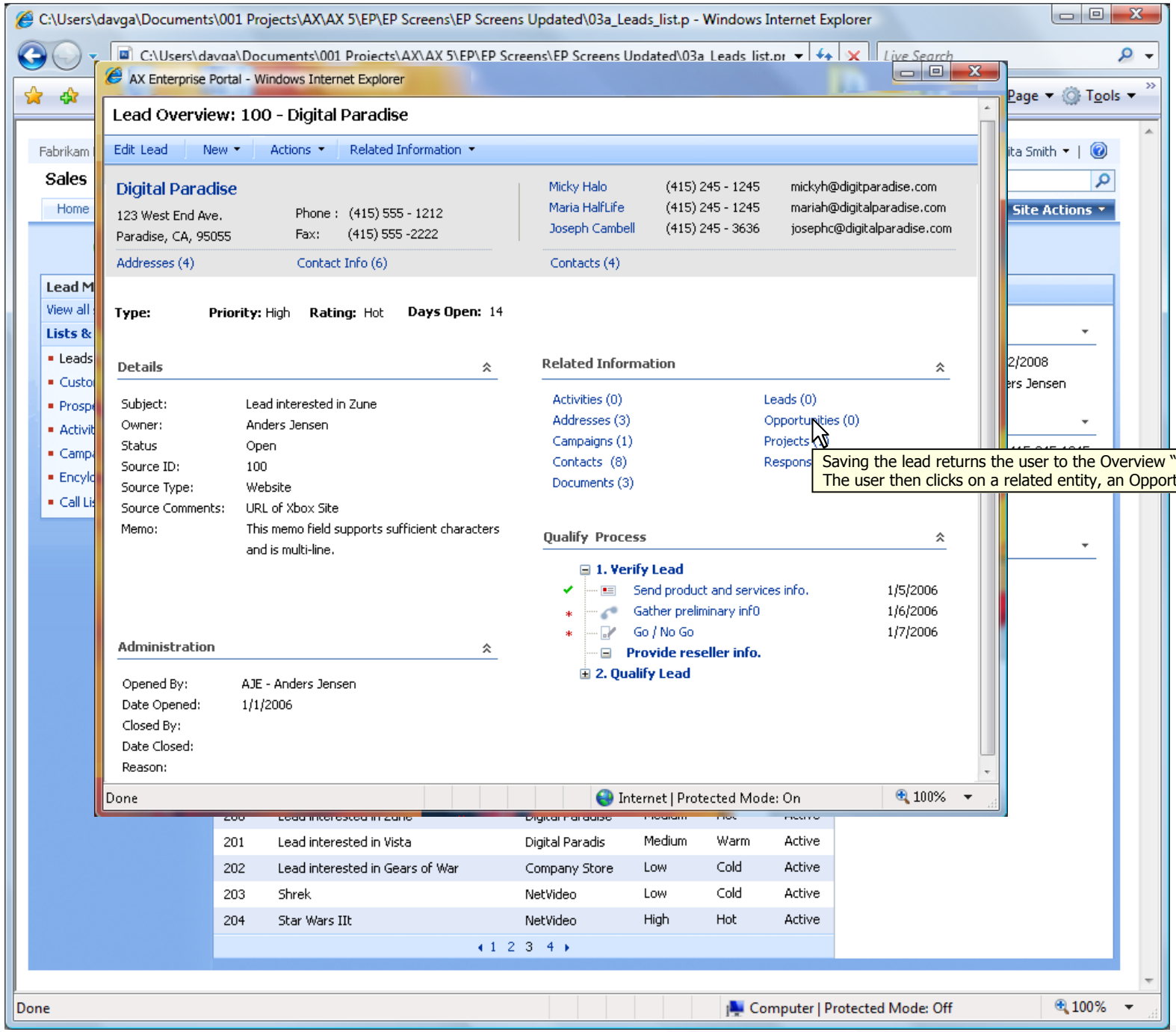
Dynamics AX5 | CRM Enterprise Portal | Basic Entity Navigation Model



Basic Entity Navigation Model



Dynamics AX5 | CRM Enterprise Portal | Basic Entity Navigation Model



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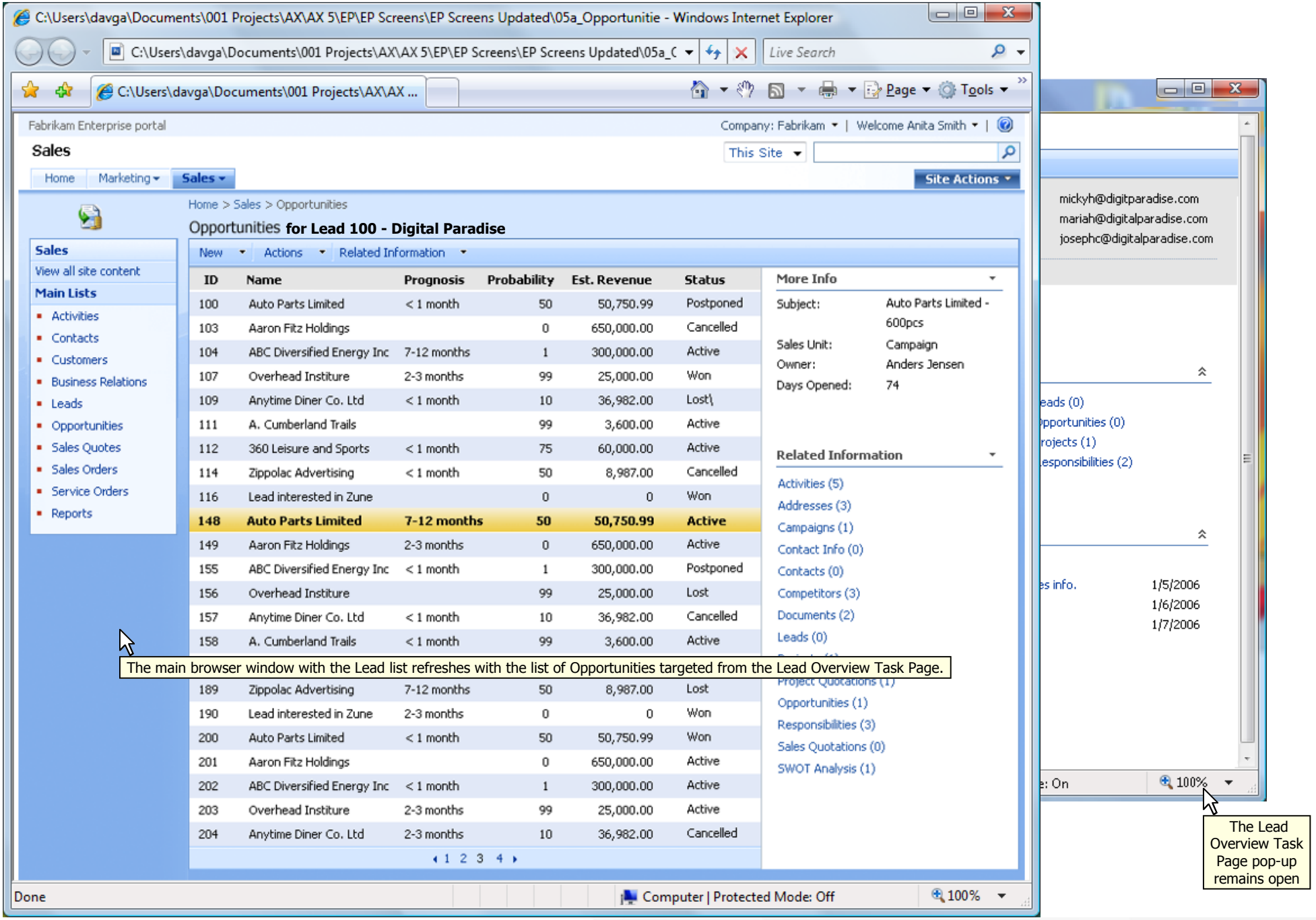


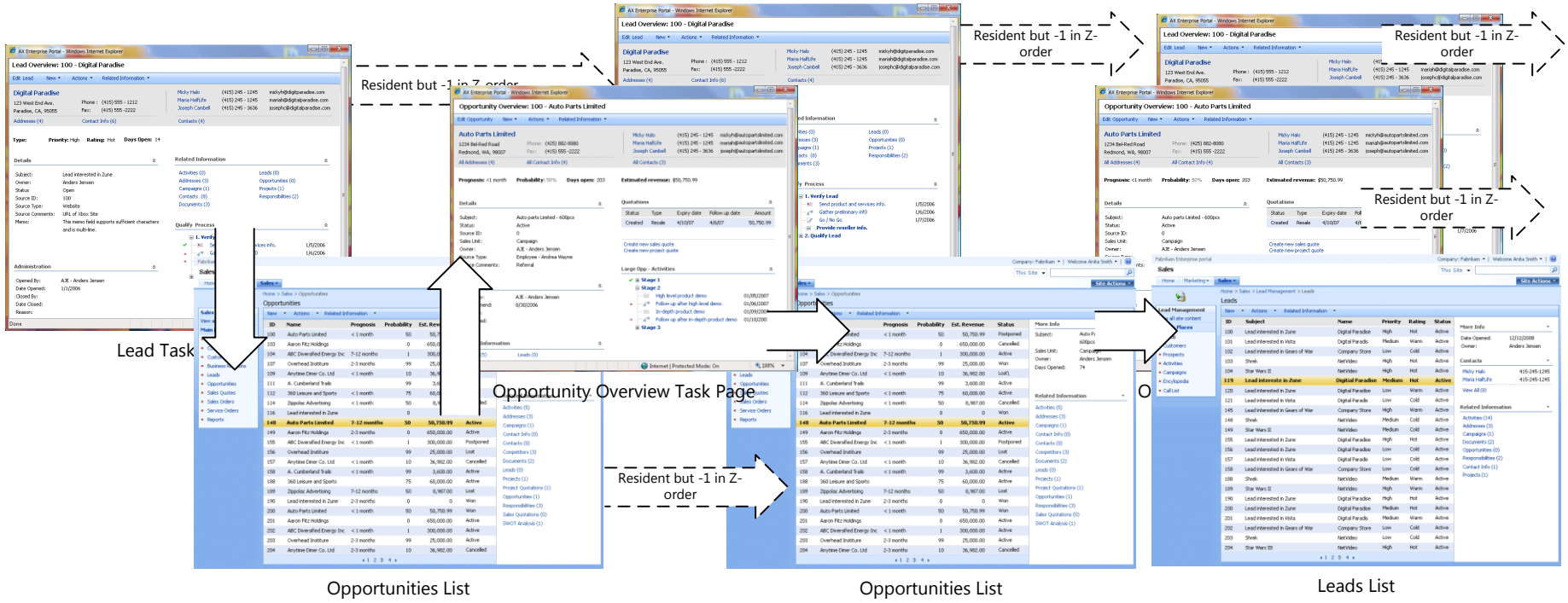
The main browser window with the Lead list refreshes with the list of Opportunities targeted from the Lead Overview Task Page.

The Lead Overview Task Page pop-up remains open

Scenario with Multiple Inspectors

Pop-up "Inspector" task page instances

Main "Explorer" browser instance

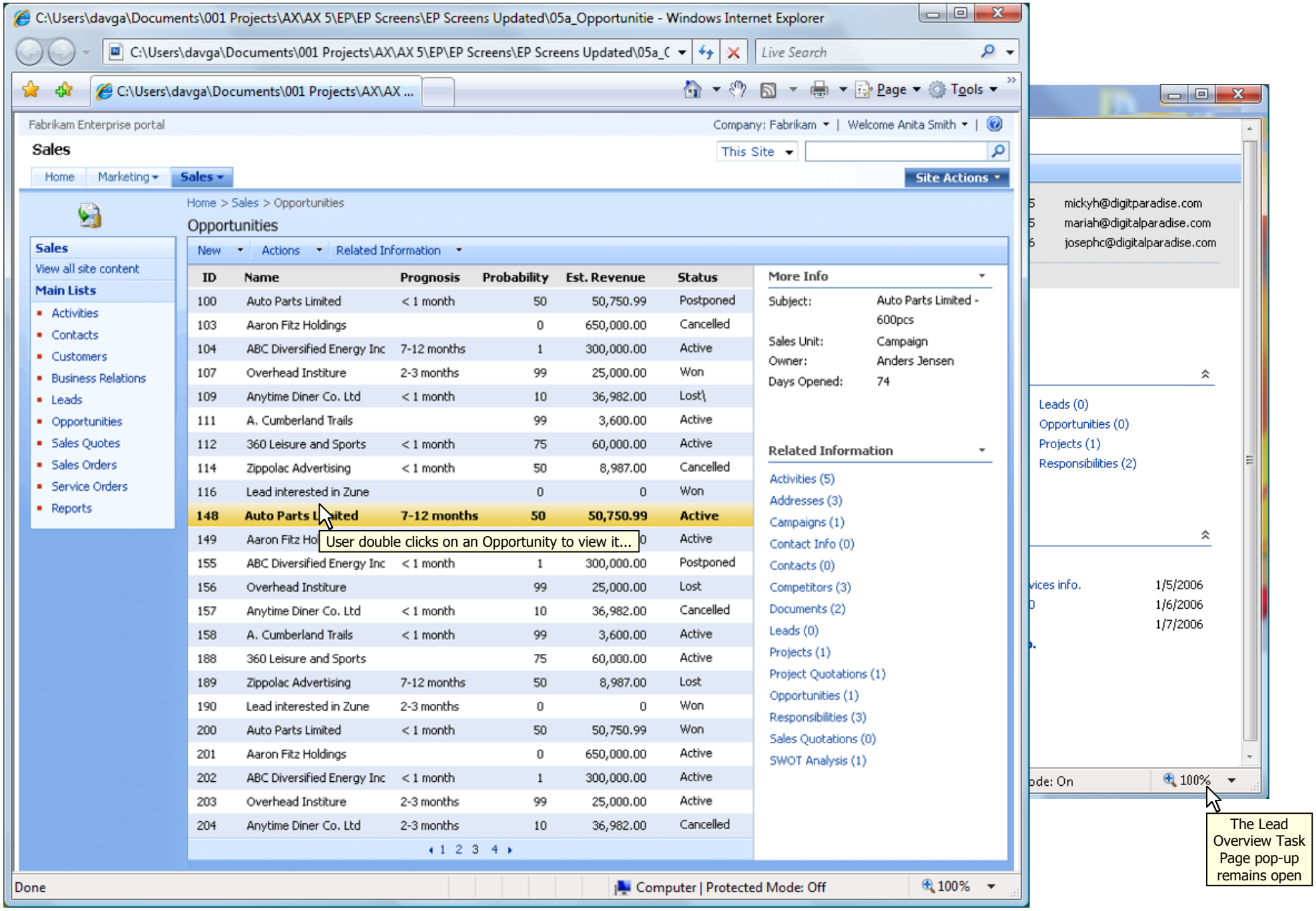


Desktop

Scenario:

S2.4. Continued from Basic Navigation: Clicking on the Opportunities link brings the original main browser instance into focus and refreshes with the Opportunities List page for that Lead.
S2.5. Michael then selects an Opportunity from the Opportunity List and double-clicks it to open the Opportunity for review.
S2.6. This opens an additional Task Page instance to display the Opportunity details. The previously opened Lead remains open in it's original Task Page instance.
S2.7. After reviewing the lead, Michael, clicks down on the Start bar to go back to the Opportunities List in the main browser window.
S2.8. When Michael clicks the Back button of the browser containing the Opportunities List, the previous page – the Leads List will be rendered.
S2.9. At the end of the scenario, the main browser window displays the original Leads list from step 1, and two Task Page pop-ups, one each for the selected Lead and Opportunity.

Dynamics AX5 | CRM Enterprise Portal | Scenario with Multiple Inspectors



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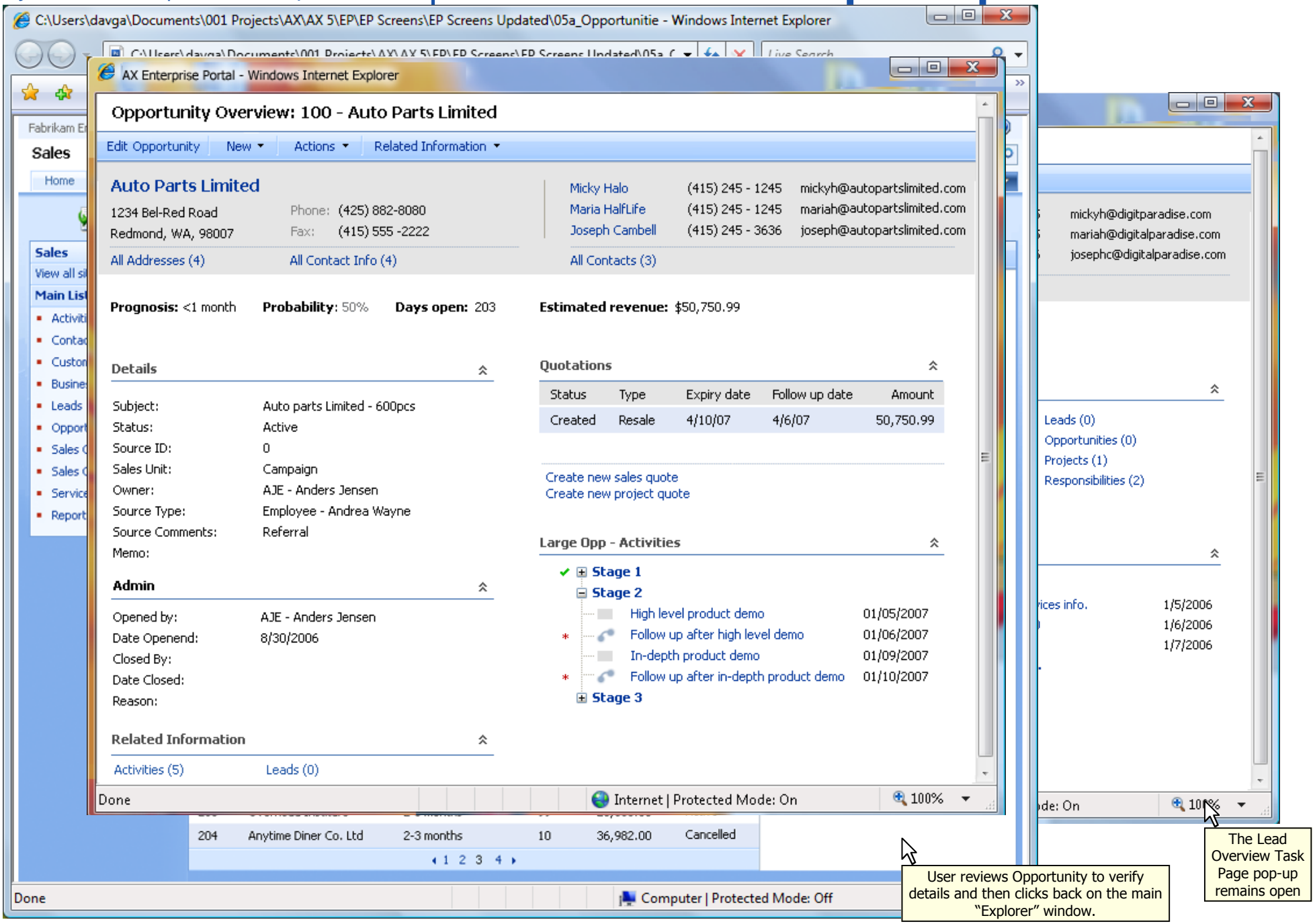

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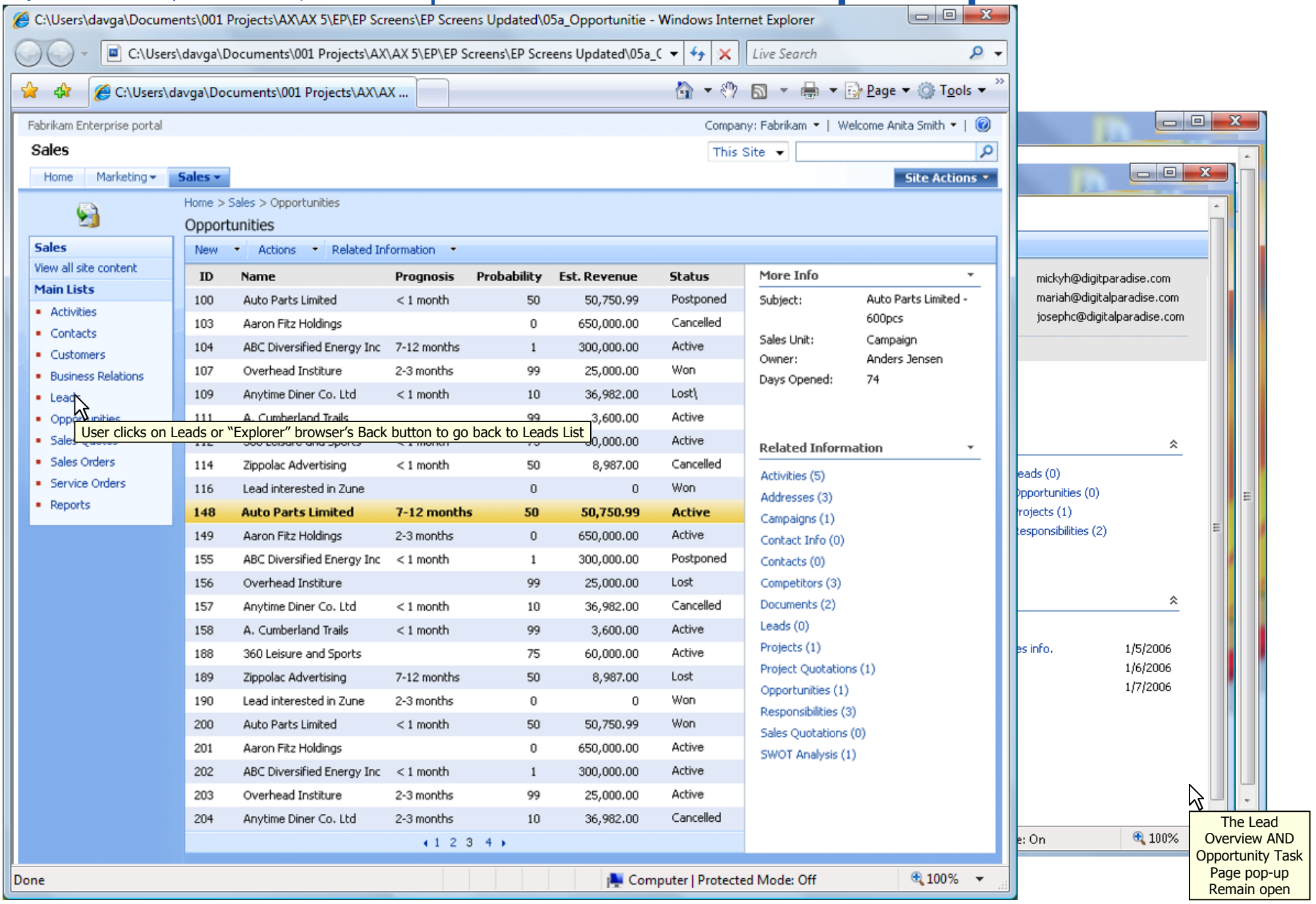

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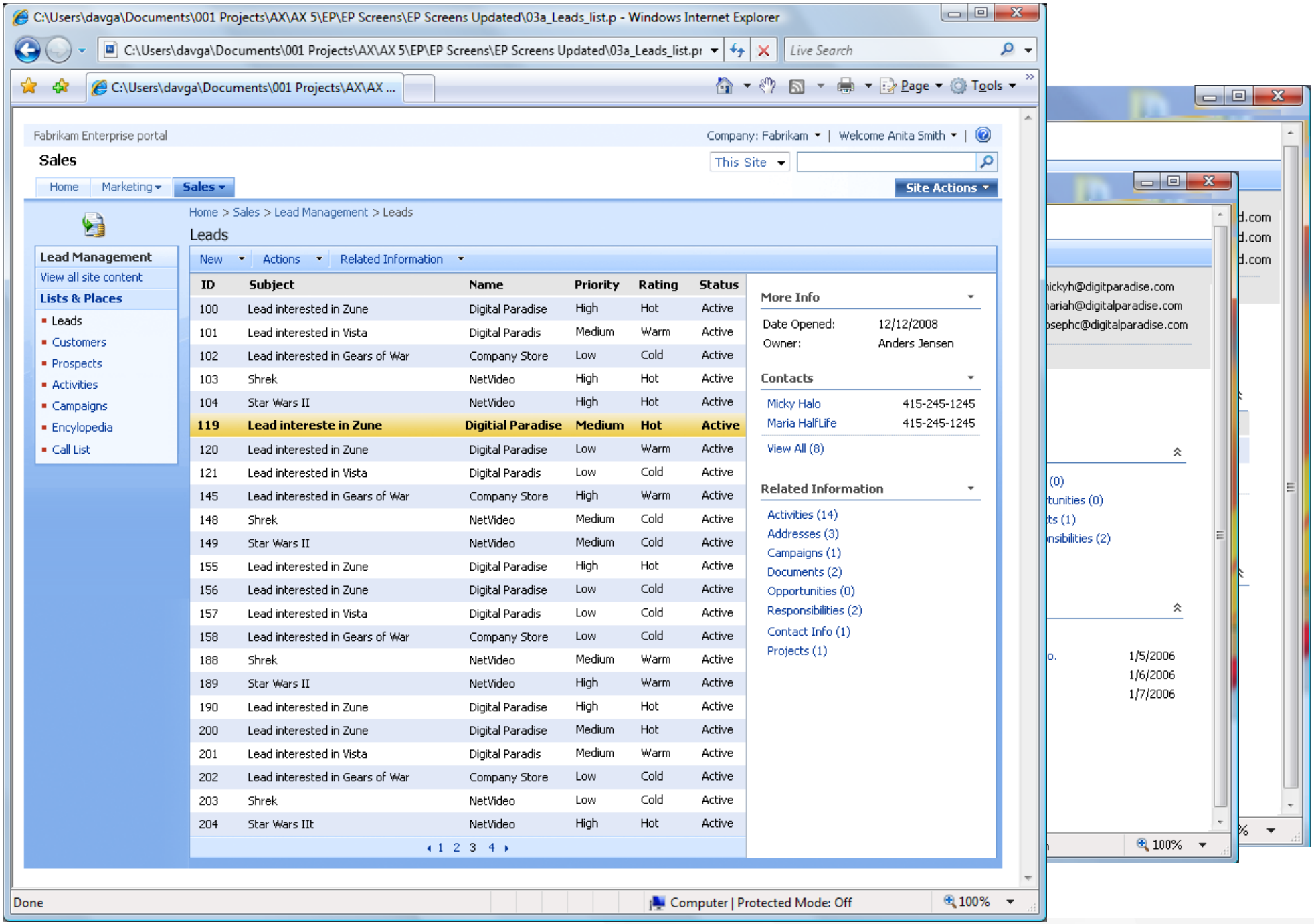


Alternate Scenarios

Targeted Persona: Michael Account Manager

Michael deals with current customers. He closes sales brought in by David. He ensures orders are fulfilled to the customer's satisfaction (date, quantity, quality) and engages in up selling activities.

Using the Edit Action from a List

Michael needs to change an Opportunity after selecting it from the Opportunities List Page.

Viewing Lists from Enhanced Previews

Michael wants to edit a Contact of a Lead while viewing an Enhanced Preview on the Lead Overview Task Page.

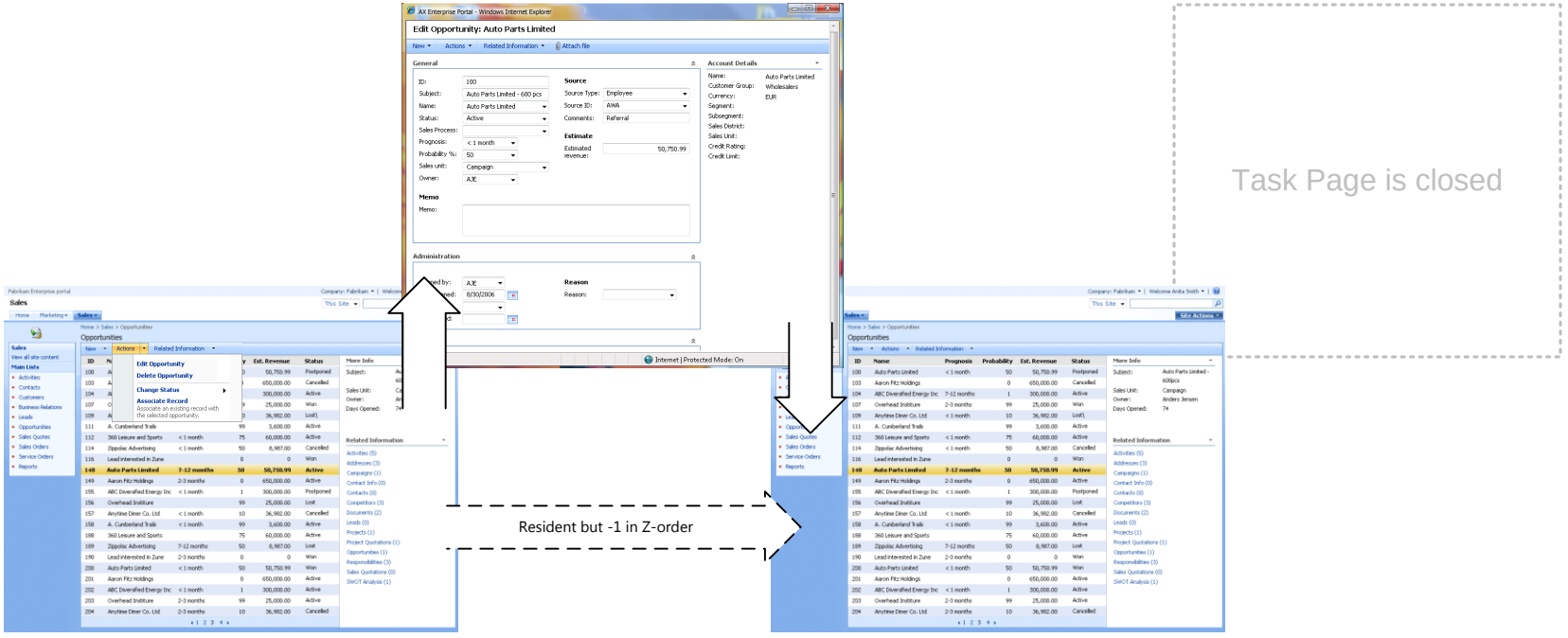
Navigating to Entities Without List Pages

Michael needs to view related SWOT Analysis information for a selected Opportunity.

Alternate Scenario: Edit Action from List

Pop-up "Inspector" task page instances

Main "Explorer" browser instance

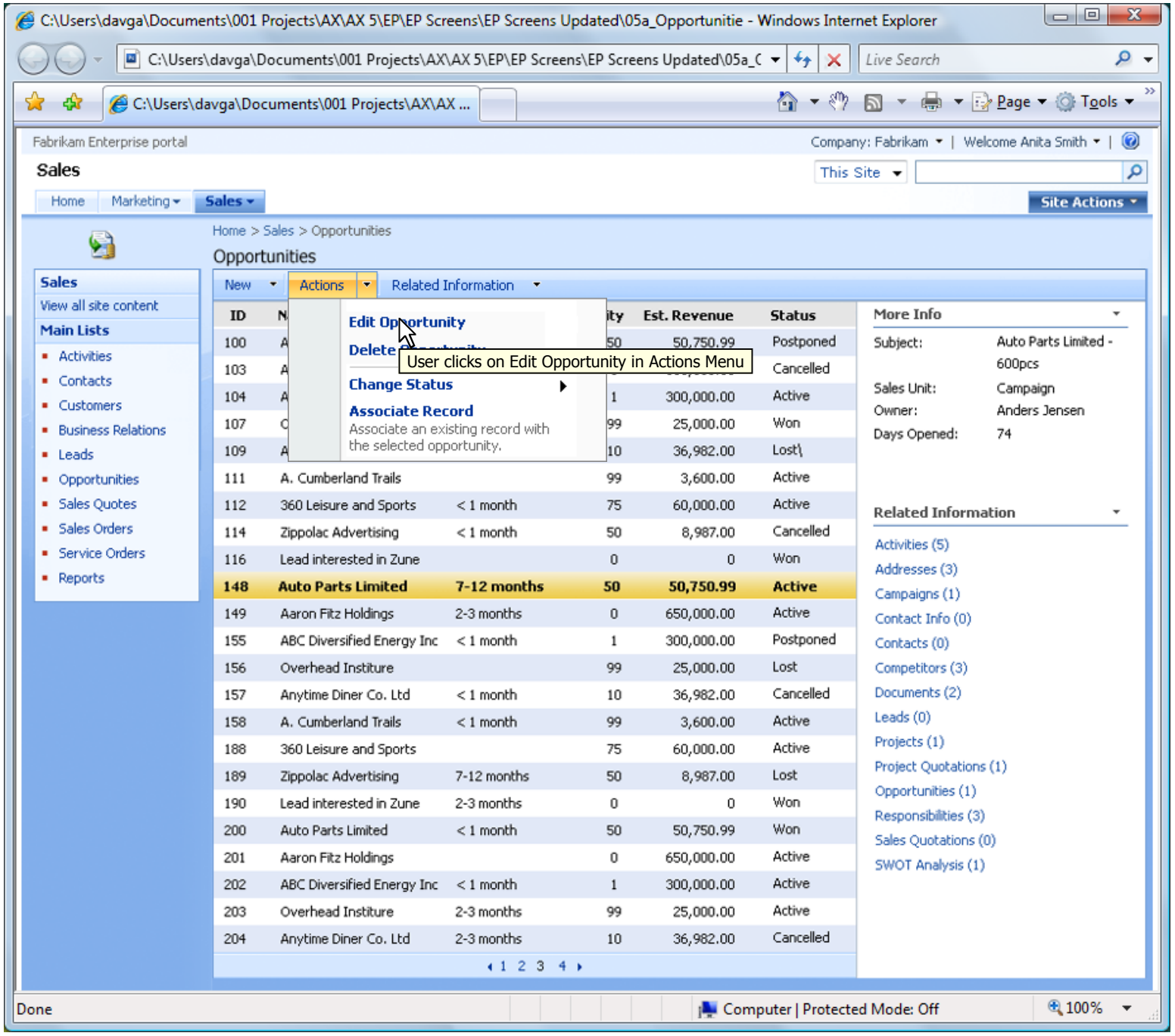


Desktop

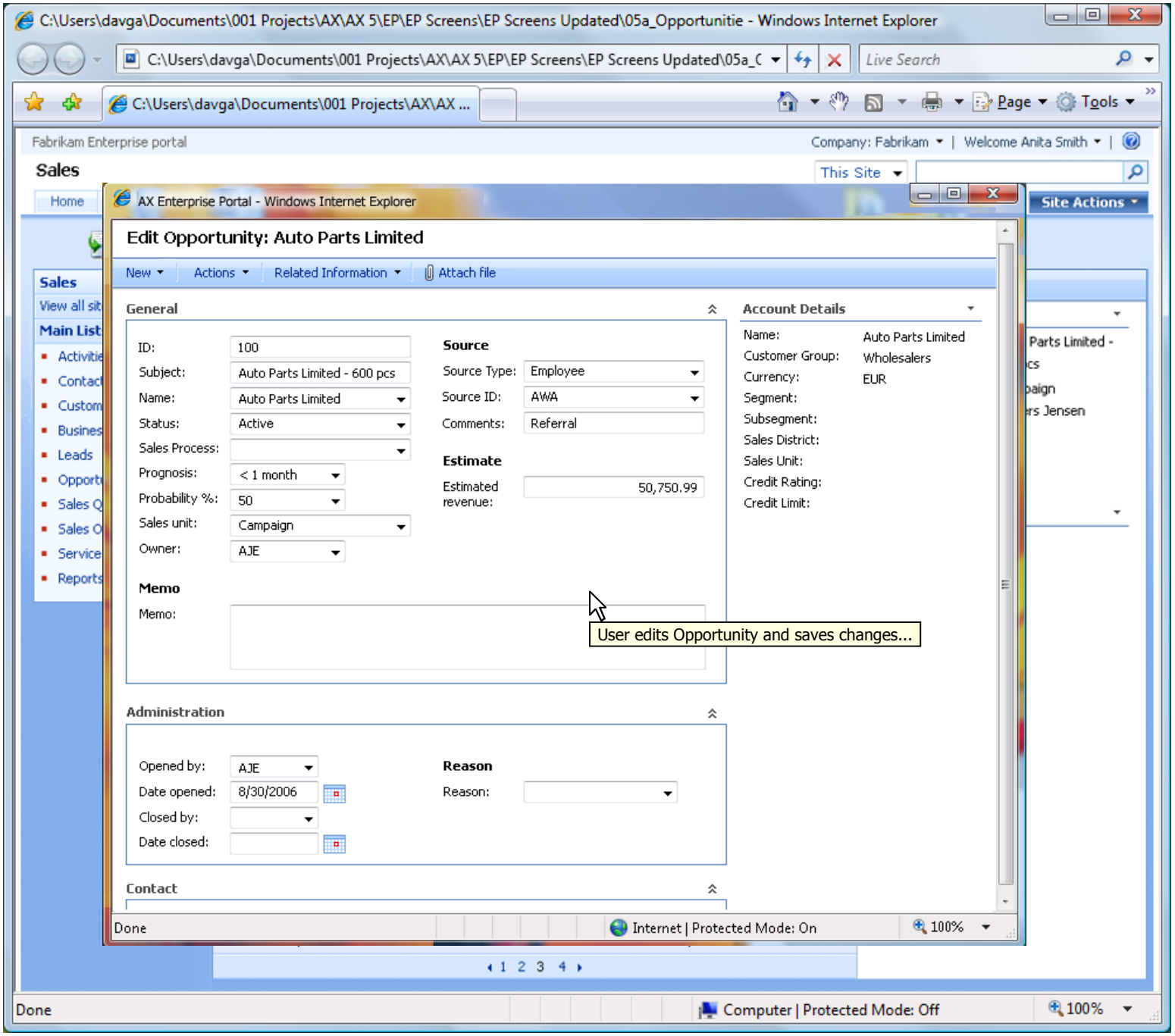
Scenario:

A1.1 Michael selects an Opportunity from the List page and selects "Edit Opportunity" from the Actions menu of the List.
A1.2 This opens a Task Page pop-up "inspector" over the List Page with Edit view/"mode" of the selected Opportunity.
A1.3 Once the changes have been made and saved, the Task Page pop-up is dismissed and the main "explorer" browser with the Opportunities List is given focus.

Alternate Scenario: Edit Action from List



Dynamics AX5 | CRM Enterprise Portal | Alternate Scenario: Edit Action from List



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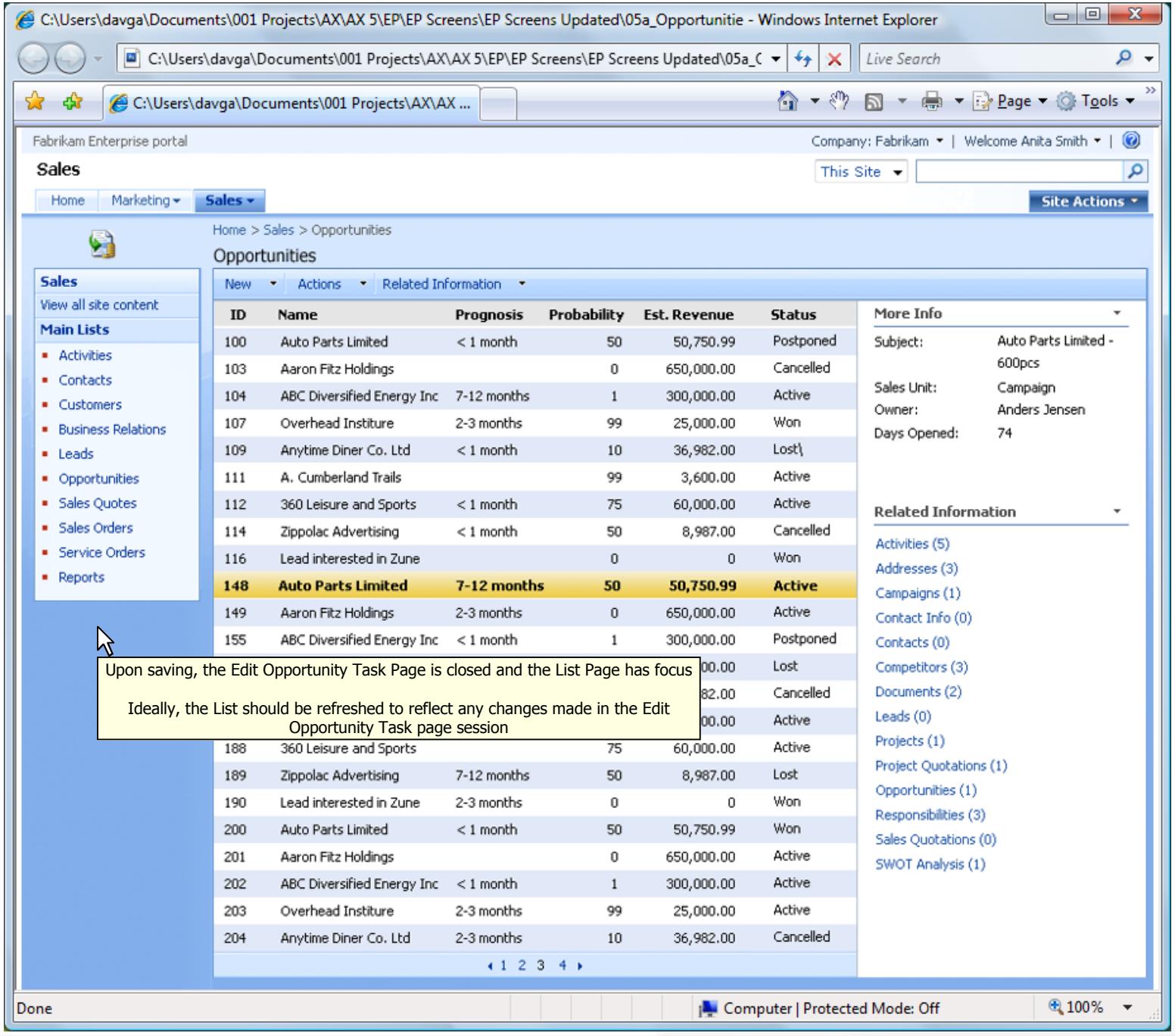
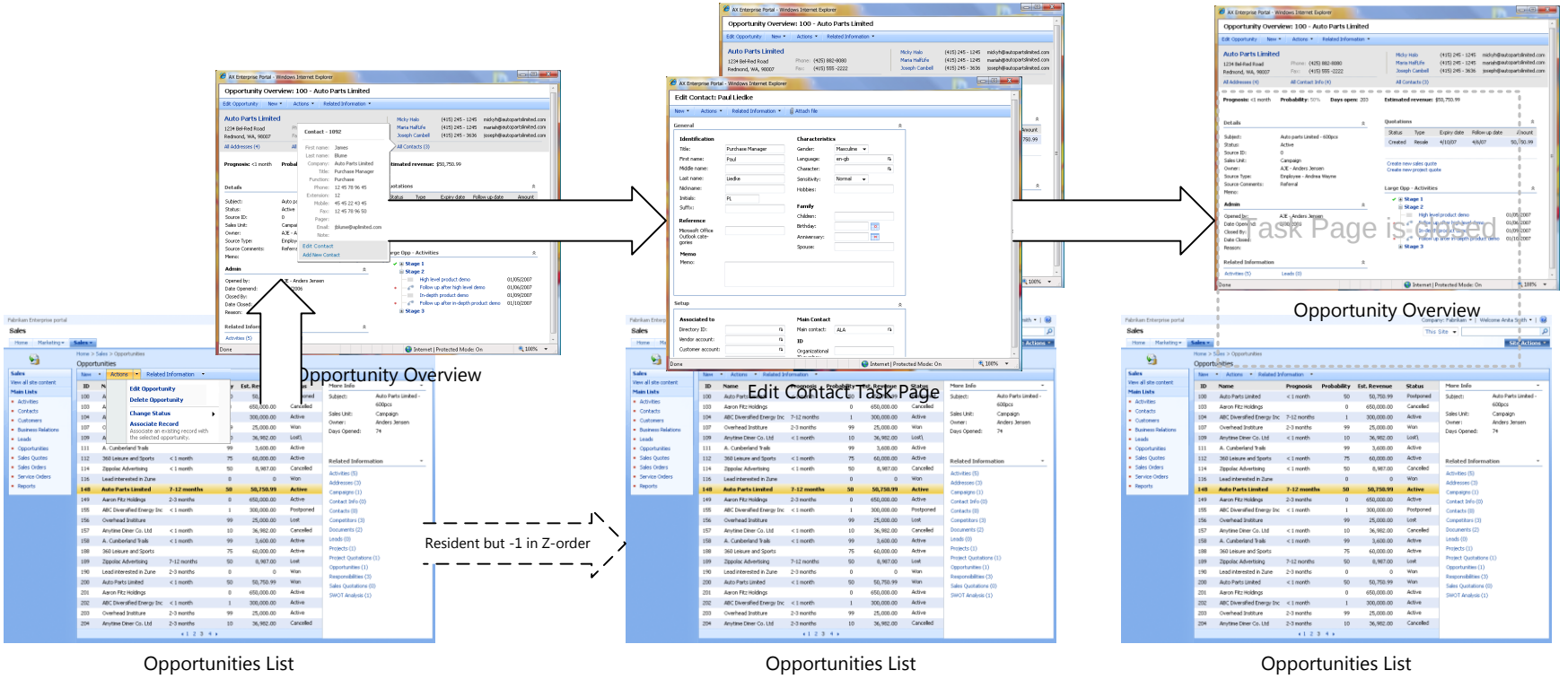


Alternate Scenario: Enhanced Previews

Pop-up "Inspector" task page instances

Main "Explorer" browser instance

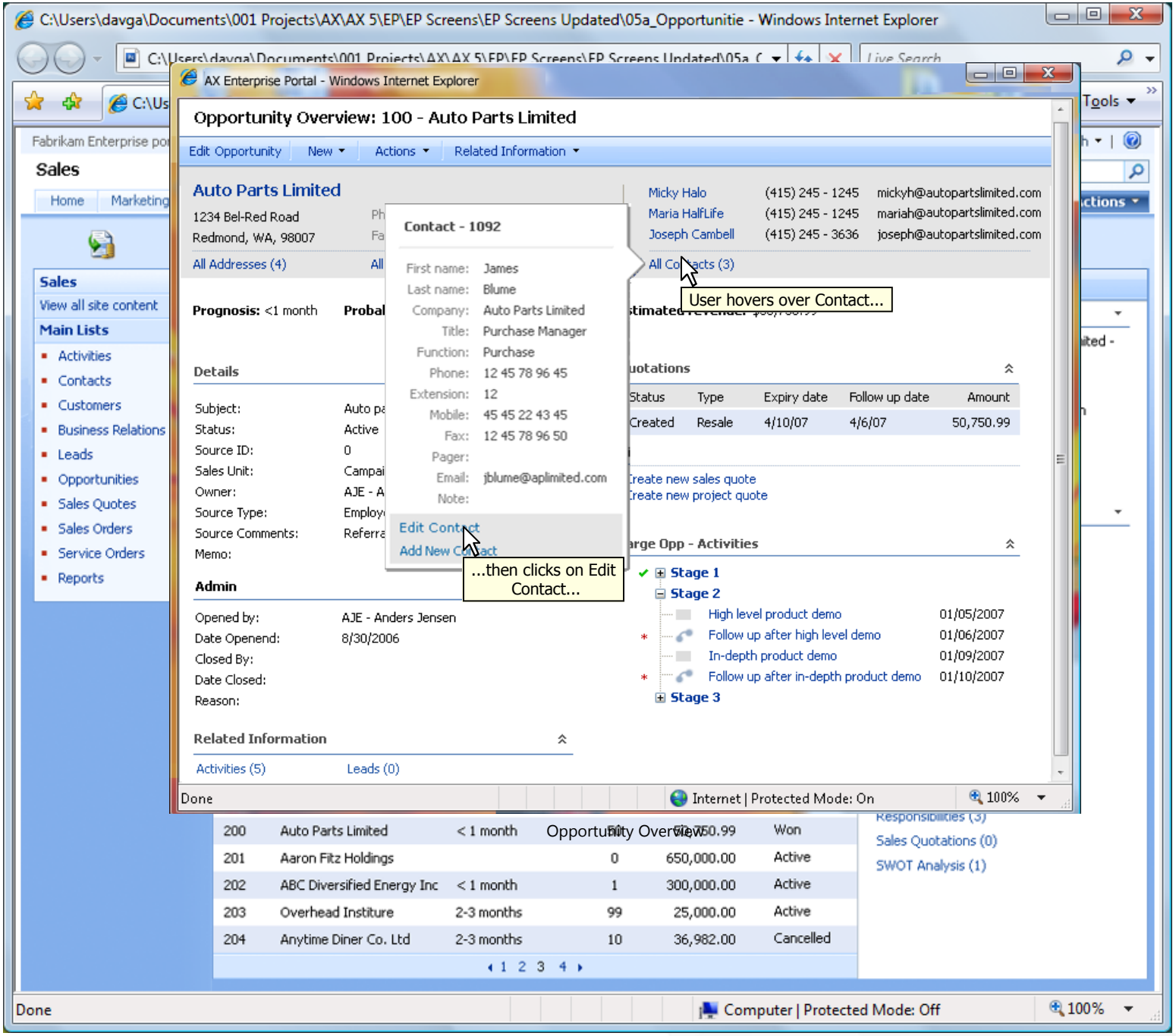


Desktop

Scenario:

A2.1 From an open Opportunity Overview Task Page pop-up, Michael hovers over the All Contacts link in the Opportunity's summary details.
A2.2 This opens an Enhanced Preview, showing the details of the Contact for this Opportunity. Michael needs to edit the content of this Opportunity's Contact, so he clicks on the Edit Contact link at the bottom of the Preview.
A2.3 The Edit Contact Task Page pop-up opens over the Opportunity Overview task page, allowing Michael to edit the contents of the Contact.
A2.4 When finished, Michael saves the Contact, which closes. The Opportunity Overview Task Page now has focus.

Alternate Scenario: Enhanced Previews



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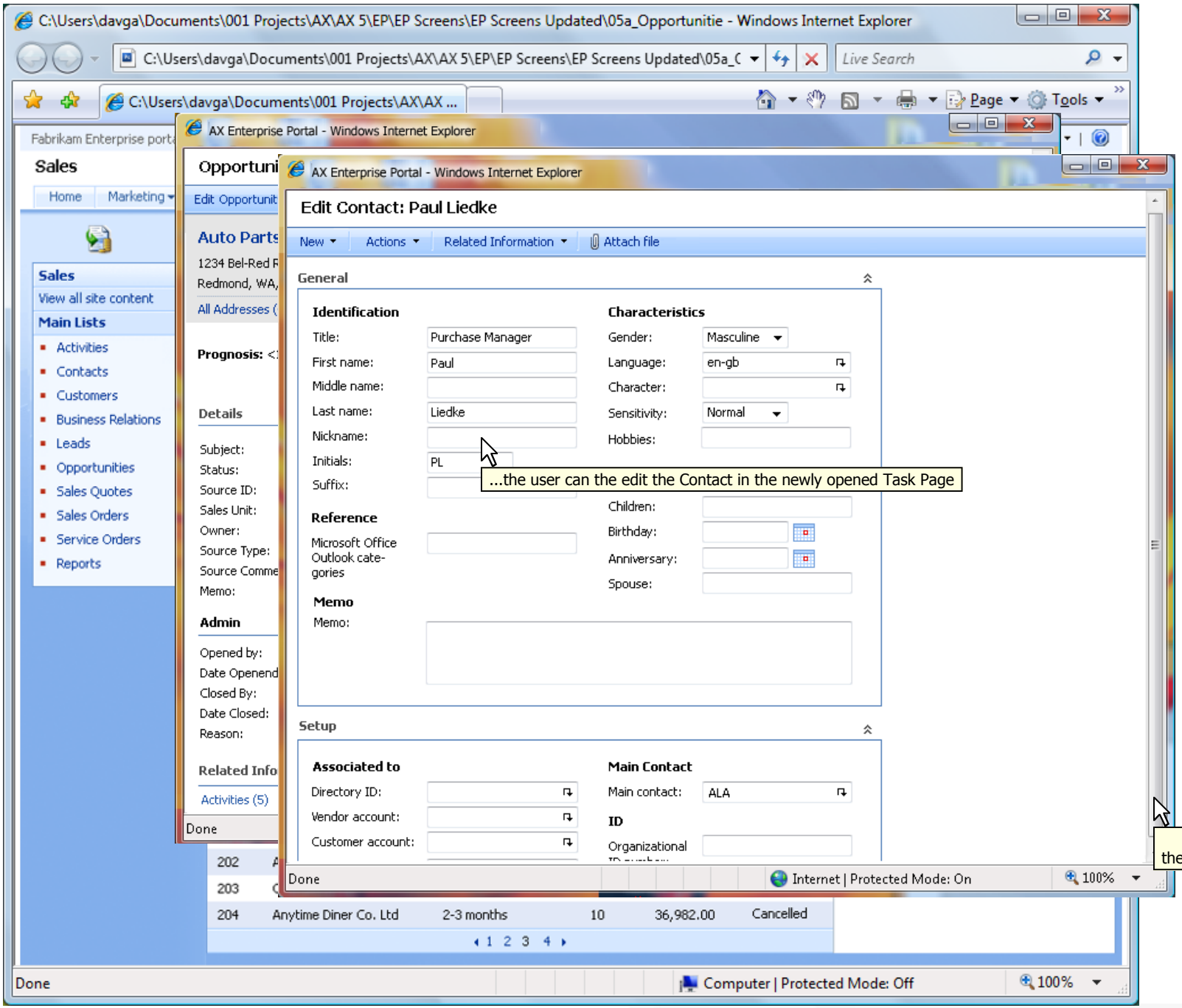
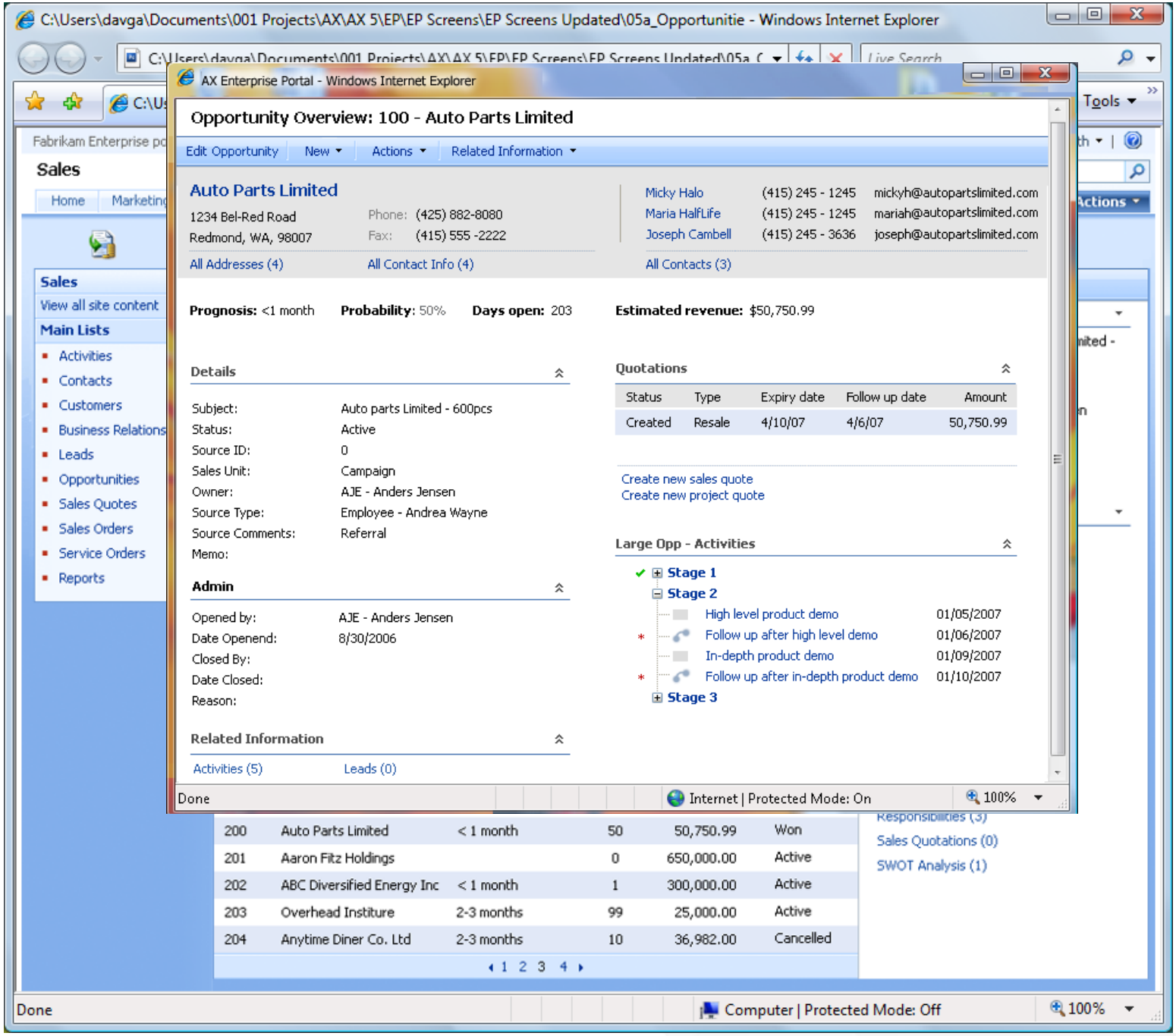
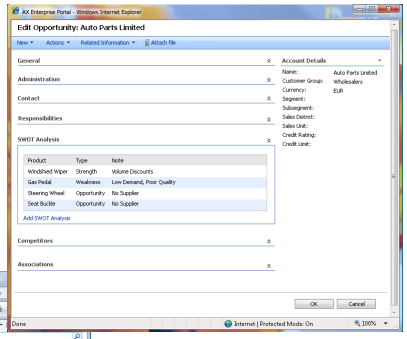


Dynamics AX5 | CRM Enterprise Portal | Alternate Scenario: Enhanced Previews



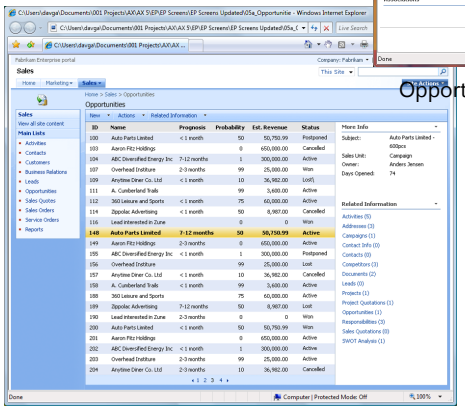
Alternate Scenario: Entities W/O Lists

Pop-up "Inspector" task page instances



Opportunity with Fast Tabs Targeted

Main "Explorer" browser instance



Desktop

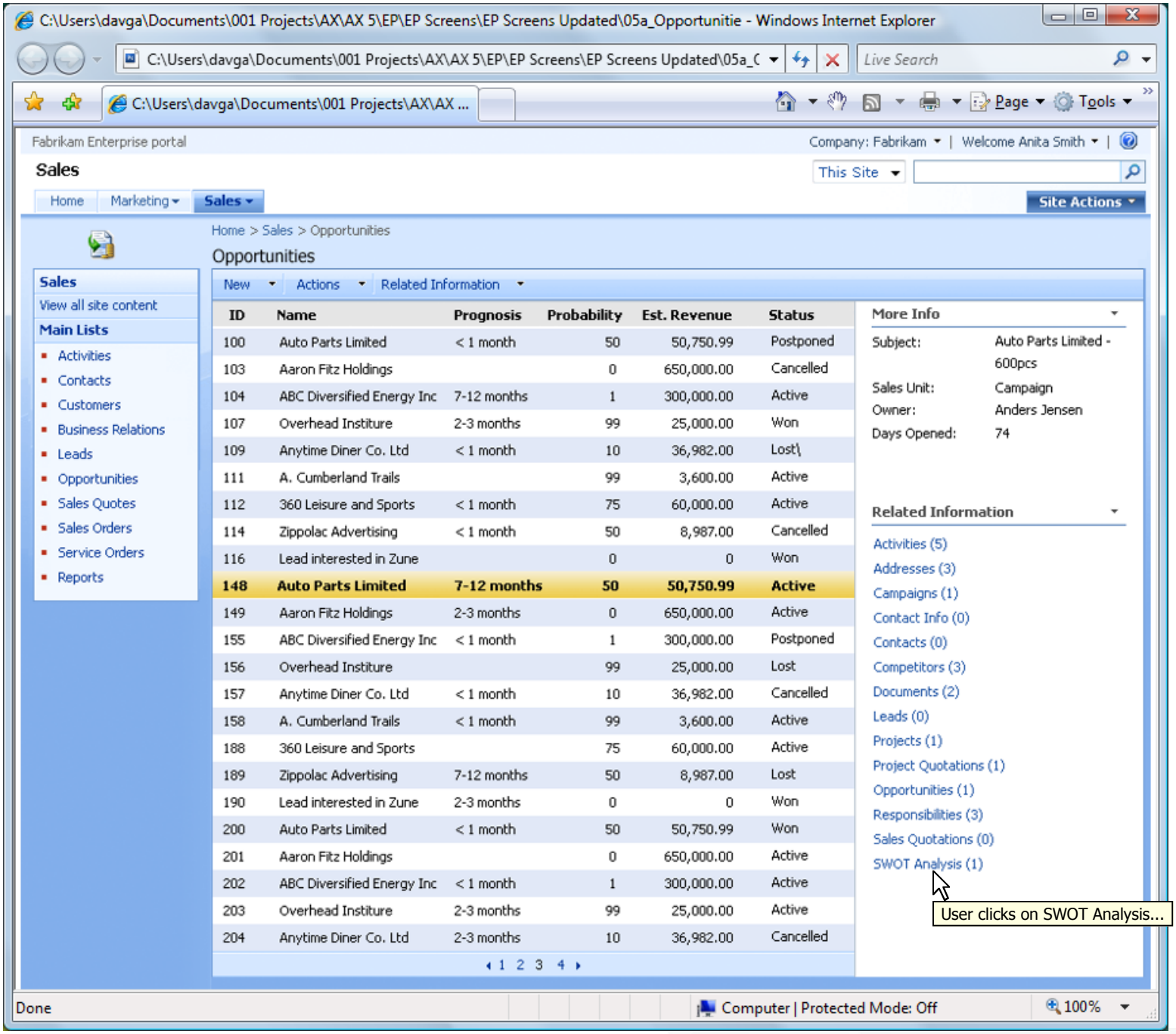
Scenario:

A3.1 Michael selects an Opportunity in the Opportunity List page. This action refreshes the Related Information on this page. There Michael sees that the selected Opportunity has an associated SWOT Analysis.

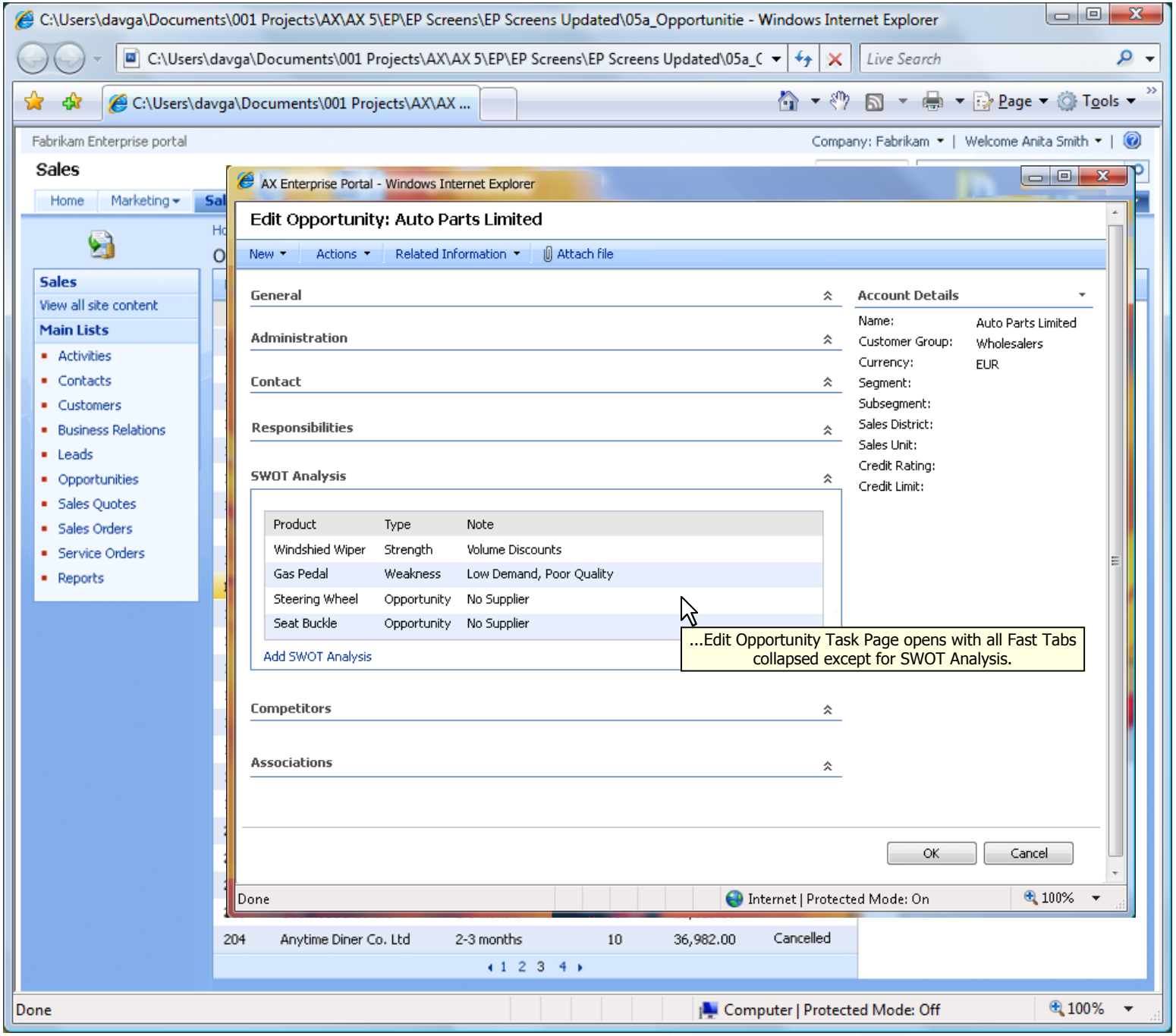
A3.2 Michael clicks on the SWOT Analysis link. Since SWOT Analysis's do not have List Pages, the targeted Opportunity Edit Task Page pop-up is launched with all Fast Tabs on the Task Page closed except for SWOT Analysis.

A3.3 From this Task Page, Michael can drill further down into the SWOT Analysis related entities.

Dynamics AX5 | CRM Enterprise Portal | Alternate Scenario: Entities W/O Lists



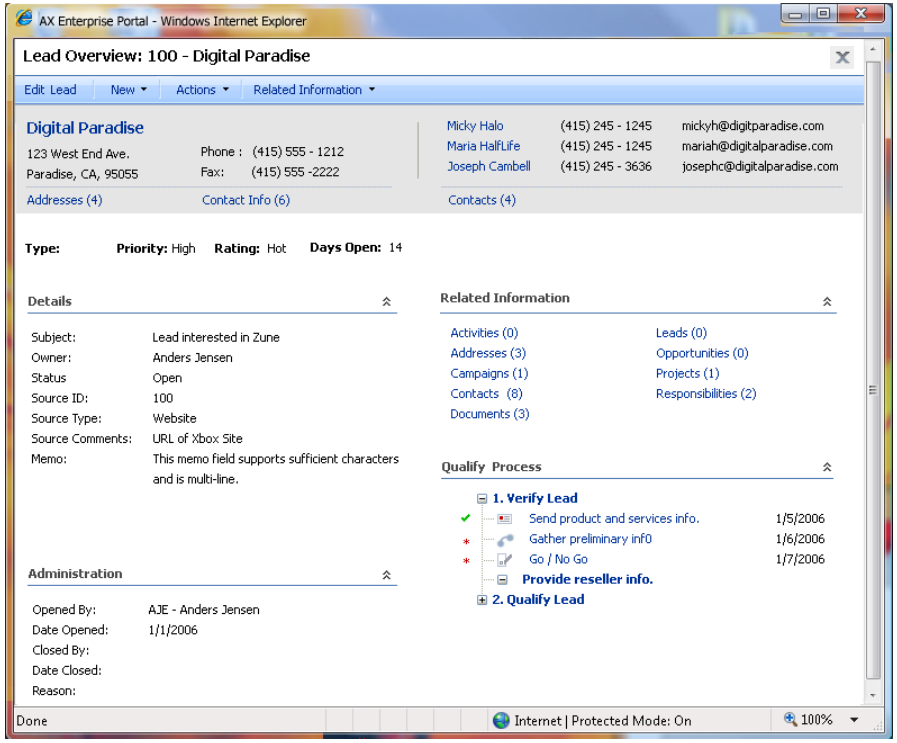
Alternate Scenario: Entities W/O Lists



Future Optimizations

Adding "Close" Control to Entity Overview Task Pages

Allow users to better manage pop-ups with an explicit Close Window control in the header and footer of the Entity Overview Task Page template



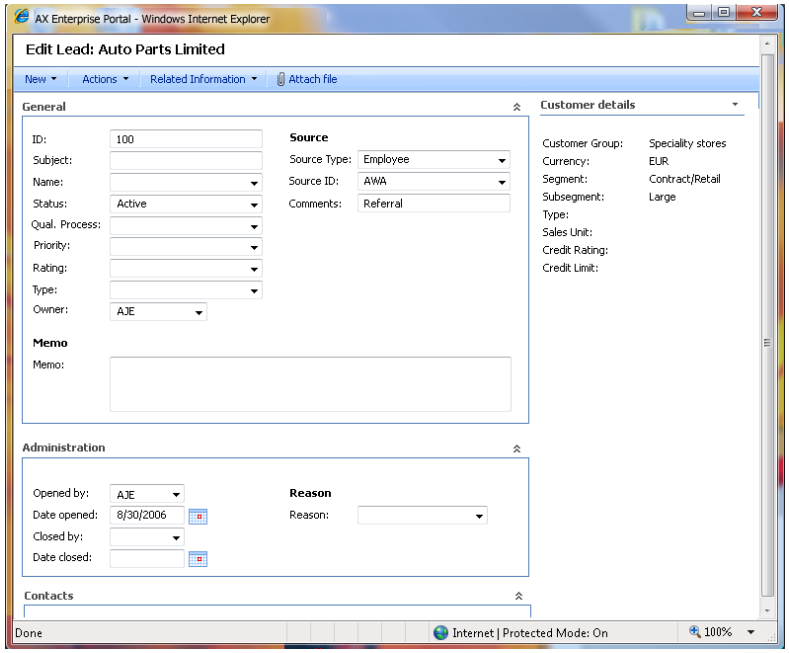
Adding Page Anchors & Links for Long Pages

Allow users to better navigate within the length of a long Task Page with the aid of anchors or other supplemental navigation.

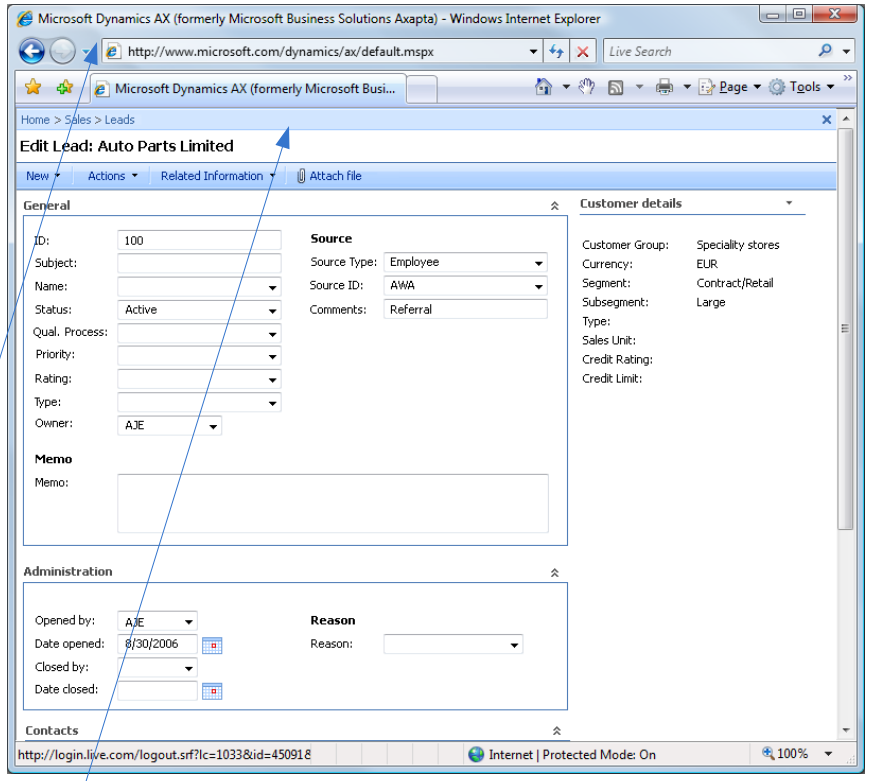
Enhanced Task Page Proposal

Revisions to better support navigation & deliver browser features to EP

Addition of a static breadcrumb bar and full IE “chrome”



Standard EP Task Page Template



Enhanced EP Task Page Template

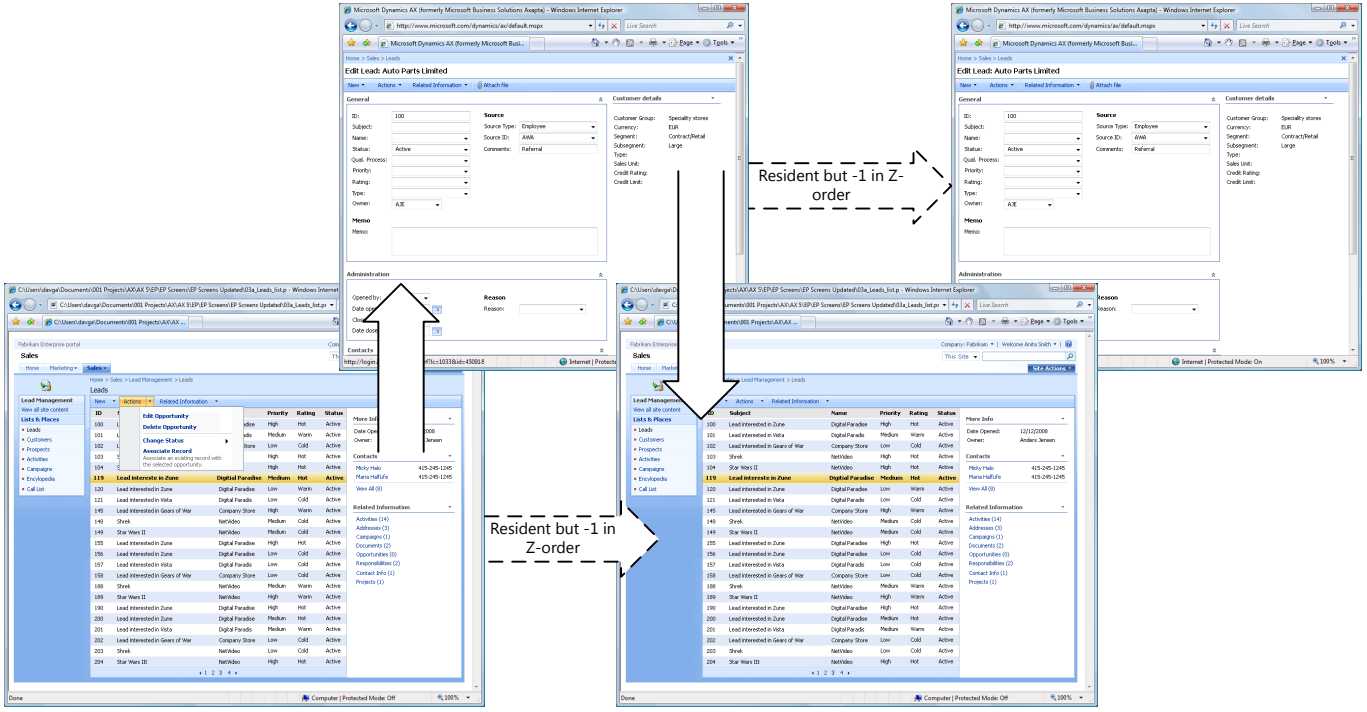
Full IE7 tab, tool & address bars

Static breadcrumb bar navigation bar

Enhanced Task Page – Breadcrumb Nav

Pop-up "Inspector" task page instances

Main "Explorer" browser instance



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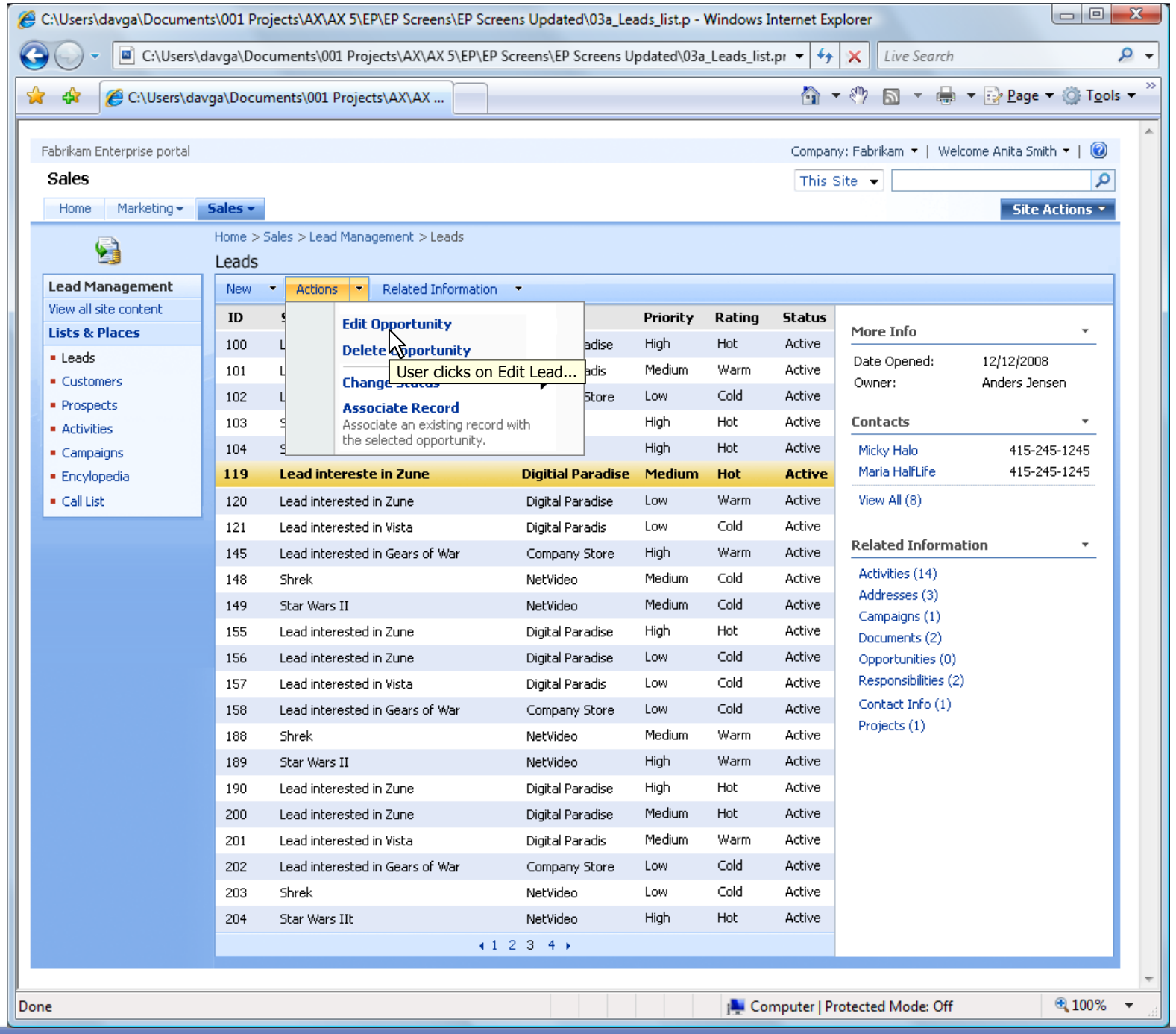
Scenario:

ETP1.1 Michael selects a Lead from the Lead List page and opens the Actions menu. He clicks on Edit Lead.
ETP1.2 This opens the Enhanced Task Page for this selected Lead in the Edit mode.
ETP1.3 Realizing he needs some data from another Lead back on the Leads List page, Michael clicks on Leads in the new Breadcrumb Bar of the Leads Edit Enhanced Task Page.
ETP1.4 This brings the Leads List browser instance back to focus. The Edit Lead Task Page remains open.

Enhanced Task Page – Breadcrumb Nav



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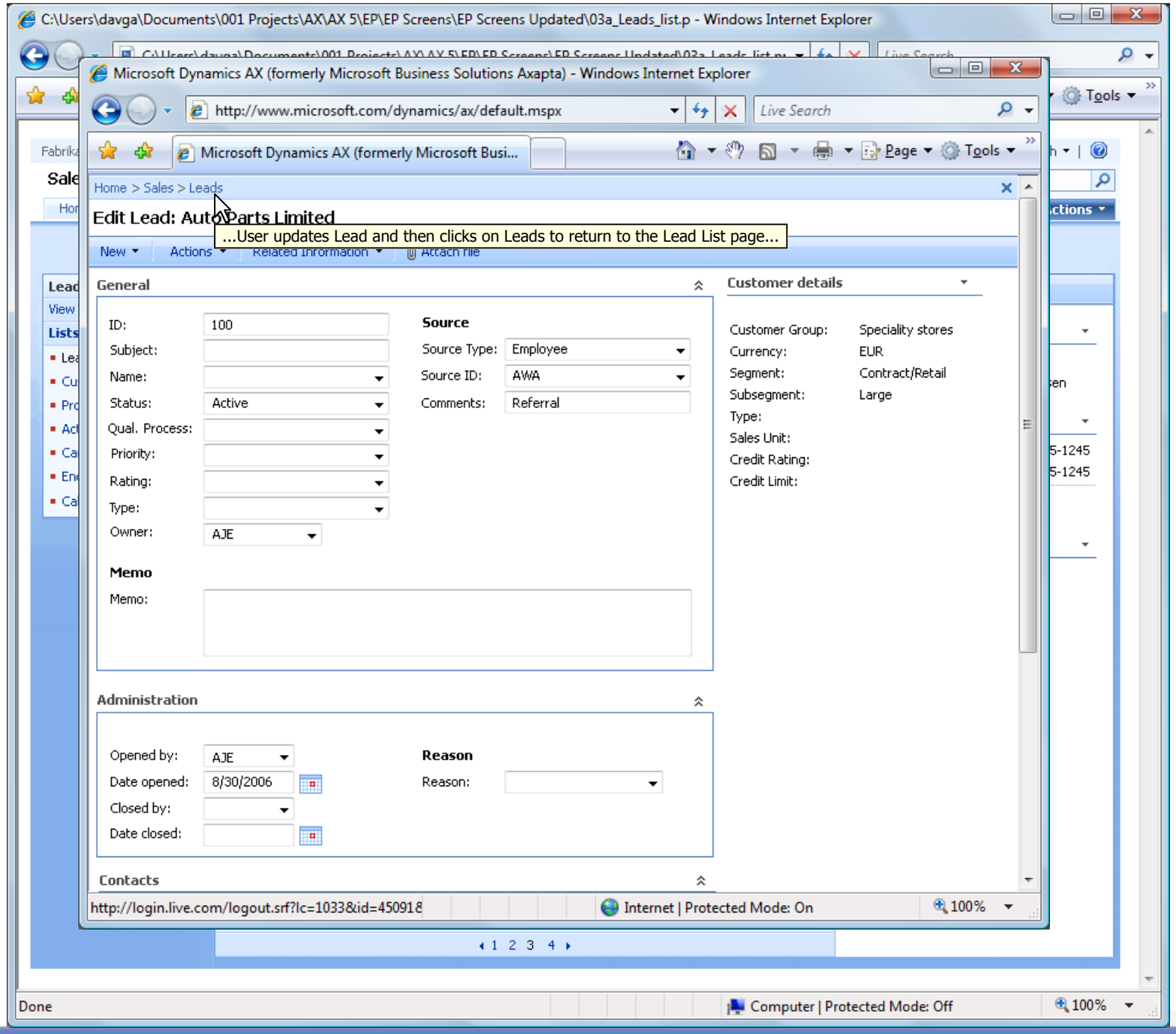

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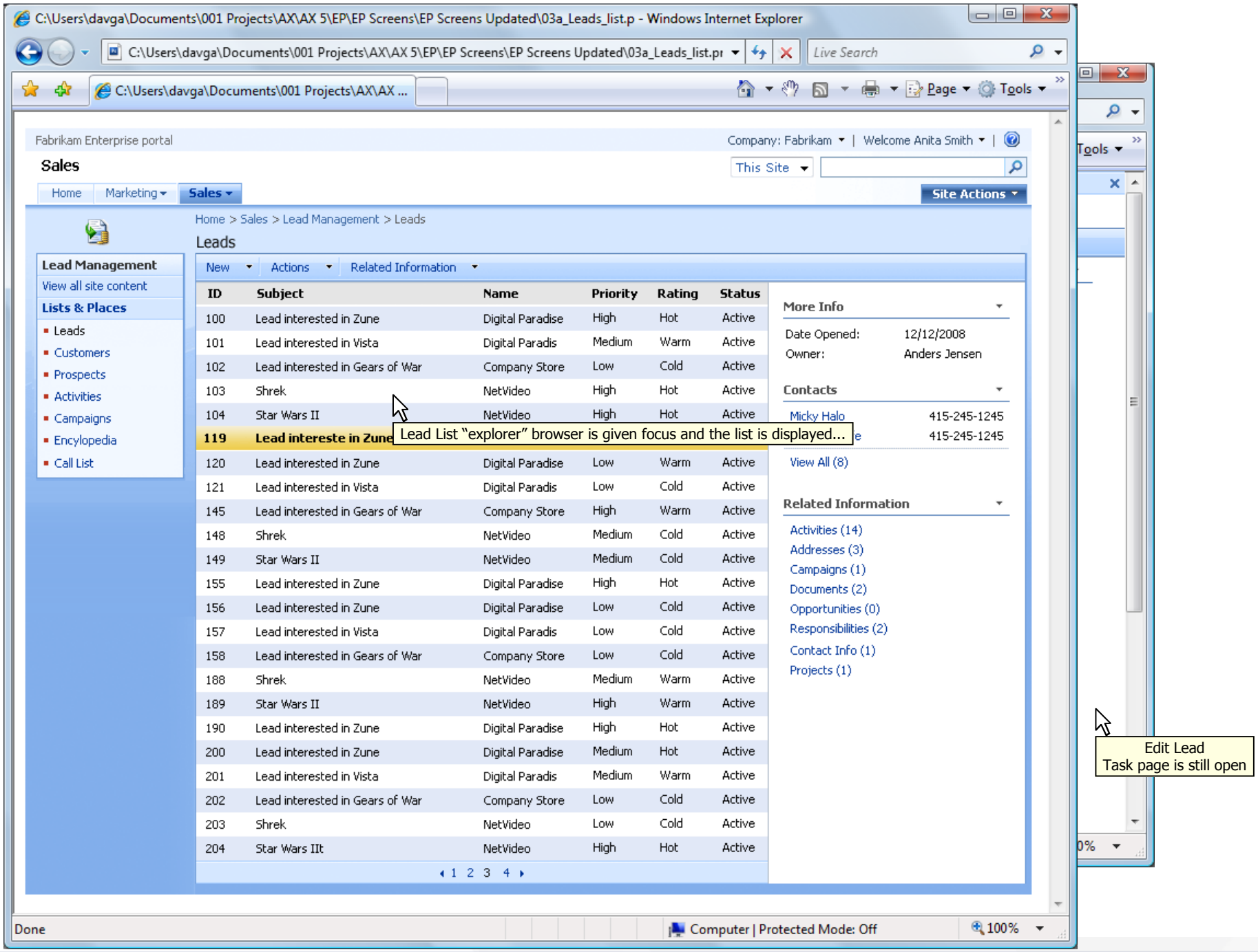
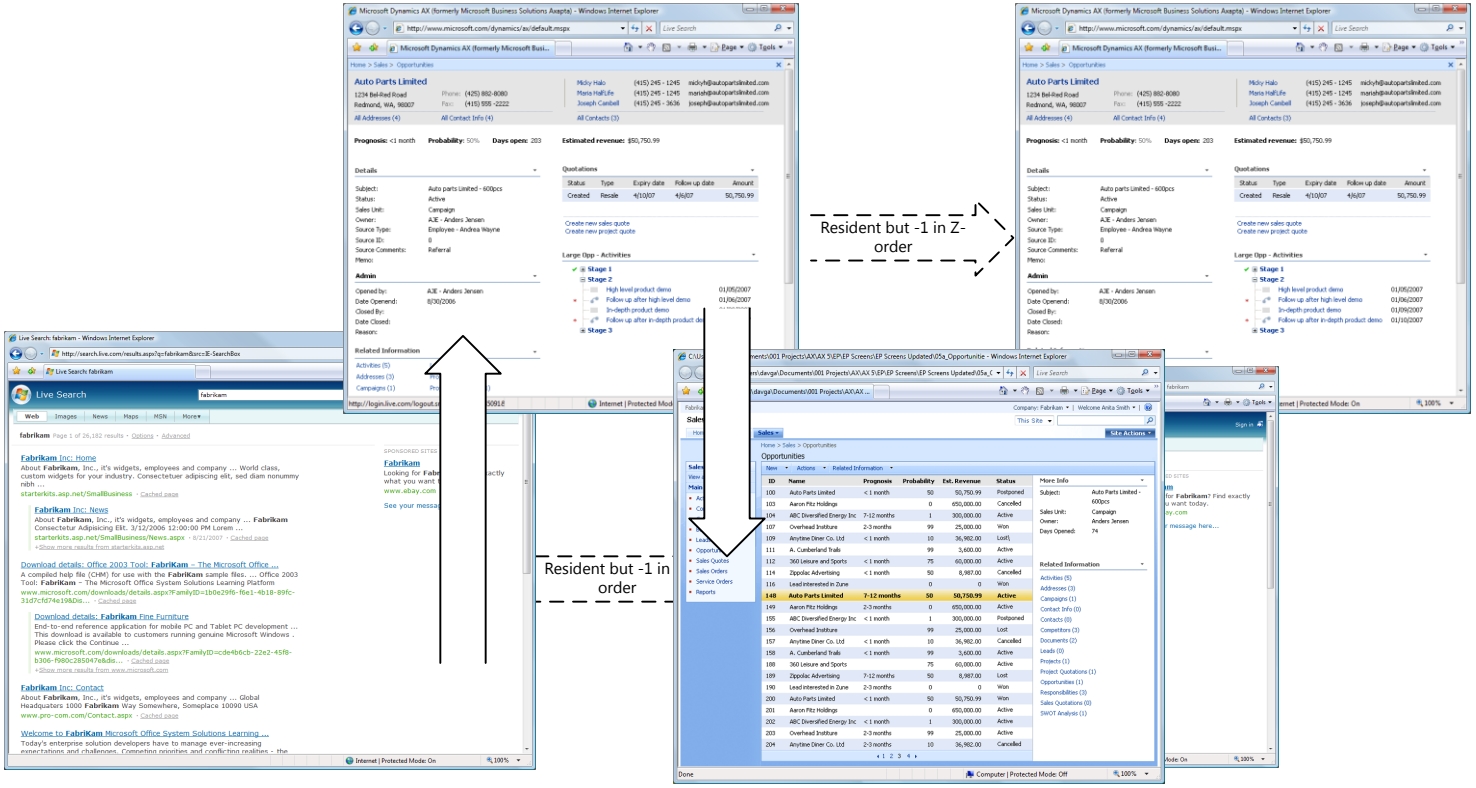


Entry from Live Search Results

Pop-up "Inspector" task page instances

Main "Explorer" browser instance

Desktop



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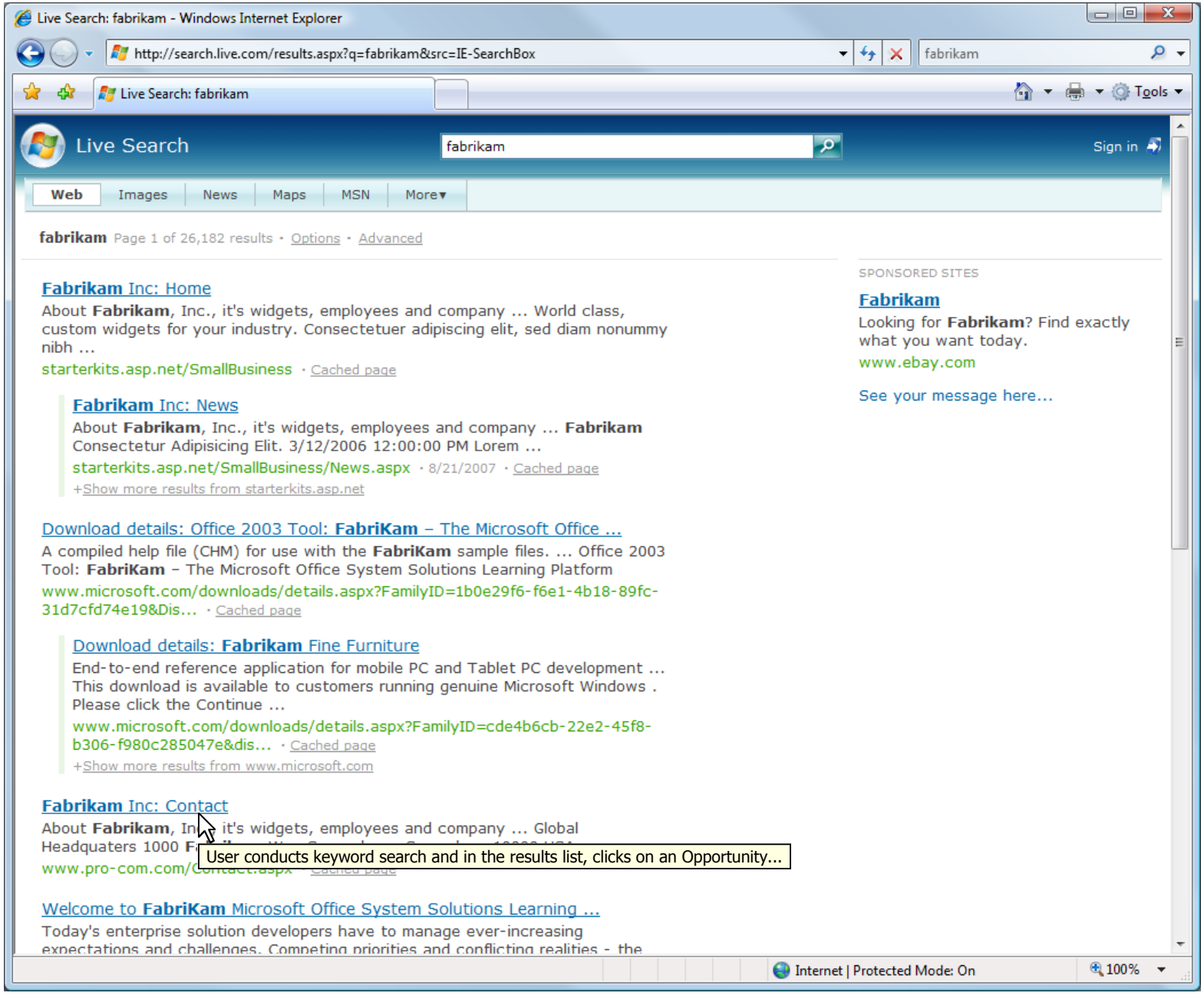

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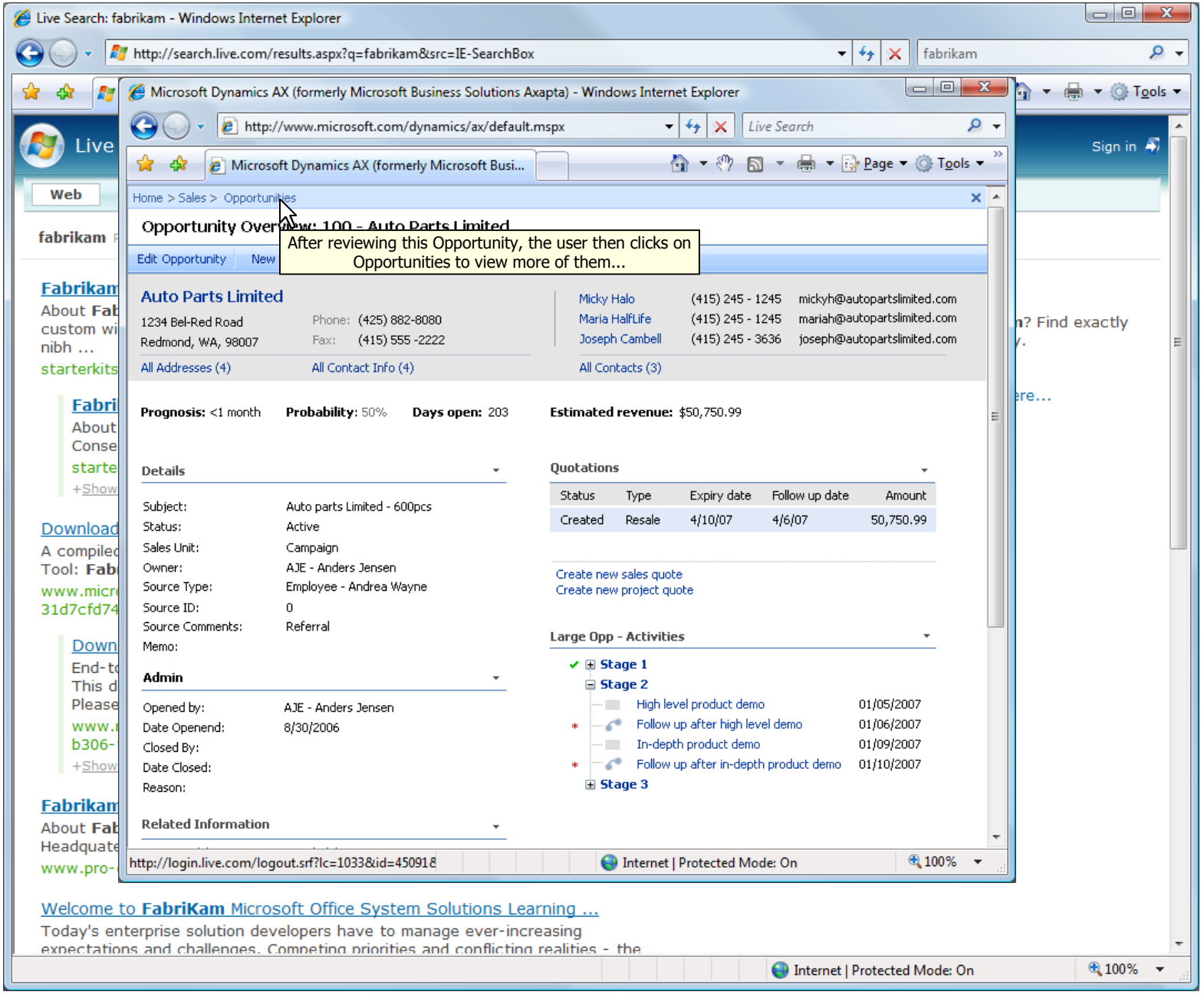

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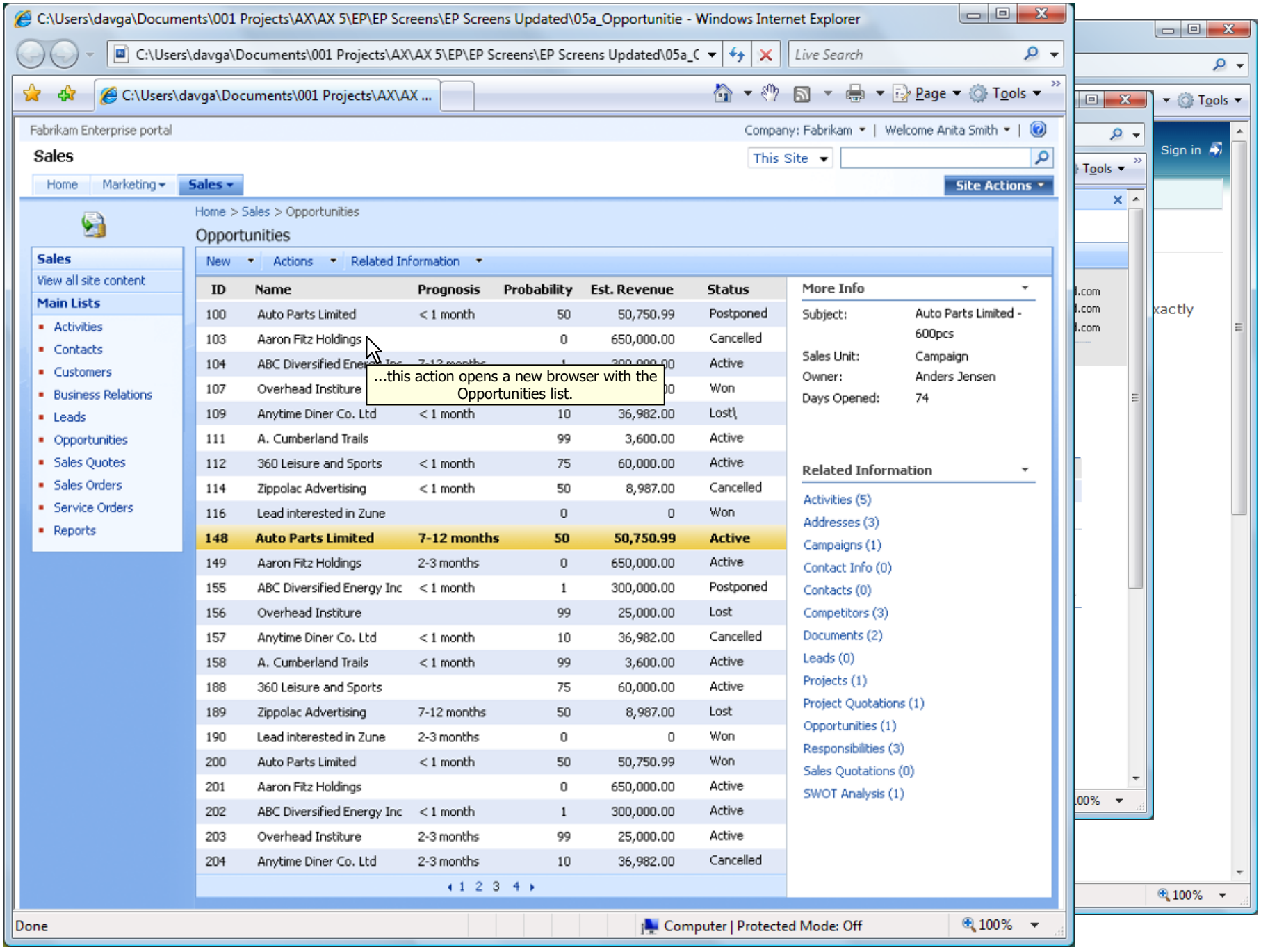
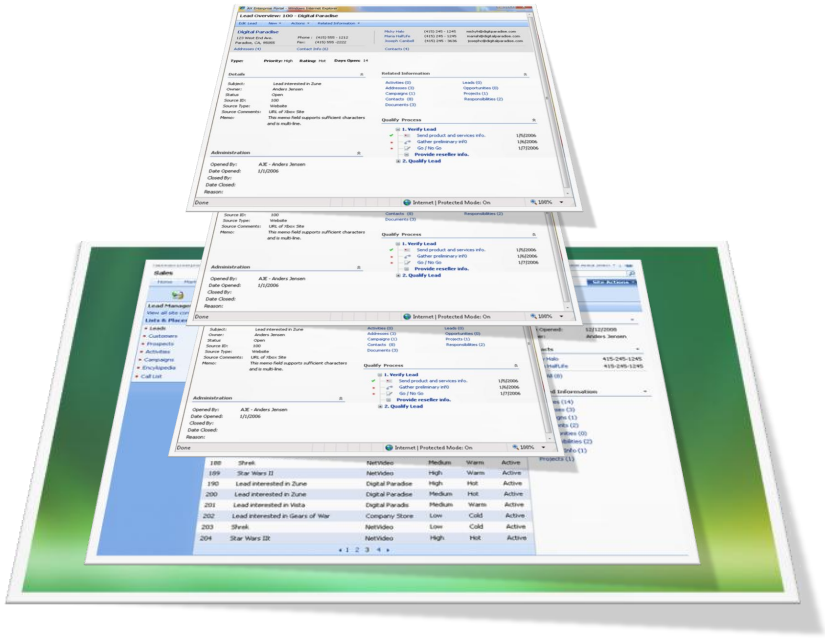


ID	Name	Prognosis	Probability	Est. Revenue	Status
100	Auto Parts Limited	< 1 month	50	50,750.99	Postponed
103	Aaron Fitz Holdings		0	650,000.00	Cancelled
104	ABC Diversified Ener... Inc	7-12 months	1	300,000.00	Active
107	Overhead Institure				Won
109	Anytime Diner Co. Ltd	< 1 month	10	36,982.00	Lost\
111	A. Cumberland Trails		99	3,600.00	Active
112	360 Leisure and Sports	< 1 month	75	60,000.00	Active
114	Zippolac Advertising	< 1 month	50	8,987.00	Cancelled
116	Lead interested in Zune		0	0	Won
148	**Auto Parts Limited**	**7-12 months**	**50**	**50,750.99**	**Active**
149	Aaron Fitz Holdings	2-3 months	0	650,000.00	Active
155	ABC Diversified Energy Inc	< 1 month	1	300,000.00	Postponed
156	Overhead Institure		99	25,000.00	Lost
157	Anytime Diner Co. Ltd	< 1 month	10	36,982.00	Cancelled
158	A. Cumberland Trails	< 1 month	99	3,600.00	Active
188	360 Leisure and Sports		75	60,000.00	Active
189	Zippolac Advertising	7-12 months	50	8,987.00	Lost
190	Lead interested in Zune	2-3 months	0	0	Won
200	Auto Parts Limited	< 1 month	50	50,750.99	Won
201	Aaron Fitz Holdings		0	650,000.00	Active
202	ABC Diversified Energy Inc	< 1 month	1	300,000.00	Active
203	Overhead Institure	2-3 months	99	25,000.00	Active
204	Anytime Diner Co. Ltd	2-3 months	10	36,982.00	Cancelled

Conclusions

Pros

- This model affords user support for both link-based page navigation and form-based dialog interaction.
- Good step towards an SDI-like approach similar to Win32 client
- Support comparison of two entities simultaneously

Cons

- May lead to many open task pages clogging the Start Bar
- Window management is still a problem (similar to MDI on Win32 client)