

# 2 questions

1. Why should we care about integrating PIM data?
2. What does it mean to integrate PIM data?

# Answer to Question 1

Why should we care about integrating PIM data?

Because the reality of today's information workplace demands it.

# The modern workplace

1. Design for the Real World
  - a. High volume flow of information
  - b. High noise-to-signal ratio
  - c. of Varied shapes - emails, notes, documents, contacts, mailing list, blog entries, pictures
  - d. and Varied sizes - review compensation packages, write thank you note to Jason and Maria
  
2. Design for the Way You Work...with constant interruptions

# Answer to Question 2

What does it mean to integrate PIM data?

- Data-centered views of information *as opposed to app-centric views of data*
- Ability to transform data on an as-needed basis *as opposed to app-centric type-casting of data*

# Data-centered views of information

Why should we care about integration?  
It allows for human-centered organization.

Status Projects People Location



Protocols File formats Applications

# 1. Central Collection Bin

Need to be able to capture ideas in it without thinking about it. Which means...

No need to pre-process the information before you enter, aka no filing or categorization, just a big heterogeneous dumping ground.

In order for an information management system to work, the system must be **trusted** and **complete**.

Scenarios we want to avoid...

“It'd be easier to just remember.” - *Incomplete system*

“If I write it down, I'll just lose it somewhere and won't be able to find it again.” - *Untrusted system*



## 2. Tracking an item through its Lifecycle

**T**ake **big** things and *break them down*,  
take **opaque** things and **clarify** them

meanwhile...

.stages lifecycle their through items **track** you as

move  
things  
**in**  
and  
**out**  
of  
**F**  
**O**  
**C**  
**U**  
**S**

# Brainstorm

Write down 10 things on your mind (incl. recent email)

Black box

Research

Stalled - Waiting for something or someone

Can do

Can do < 2 minutes

Done - No (further) action required

Attach timeframes

1. Due dates, milestones, event dates
2. Reminder dates

# Metadata to keep track of

1. Lifecycle stage
2. Relevant timeframe
3. **FOCUS**

# ...more Metadata to keep track of

1. Who
2. Context
3. Project
4. Topic and Keywords

At the end of this presentation we'll come back to a brief discussion of how you actually go about attaching metadata to items in Chandler

# Why do we care about Metadata? (Hint, Search is the least of it;o)

What's my **status** on this task?

What are the **due dates** and milestone dates?

When do I need to start **focusing** on this task? (Reminders)

**Who** do I need to discuss this with?

In what **context** am I going to accomplish this task?

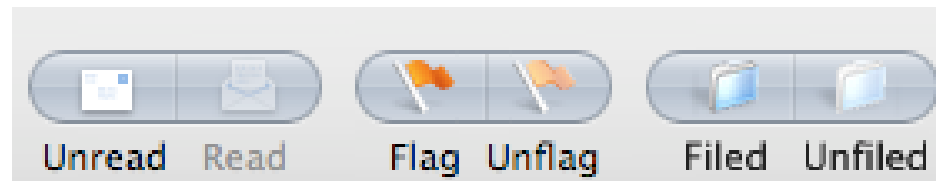
What **project** is this for?

What is this task **about**?

These are all Questions that will help you clarify and break down big, complex, opaque tasks into an obvious progression of executable next actions.

You don't need to answer them all at once, the goal for Chandler is to help you 1) answer these questions, slowly over time; and 2) to keep track of your progress

Status quo:  
It's a Binary World in your PIM...  
But your life isn't



Are you Done or Not Done?

Is life ever that simple? Do you ever wish your PIM was better at helping you keep track of incremental progress you make on your tasks?

Let's take a look at how Chandler can help.

# Triage workflow: a linear view of a single pass through Triage



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## 2. Tracking an item through its Lifecycle

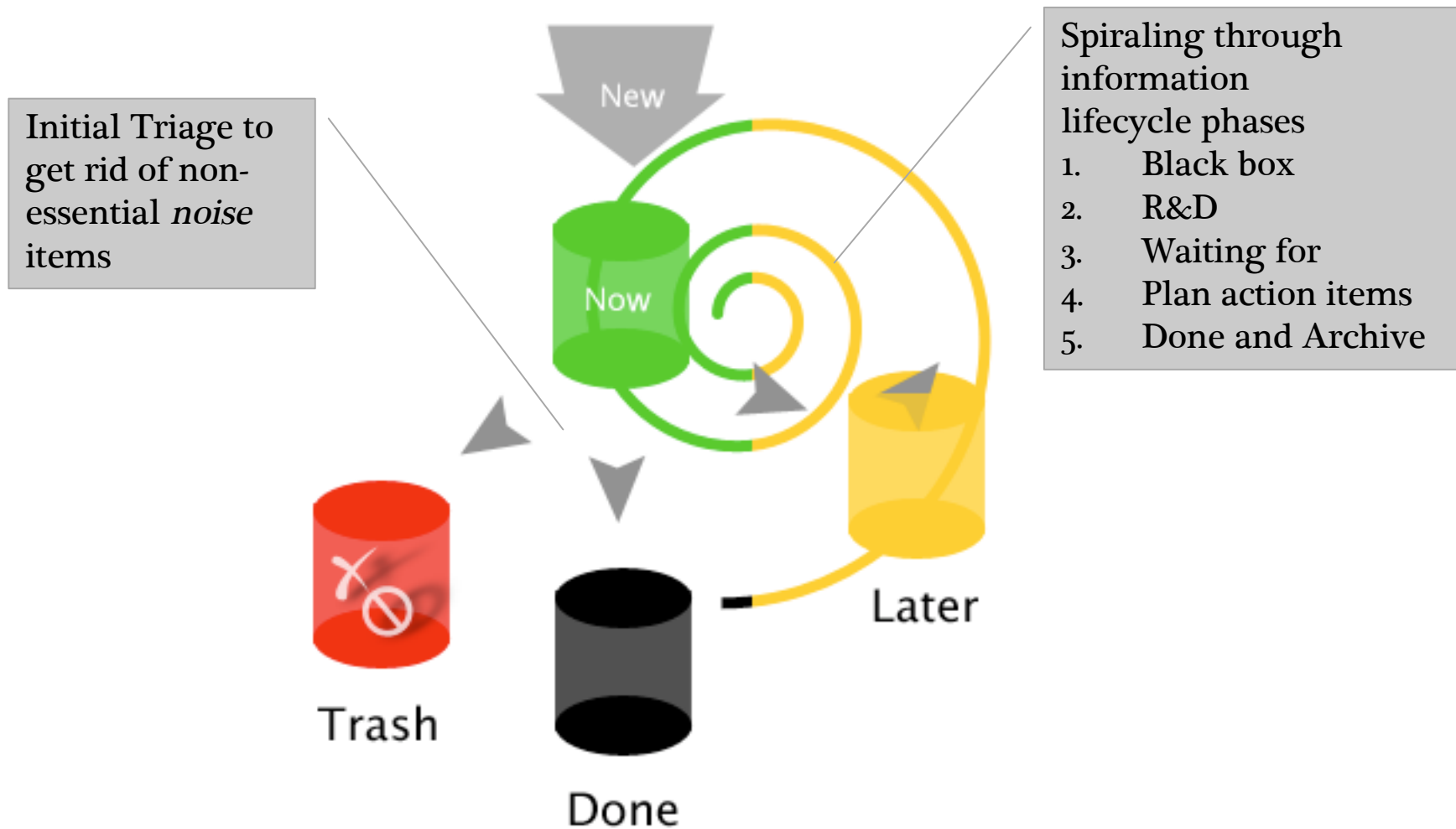
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# Triage workflow: a topographical view of an item's lifecycle through the Triage system



# As simple as Flagging, but better

Triage all of your information from a single, Universal Inbox.

Triage items as you scan, then hit Clean up to file them away in one click.

Who	About	When	Status
Now 28 Items			Now
to Michael Kent	New Project Announcement	8:14 PM	2 Now
fr Anthony Jackson	Re: New Project Announcement	8:14 PM	Now
fr Angela Green	Home loans	(*) 9:30 PM	Junk
to Jordan Adams	[Dev] Profile of startup	2 - 4 PM	4 Now
fr Mark Timmons	Re: [Dev] Profile of startup	Yesterday	Arch
fr Nate Brillman	Re: [Dev] Profile of startup	Yesterday	Now
fr Eileen Simmons	Research Results Attached as Docum	Yesterday	5 Later
fr alias@domain.com	subject goes here	M	Later
fr Me	record sales	M	Now
fr abraham.lincoln@gm.edu	my country for a beaver!	M	1 Now
fr tonyb@parliament	mano a mano a bush	M	Later
to Jensen Biggens III	how live large in I.a.	Su	Now
to Jordan Knight	Orthodontia conference 2004	Su	Now
fr Carol King	dinner at Freddie's, bring your own	Su	Done
fr Fania Michaels	discuss inviting Arlene with Fania	Su	Done
fr hail@mary.com	bad credit?	Sa	Done
fr king@wenceslas.com	What have you done for me lately?	Sa	1 Now
to Kathy Peter, Martha Young	my kingdom for a horse!	Sa	Now
fr mason@dixonline.com	confessions of a spineless arthropod	F	Now
fr george@curious.com	my kingdom for a mouse!	F	Now
	wall proposal	F	Now
	Conference attendance	Th	Later
to Karen Hughes	you knowest not what which you sayest	Th	Later
fr Port@tonkin.sw	Big losses? Little pay-off?	Sep 1, 2004	Later
to majordomo@admin.net	Bridal party! invitations	Sep 1, 2004	Later
fr Me	Pick up cabbanges	Aug 31, 2004	Later
fr cheese@grater.com	Cuisinarts Gone WILD!!!	Aug 31, 2004	Later
to Roberta Newsom	Can you come at 8:30 on Monday	Aug 30, 2004	Later
Later 473 Items			Later
Done 1027 Items			Done

# Caveat: Finer gradation of Focus

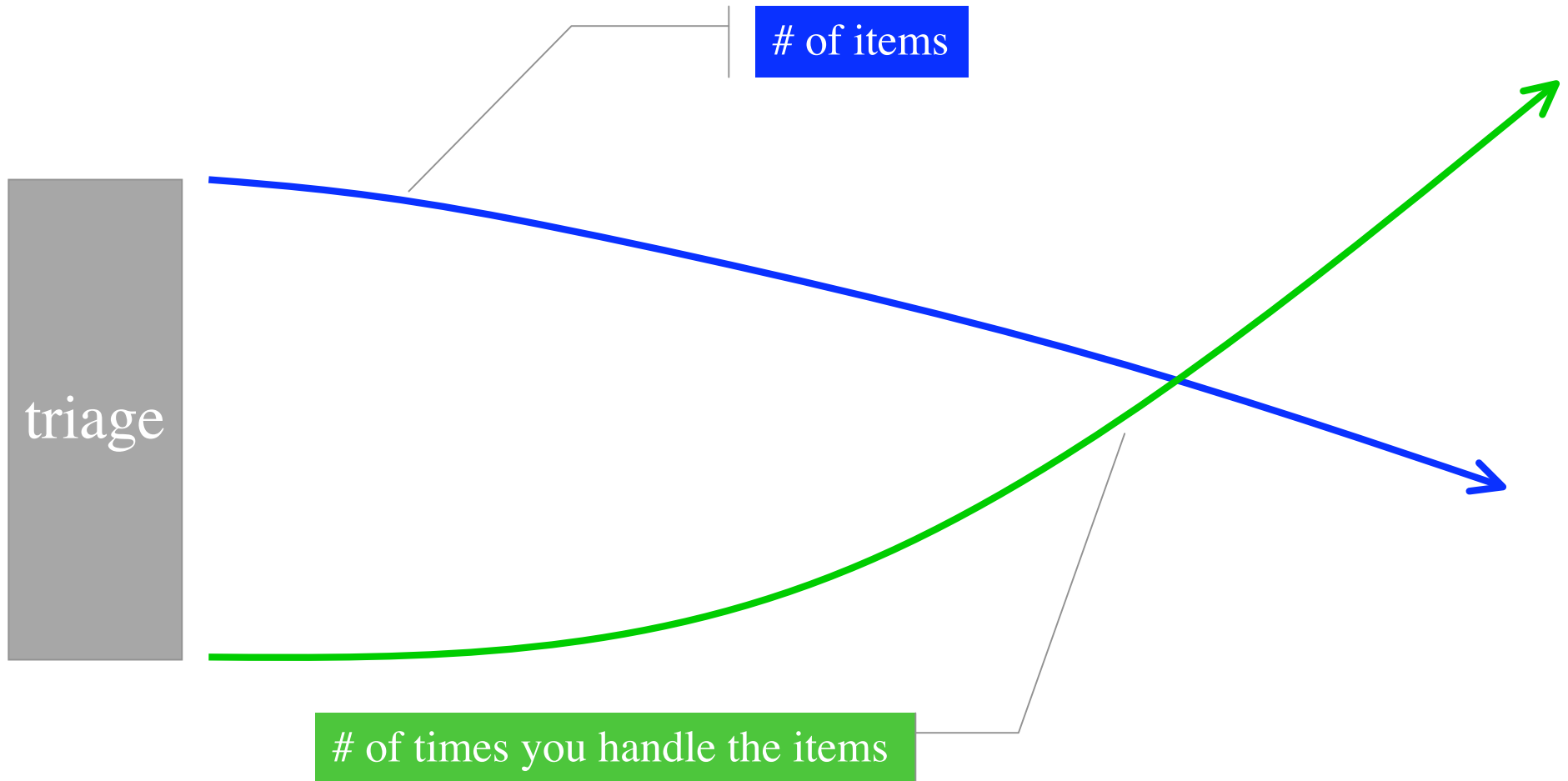


Today  
Tonight  
Tomorrow

Do versus Keep on top of

## Benefits to staying coarse-grain

# Side effect: Efficiency in Information Management



Ability to transform data  
on an as-needed basis

Backtrack to 1 of the most important questions to answer when clarifying and breaking down tasks:

Where does this information belong in the PIM? (different from Projects, Context lists and Who-Agendas)

On Task lists

On your Calendar

In a Reference Library

In someone else's Inbox (via email, im, sharing)

# Don't Copy and Paste, Stamp

Items of all kinds represent tasks to you

Draft of an email

A meeting you need to schedule

Document you need to work on

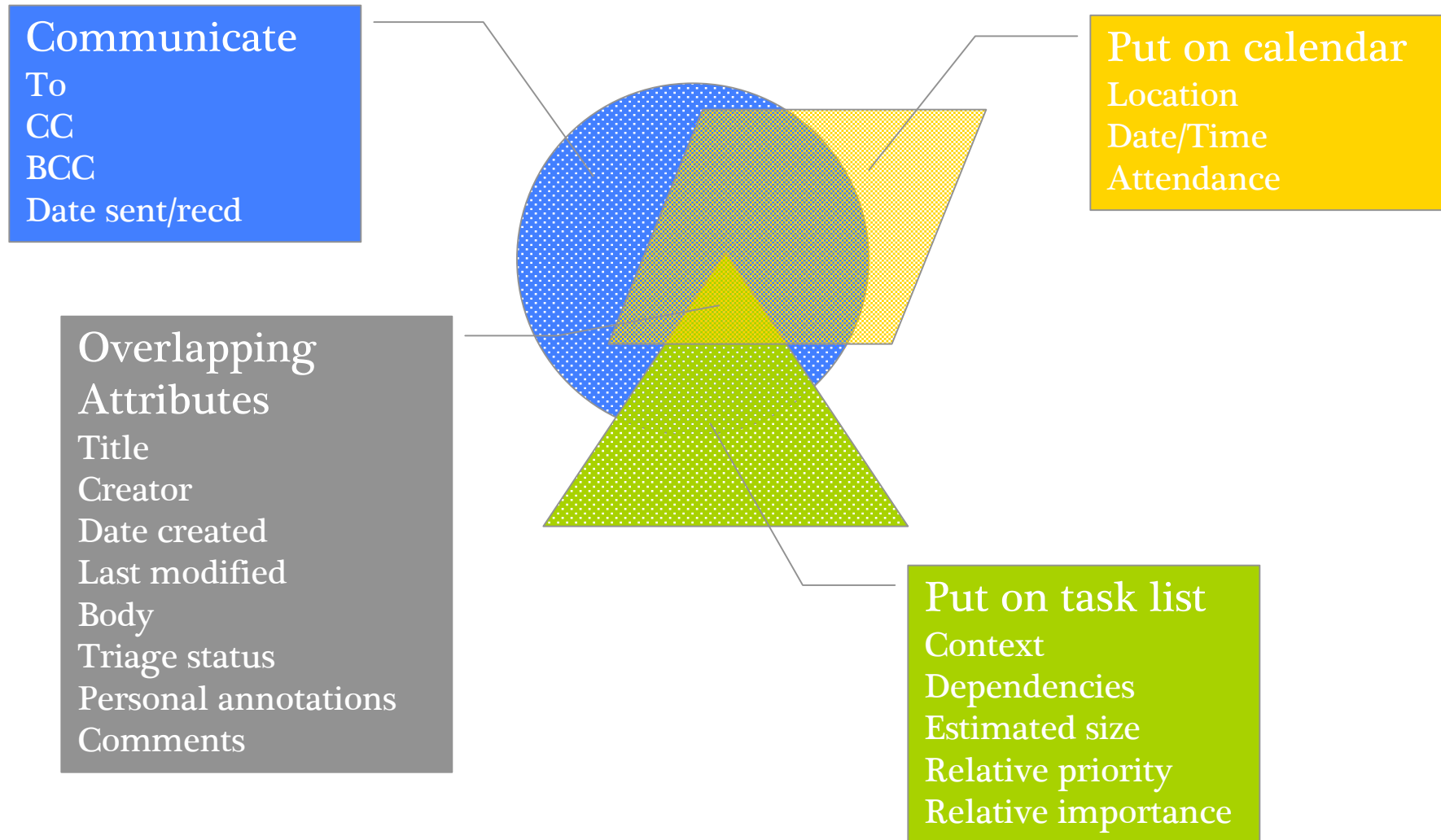
Photo you need to clean-up and send out

Blog entry you've been meaning to read

So you need to be able put drafts of Emails on your Task list, schedule Tasks on your Calendar, send a Photo out as an Email, comment on an Article and post it to your Blog.

\*Tasks are a remnant of action-oriented workplace where people actually “did” things. What we really mean when we say we're living in an information age and we do information work, is that all of the things we “do” have digital artifacts (emails, documents, phone logs). And these digital artifacts are our tasks. Not some “action” we need to record as a task item on a task list.

# Stamping 101



Recap

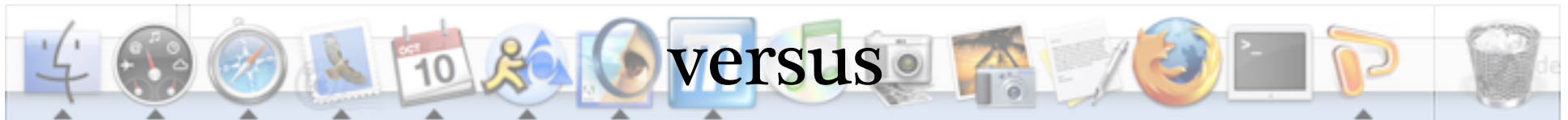
Why should we care about integration?  
It allows you to FOCUS.

You don't care about what form the item takes  
What you care about is FOCUS  
The question you're trying to answer at all times is:  
What should I be doing right now?

The answer to that question can't be  
found in any single application.

Why should we care about integration?  
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# Bi-directional References in Chandler



All collections are attributes on their member items. *Project: Release Launch*

All attributes are in turn collections of items based on that attribute. *All items with the attribute Project: Release Launch*

We call this: bi-directional references.

But not all references are created equal...

# Iterative Approach to Organizing Information with Metadata Identifiable Behaviors

## Tagging

Keywords, Topics

Item descriptions

## Capturing

metadata

Phone number,

Location, Size, Status

Attendees

## Monitoring

Collections

Project, Agendas

# Motivation behind Behaviors

## Tagging

Keywords, Topics  
Item descriptions

## Capturing metadata

Phone number,  
Location, Size, Status  
Attendees

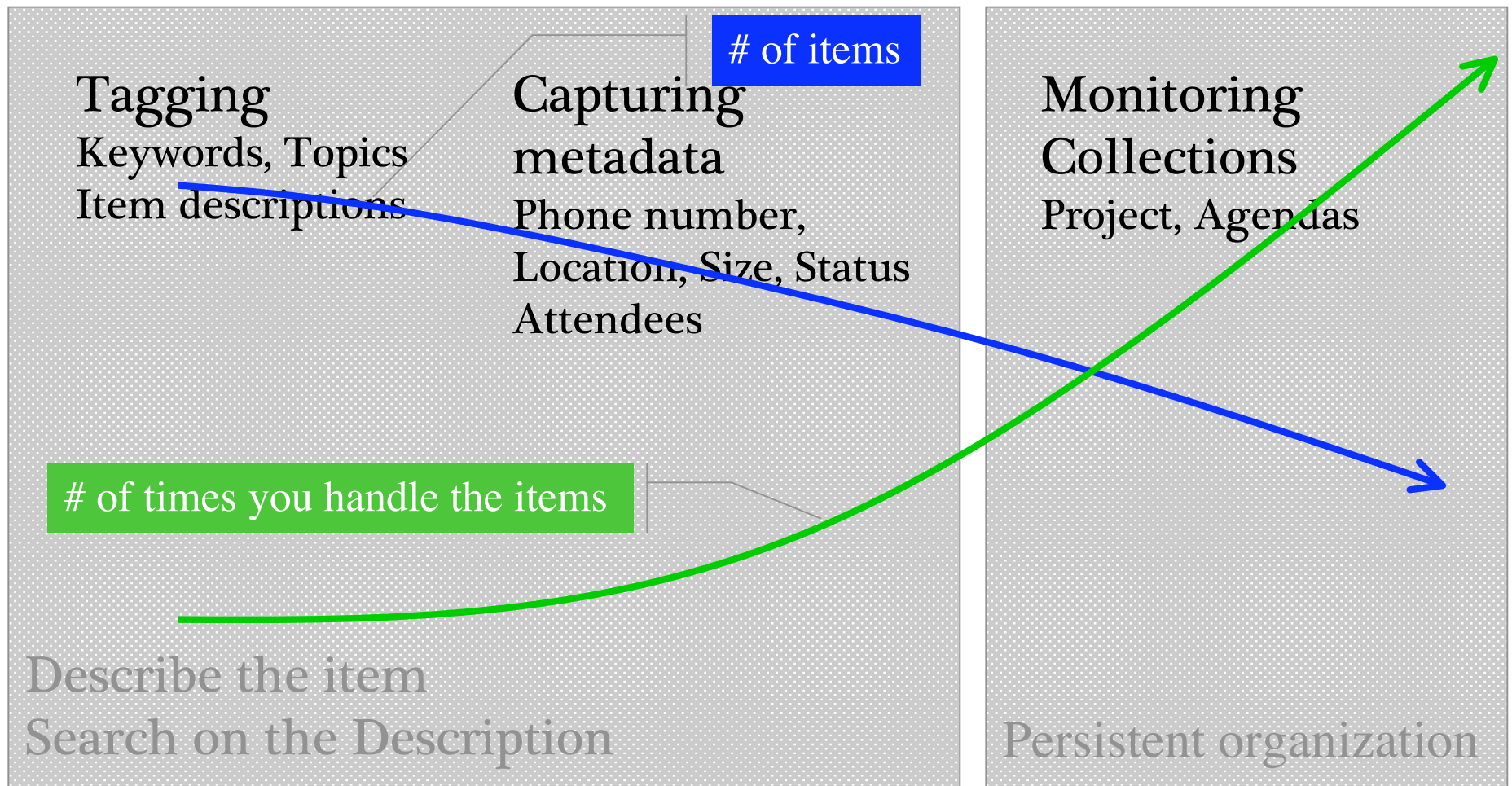
## Monitoring Collections

Project, Agendas

Describe the item  
Search on the Description

Persistent organization  
Groups you interact with  
Prune and care for regularly  
Status, Planning

# Phases of Organization



# Lifecycle of an Item versus [Blue] Lifecycle of Collections of Items [Orange]

