Gabriel Spitz

Using Reporting Applicatio

Introduction

The objective of this document is to outline an interaction vision for the Reporting Application. It is intended to identify and describe the set of Activities, Tasks, and Actions that will be involved when interacting with Reports. While task analysis should be comprehensive and identify in details each task and action, it is often an unrealistic goal, particularly in rapid software development programs. Thus the task analysis presented below is not exhaustive, however it captures the key tasks that should be associated with a reporting application.

Effort was made in the Task Analysis to remain technology agnostic, however this was not always successful. A major reason is that many technology words are very common in today's vocabulary. In spite of the inclusion of such words, we should not assume a technology; rather select technology that is most appropriate for the task and users needs.

Task Analysis

Reporting Activities

An activity within the context of Reporting is something that a user or a customer is doing to or with an object, and is directed toward a high-level goal or objective. Activities by themselves do not result in specific outcomes, however they are an organizing concept for lower levels tasks.
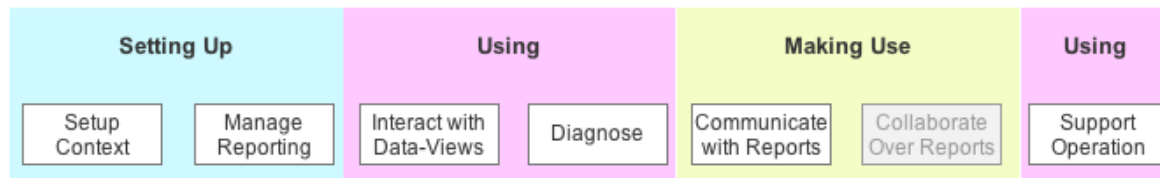

Figure 1: Key Activities associated with Reporting

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Reporting Activities and Tasks

Tasks are a set of actions that users perform in order to achieve a specific and meaningful or practical intent.

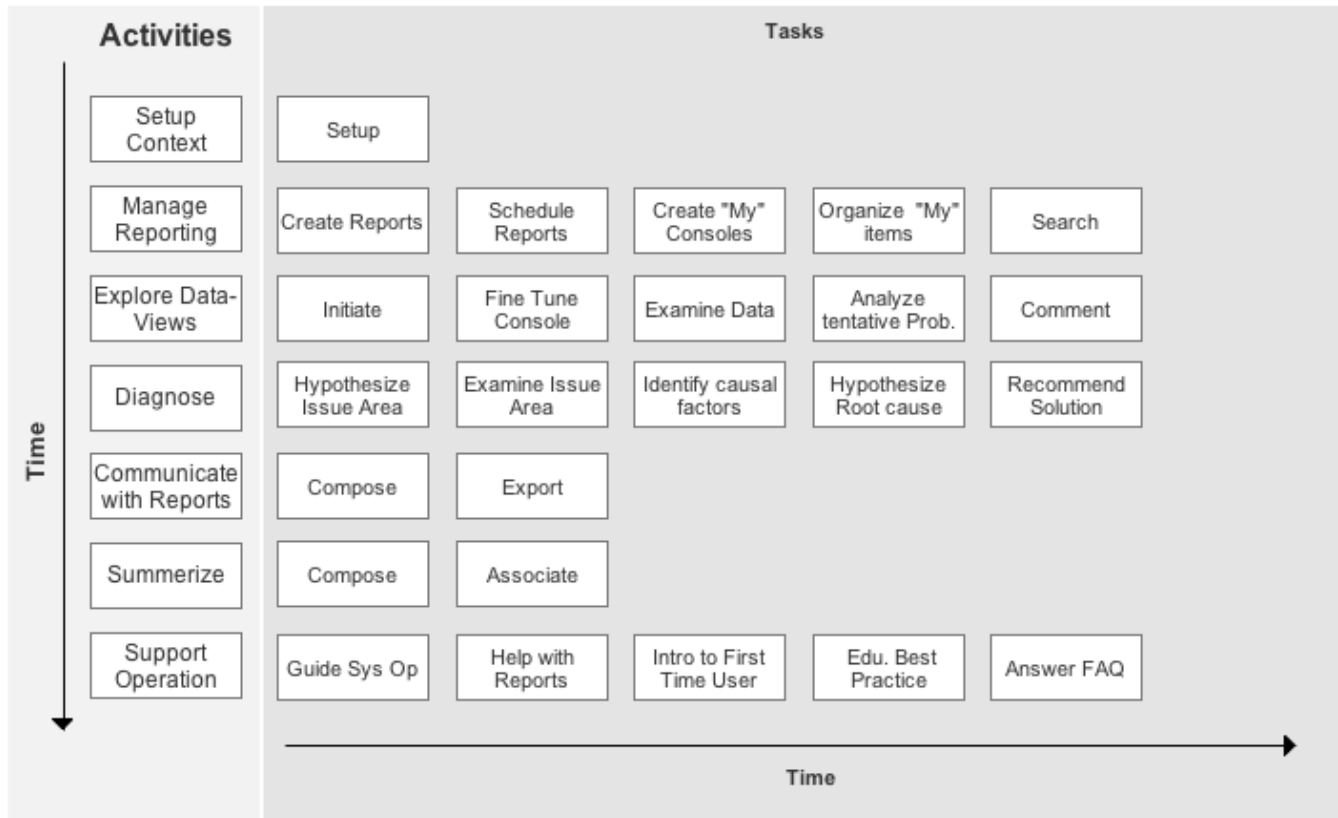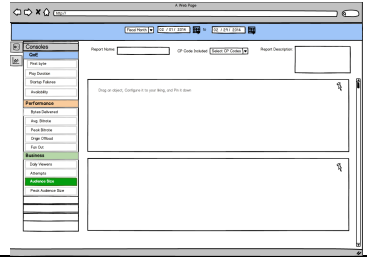| Activities	Tasks				
Setup Context	Setup				
Manage Reporting	Create Reports	Schedule Reports	Create "My" Consoles	Organize "My" items	Search
Explore Data-Views	Initiate	Fine Tune Console	Examine Data	Analyze tentative Prob.	Comment
Diagnose	Hypothesize Issue Area	Examine Issue Area	Identify causal factors	Hypothesize Root cause	Recommend Solution
Communicate with Reports	Compose	Export			
Summerize	Compose	Associate			
Support Operation	Guide Sys Op	Help with Reports	Intro to First Time User	Edu. Best Practice	Answer FAQ

Figure 2: Key Reporting Activities and Tasks

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Reporting Activities, Tasks, Actions

User	Application	Comments	Visual Concepts
Setup			
Setup Context			
	Based on user login the system will identify the user and associate with him/her a set of allowable products and CP codes		
Joe reviews the set of **products** on his contract and selects the products that he plans to monitor	System will record and associate these products with Joe	The default should be all products	
Joe than reviews the set of **CP codes** that he has access to, and selects the one he wants to Monitor.	System will record and associate these products with Joe	The default should be all CP Codes	
Joe than sets up the default date-range for reports e.g., Previous Week, Previous Month	System will record and associate the Date-Range Joe		
Manage Reporting			
Create Reports		A report is a pre-described and personalized set of Views organized in a sequential form. These views can include Consoles and Data-Views at various configurations levels-drill	

		down, filters, etc.	
Joe initiates Report Creation	Open a Report Form		
Joe enters Report name	Display Report Name		
Joe selects Report Focus/Template	Display different Report Templates with explanation of their value	Report Templates are goal oriented set of views we recommend to help user achieve their intent.	
Joe selects Report scope (CP codes)	Display an organized list of available entities – CP codes, Groups, etc.		
Joe enters Report description	Display description entered		
Joe Drags and Drops Individual Data-Views	Display data-views on console		
Joe Manipulates Data-View's Attribute and Pin the desired view	Display data-view with the selected attributes	Some of the selectable attributes will include dimensions, presentation format, drill down level	
Joe saves the Report Form	The Report name appears in the "My Items" section of the Navigation Pane		