

Susie Robson Portfolio

UX Design and Research



Activation UI (AUI)

- ▶ Design problem:
 - Design a new application for license activation
- ▶ 3 key components:
 - An interface to create and extend trials
 - An interface Customer Service could use to assist customers with non self-service licensing tasks, or that customers were unable to do on their own (e.g. activating, re-designations, etc.)
 - An interface for the Admin to perform tasks related to policy and license file management

UX design process

Analysis

Identify 80 use cases (tasks)
Assumptions, Triggers, Goals

Create workflow diagram
Incorporates all 80 use cases

Design

Create paper prototype

Usability test

Test paper prototype with end users

Revise prototype

Test again

Create detailed mockup

Final usability test

Specification

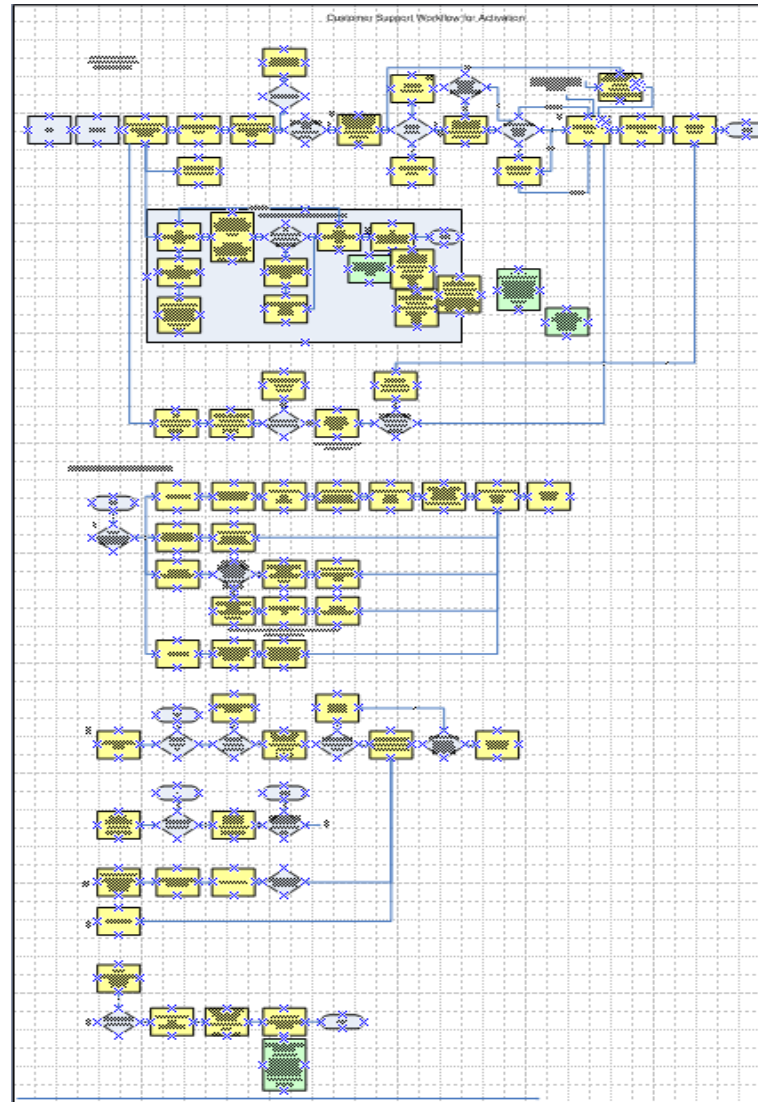
Visio specification

Workflows

Analysis

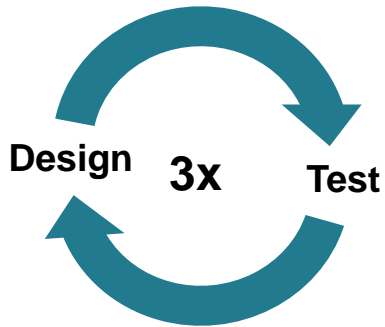
Visio document printed on plotter printer.

This represented all 80 use cases.



Prototypes (with annotations)

Design



The MathWorks **Inside** Applications | www.mathworks.com | Emergency Procedure

Releasing Products | Selling | Supporting Customers | Company Reference | Business Areas

Search People Site

Activation UI

Search Create Trial Extend Trial Policy Administration LFD Administration Help

Configure the MATLAB and Simulink Trial

Clicking Next will generate a trial for the contact you specified. **To complete the process, you will need to send notification to that contact on the next page.**

*Trial Expiration Date: (yyyy-mm-dd) **OR** Trial Duration: -- select one --

Allowable selections are based on permissions. The user can edit the date using the calendar, by typing an ISO format into the text field, or using the drop down menu. Drop down options are 15, 30, 60, 90, 120, 180, 365.

*Trial Activation Type: Designated Computer [What is this?]

Default for standard trial is "Designated Computer". Mousing over link shows hint; clicking link opens a separate window with info. Other options are Concurrent Network User and NNU.

Count:

Only enabled for Concurrent Network or NNU, Default is 5 for those types, and users can enter in a value up to 100. The value "1" should be shown in drop down for Designated Computer but it is not editable.

Send Trial Reminder [What is this?]

Send Trial Reminder defaults: Sales, Distributors, and Partners will default to checked. All other users will default as unchecked. Mousing over link shows hint; clicking link opens a separate window with info.

*Trial Purpose: -- select one -- [What is this?]

Options based on user permissions. (See Craig's spreadsheet.) Disable for Kathy Ford, since it doesn't apply. Mousing over link shows hint; clicking link opens a separate window with info.

Trial Label:

(Customer facing)

<< Previous Next >>

Next button is disabled until all required fields are supplied. Clicking Next creates the Entitlement.

Consistency across all apps

- ▶ All internal application shared a consistent Search page

The screenshot shows the 'Inside' application interface for 'The MathWorks'. At the top, there is a navigation bar with links for 'Releasing Products', 'Selling', 'Supporting Customers', 'Company Reference', and 'Business Areas'. A search bar is located in the top right corner. Below the navigation bar, the page title is 'Activation UI'. A secondary navigation bar contains buttons for 'Search', 'Create Trial', 'Extend Trial', 'Administration', and 'Help'. The main content area features a 'Type:' dropdown menu set to 'License' and a 'Save as Default' button. An information icon and text prompt the user to provide a value for at least one of the following fields. The fields are: 'License Number' (with an equals sign dropdown and a text input), 'License Label' (with a 'Like' dropdown and a text input), 'Contact First Name' (with a 'Like' dropdown and a text input), 'Contact Last Name' (with a 'Like' dropdown and a text input), 'Contact E-mail' (with a 'Like' dropdown and a text input), 'Activation Key' (with an equals sign dropdown and a text input), and 'Status' (with an equals sign dropdown and a 'Active' dropdown). At the bottom, there are 'Search' and 'Clear' buttons. A footnote explains that the '†' symbol indicates indexed fields for improved search speed.

The MathWorks **Inside** Applications | www.mathworks.com | Emergency Procedure

Search

People Site

Releasing Products Selling Supporting Customers Company Reference Business Areas

Activation UI

Search Create Trial Extend Trial Administration Help

Type: License Save as Default

Please provide a value for **at least one** of the following fields.

† License Number: = [dropdown] [input]

License Label: Like [dropdown] [input]

† Contact First Name: Like [dropdown] [input]

† Contact Last Name: Like [dropdown] [input]

Contact E-mail: Like [dropdown] [input]

Activation Key: = [dropdown] [input]

Status: = [dropdown] Active [dropdown]

Search Clear

† Indexed field. Select one or more indexed fields to improve search speed.


Hand off to development

Specification

- ▶ Screen shots with descriptions

Details of Screens

AUI top of page



Activation UI Top of Page

Default Mode

- The top portion of the above screen cannot be edited until the Edit button is clicked. Once you click the Edit button, it goes into Edit mode. The Edit button will be replaced by a Save button and all editable fields will have the appropriate pulldowns, text fields, etc. The rest of the screen will be grayed out so it is obvious that you are only working/saving the top portion. When the Save button is clicked, the Audit dialog box will appear where the rep will enter the Siebel Service Request Number and their username and click Save. This will finalize all changes that were made.
- In default mode, the checkboxes should not look like they can be clicked. Maybe just show the checkmark but no box? Or gray them out?
- At the top of the AUI (with the tab views), the License Number is a link back to ORC. The TSUR will just say Trial and not be a link.
- If there is only one Activation Type, display only one long tab across the page. If there are multiple Activation Types for one license, display all tabs. The currently selected tab will be blue, as shown above. When another tab is clicked, it stays where it is but the tab changes color to active blue, while the others are grayish blue.

Final UI

- ▶ Less moving between screens
- ▶ Ability to find all information in one place
- ▶ Improved learnability and productivity

Activation UI

<< Back to search results

License #220668

Activation Type - Network Named User

License Label: Jim's Test Lic

Activation Type: Network Named User
Status: Active

License Option: Network Named User

License Use: Commercial

License Term: Annual

Policy: Network Named User - STAFF

Activations Remaining: 0

Computer Redesignations Remaining: 99998

Named User Redesignations Remaining: 0

Override Date:

License File Definition: Network Named User

Validating from products: Disabled

New User Download Access:

New User Activation Key Access:

Rights Refresh Needed: No

Activation Key: 15804-91170-12960-57839-21437

All Product FIK Approval:

Activation Details
Products
Contacts
History

Activations Show 2 rows

<input type="checkbox"/>	Status	Activation ID	Activation Label	Initial Activation Date	Activated By	Host ID	OS/Hardware	Latest Activated Release	Validation Status	Rights Refresh
<input type="checkbox"/>	Active	14293	001234567891	2008-03-25	jmatz	777777	Linux	R2008a	Current	No
<input checked="" type="checkbox"/>	Inactive	5922	0017317D3F6D	2008-03-04	jschmidt	0017317D3F6D	Windows	R2008a	Overdue	No

License File Details 3 rows

License File Generation Date	Created By	Release	Computer Login Name	Source	Rights Refresh	SR#
2008-03-25	jmatz	R2008a		IAUI;IENT	false	
2008-06-04	cchiuchi	R2008a		IAUI;IENT	false	
2008-06-13	mkissing	R2008a		IAUI;IENT	false	

Wireframes

- ▶ Create Visio wireframes for new content management application, verify workflow and design through usability testing

Wireframes

Content Management

Q4 Hartford Life Account 12345

Due Date: 10/29/10 Assigned to: [username]

Report Name	Checked Out By	Report Type	Portfolio	Last Modified	Status	View Package	View Details	View History
Fixed Income Report		Fixed Income Report	Portfolio 1	03/27/2010 9:35 PM	Complete	view	edit	replace
Performance Summary		Performance Summary	Portfolio 2	03/27/2010 9:35 PM	Complete	view	edit	replace
Holdings Report		Holdings Report	Portfolio 3	03/27/2010 9:35 PM	Complete	view	edit	replace
Executive Summary		Executive Summary	Portfolio 5	03/27/2010 9:35 PM	Complete	view	edit	replace
Add [Report Type]		TAILOR Letter	Portfolio 6		Incomplete	add		

Comments

Previous Comments 10/01/10 7:21 AM Laura Kerry (RM): I've reviewed all the reports and we are ready for delivery

Actions

Send

Logout ABC

Narrow Your Choices

Accounts Sales People

Channel

- BT 17 x
- PC 1 x
- None 1 x

Industry

- 01. Automotive 16,813 x

Source

- SOD 18 x

Brand

- ENOVIA 2 x
- CATIA 2 x
- DELMIA 1 x
- 3D VIA 1 x
- SOLIDWORKS 1 x
- SERVICES 1 x
- SIMULIA 1 x
- NA 1 x

GEO

Customers

Advanced Search [Clear Search] [Account Name] [Country] [City] [Duns] [DSx Client Site ID]

Search

SAVE THIS SEARCH

Fidelity

Accounts & Trade News & Insights Research Guidance & Retirement Investment Products

Home > Investment Products >

Fixed Income & Bonds

Fixed income investments generally pay a return on a fixed schedule, though the amount of the payments can vary. Individual bonds may be the best known type of fixed income security, but the category also includes bond funds, ETFs, CDs, and money market funds.

Looking for fixed income investments?

Individual Bonds

Bonds make interest payments and repay the principal on a fixed schedule. Future payments are subject to the creditworthiness of the issuer.

Bond Funds

Bond mutual funds invest primarily in individual bonds. Many make periodic dividend payments based on the interest paid by the bonds held in the fund.

Fixed Income ETFs

Exchange-traded funds (ETFs) are baskets of investments that trade as a single unit throughout the day.

CDs and Money Market Funds

CDs and money market funds offer low risk and return. CDs are FDIC insured*; money market funds, while not insured, seek to preserve principal.

Other Fixed Income

[Fixed Annuities](#) | [Structured Products](#) | [Other Income-Generating Products](#)

[Compare All Fixed Income Products](#)

Why Fidelity fixed income

- Why buy bonds & CDs at Fidelity
- Fixed income tools & services

Research fixed income

Stay up to date with news, market data, and research on fixed income investing and the bond market.

Open an Account

Questions?

800-348-3548

Instant message a representative.

Find an Investor Center

Find a bond

CUSIP (new & secondary)

Name (secondary)

Go

From our experts

[Viewpoint article 1](#)

[Viewpoint article 2](#)

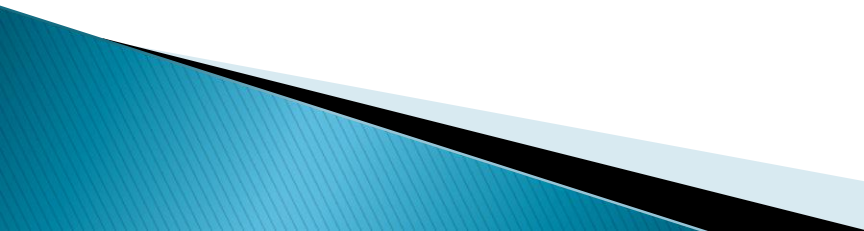
[Viewpoint article 3](#)

[View all fixed income articles](#)

Fidelity Learning Center

[View all fixed income topics](#)

Siebel for Call Center

- ▶ Improve Siebel for Call Center
 - Reduce call time
 - Reduce wrap-up time
 - Expand customer touches
 - ▶ Conducted brainstorming sessions with users to identify pains
 - ▶ Contextual inquiries
 - ▶ Facilitated usability study with 27 users
 - ▶ Identified top 3 issues that, if fixed, could save over \$1,000,000/year
- 

Siebel for Call Center

Consistency

- Zip, Zip Code, Postal Code

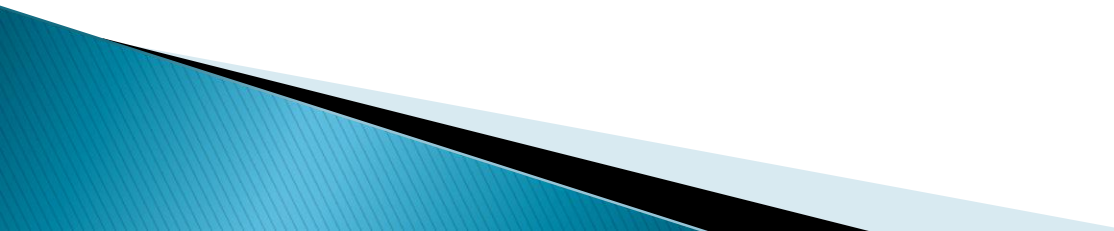
The screenshot shows a form with two sections. The top section has a dropdown menu with 'Postal Code: 5430' selected, and a 'Zip:' field. The bottom section has a 'Find Account' button and a 'Zip Code:' field. Red circles highlight the 'Postal Code: 5430' dropdown, the 'Zip:' field, and the 'Zip Code:' field to illustrate consistency in labeling.

Scroll Bar/Coverage Web Mockup

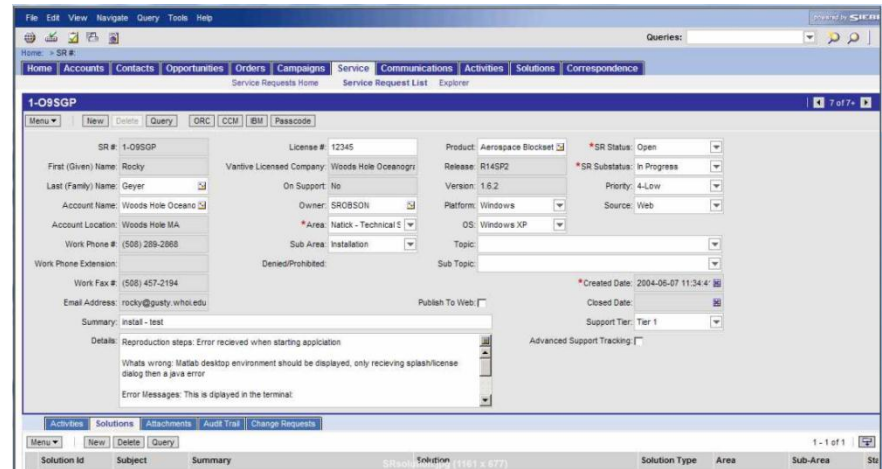
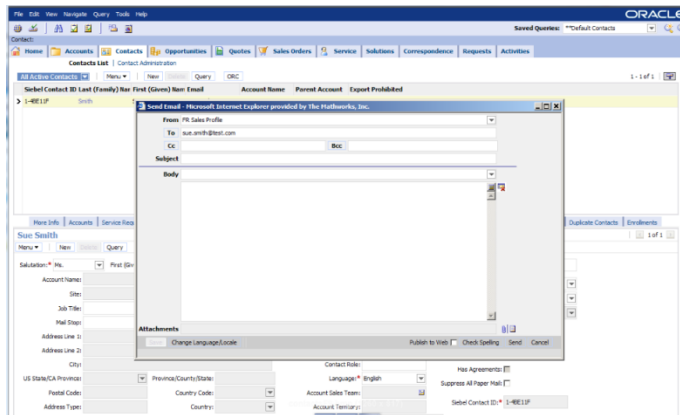
The screenshot shows a web browser window displaying a Siebel interface. A 'Coverage' dialog box is open, showing a list of activities. The dialog box has a title bar 'Coverage' and a 'Browse' button. The list of activities includes columns for 'Due Date', 'Customer Id', 'Sub Type', 'Comments', 'Status', 'Activity', and 'Activity Type'. The 'Status' column shows 'Open' for all activities. The 'Activity' column shows 'AMERICAN' for all activities. The 'Activity Type' column shows various activity types like 'Admin Period AME', 'Shop Clear AME', 'PT Assistance AME', etc.

Due Date	Customer Id	Sub Type	Comments	Status	Activity	Activity Type
9/26/2003	94009	Send View (2 Letter)	PT 274	Open	AMERICAN	Admin Period AME
10/7/2003	94040	Reminder Send View: 21		Open	AMERICAN	Admin Period AME
9/26/2003	94040	Create HO Account One		Open	AMERICAN	Shop Clear AME
9/26/2003	94040	Create HO Account One		Open	AMERICAN	Shop Clear AME
9/26/2003	94009	Check Service Request		Open	AMERICAN	Technical Respon-d
9/26/2003	94009	Additional Note	PATIENT	Open	AMERICAN	General AME
10/12/2003	94009	Check Application Status	WAITIN	Open	AMERICAN	PT Assistance AME
9/26/2003	94009	Additional Note	9/26/03	Open	AMERICAN	General AME
9/26/2003	94040	Additional Note	9/26/03	Open	AMERICAN	General AME
10/7/2003	94040	Reminder Send View: 21		Open	AMERICAN	Admin Period AME
9/26/2003	94040	Create HO Account One		Open	AMERICAN	Shop Clear AME
9/26/2003	94009	Create HO Account One		Open	AMERICAN	Shop Clear AME
9/26/2003	94009	Check Service Request		Open	AMERICAN	Technical Respon-d
9/26/2003	94009	Additional Note	PATIENT-HO-QUESTIONS-ABOUT-NA	Open	AMERICAN	General AME
10/12/2003	94009	Check Application Status	WAITING ON APP FROM PT. EBLAND	Open	AMERICAN	PT Assistance AME
9/26/2003	94009	Additional Note	9/26/03 1:23 PM -PT CLD TO CHECK I	Open	AMERICAN	General AME
9/26/2003	94009	Additional Note	9/26/03 3:09 PM-DR. CALLED IN ABOUT	Open	AMERICAN	General AME

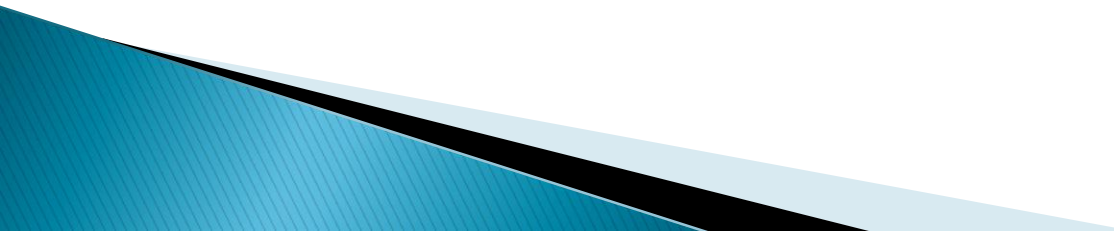
Siebel for Support Teams

- ▶ Continuously improve Siebel for Tech Support, Customer Service, Install Support
 - ▶ Reduce pre-call time
 - ▶ Improve email within Siebel
 - Added Save button to F9 mail
 - ▶ General workflow
 - ▶ Solutions
 - ▶ Localization
 - ▶ Much more
- 

Siebel

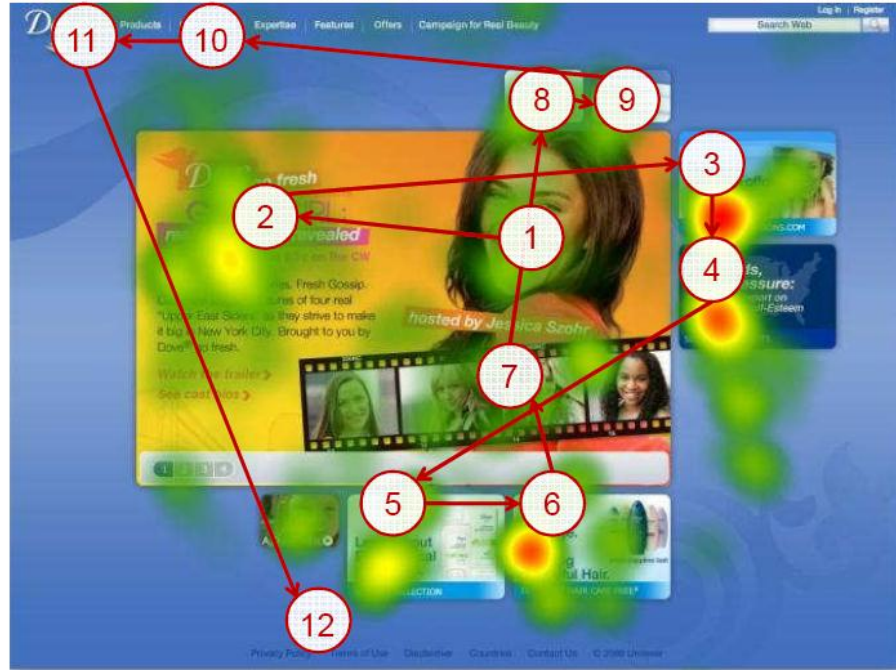


B2C websites

- ▶ Facilitated sessions to improve B2C websites using eye tracking, biometric feedback, and usability observations
 - ▶ Identified areas that were overlooked or were frustrating
 - ▶ Identified areas that stood out, seemed most important
- 

B2C websites

Heat map and gaze plots (click to add heat map and click again to view the gaze plot)



- Users initially focus on the hair and skin on the featured photograph
- From there, users spend minimal time on the main article, quickly moving to the modules
- The first three modules – coupons/dimensions, girl pressure and solutions for damaged hair gain strong focus
- This focus dissipates as the users read about clinical protection.
- Only after all content has been explored do they even notice the top navigation.
- Users do not find search or registration.

Websites

- ▶ Designed, developed, maintain several websites for nonprofits
 - Dreamweaver with HTML and CSS
 - Wordpress

Websites

Matlab Central – User Community

- ▶ Redesign User Community site to add more blogs, improve usability, update the Newsgroup, allow for tracking their own posts
- ▶ Add Social Networking, tag clouds to community site

The screenshot shows the MATLAB Central website interface. The top navigation bar includes 'File Exchange', 'Newsgroup', 'Link Exchange', 'Blogs', and 'Contest'. The main content area is divided into three columns: 'File Exchange', 'Newsgroup', and 'Blogs'. The 'File Exchange' column lists recent files such as 'JPEG compression', 'ROC curve', and 'DTMF tones detection'. The 'Newsgroup' column features recent posts like 'convert video avi to frames', 'Beak Slider for binary Thresholds?', and 'errors only in compiled version'. The 'Blogs' column highlights featured content, including 'FILE EXCHANGE PICK OF THE WEEK' and 'LOREN ON THE ART OF MATLAB'.

The screenshot displays the 'Search Files' section of the MATLAB Central website. It includes a search bar, a 'View All files by:' dropdown menu, and a list of search results. The search results table is as follows:

Date	Updated	Submitted	Time Frame	All Time	Last 30 Days	Last 7 Days	Downloads (last 30 days)	Comments	Rating
12 Nov 2010			JPEG compression				132	0	
12 Nov 2010			ROC curve				353	20	3.5 / 16 ratings
12 Nov 2010			DTMF tones detection				54	0	4.0 / 1 rating