

IdeaMatrix 2008: Understanding User Definable Dimensions

IdeaMatrix 2008.03.06.4x and Subsequent Releases for the BlackBerry smartphone

With the first release of 2008, REXwireless introduced user-definable dimensions to the IdeaMatrix software application for BlackBerry smartphones.

REXwireless recommends creating a folder for each project. IdeaMatrix's structure is one where every note resides in a user-created folder. Folders then reside in drawers. This design makes it easy and natural to stay organized by project.

With the advent of user-definable alternate dimensions, a note can now be grouped by an alternate dimension in addition to its core "project" folder. In fact, one note can be assigned to up to four additional dimensions and viewed in each, giving the user five ways to group his or her notes.

What do "User Definable Dimensions" do for the IdeaMatrix BlackBerry user?

Perhaps the easiest way to visualize dimensions is by example.

While notes may reside in many different project-folders, they all may have a common thread. For example, a sales professional may decide to create a second grouping of all the emails they have injected from the e-mail program by the "from" / "to" customer name, even if they typically save e-mails by the project.

So Julie, an IBM client executive, might have projects called "Lotus Notes Groupware Sale", "Tivoli Sale", "MVS Upgrade Sale", and "Blade Servers for CFO Data Mining Sale", all under the Drawer "AIG Insurance", her assigned customer account. Her IdeaMatrix project-folder structure would look like this in the cabinet-folder view:



Julie would go to Profile/Preferences and turn on "Show User Dimension 1 Fields". On the cabinet view, the new dimension drawer will appear which is easily seen with the special cube icon scheme. She would first "edit" that drawer, renaming it "Key Customer Contacts" and then add her key customer contact names to the drawer as new folders.

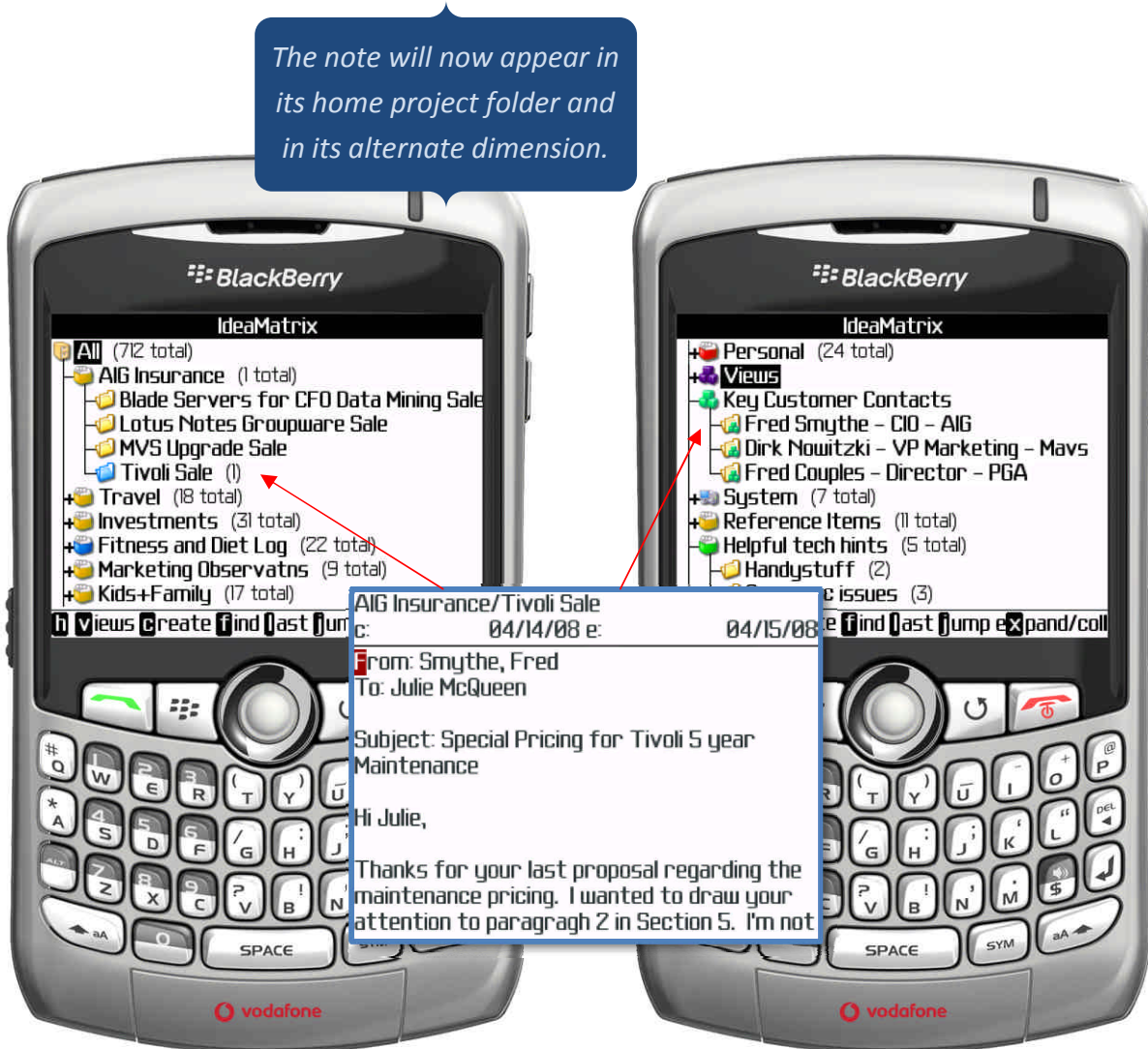
For the AIG example, one of her key contacts might be “Fred Smythe – CIO – AIG”.
The new “User Dimension 1” section would now look like this:

- Key Customer Contacts
 - Fred Smythe – CIO – AIG
 - Dirk Nowitzki – VP Marketing – Mavs
 - Fred Couples – Director – PGA

Julie could then assign any notes that relate to Fred Smythe by editing the note and changing the new Key Customer Contacts field that has appeared on the edit screen to “Fred Smythe – CIO – AIG”.



Then, whenever she wants to look at all saved notes grouped by Fred, she could view the notes in the dimension view and see all of them, no matter which project they actually landed in.



Julie could expand her use of dimensions for other purposes as well. An idea might be to use the second user definable dimension to group notes by different IBM reseller firms, or to flag certain notes as needing follow-up for different reasons (for example, not invoiced, invoiced but payment outstanding, etc.), or add purchase order tracking to certain notes that are orders.

The possibilities are limitless.

How can “User Definable Dimensions” fit my world?

The flexibility of user definable dimensions works well for many professions. No matter what your profession, creating an alternate dimension that groups notes by person is often helpful.

In addition to an alternate “person” dimension, each professional has areas that apply to their mission:

- Doctors might create a dimension that flags notes by certain illness.
- Lawyers could use the feature to attach client number and matter number to individual communications and ideas.
- Construction professionals might group by subcontractor used on various jobs, given that the same subcontractors tend to show up across different construction jobs.
- Professors could keep alternate grouping of notes by class or student.
- Software developers might use dimensions to group notes by design goal.
- Realtors could use dimensions to cross reference home inspectors, mortgage agents, and title companies.

And everyone could use the feature for tracking notes and ideas against goals and New Year’s resolutions.

Final Observation: Using Dimensions as a Pick-List Data Field

Although user definable dimensions were created for alternate grouping and viewing purposes, the feature can easily be used to add up to four data fields to an IdeaMatrix instead.

For a simple example, a person could decide to add a priority field to his or her IdeaMatrix. By enabling one of the dimensions while in Profile/Preferences, then renaming it as “Priority”, he or she should then add folders such as “Critical”, “Important”, “Normal”, and “Trivial” to the Priority “dimension” drawer.

Afterwards, every IdeaMatrix note could be created or edited and the Priority dimension field would offer a pick list of those four values to the user.

Please Share your Experiences, Ideas, and Use of IdeaMatrix at REXwireless.com/forums

REXwireless operates forums for the primary purpose of facilitating user-to-user sharing of ideas. BlackBerry users are an elite group and the ideas are quite varied. IdeaMatrix has always been a highly-flexible tool and user definable dimensions add to that tradition. Please join the best practices / ideas conversation at REXwireless.com/forums. Your participation will should enrich your own IdeaMatrix experience and help other BlackBerry users as well.

For support, please e-mail our support center. Our forums are not intended to be a support function.