Portfolio B-C Components

1. Login
   1. If not a member register
      1. You receive an email
      2. You click on email it takes you back to site
         1. You land on welcome page
         2. Enter you demographic info ( this just your name, address, favorite color)
         3. Welcome you are ready to enter your assets!
   2. If you have forgotten you password click here
      1. You enter your email
      2. You get new password or receive you password depending on what y’all what to do
2. Portfolio Menu
   1. Build the back end to support whatever system/design Theresa comes up with
   2. Apply the design to the front end
3. Dashboard
   1. Since I don’t know what we should put here I cannot commit to having it built out. Once someone decides what should be displayed I will add it to this document.
4. PortItems ( buckets, portfolio items, assets, wtfe )
   1. List
   2. Add/Edit
   3. View
   4. Delete
   5. Add/Associate document or photo with item( for now select doc or photo from list of names )
5. Docs and photos
   1. List ( just like the other lists )
   2. Add/edit
   3. View ( view the meta data ( name of file, description )
   4. View ( in new window the actual doc/photo)
   5. delete
6. Portfolio (View, subset, wtfe)
   1. Add/edit
      1. some meta data ( name, desc )
      2. someway to select items from your portitems to be in your portfolio
   2. View ( select Pdf/doc/html ) this is a view for the logged in user only. Not a public facing website.
   3. Delete
   4. Email (select pdf/doc)
7. Email
   1. Look for items that are going to expire and email me about them

What this does NOT include

Let me iterate that while this version of the app will not include the following, all of the following are being planned for and will be easily integrated as soon as were done building this part

1. Reporting. There will be no reporting
2. Permissioning. Since this is a b to c model there is only one level of user. There for there will not be a need to say who can see what. You can see your information and no one else can. ( until you get hired by a b to b client. Which will be later ) There will of course be security in that no one can see your information.
3. There will be no public facing website for people to display their portfolio. One can email it to someone but this will be as an attachment.
4. There will be no internal employee structure. Not departments or positions and so on. This is useful only for the B to B.
5. Magnet assistant. As this is for end users, not affiliated with a DecisionCritical client, there is no need for them to make themselves do an assistant and no one to report on their progress etc.
6. Mobile
7. Import