

Implement the project described in the pdf file

### **\$\$Project-Rules**

- Only do what is explicitly written in this document when it comes down to pages, menus and features.
- Business professional css

### **\$\$Application-Type**

- Web application
  - simple app with html, css and likely lots of java-script. No database needed.

### **\$\$Application-Structure**

- There is a single home page that acts as host to all other pages, the user never changes URL, this is the **\$Page-Area**.
- Critical to ensure that all content that is labeled as “%-Page” is always and only displayed in the **\$Page-Area**

### **\$Main-App-Page**

- There are three main functional areas, **\$Main-Header**, **\$Left-Navigation**, **\$Page-Area**
- The \$Header occupies the full horizontal of the page
- The \$Left-Navigation and \$Page-Area are side by side under the \$Header
- These three areas are always shown, **\$Left-Navigation** can be collapsed so that the **\$Page-Area** gets more space
- **\$Main-App-Page** will never have a scroll bar, if any appears will part of other pages being rendered inside the **\$Page-Area**

### **\$Main-Header**

- covers about - 15% of the total vertical width of the **\$Main-App-Page**
- The header is made from two sub components, **\$Search-Bar-Area** and **\$Top-Navigation-Area**

### **\$Left-Navigation**

- when expanded covers about 15% of horizontal size of **\$Main-App-Page**
- Each item in the **\$Left-Navigation** has an icon a head of the label
- The icon set is in gray hue
- Pick icons that correspond with the provide label
- Each items and Icon together fill the full horizontal width of the **\$Left-Navigation**
- should be collapsable and expanded by default. When collapsed only show the icons from the pages listed on the left bar

### **\$Page-Area**

- this page content dynamically changes depending on the user's choices from the \$Header or \$Left-Navigation

- There should be very minimal border between the **\$Main-Header**, **\$Left-Navigation**, **\$Page-Area**, the **\$Page-Area** should utilize its space fully as this is where the main interaction of the experience happens

### **\$Search-Bar-Area**

- This area covers 60% of the **\$Header** allocated vertical space
- This area contains three elements **\$Salesforce-Icon**, **\$Search-Bar**, **\$Application-Icons**

### **\$Salesforce-Icon**

- A blue cloud icon that is on the left end of the **\$Search-Bar-Area**

### **\$Search-Bar**

- A search bar, only for display for now not functional
- Is centered in the **\$Search-Bar-Area**

### **\$Application-Icons**

- small icons that will load different pages in the **\$Page-Area**
- The **\$Application-Icons** are right align within the **\$Search-Bar-Area**

### **\$Top-Navigation-Area**

- this area covers 40% of the **\$Header** allocation vertical space
- This area has three elements **\$App-Picker-Icon**, **\$App-Label**, **\$Navigation-Menu-Elements**
- Ensure that **\$App-Picker-Icon**, **\$App-Label**, **\$Navigation-Menu-Elements** are left aligned within **\$Top-Navigation-Area**

### **\$App-Picker-Icon**

- Application picker icon (use the nine dots 3x3 Google style).
- When clicked a dropdown menu of Applications will come up.
- Use “**\$Sales**”, “**\$Service-App**”, “**\$Marketing-App**”, “**\$Commerce-App**” and “**\$Data-360-App**” (defaulted), do not display the “-App” part in the label
- If any of the other apps is selected the only change is the **\$App-Label**

### **\$App-Label**

- This label changes depending on the selection from the menu that shows in **\$App-Picker-Icon**

### **\$Navigation-Menu-Elements (Tabs) for \$Data-360-App**

- **\$Home** - will load **\$Home-Data-360-Page**
- **\$Solution-Manager** - “Solution Manager” will load the object home for the page. An object home is a tile list of all the records that are stored in the **\$Solution-Manager**. There is only one tile on it. **\$Integrate-Business-Entities-Tile**”

### **\$Solution-Manager-Tiles**

- **\$Integrate-Business-Entities-Tile**”

### **\$Tile-Template**

- **\$Title** - title for the template
- **\$Description** - short description of the solution template
- **\$Extended Description** - a more detailed description of the solution template
- **\$Click** - each tile when clicked will open a specific page to be loaded in the **\$Page-Area**

### **\$Integrate-Business-Entities-Tile**

- Title "Integrate Business Entities from Informatica in Data360"
- Description - Realize the full potential of the curated and enriched business entities from Informatica directly in D360. In this step by step guide, we will work through the steps required to operationalize business entities created in Informatica in D360
- On click will load **\$Integrate-Business-Entities-Page**

### **\$Home-Data-360-Page**

- Placeholder page that shows empty

### **\$Left-Navigation's selection**

- **\$Connect-Unify** - "Connect & Unify", placeholder page shows when selected with empty state
- **\$Govern-Data** - "Govern Data", placeholder page shows when selected with empty state
- **\$Process-Content** - "Process Content", , placeholder page shows when selected with empty state
- **\$Query-Segment** - "Query & Segment", placeholder page shows when selected with empty state
- **\$Analyze-Predict** - "Analyze & Predict", placeholder page shows when selected with empty state
- **\$Act-on-Data** - "Act on Data", placeholder page shows when selected with empty state
- **\$Build-Share** - "Build & Share", placeholder page shows when selected with empty state

### **\$Integrate-Business-Entities-Page** - the page content displays in the **\$Page-Area**

- This page is made up of **\$Header-Instructions**, **\$Step-Summary** panel and multiple **\$Step-Details-XX** panels
- The goal of this page is to provide a guided tutorial for a user that is trying to accomplish a complex multi step task
- **\$Header-Instructions** covers the top 20% of the **\$Integrate-Business-Entities-Page**
- **\$Step-Summary** cover another 20% of the **\$Integrate-Business-Entities-Page**
- Has 7 steps of **\$Step-Details-Template** panels
- There should be some space between the **\$Step-Summary** and the **\$Step-Details**-panels below.
- **\$Step-Details-Template** panels are expected to introduce a scroll on the page so that the user can preview all of them

## **\$Step-Summary**

- Has a collapsable button, similar to the **\$Left-Navigation**, except that it collapses vertically, closer to the **\$Header-Instructions** so that the **\$Step-Details-Template** panels can occupy a longer portion of the screen.
- Each step of this should correspond to exactly one **\$Step-Details** from the selected page.
- Individual steps can be clicked to redirect the user to the specific step and open it
- Each step should have a notion of completeness that will be represented with an icon before the step's label
- The icons can be 'Not Started', 'In-Progress', 'Completed' and will dynamically updates based on the actions the user takes in the **\$Step-Details** linked to the step
- Next to the list of steps there is a large placeholder 'div' for a video tutorial associated with the tile. Link to documentation.
- This component is not locked at the top position, it scrolls with the page
- Minimal vertical length should ensure that all steps can be clearly seen without scrolling within the component. If the steps are too many, consider 2-3 column layout for the steps until it becomes clear that scroll is needed

**\$Step-Details-Template** for the individual steps. This template will be used for every 'step' of every sub-page process. The design should be solid.

## Style

- By default the panel is collapsed
- Displays the **\$title**, **\$headline** and **\$sub-steps-summary**, even when compacted
- **\$footer** area holds the "View Documentation" and "Next Steps" buttons that are part of each step unless overridden. "Next Steps" is right aligned and the "View Documentation" and "Check out Tutorial" links are left aligned within the \$footer of the **\$Step-Details-Template**
- If Compacted should have the vertical size of the **\$Top-Navigation-Area**
- Ensure that the minimal collapsed vertical width has clearly readable title and headline
- If Expanded should have a triple the size of the **\$Top-Navigation-Area** with 1/3 reserved for the title and headline, so when the user expands and collapses the experience is smooth
- Steps and checkboxes associated with the steps are left aligned
- Action buttons are right aligned - these are navigation buttons to other pages that the user may need to open to deeply configure the specific step
- Separate the area into two side by side divs, keep the action buttons on the right side with the documentation and links. Keep the instructions and checkboxes on the left side
- Aim to create minimalistic design, no need for the steps to get too long or the user will be intimidated, use multi-column designs often if needed

## Functionality

- **\$sub-steps-summary** is a small area within the step-headline that shows the number of completed sub steps. "0 out of 3" and changes as the user completes the sub-steps

- The expanded area of the panel is referred to as **\$main-body** in the panel details
- This is a list of tiny steps and instructions the user will have to perform on different parts of the application
- Each line of the list contains a **\$checkbox** that the user can mark as complete, this **\$checkbox** is left aligned and \$instructions text also right aligned to the checkbox.
- Each step have links to additional documentation and tutorials that are right align
- **\$Description** of the objective for this step
- Validation criteria that the user can perform for this step
- Steps should be mini functional areas where the user is asked to provide or do very specific actions that once performed will mark the sub-step complete
- Some steps are only manually marked
- Add a navigation button in the button left “Next Step” that will do several things - it will scroll the page so that the next step is open and top-aligned the page should ideally flow as the user fills in the step then clicks next step. The page scrolls in a way that the user can still see the header of the step, not only the step-details.

#### **\$Header-Instructions-Template** for **\$Solution-Manager** item

- **\$Title** - show the title associated with the \$Tile-Template
- **\$Description** - extended description if available that is associated with the **\$Tile-Template**

#### **\$Header-Instructions** for **\$Integrate-Business-Entities-Page** on

##### **\$Header-Instructions-Template**

- Description Realize the full potential of the curated and enriched business entities from Informatica directly in D360. In this step by step guide, we will work though the steps required to operationalize business entities created in Informatica in D360

#### **Step-Details** for **\$Integrate-Business-Entities-Page** of type **\$Step-Details-Template**

The step details appear as a panel list on the **\$Integrate-Business-Entities-Page**, the user can scroll through the tasks, open them up and usually start to complete them in order. Leverage the **\$Step-Details-Template** and innovate on the extra items only within the body of the step. The **\$footer** and **\$header** are already defined part of the template

- **\$Connect-to-Informatica-System-Panel** - consider two column layout, one if existing connection exists and one if the user needs to add the Tenant/User/Password
  - Input Name for the Connection or Choose Existing if available from dropdown
  - Input Tenant URL - text field for user to populate
  - Input UserName - text field for user to populate
  - Input Password - text field for user to populate
  - Validation Step - using the provided information in the previous steps a user can click the “Create & Validate” button and the system will show a spinning wheel for a second and then show that successful connection is created.
- **\$Choose Business Entity**
  - Details - Select Business from the connected tenant to integrate into Data 360

- Action: Picker populated with a list of Informatica's primary business entities - Customer, Organization, Product, Supplier
- Documentation links show on the right of the picker right aligned
- Validation - ignore validation check for this step
- Complete - mark complete when a User select an item from the picker
- \$Review and Extend Mappings
  - Details: Based on selected business entities these are the data objects identified from informatica that are being synced to Data 360. Show a scrollable list of table names associated with the respected business entity once the user has selected it
  - Notification: We've detected extra fields beyond the standard. Below is the the proposed list of modification to Salesforce's DMO to add placeholders for these values
  - Action - Add button with label "Review Mappings" for it will redirect the user to different page
  - This step should be completed when the user clicks on 'Review Mappings'
- \$Validate Connected data and mappings
  - Details: By Now we've integrated, mapped and transformed the Business Entities to the Standard Data Model, the following previews are based on sample data to help validate correctness of mapping and field value population
- \$Set up Identity Rules
  - Details: In this section we are going to review and optionally create new rules that help link operation records to your business entities.
  - Action - Add button "Configure Match and Reconciliation Rules"
  - Enable Identity Rules Schedule
- \$Validate Identity Data
  - Details: After Identity Resolution has finished processing use the following sample data preview to inspect the data
- \$Enable sync to Informatica
  - Details: Enable sync to Informatica for Key-Rings that do not contain a business entity. Share the source records for enrichment and quality assurance.
  - Action - Add button "Configure D360 Setup" in Informatica
  - Checkbox - mark manually as complete when done
  - Validation - remove the validation step
- \$Setup Experiences
  - Substep-1: "Search Before Create" - prevent duplicate records from being created. Add action link to "View Trailhead for Setup" right aligned
  - Substep-2: "Copy field" - enrich operational records with enterprise attributes. Add action link to "View Trailhead for Setup" right aligned
  - 
  - Substep-3: "Related List" - showcase any information related to the primary entity. Add action link to "View Trailhead for Setup" right aligned
  - Add link for documentation and tutorial to each substep

**\$Connect-to-Informatica-System-Panel** details

- Title: "Connect to Informatica System"
- Headline: "Establish trusted connection between D360 and Informatica tenants"
- Main-Body's list has only one item with description "Configure details for the Informatica tenant, so that a trusted connection between them can be provided. The important items are "User-Name" and "Password"