

User Scenarios

This is a collection of user scenarios that will be used to test the process flow of EGF on both the Origination and Trading side of the web site.

Scenario 1

User Definition

User is a CFO of a large corporation with extensive web knowledge and detailed financial knowledge. User has never seen the EGF web site before.

Task Definition

The user wants to explore a loan application and find out how EGF will process the loan.

User needs at end of scenario

User needs a solid understanding of how EGF will secure the loan, what the potential turnaround time will be, and what documentation will be needed to start.

Scenario Steps:

Scenario 2

User Definition

User is a Lease Guarantor

Task Definition

The user has to provide documentation for a deal in progress. Guarantor has a login name provided, but no idea where and how to upload required documentation.

User needs at end of scenario

User needs to login, find the appropriate deal, research what documents are needed and how the documents can be uploaded. User then needs to find who to notify when file is uploaded.

Scenario Steps:

Scenario 3

User Definition

User is the legal counsel for a borrower

Task Definition

The user has been asked to review documents for an upcoming loan and agree to the terms or propose different terms

User needs at end of scenario

The user needs to login, find the right documents, then approve documents or provide alternative language.

Scenario Steps:

Scenario 4

User Definition

User is a financial officer for a large corporation

Task Definition

The user wants to initiate a loan with EGF, use his/her own 3rd party vendors (legal, accounting), track its progress through completion, and then download the final terms in a printable form.

User needs at end of scenario

The user needs an overview of the process, a user login and password, an area where the status of the deal can be monitored, and a printable form of the final documents. The user also needs a way to invite other users on his/her behalf to become 3rd party counsel, vendors etc.

Scenario Steps:

Scenario 5

User Definition

User is an Institutional Investor

Task Definition

The user has been invited to use EGF for the first time. He/She wants to see what EGF has to offer and, if it seems an advantage, wants to create an account.

User needs at end of scenario

User needs to know what EGF offers, what the usual flow is, how reliable the site is, and what it offers over real life. Finally, the user needs to sign up for a new account.

Scenario Steps:

Scenario 6

User Definition

User is a Broker

Task Definition

The user wants to sell a security on EGF. The user needs an idea of the current market value and what documents are needed to sell the security. The user then needs to begin a sale, and track its progress.

User needs at end of scenario

The user needs to get a value estimate from the trading community and a list of required documents to sell the security. The user then needs a sale initiation decision point and a way to track the current price.

Scenario Steps:

Scenario 6

User Definition

User is a Broker

Task Definition

The user wants to sell a security on EGF. The user needs an idea of the current market value and what documents are needed to sell the security. The user then needs to begin a sale, and track its progress.

User needs at end of scenario

The user needs to get a value estimate from the trading community and a list of required documents to sell the security. The user then needs a sale initiation decision point and a way to track the current price.

Scenario Steps:

Scenario 7

User Definition

User is a Broker

Task Definition

The user wants to use EGF to buy and sell securities on an ongoing basis. The user has an account and wants to upload all current portfolio information. The user then wants to track portfolio performance versus industry benchmarks.

User needs at end of scenario

This user needs an easy way to upload data on current holdings and the required documentation. The user then needs a portfolio report and a way to compare it to benchmarks.

Scenario Steps:

Scenario 8

User Definition

User is a journalist that wants to monitor the market

Task Definition

The user wants to see the most current data on deals

User needs at end of scenario

The user needs a login and a summary of data (washed of identifiable information)

Scenario Steps:

Scenario 9

User Definition

User is a title company

Task Definition

The user has to provide documentation for closing a loan

User needs at end of scenario

The user needs a login and a way to find the appropriate deal page. The user then needs to upload documents or to approve current docs.

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Scenario Steps:

Scenario 10

User Definition

Task Definition

User needs at end of scenario

Scenario Steps: