

This is a revised list of the requirements for the IIM v1.0.

- Overview

- There will be two separate views within the app. The first is called MY IIM Briefcase. This view can be thought of as the user's briefcase that contains a series of personal folders. The other view will be the IIM Library. The library view will be the public library from which users can access content to place in their private folders.
- MY IIM is where users are expected to spend most of their time. Each user can customize the contents that they want to see within this view. Therefore, this view will be unique to each user.
- Conversely, the IIM Public Library view will be common to and accessible by all users. It can be thought of as a portal where the firm can make content available to all its IIM users.
- Since the document and A/V capabilities of the app are largely known at this stage, this document will focus primarily on user interaction around navigation, public and private folders, MY IIM and the IIM Library, and managing content between these two views.

- Screen Layout

- Each of the two views will be divided vertically into 2 primary areas, folder **Navigation** on the left (20-25% of the display) and the content display panel on the right, called the **Main Display** (75-80%).

- Navigation

- Content files available in both My IIM and the IIM Library will be stored in folders that will appear in alpha order in the folder navigation area of the app.

- Main Display

- Applications Panel

- The layout of the window panes in the main display in both views is the same as previous versions. The top approximately 1/3rd measured vertically (or bottom ~1/3rd - depending on user configuration) will contain 4 separate apps for notes, a single document view, and a 2 limited purpose email boxes.

- Content Reader Panels

- The remaining section of the main display will contain two rows for documents and A/V files, respectively.

- Main Display in detail (for both views: My IIM and IIM Library, except where noted)

- The Applications Panel

- The Apps panel will be designed to house multiple, independent applications. Initially, it will contain 4 apps that perform the following tasks:
 - Creating notes within the iPad (IIM Briefcase view only)

- Holding ***fund specific*** email content (IIM Library only)
- Holding ***general*** email content available to all users (both views)
- A single document viewer (IIM Briefcase)
- The applications panel will scroll left and right whenever there are more apps than will fit in a single screen view.
- The details of each of these apps are discussed next:
 - Notes: (Only appears in my IIM view)
 - Notes section is for creating short notes directly on the iPad using two options: a) create a new post, or b) open the Pages app on the iPad. This will be a space where the user has the most recent information available at their finger tips about the selected My IIM folder. Examples of the type of information that will be recorded as notes are: sales call notes, the latest update on a fund sent around via email (which they may want to cut from an email and paste into notes as a post).
 - If the user selects 'Post', an entry window appears above the other Notes entries along with the keypad. This canvas does not need to expand for posting entries but it should be expandable so it can be presented to others.
 - If user selects email, the email application opens and presents the user with an email message that includes the post in the body of the message (the same way you can mail a link from other applications today). The user completes the email and hits send. The app returns to the most recent IIM view ready to continue.
 - If user select Pages (Apple's word processing application), and they have it installed on their device, the app launches and allows the user to operate within the Pages application. Once they save the Pages document they have to re-launch IIM to begin using it again.
 - Fund Specific Commentary for the IIM Library (only appears in the Public Library view). This is called 'Limited Purpose E-mailbox 1, (LPEI)'.
 - The contents (text and attachments) from any properly structured email sent to this mailbox will be parsed and placed into the IIM Public Library (stored at box.net or pier7mobile website) in fund specific folders.
 - To facilitate parsing, the email author will create a simple marker (like Fund ID or Name) for each unique paragraph and/or email attachment. This marker will be linked to the correct destination folder.

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- When a user selects a specific fund folder in the IIM Library navigation menu, attachments and text linked to that fund by the parsing process will appear in the LPE1 viewer window in the main display of the IIM Library (public library view).
- The contents within this 'inbox' will be scrollable vertically and organized by date, newest on top. If a message in the inbox is tapped the message expands to fill the main display screen.
- Each folder available in the IIM Library navigation menu will have it's own inbox displayed in the main display of the IIM Library view when selected. This view will not be available in My IIM.
- No message will be partially parsed. Any error will trigger a complete rejection. Messages that cannot be processed will be returned to sender with an appropriately worded rejection message.
- Single Document View (My IIM only)
 - This purpose of this area is to allow for a single document to be given 'priority treatment' by allowing it to appear many times larger than the rest of the documents in the library. It is more likely this will be a single page rather than a larger document. The user will use this to emphasize particular points or to convey information that is not specific to a particular IIM Briefcase folder. Therefore, it will always be viewable no matter what personal folder has been selected.
 - You can add any file at any time from the content reader section to the single document view (from folders located in both My IIM and the IIM Library) or delete items at any time.
- General IIM News (message center). 'LPE2' (appears in all views)
 - This app is similar to LPE1 above except that it will be parsed to a single general news folder. It will not contain fund specific information and is not expected to regularly contain attachments.
 - Any note sent to this mailbox will appear in all users iPads as a new message in a separate app window called IIM General News. The message will *always be available* within the main display, like Single Document View, but *not always viewable* because of the dimensions of the two other windows in the applications panel. A new message here means that the iPad has actually downloaded the mail to the local device and not that users have read the news in a device.
 - A notification alert in the navigation bar will inform users that there are new messages in the General IIM News app, which may not be visible if the user has scrolled this view off the main screen. Tapping the notification icon or scrolling the view to the left will reveal the LPE2 app window so the message can be read. (When the 'twitter' app is

implemented its messages will show up as a notification icon in the nav bar (and on the app icon if the app is closed). There should always be a refresh icon to pull the news down to the device, considering that it is a periodical polling process to the central server. When a user sees the alert, he/she can then refresh this view.

- The Content Reader

- The contents of any folder selected in the navigation panel on the left (either public or private library content) will appear in one of the two content reader sections in the main display.
- Each file within the selected folder will be shown in miniature with the first page or video frame visible, depending on whether the file is a document or video. Audio files will appear with a stylized audio icon. Only file names will be captured along with the files at this point. Each panel will scroll left and right to reveal any additional documents that are available in the content reader that do not fit within the viewable area of the main display.
- One technical issue that we are still not sure is on the public library, Box.net API won't allow you to have the miniature effect. It's only when the file is downloaded to the device, then the miniature effect can be done. If this is the case, the box.net public library files will have to use standard icons. However, My IIM will have the miniature effect.
- Individual documents and A/V files will appear one after another in their respective horizontal panels.

- Content

- As mentioned earlier, content is divided into two types, personal and public (firm wide).
- Personal content, which is only viewable in My IIM Briefcase is the result of a user creating and managing content locally (on the device).
- Public content, which is fully viewable in the IIM Library view and partially viewable in the My IIM view, is made available by someone designated as an IIM administrator. Public means that any employee given access to the public library by the Firm will be able to view content in the public library. IIM Library content is 'authorized' and made available for public viewing by the administrator.
- The Public IIM Library:
 - The public library is a central cloud storage location where the enterprise can store email text, documents, audio and video files they want to have viewed and accessed on the IIM app.
 - There are two ways to view content that is available in the IIM Library.
 - The first is for the user to access the public library by pressing the Library button. This action will change the view from the IIM Briefcase to the IIM

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Library. All available content (email text, documents, audio and video files) will appear in the IIM Library, once a specific folder is chosen.

- The second is by selecting a set up button within the My IIM Briefcase view (for more on this see IIM Briefcase below).
- The Private Library - IIM Briefcase:
 - Managing Content within the Private Library
 - The user will tap the set up button in the IIM view. This will reveal a 'Manage IIM Briefcase Content' panel in the top portion of My IIM. It is from this window that users will manage their private library content.
 - There will be four actions available to the user within this panel: Add Content, New Folder, Cancel, and Done.
 - When the user selects New Folder the app will allow a new folder to be added and existing folders to be deleted.
 - Adding Content
 - When the user selects Add Content the IIM Library content reader will appear from the bottom of the My IIM screen.
 - User can then drag content from IIM Library content reader into any available folders. User presses done when finished to dismiss the IIM content reader and the Manage Content window.
 - User can also access box.net directly to add additional files to the newly created folder and further edit folder contents. [I may still not have this right.]
 - Creating a new folder within the app will automatically create it on box.net - TBD <amma: Private folders at this point is on the local device for the first release. We can think of synchronization at the 2nd phase or when we get a large account, which can customize this process>
 - Navigation Panel:
 - There will be two navigation menus: IIM Briefcase Navigation and IIM Library Navigation.
 - My IIM Briefcase navigation will be used to access and manage the individual user's personal folders. These folders are created by the user from within the app. My IIM folders are unique to the user (or log in ID). When a user selects a folder in the navigation panel, any content within the folder will display in the appropriate sections of the main display panel (Notes, Docs, and A/V sections).
 - IIM Library navigation will be used to select specific funds to view any available content placed in the library for a given fund.
 - Files can be emailed or printed per standard iOS capability