

INFORMATION ARCHITECTURE, USER EXPERIENCE, AND APPLICATION DESIGN EXAMPLES

The following visual examples were taken from Kroll Ontracks' eDiscovery.com Manage online application. Manage aggregates and graphically displays a full portfolio of ediscovery projects using dynamic dashboards with real-time project updates and collaborative communication. You can interact with portfolio and project information to obtain insight on financial and volume analytics, track and forecast spend, and identify trends. Users can collaborate and receive project status, real-time updates, obtain instant access to their project team, and monitor communications as they relate to the portfolio and its projects.

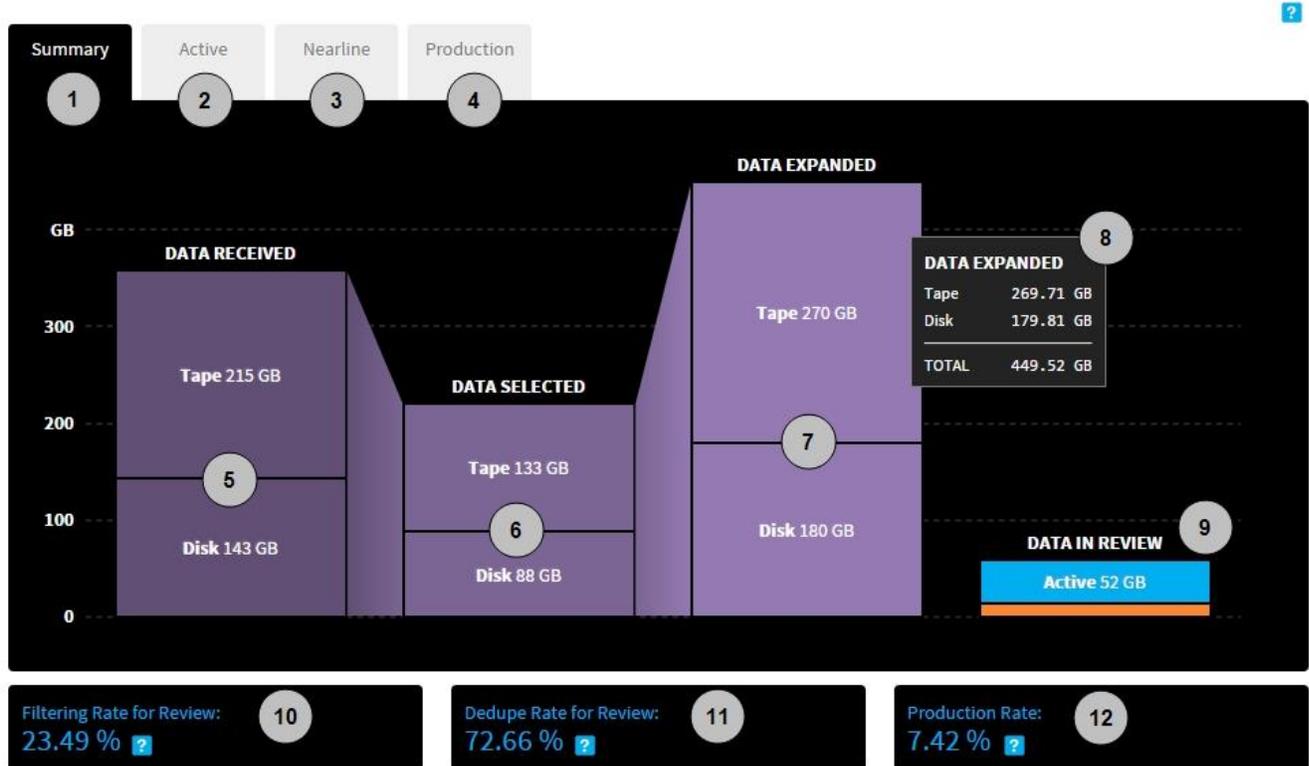
My roles on the project included Information Architect, Content Strategist, Content Developer, and User Experience designer. I also acted as a business analyst towards the end of the project. I worked very closely with the development team and the Product Owner (PO) to define the user experience, client goals, and business objectives. In addition to assisting in the design of the layout (for both desktop and mobile viewing), how it interacted with the customer, and performing multiple user experience testing sessions, I also created a terminology lexicon that acted as the basis for all application strings and a HTML/CSS color palettes (style guidelines).

The visual examples provided here can also be found on the eDiscovery.com Manage support website, an application support website that I created (<http://support.ediscovery.com/manage/index.htm>) as part of the project deliverable. The website was designed to educate and assist the user in the use of the application using images, videos, and task-based information.



SUMMARY VIEW OF PROJECT

This was a challenging interface to design. It needed to be both informative at a glance and allow the customer the opportunity to dig deeper using nothing more than a click of a mouse button or a tap of a finger (depending on the device being used to view the information). The end result was a summary display that acted as a dashboard with a great deal of information. As the application adopted new data points, the display continued to expand and contract, making as much use as possible by displaying general information by default and more in-depth information when the graphs were clicked via a pop-up window.

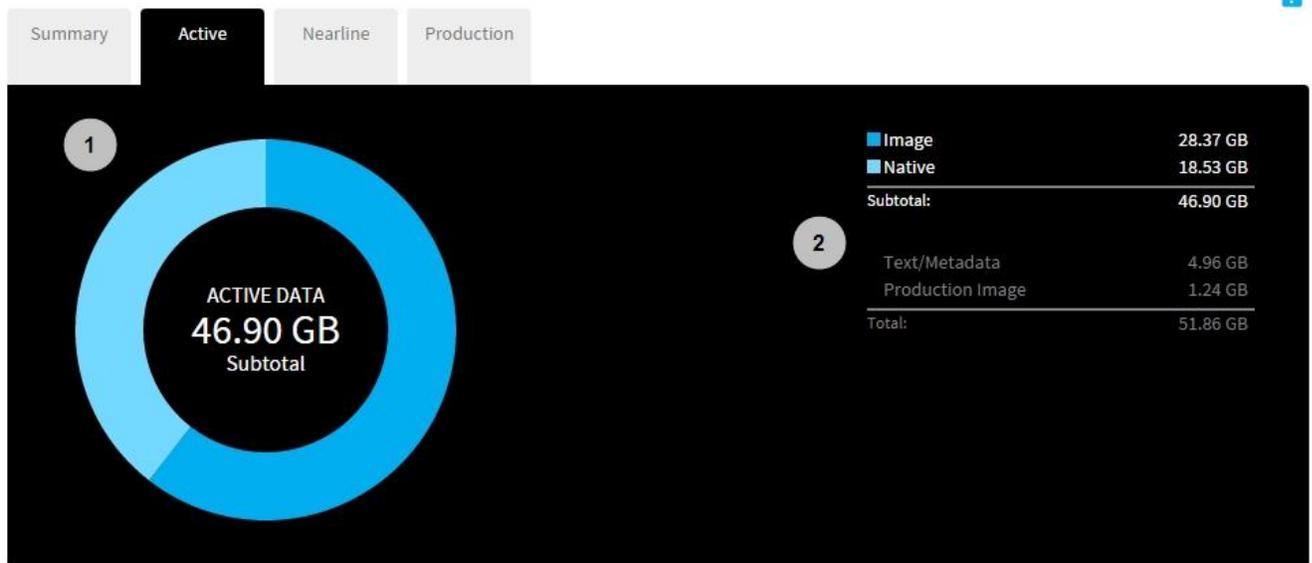


1. **Summary Tab:** Displays summary document data information for the project.
2. **Active Tab:** Displays Active document data by format.
3. **Nearline Tab:** Displays Nearline document data by format.
4. **Production Tab:** Displays Production data by Active and Nearline document count.
5. **Data Received:** The total size of document data on disk and tape sent to date and associated with this project.
6. **Data Selected:** The total size of document data on disk and tape selected for processing. The total size of Data Expanded could be equal to the total size of Data Received.

7. **Data Expanded:** A refined size of the document data on disk and tape that has been filtered and formatted.
8. **Data Details:** Click the graph columns to display more accurate count of Tape and Disk totals.
9. **Data in Review:** The total size of the document data that is currently maintained in Active and Nearline storage. Active data is represented by the blue portion of the bar. Nearline data is represented by the orange portion of the bar. Click the colored bars to view Active and Nearline totals.
10. **Filtering Rate for Review:** The percentage of document data that was removed based on filtering criteria for date, keyword, and file type. This percentage does not include deduplication.
11. **Dedupe Rate for Review:** During deduplication, the system looks through the document data that passed the filtering criteria and removes any duplicate data. This is the percentage of those filtered documents that were removed during deduplication.
12. **Production Rate:** Percentage of documents containing Production images as compared to the total number of documents in the database, including both Active and Nearline.

ACTIVE DATA VIEW OF PROJECT

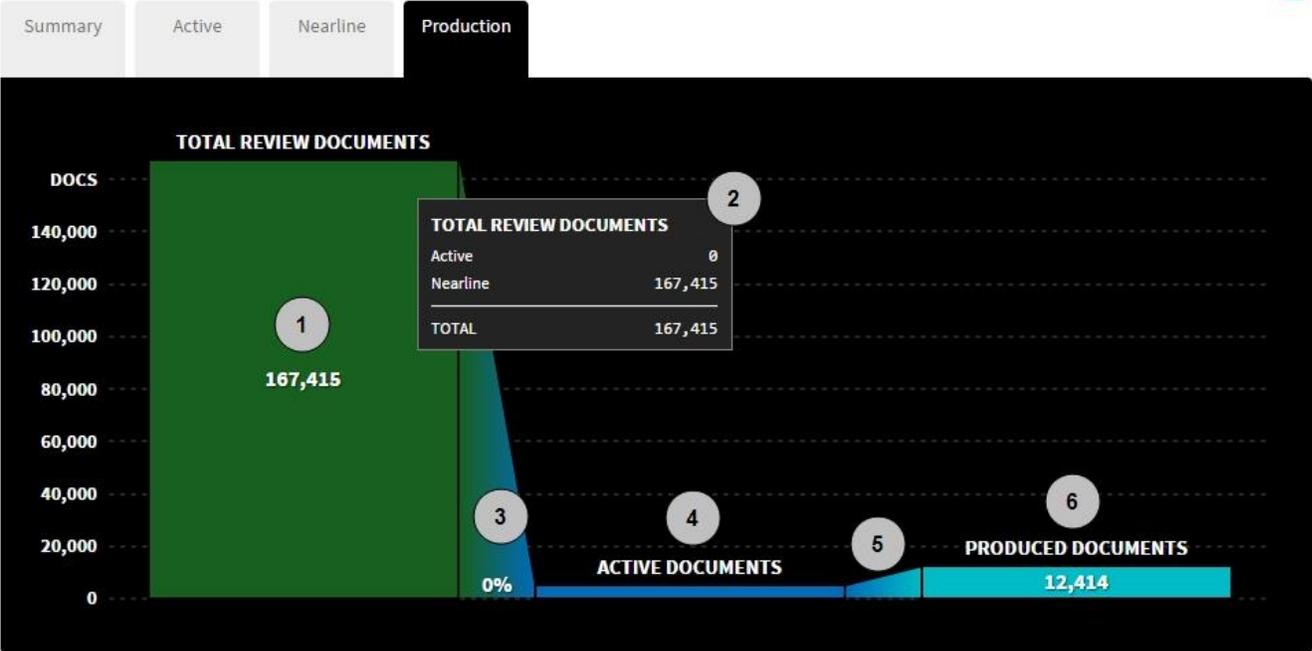
The Active and Nearline tabs were designed to quickly provide the customer information regarding bulk data and its current usage. Clicking on rings of the graph circle removed the data from the visual graph, replaced its location on the graph key, and changed the color to grey. This allowed the customer to interact with their data size and assist in determining where the majority of their funds were being spent in regards to storage by visually showing how the subtotals shifted per selected data.



1. **Graph:** Displays the total document data size in storage by document data format type. If one or more format types are temporarily removed from the format graph legend, a subtotal value is displayed.
2. **Format Graph Legend:** Displays the total document data size for individual document data format types in storage. Click a format type to temporarily remove it from the graph to display total and subtotal values.

PRODUCTION DATA VIEW OF PROJECT

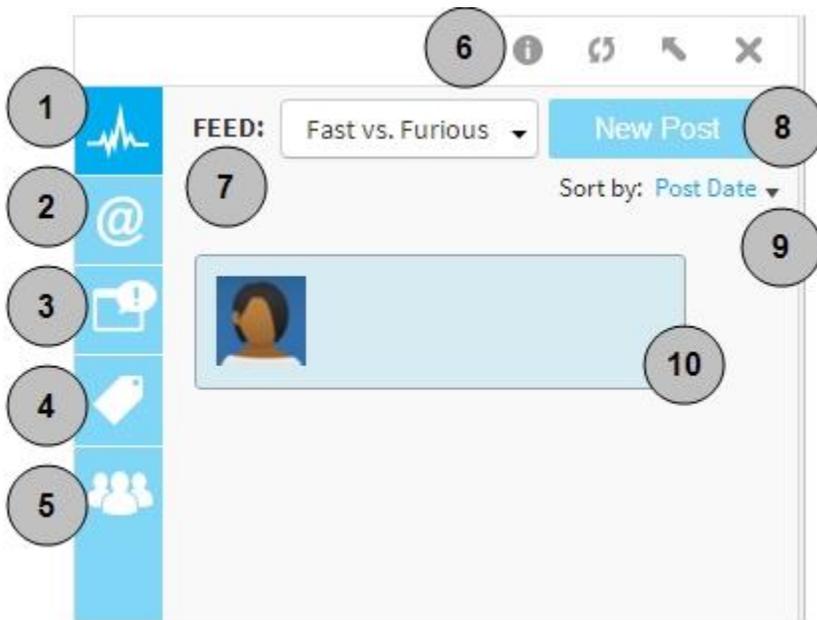
The Production tab took many of the same design elements of the Summary tab in order to create a uniform and consistent method of communicating. However, the data points being shown were so wildly different than the summary, it was necessary to tweak the view slightly, which resulted in a very positive response from the customers during our user experience testing.



1. **Total Review Documents:** Displays the total number of documents currently in the project.
2. **Data Details:** Click the graph columns to display a more accurate count of documents in both Active and Nearline storage.
3. **Ratio of Active Documents:** Displays the ratio of Active documents compared to the total number of documents in the project.
4. **Active Documents:** Displays the total number of Active documents in the project.
5. **Ratio of Produced Documents:** Displays the ratio of produced documents compared to the total number of Active documents in the project.
6. **Produced Documents:** Displays the total number of documents produced.

WEB-BASED COMMUNICATION TOOL HOUSED WITHIN THE APPLICATION

The goal of the web-based communication tool was to simulate the same type of experience users have when using social networking websites such as Facebook. This was a deliberate design choice so as to encourage communication between different teams. The initial design of the web-based communication tool displayed its contents as a right-justified portion of the overall application. During our early user experience testing, it became clear that the web-based communication tool needed to be available, but discreetly tucked away when not in use. This resulted in the tool being designed to “slide” open and take a specified percentage of the screen and then “slide” back into its hidden position when not in use.



1. **Feed Tab:** View portfolio and project-level updates.
2. **Mentions Tab:** View project-specific updates directed at you or another user's comments on your message. You can filter what messages are visible by selecting a specific feed.
3. **System Messages Tab:** View system level messages posted by a System User. System messages are always in yellow.
4. **Topics Tab:** View topics by their hashtag (#) values. The top 10 trending tags are displayed.
5. **Team Tab:** View list of users currently associated with the project, including their user name, their user role, and their email address. The list of users displayed is determined by which feed you are currently viewing. All users who can access the same feed are listed. You can sort the list of users by their name or use the **Filter** box to quickly find a specific user. When finished, delete the filter terms to see all the users again.
6. **Notification Center tool options:** These include a link to the help system (i), an option to refresh the feed (↻), an option to undock the Notification Center from the Manage application (↖), and closing the Notification Center (X).
7. **Feed:** Change what messages are displayed in the selected tab by adjusting the feed value. A feed is a continuous stream of conversation related to a portfolio or project. See "[Security and Visibility](#)" for more information.
8. **New Post:** Start a new collaboration thread.

9. **Sort by:** Sort the conversation by posted date or most recently updated. See "[Sorting and Approving Posts](#)" for more information.
10. Posts and post comments are displayed based on your sort order preference (default is by Post Date).

EARLY WIREFRAMING EXAMPLE

The following is an example of some early wireframing I completed for the project that helped the developers visualize the end product goals using my prototyping. These were put together using as few words and images as possible per the instructions of the Product Owner who wanted the “idea to be clear without dictating the design approach”. This was challenging, as a traditional wireframe can contain a great deal more information. In this case, the Product Owner and I agreed upon the below example. Using it, we built onto the application each sprint. Since the development teams were located in three different countries, using a simplistic wireframe approach helped in ensuring the sprint goals were always very clear in regards to the visual end-goal.

