# Designs by Aradia Correnti

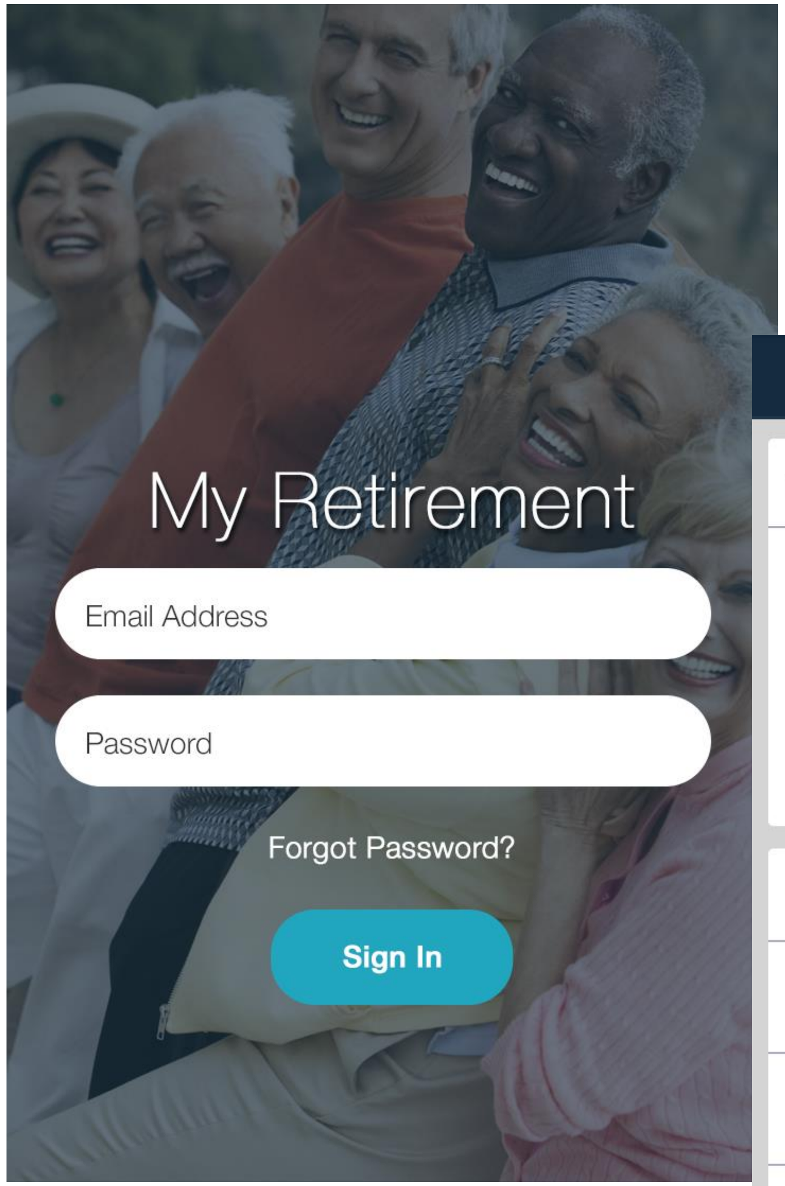
## A Sampling of:

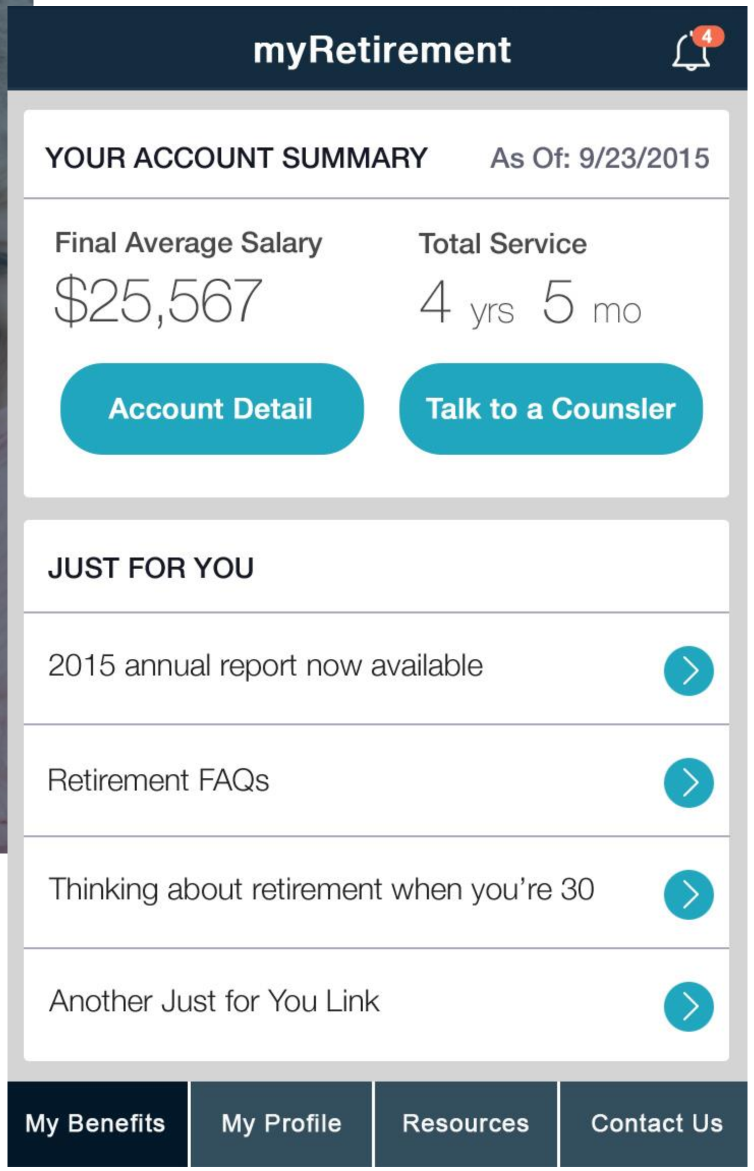
- UX Strategy
- Information Architecture
- UX Design
- Visual Design

# ACCENTURE

# ACCENTURE: DIGITAL PENSIONS PLANNING

| | |
|---|---|
| Project Description | Accenture looks for new client opportunities by identifying gaps in specific industries & prototyping solutions to fill those gaps. A recent opportunity arose with the discovery that most states & municipalities still manage and take applications for pensions via *paper-based forms & processes*. The goal was to provide digitized self-service to employees contributing to a given pension fund, and to fully digitize the retirement application process. |
| Project Scope | • Build a high-level clickable prototype illustrating mobile pensions app concept<br>• Conduct research & gather requirements for actual app release<br>• Create base-level, client-agnostic asset aimed at future pensioners<br>• Create base asset for employers who report contributions to pension system<br>• Pitch base assets to prospective clients<br>• Create custom versions of base asset for contracted clients |
| Contributions | • Conducted deep industry research (pensions, wealth management & fintech<br>• Created new & updated existing clickable prototypes & conceptual designs of base asset (end-user/future pensioner focused)<br>• Customized prototype for pitches to Ontario (ORPP), State of NY and State of MI<br>• Created interaction model, information architecture, wireframes, functional specifications, visual designs, and style guides<br>• Worked directly w/State of MI to fully redesign base asset from the ground up to meet their specific needs |



# DIGITAL PENSIONS: RESEARCH & PERSONAS

| QUESTION | ANSWER | COMMENTS |
|---|---|---|
| **GENERAL** | | |
| How would you describe your role? | [redacted] | [redacted] |
| What about the current benefits industry do you find most interesting and/or relevant to what we can do for clients & pensioners? | [redacted] | |
| **GOALS** | | |
| How would you describe the #1 business goal that you/Accenture have for delivering to benefits organizations? | [redacted] | |
| What is the biggest area of need you hear about when speaking with prospective clients? | [redacted] | |
| Have any prospective clients expressed interest in giving pensioners mobile access to benefits information & transactions? | [redacted] CONTENT CONFIDENTIAL [redacted] | |
| **DEMOGRAPHICS** | | |
| **25 yr old just joined Civil Service (less than 75% completion toward eligibility for pension)** | [redacted] | [redacted] |
| **Very close to retirement** | [redacted] | |
| **Newly Retired** | [redacted] | [redacted] |
| **Post Retirement ~5 years** | [redacted] | |

## PERSONAS SUMMARY

### Pre-Retirement

**PAULA MYO**
- Recently began her career
- Still figuring out benefits and pension plans

**GEORGE GLASS**
- Almost ready to retire
- Making sure loose ends are tied up and last-minute decisions are made

### Post-Retirement

**THOMAS ANDERSON**
- Recently retired
- Needs to make sure his payments are on the way

**KATHRYN JANEWAY**
- Retired for years
- Needs to check in periodically
- Contributes to MyRetirement community

## PAULA **MYO**

*I need guidance on making the right decisions for my pension plan, and the flexibility to make changes on the fly, whenever I need to.*

### Key Distinctions
- Just started her career as an Auditor with the WA State Dept. of Revenue
- Still figuring out her pension plan and learning to making well-informed decisions
  - Given her educational background in finance, she's already thinking about retirement and investments

### Key Needs
- Easy access to counseling
- Flexibility in making changes as she learns more about her pension
- Ensuring her investments are on track

## GEORGE **GLASS** — SCENARIOS

[redacted]

CONTENT CONFIDENTIAL

[redacted]

# DIGITAL PENSIONS: INFORMATION ARCHITECTURE

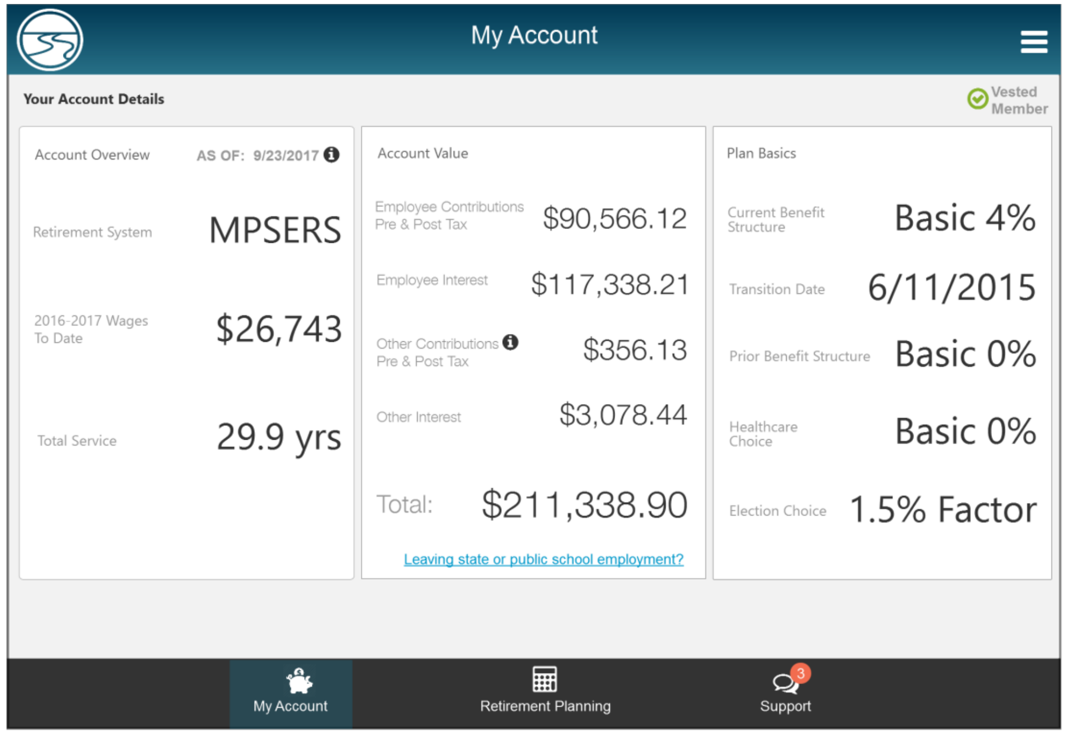
**ACTIVE MEMBER**

**ACCOUNT SNAPSHOT**
- Alerts
- Account Overview
- Account Value
- My Pension Basics

**RETIREMENT PLANNING**
- Dependents & Benes
  - Beneficiaries Count
  - Add/Manage
- Retirement Card
  - Run/View Estimate
  - Apply for Retirement
- About Plans
  - Pension
  - Health

**SUPPORT**
- FAQs
- Facebook
- Announcements
- Message Board (Phase II)

**FLYOUT MENU**
- My Contact Info
- Settings
- Log Out




"My Account" would be the new Landing Page. It surfaces information related to the finance aspect of the user's data (Service, contributions, account value thus far).

The Account Overview Card is exactly the same and in the same place (App Landing Page). The Account Value Card is simply bubbled up to the top level of the UI instead of being access through the sub/side menu.

"Plan Basics" is still under review, and may move to the Flyout Menu; it's meant to surface read-only, non-actionable basic information about the member's retirement system and benefit plan.

**With this Navigation Model, there are 3 App Menu Items:**
- My Account
- Retirement Planning (or "Pension Planning")
- Support (Groups Resources & Contact Us, since these are very scaled down/simplified for ORS)

The Flyout Menu would house things that are
- Settings/Profile related
- Items that are of much lower importance and don't fit with the main nav categories

# DIGITAL PENSIONS: INFORMATION ARCHITECTURE

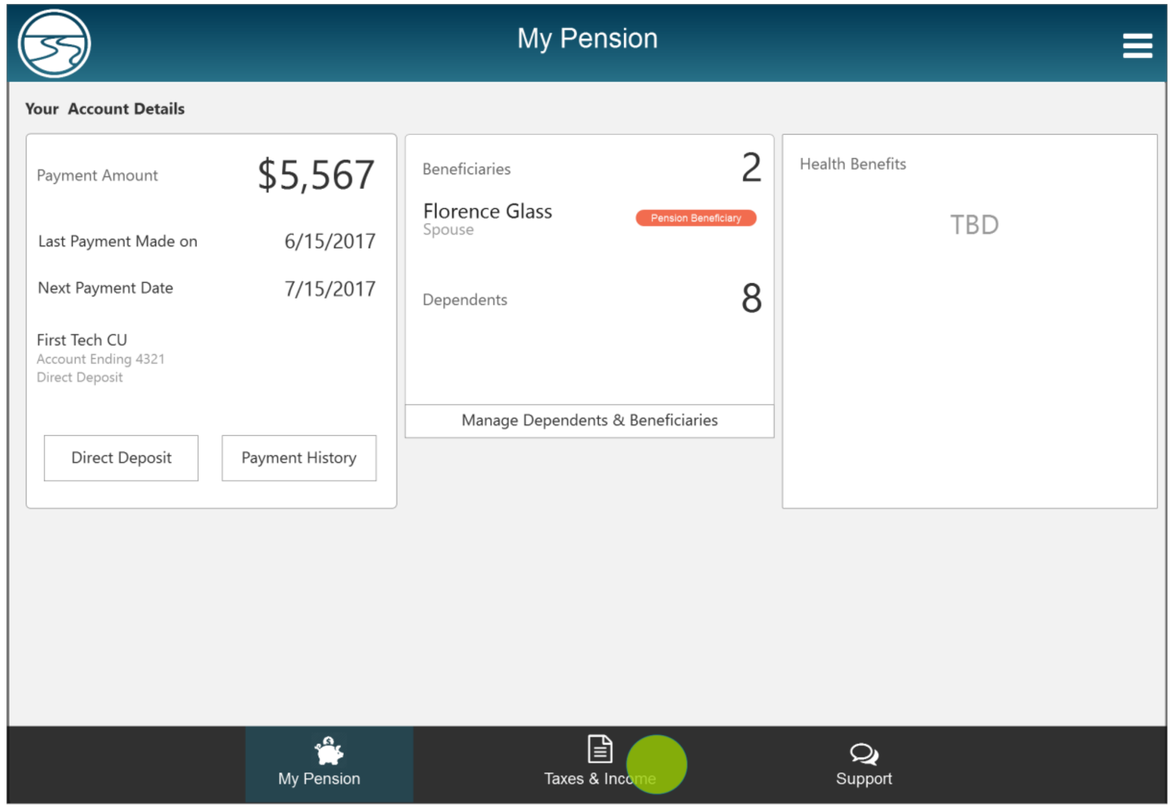
**RETIRED MEMBER**

**MY PENSION**
- Alerts
- Payments
  - Direct Deposit
  - Payment History
- Dependents & Benes
- Health Benefits (Phase II)

**TAXES & INCOME**
- Proof of Income
- Tax Withholdings
- Tax Receipts (1099Rs)

**SUPPORT**
- FAQs
- Facebook
- Announcements
- Message Board (Phase II)

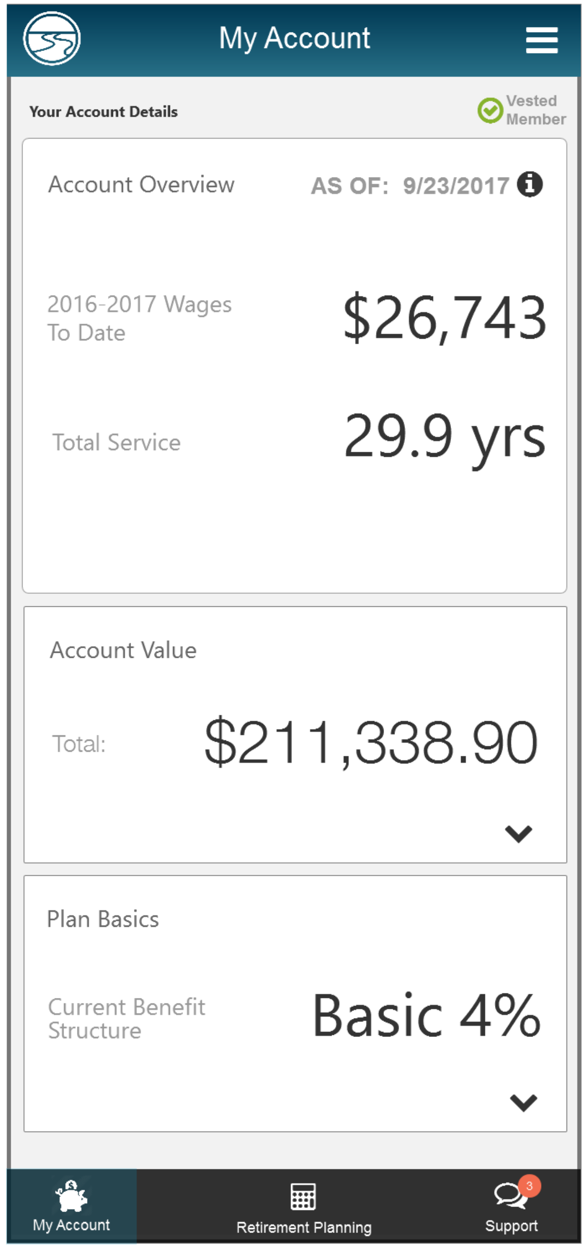
**FLYOUT MENU**
- Upload & Download
- My Contact Info
- Settings
- Log Out

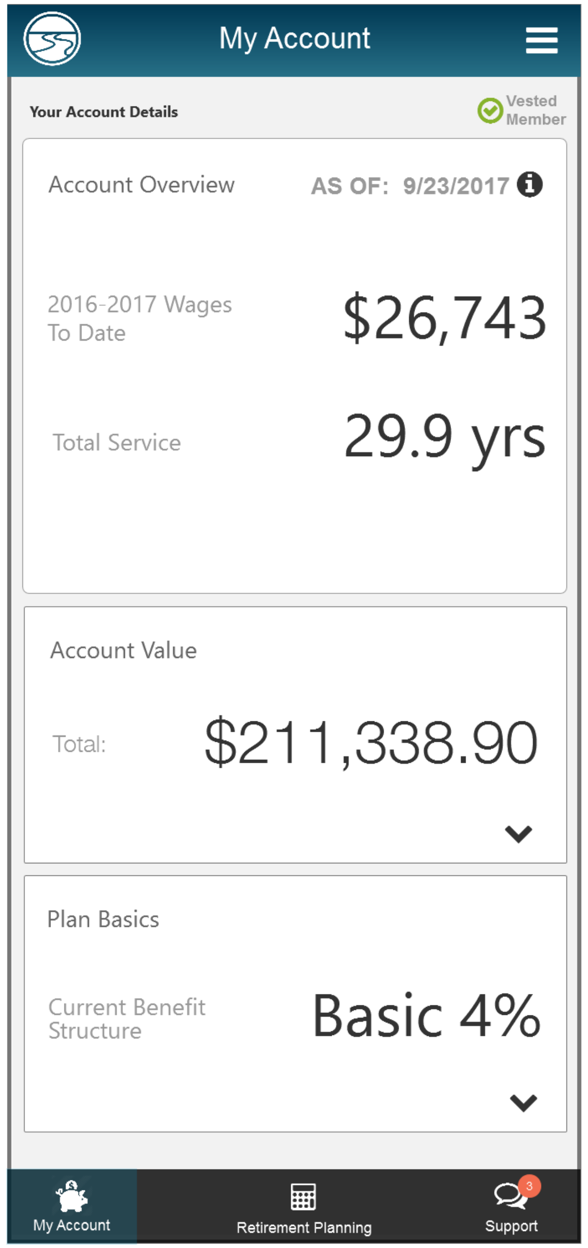


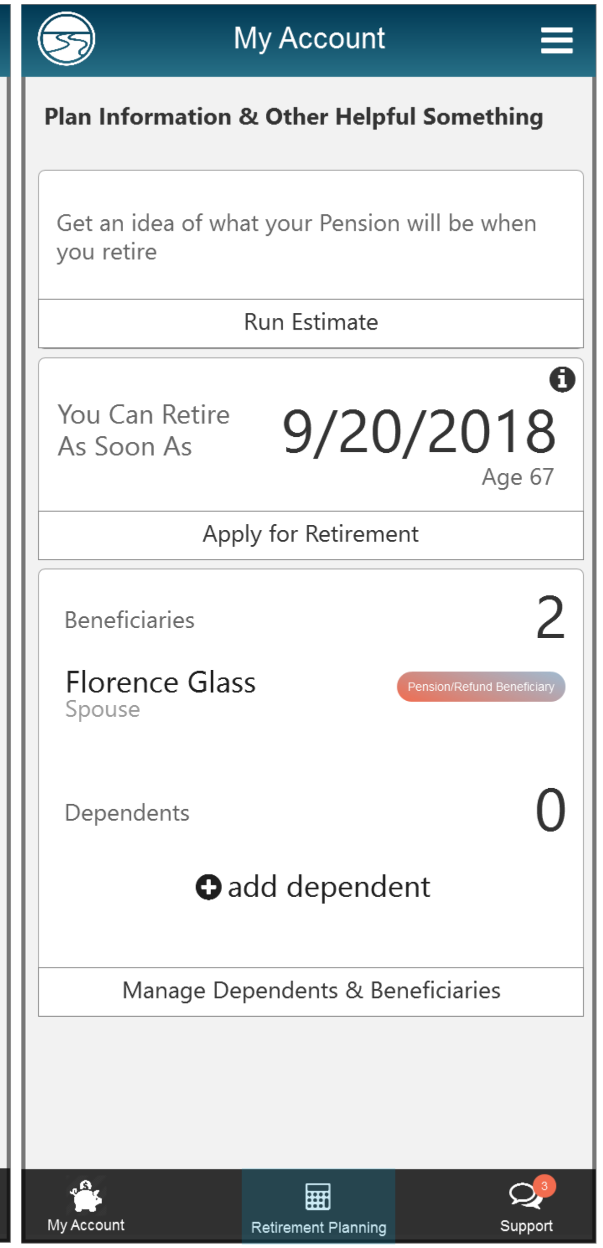

**Scenarios for Retirees are very different. For this reason, we would restructure the app for after a user retires and they'd see this Navigation Model instead. There are still 3 Main Nav items:**
- My Pension (payments, financial info, Beneficiaries - since they're also receiving benefits/money)
- Taxes & Docs (tax information, proof of income, and potentially other documents and forms in the future)
- Support (same as for Active Members, but potentially with Targeted Content)

The My Pension Page includes the Payment Card; the only change to this card is that there's a PAYMENT HISTORY button. It makes sense to put this in the card since we're displaying the Last Payment Date here.

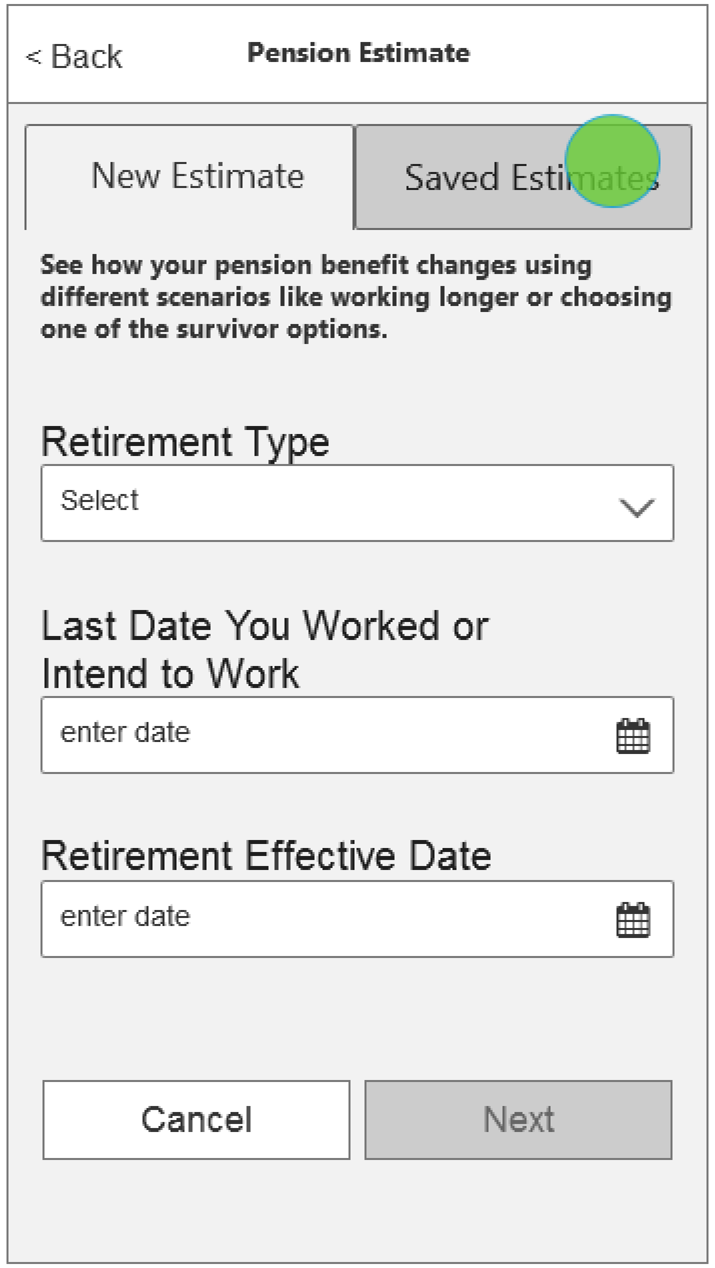
Beneficiaries Card is the same as for Active Members.




Here, the Beneficiaries/ Dependents Card dispays **an example** of how the app may visually indicate that someone is both a Pension and Refund Beneficiary.




The My Account Page includes Cards/Data related to finances and service (Contributions, wages, years worked).

If the member is new to the system, the app will still display all the lines of data. It is not likely that they would be in the retirement system/use the app and actually have **zero** showing up for these values, however.

NOTE: (Account Value Card) Some members will not have *Other Contributions & Interest* or *Other Interest*. In these cases, we will not displays these lines/values.

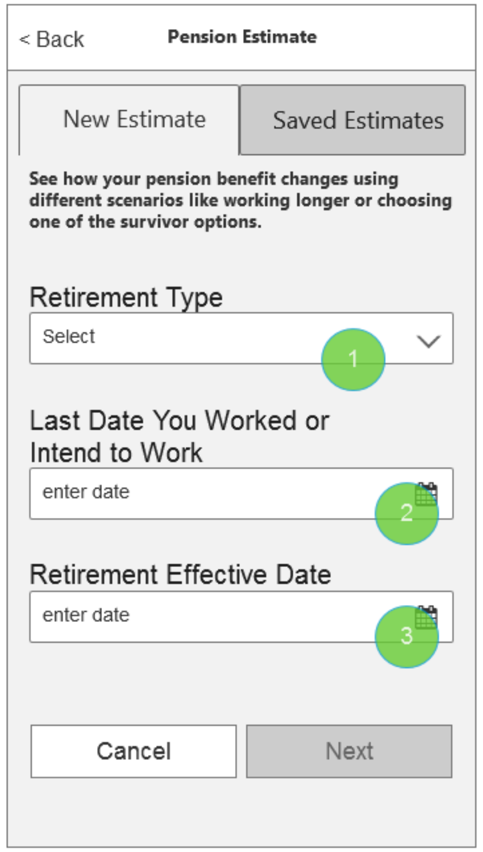
NOTE: (Plan Basics Card).Some members will not have a *Transition Date* (if they're new to the system). In these cases, the app will hide this value

## Design Rationale:

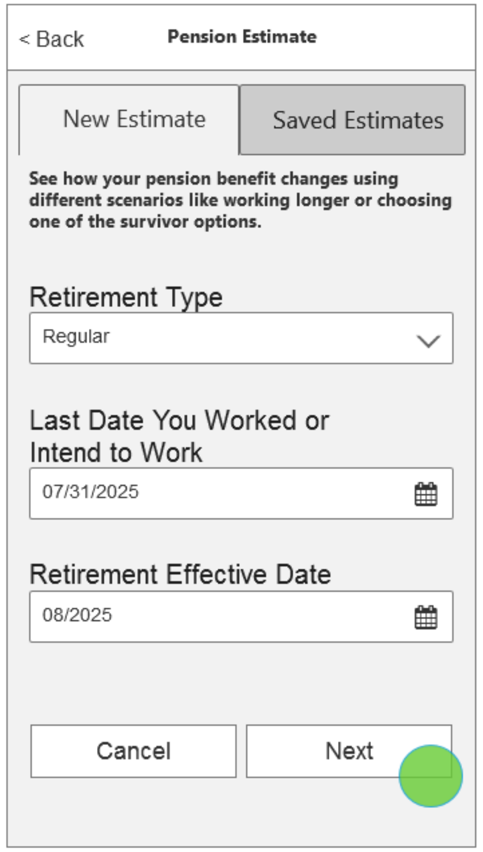
- Needed a "smart" app that displays appropriate info/functionality based on 3 Personas
  - Younger Planner
  - Pre-retirement
  - Retiree
- Card-based approach is great for financial information that has tiers of importance (e.g., summary vs. detail)
- Users aren't going to come to the app often, so always bubble up the most relevant information in the card for glance-able view of critical data (e.g., my total account value/contributions so far)

# DIGITAL PENSIONS: WIREFRAMES (Pension Estimate)

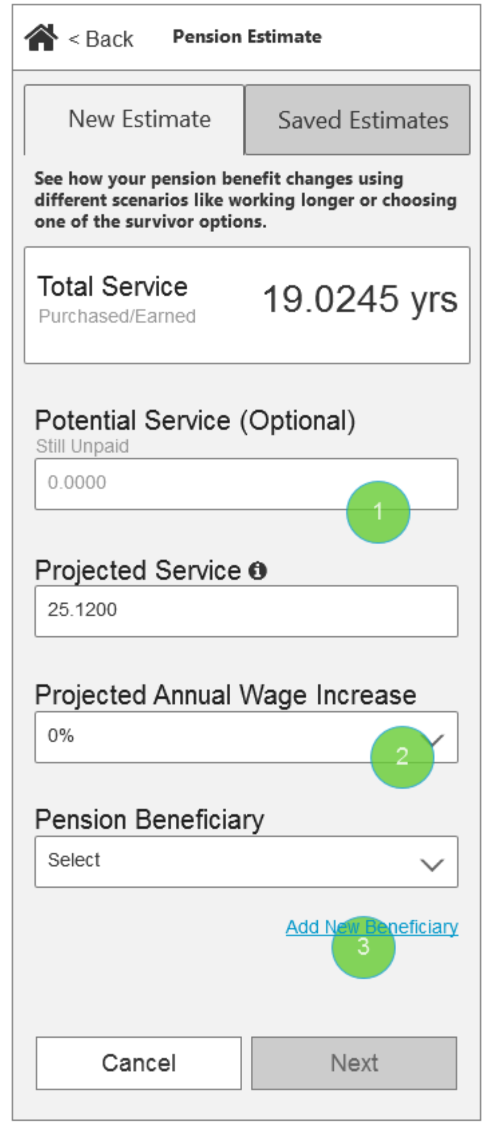
## Estimate - Basic Info



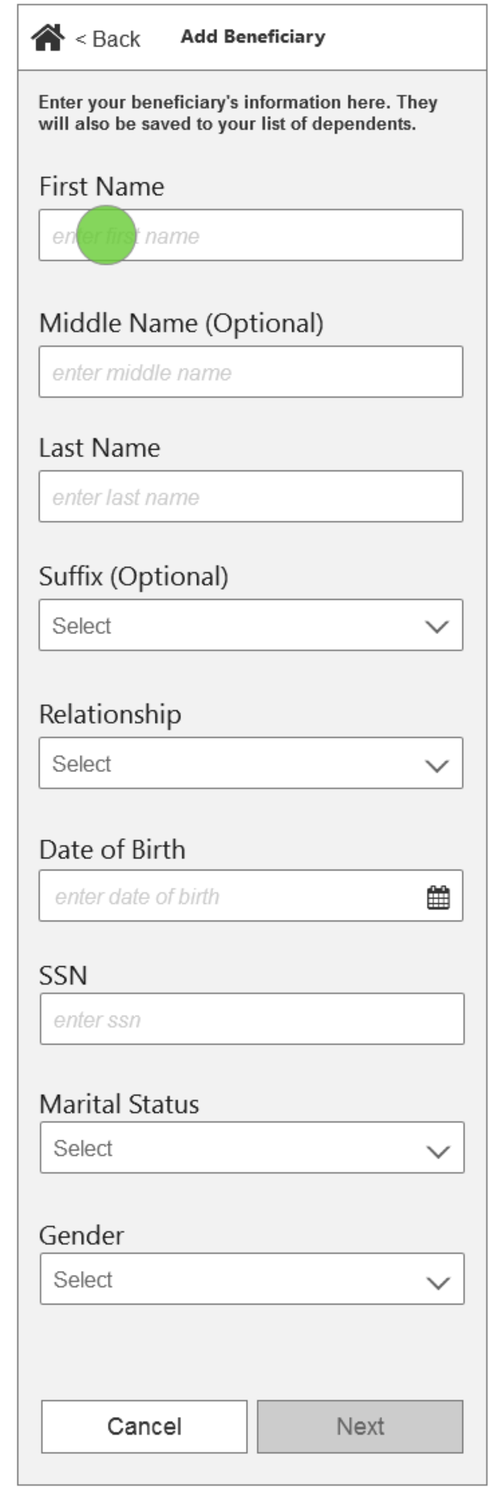

## Estimate - Basic Info




## Estimate - Service

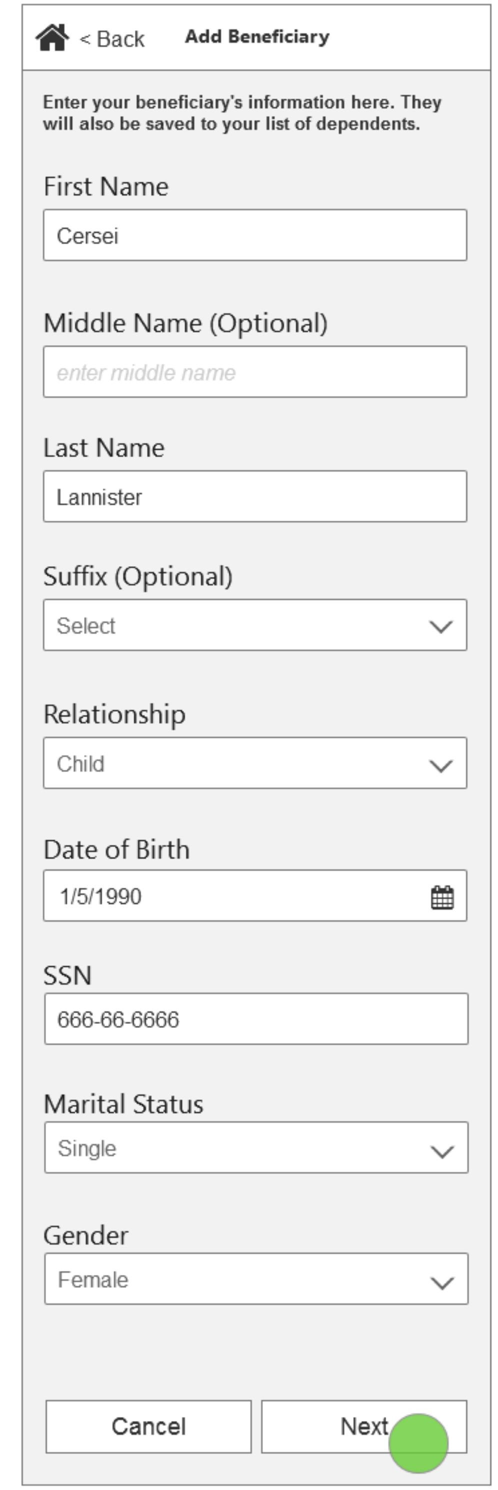



## Add New Beneficiary



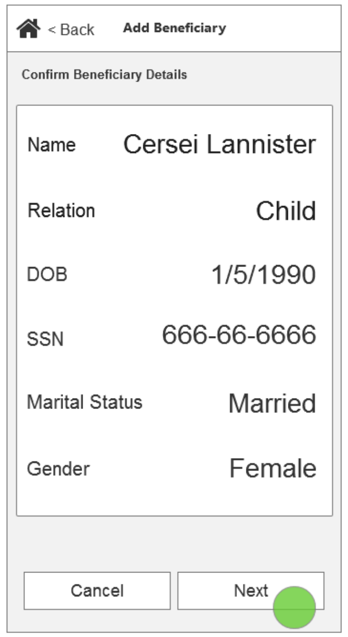

Enter information for new contact. Clicking cancel takes the user back to the previous page.

## Add New Beneficiary

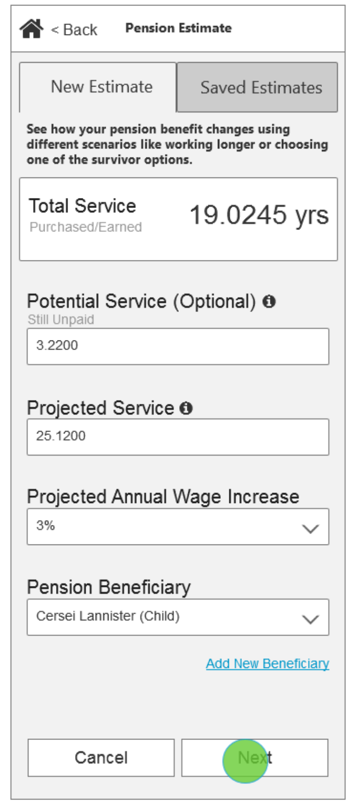



Enter information for new contact. Clicking cancel takes the user back to the previous page.

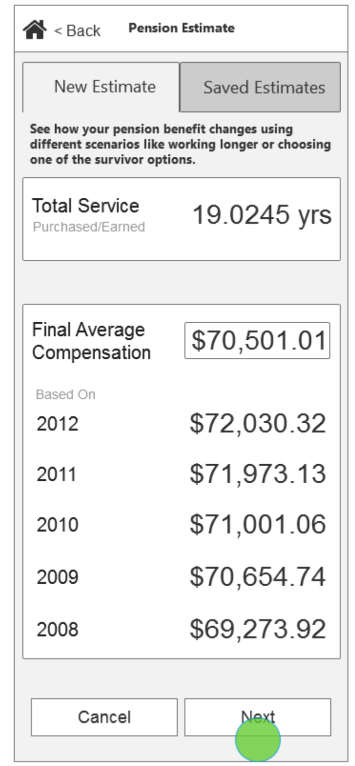
## Confirm Beneficiary Details



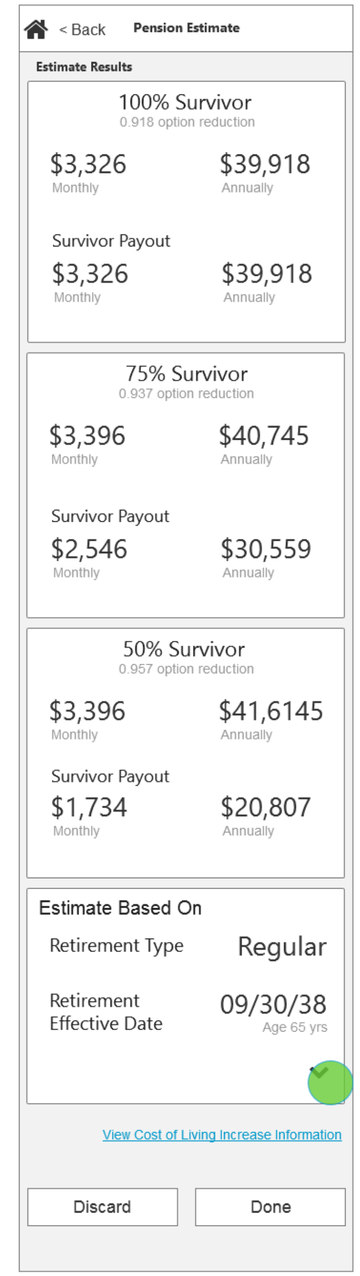

## Estimate - Service



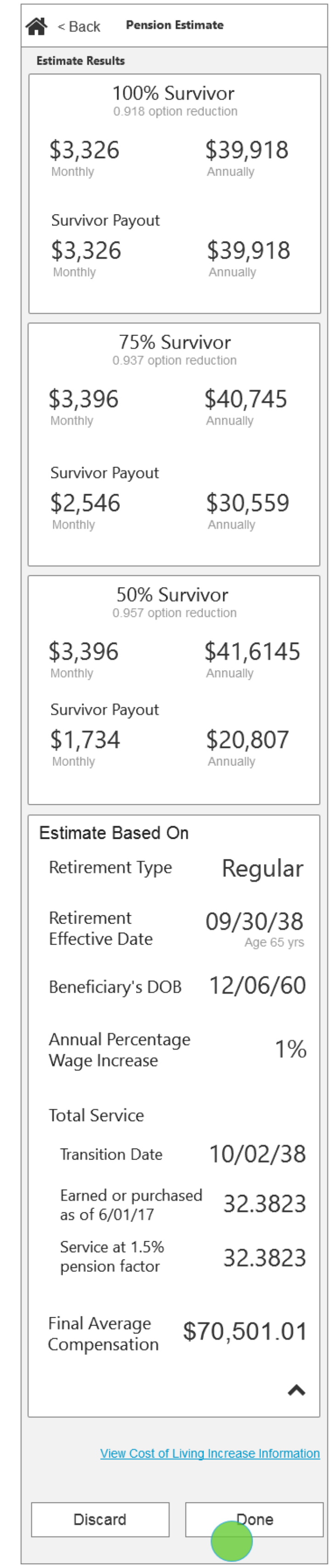

## Estimate - FAC



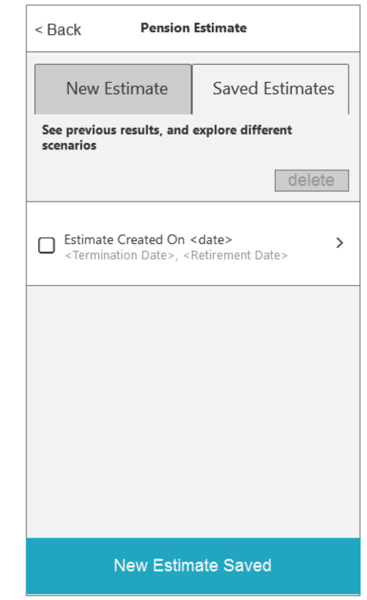

## Estimate Results



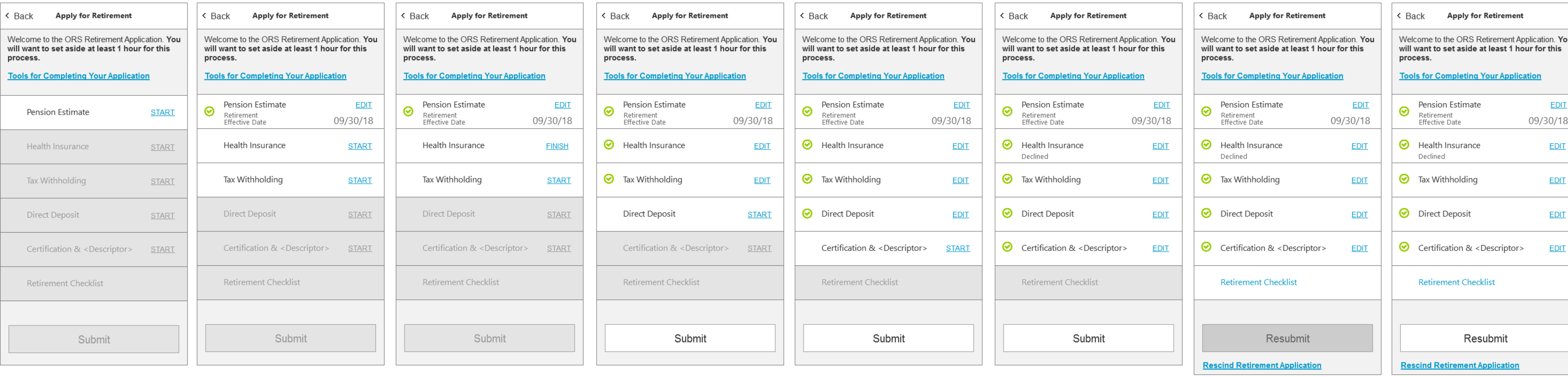

## Expanded Summary Card




## End - Saved Estimates



## RETIREMENT APPLICATION STEP LIST STATES




Each step that has been completed will include a visual indicator (checkmark).

If a step in the list has been started and saved for later, but not completed, the link for that item will toggle to FINISH. The next step in the list is NOT enabled until the incomplete step is finished.

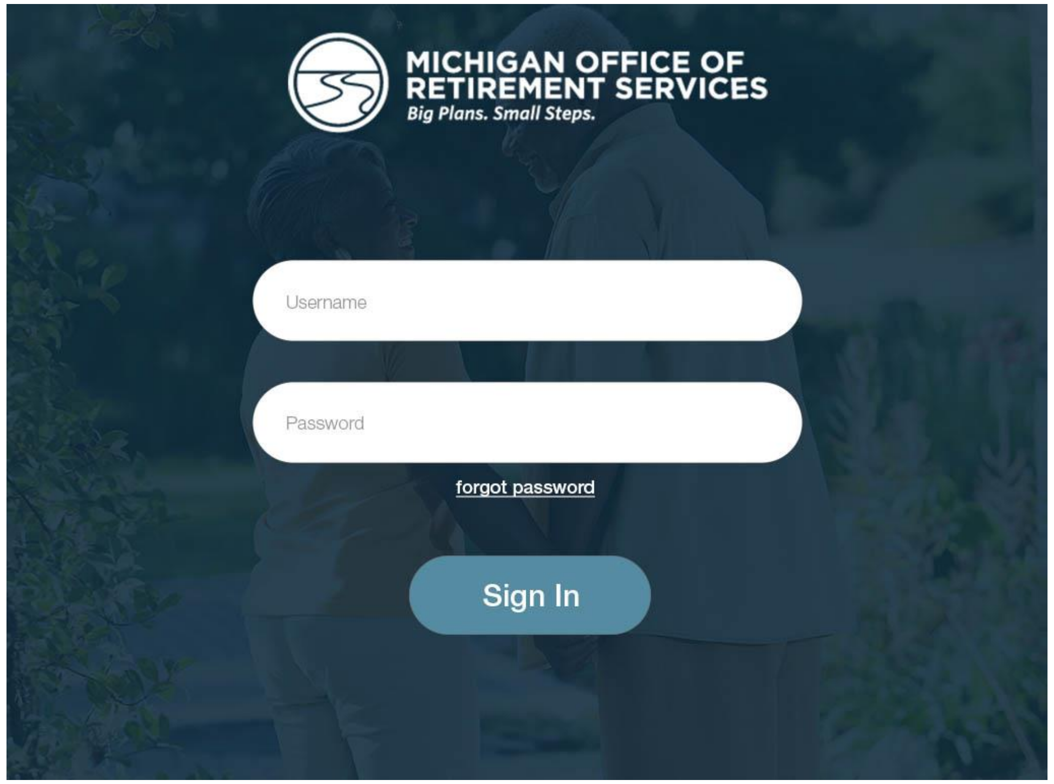
When a step is completed, the *following* step in the list and the related link are enabled.

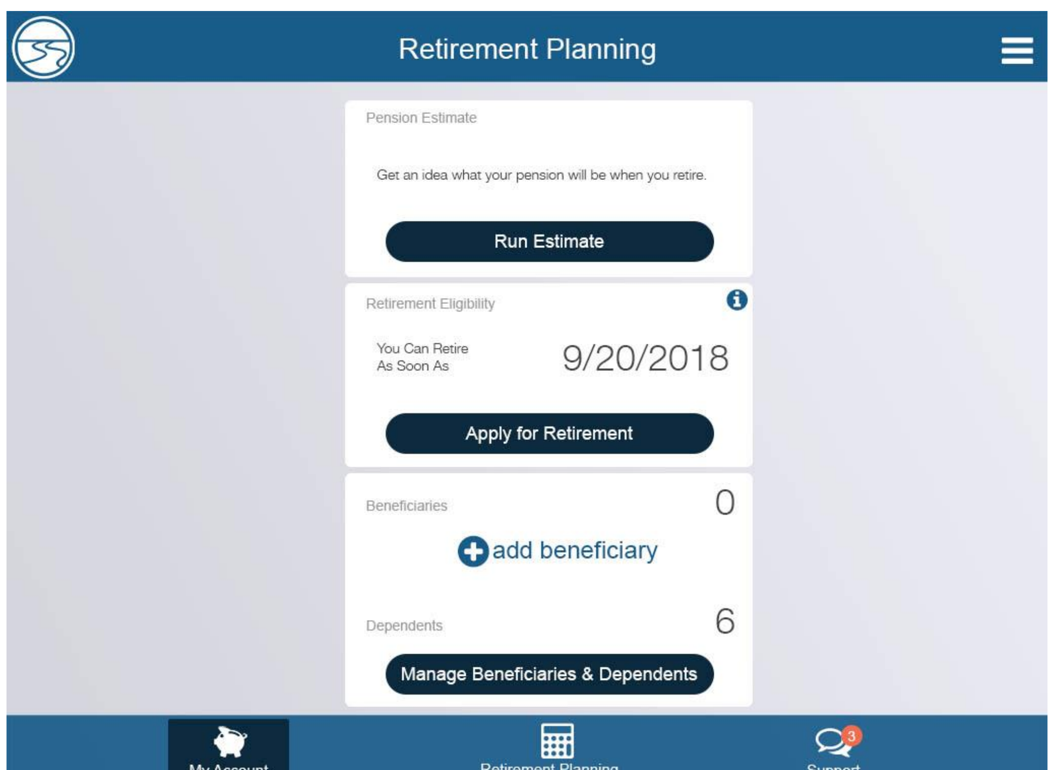
This shows the list when Healthcare has been declined altogether.

Once the application has been submitted, the Retirement Checklist is always accessible, and the SUBMIT button toggles to RESUBMIT. **The button is disabled until the member makes a change to any step in the list.**

There is also a RESCIND RETIREMENT APPLICATION link at the bottom. Tapping this button will reset the list to its Default State and clear out all data associated with each step.

If the user goes back to edit any step in the list, the RESUBMIT button will be enabled.



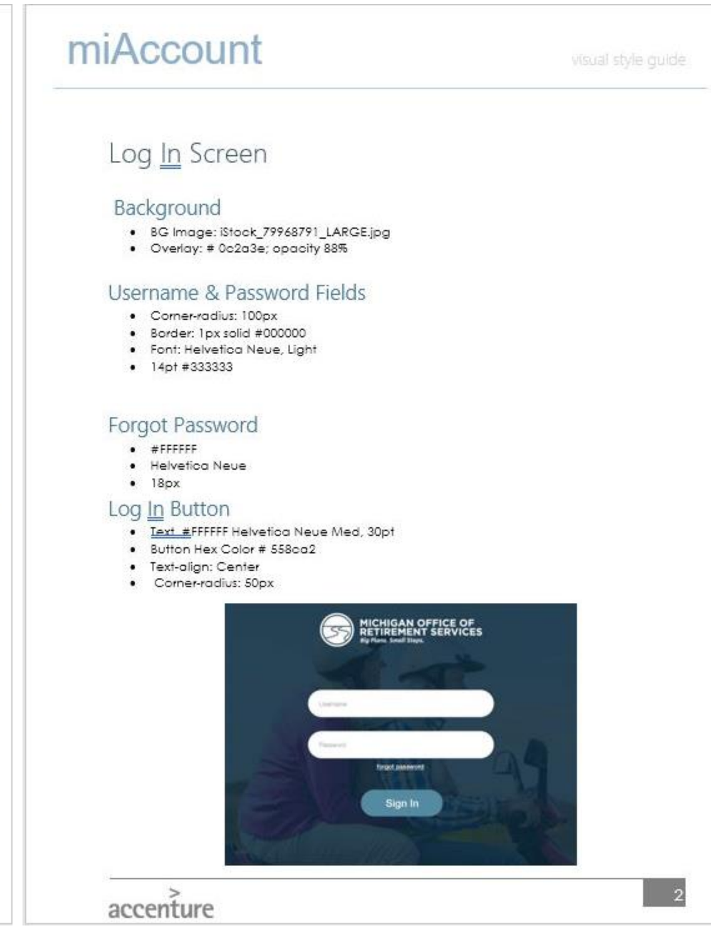




MICHIGAN OFFICE OF RETIREMENT SERVICE
*Big Plans. Small Steps.*

miAccount
MOBILE APP
VISUAL STYLE GUIDE

November 27th, 2017
Aradia Correnti

1



miAccount — visual style guide

## Log In Screen

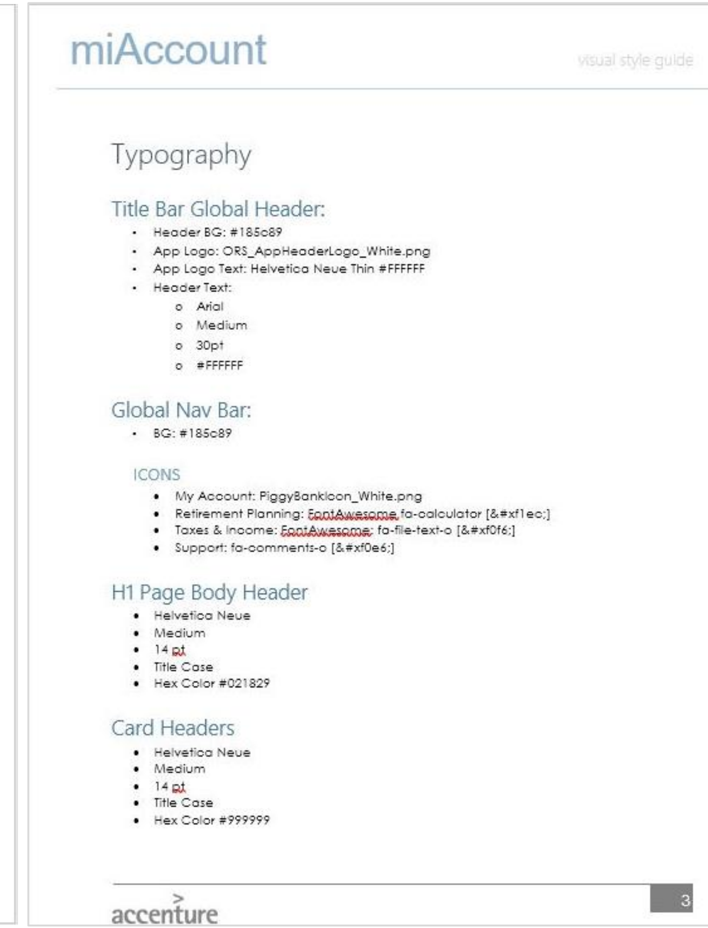
### Background
- BG Image: iStock_79968791_LARGE.jpg
- Overlay: # 0c2a3e; opacity 88%

### Username & Password Fields
- Corner-radius: 100px
- Border: 1px solid #000000
- Font: Helvetica Neue, Light
- 14pt #333333

### Forgot Password
- #FFFFFF
- Helvetica Neue
- 18px

### Log In Button
- Text #FFFFFF Helvetica Neue Med, 30pt
- Button Hex Color # 558ca2
- Text-align: Center
- Corner-radius: 50px

accenture 2



miAccount — visual style guide

## Typography

### Title Bar Global Header:
- Header BG: #185c89
- App Logo: ORS_AppHeaderLogo_White.png
- App Logo Text: Helvetica Neue Thin #FFFFFF
- Header Text:
  - Arial
  - Medium
  - 30pt
  - #FFFFFF

### Global Nav Bar:
- BG: #185c89

ICONS
- My Account: PiggyBankIcon_White.png
- Retirement Planning: FontAwesome fa-calculator []
- Taxes & Income: FontAwesome: fa-file-text-o []
- Support: fa-comments-o []

### H1 Page Body Header
- Helvetica Neue
- Medium
- 14 pt
- Title Case
- Hex Color #021829

### Card Headers
- Helvetica Neue
- Medium
- 14 pt
- Title Case
- Hex Color #999999

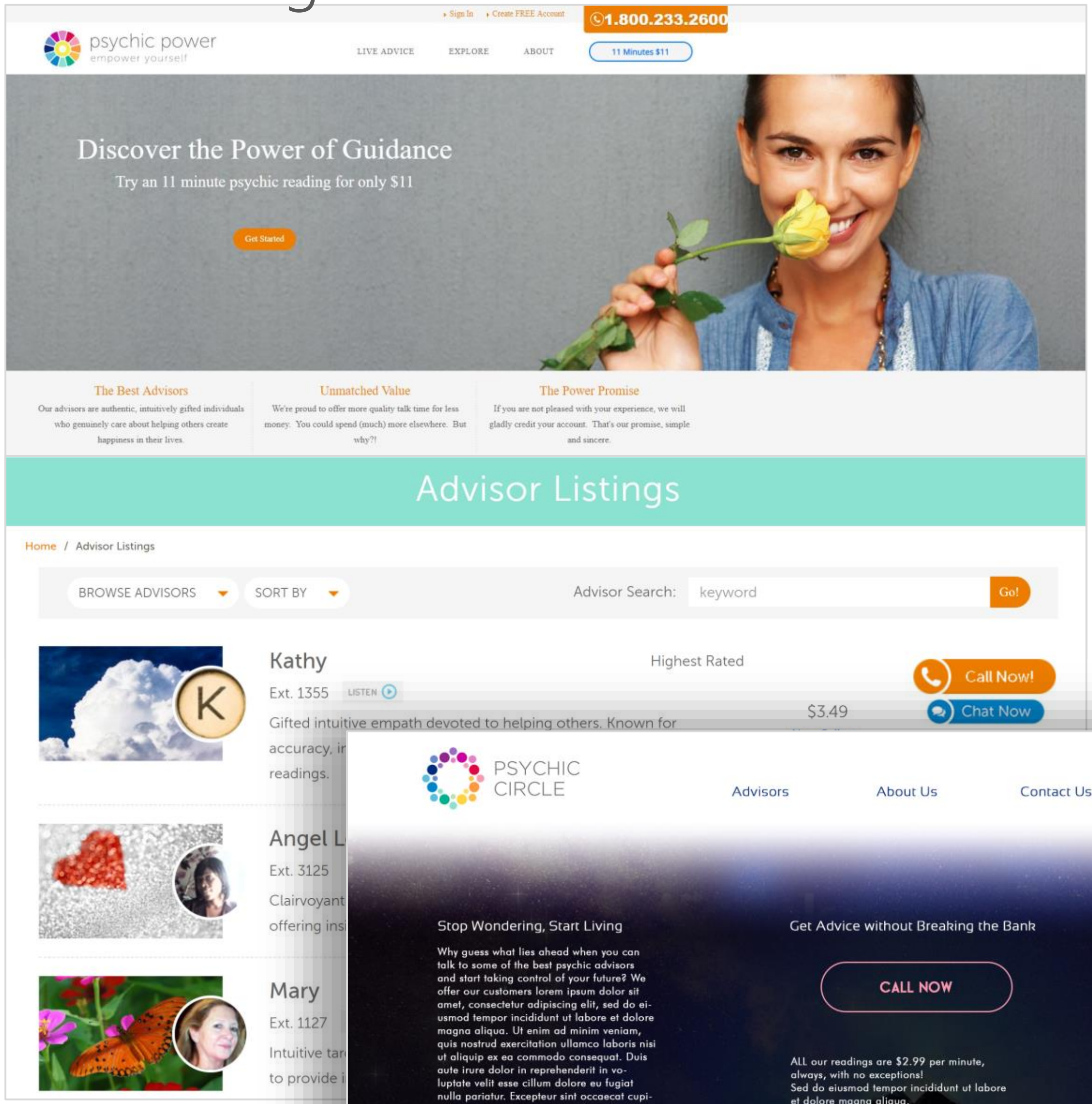
accenture 3

# PSYCHIC CIRCLE

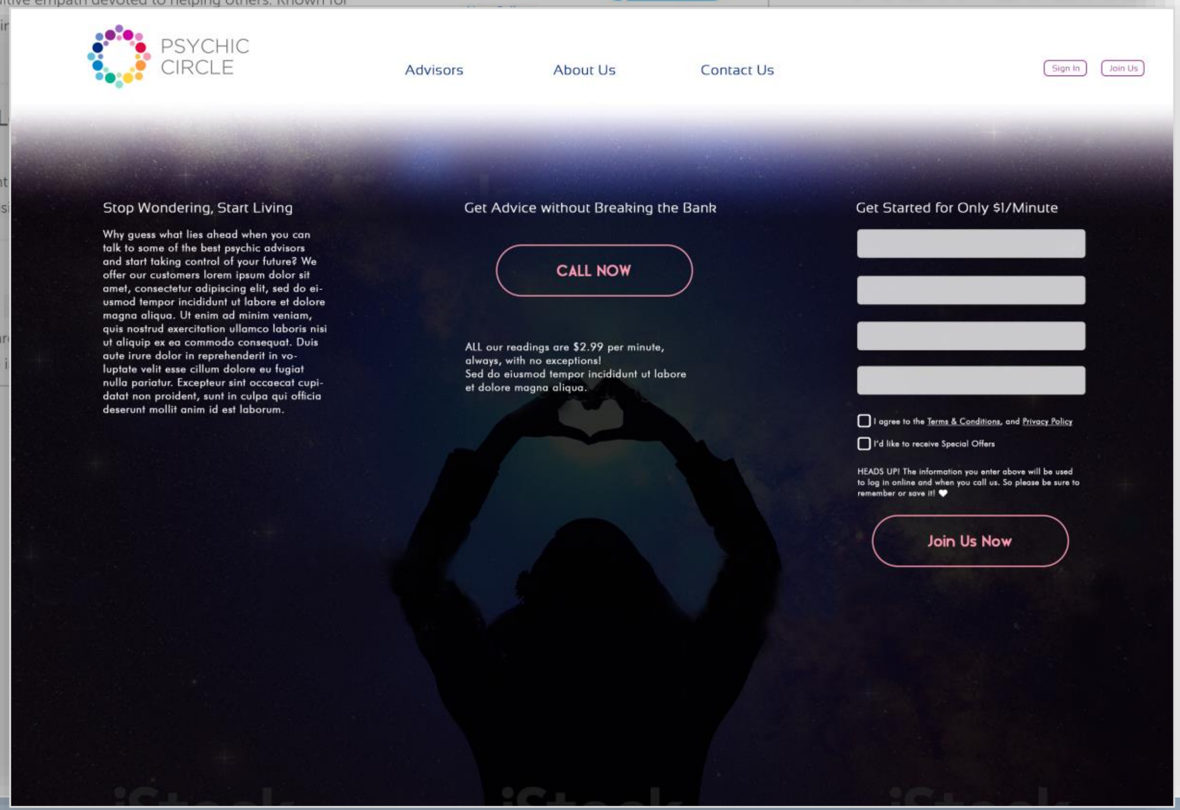
# PSYCHIC CIRCLE: NEW BRAND, NEW SITE

| | |
|---|---|
| Project Description | Psychic Power (psychicpower.com) has been around for 20+ years & is a well-established business. The client wanted to launch a new brand, by way of an ad campaign and a completely new website (separate from the existing site). His longtime developer brought me onto the project after convincing the client they needed full-fledged design to ensure the success of the new brand. |
| Project Scope | • Design and build a new website with a completely separate identity, style, and feel from the existing Psychic Power brand<br>• Make the site modern and desirable to a younger demographic<br>• Make the new business and site competitive with others in the same arena<br>• Create a site that's super responsive and mobile-focused |
| Contributions | As Sole Designer, I:<br>• Conducted competitive research & analysis<br>• Pitched concepts & features to client<br>• Created Feature Spec (requirements doc)<br>• Created IA, wireframes, branding elements (except logo), and visual design comps |

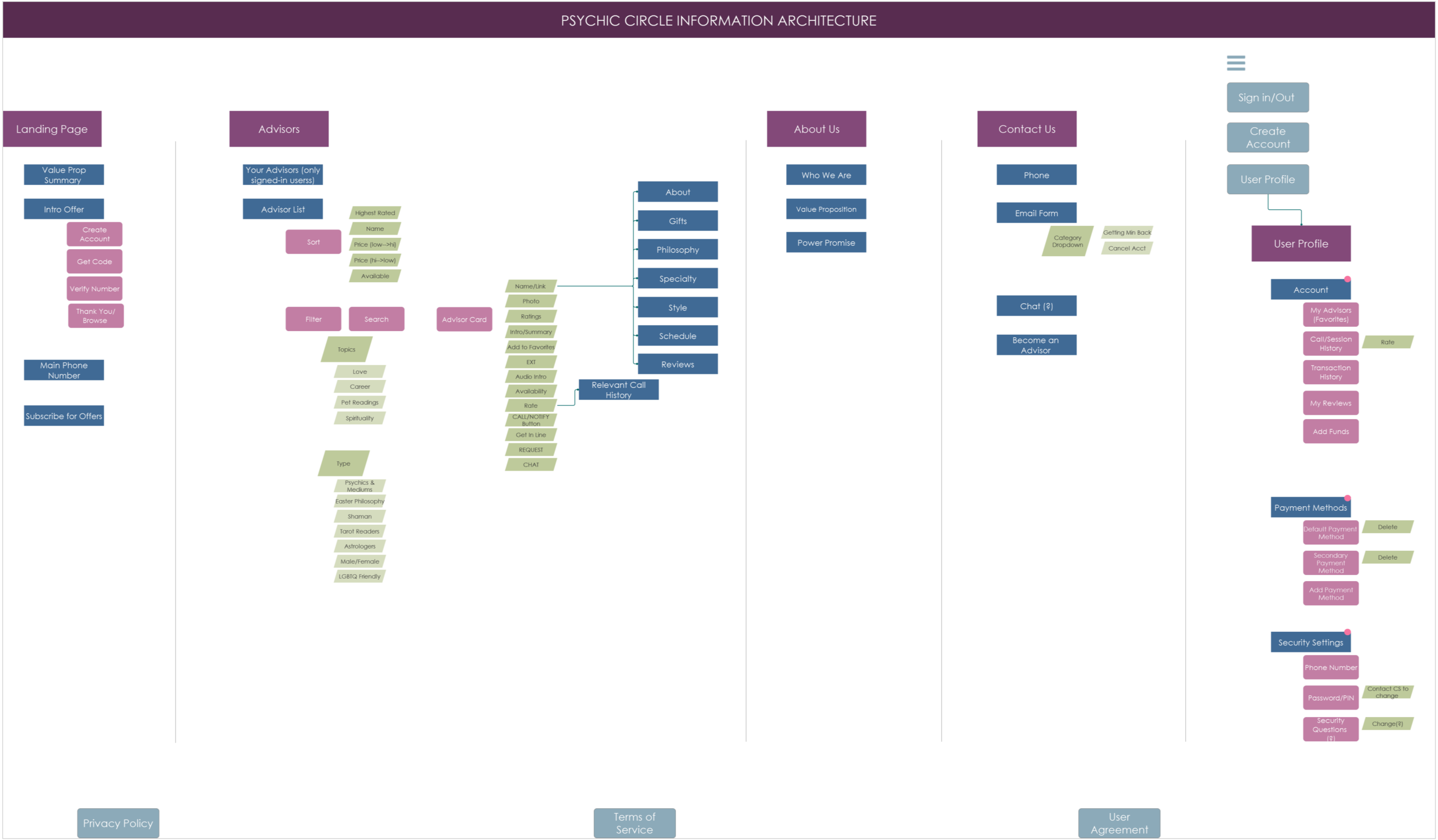
Pre-existing Brand:



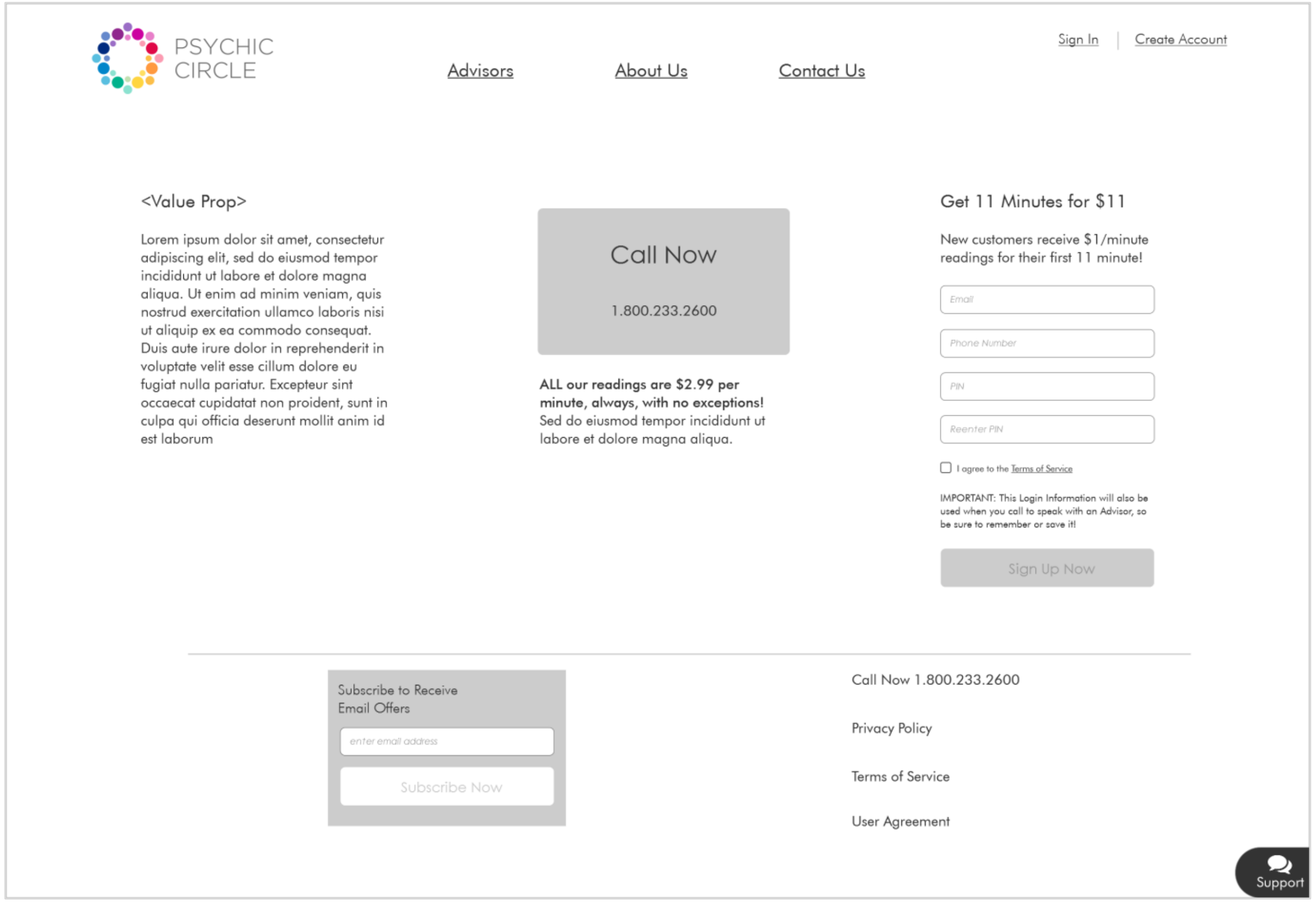

New Brand:

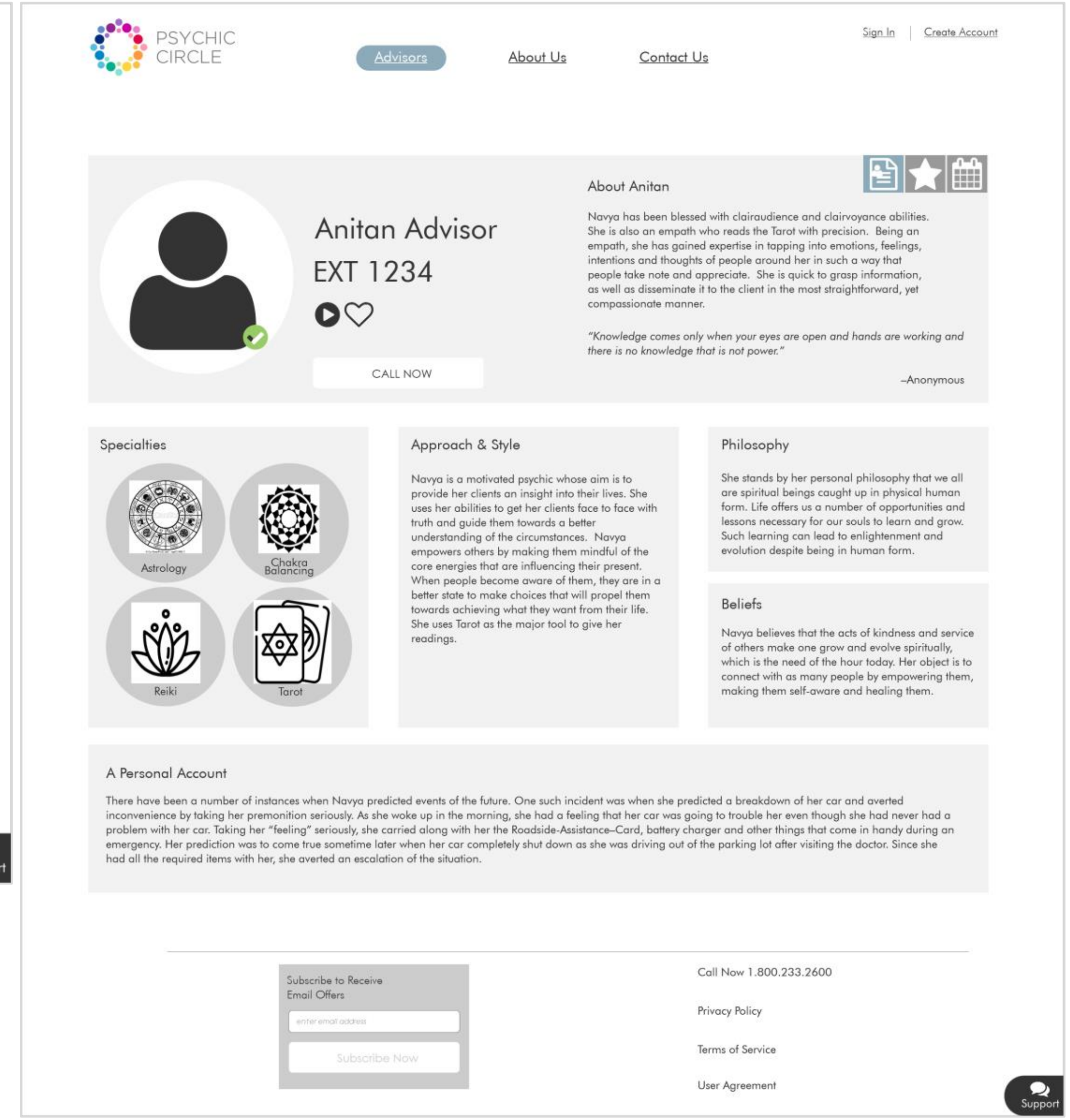


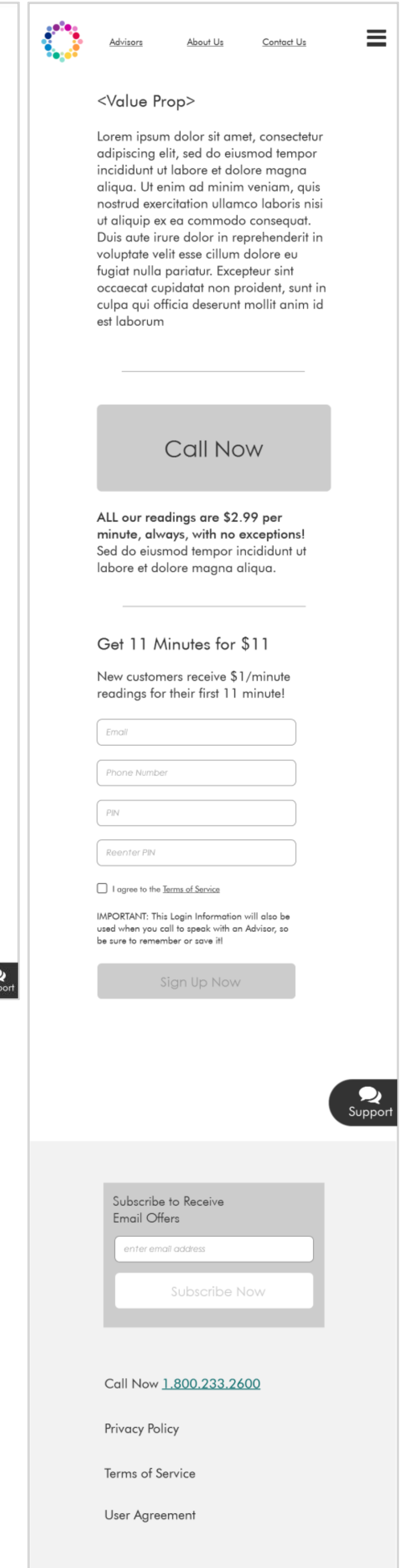
# PSYCHIC CIRCLE: INFORMATION ARCHITECTURE

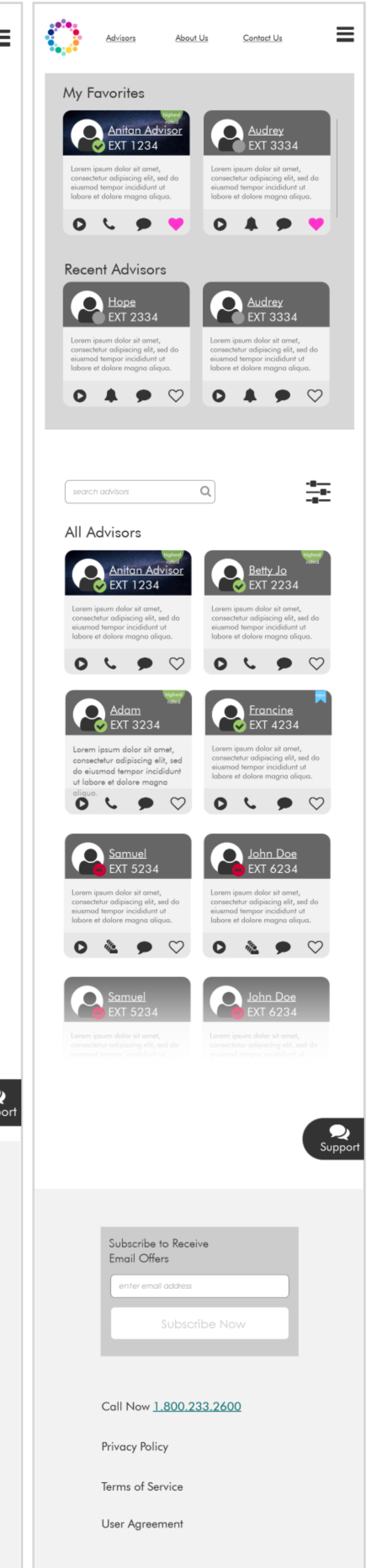


# PSYCHIC CIRCLE: WIREFRAMES



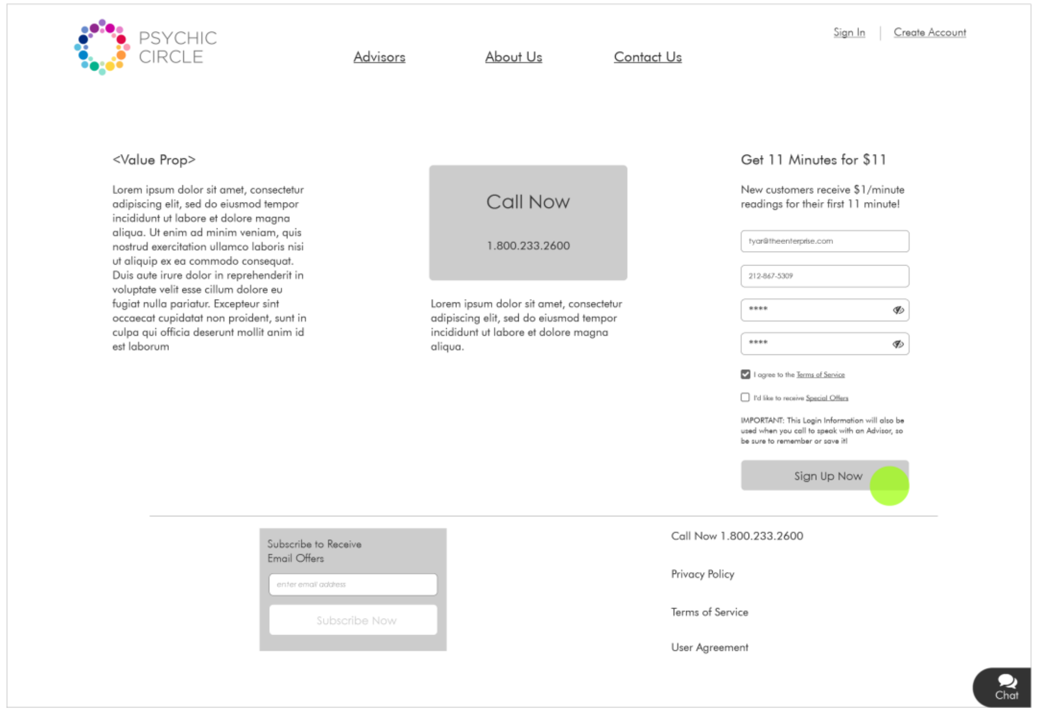




## Design Rationale:

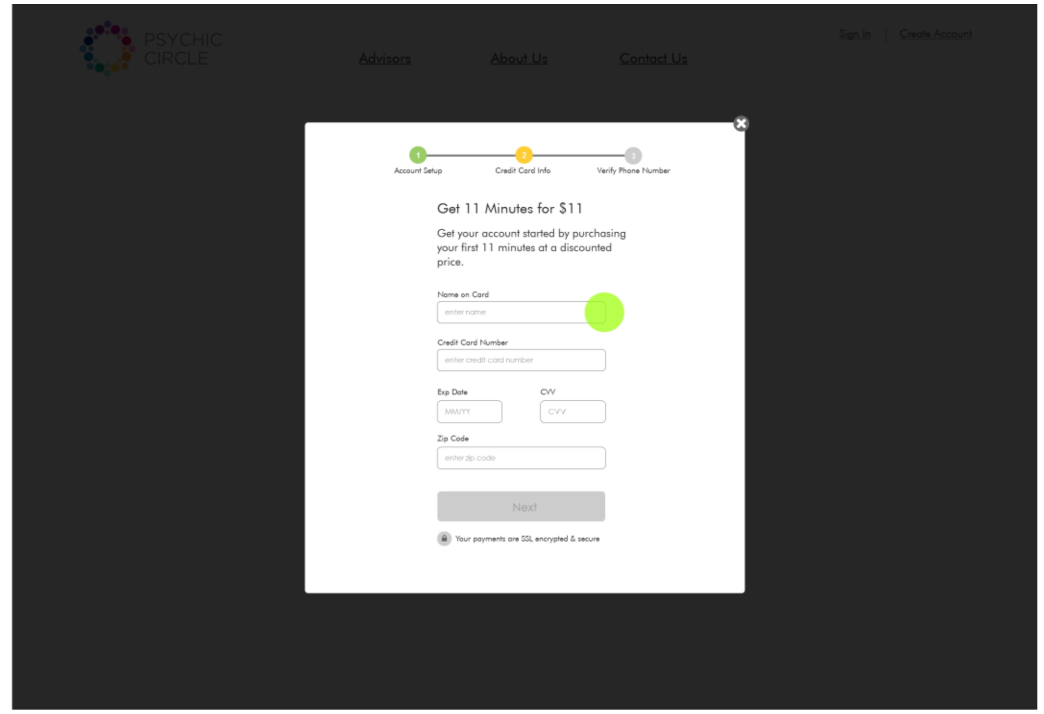
- The client wants their existing brand (Psychic Power) to remain a *content-focused* site, but for Psychic Circle to be all about the *product*—in this case, the Advisors
- 75%+ of the business comes through mobile, so I wanted an app-like feel that was very visual and would wrap columns nicely on small screens

# PSYCHIC CIRCLE: WIREFRAMES (Create an Account)




The Home Page will include a form that is always visible, where a user can set up an account. The SIGN UP button is disabled until the required information is entered AND the *Terms of Service* Checkbox is selected. If the user clicks on the *Terms of Service* link, the terms will display in a popover. (This is to keep the user in context and not take them away from the form or page.

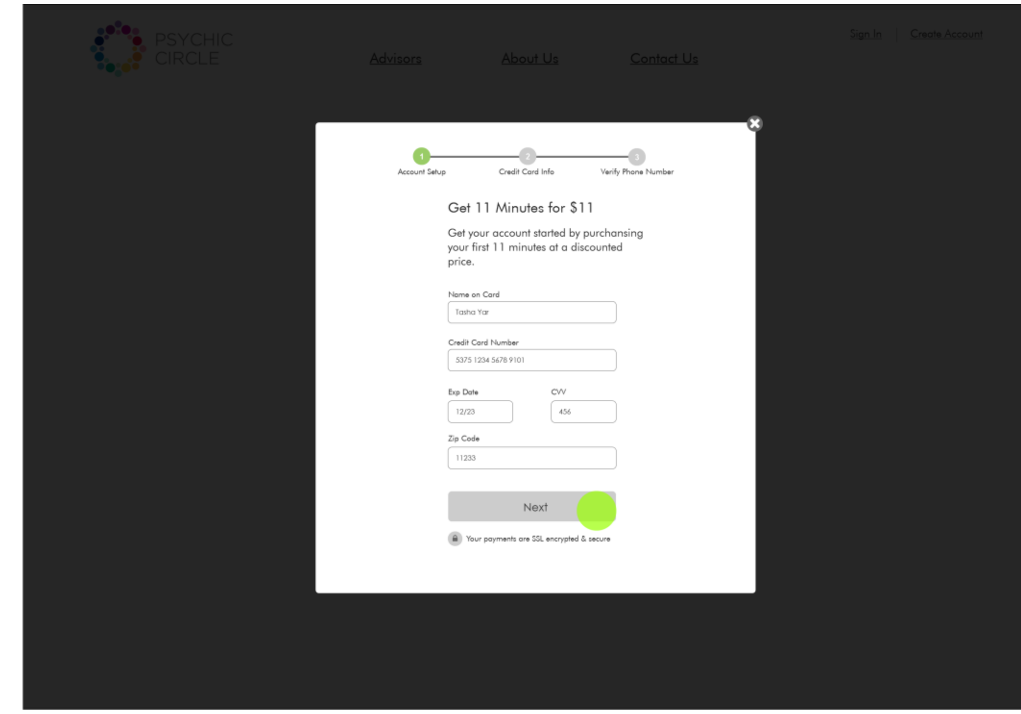
By default, the PIN entered/re-entered by the user is hidden. Tapping the SHOW icon will reveal it in the respective field and the icon will toggle to HIDE.



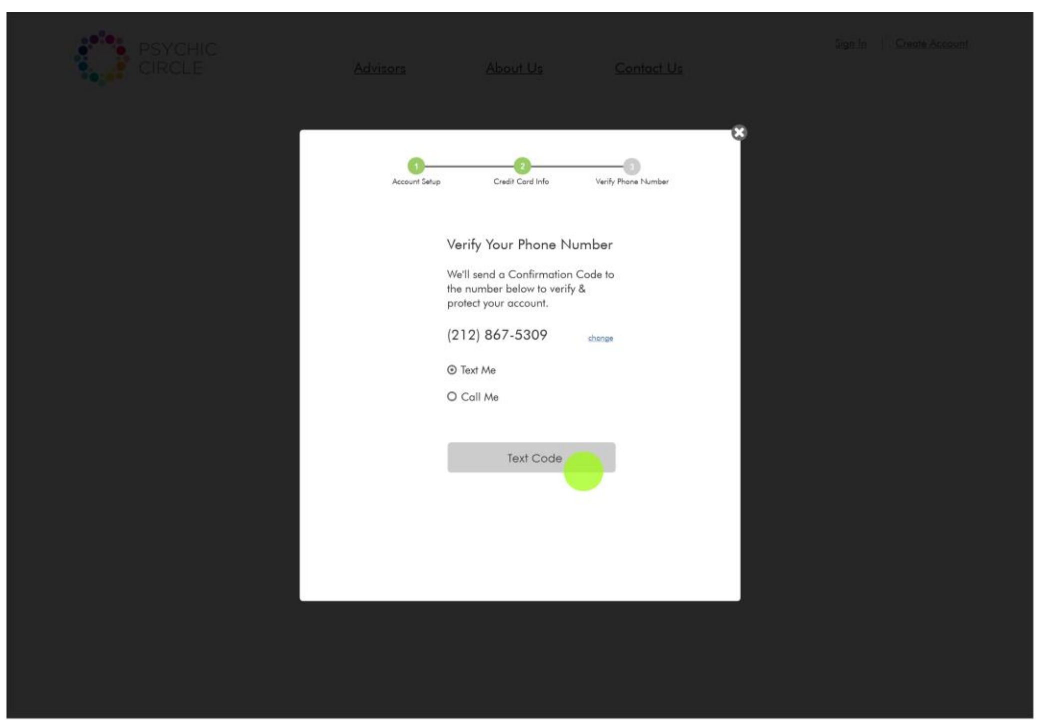

Clicking/Tapping SIGN UP invokes the rest of the flow, in a popover. This helps ensure that the user doesn't navigate away from the flow by clikgin on any of the main or sub-navigation.

The NEXT button is disabled until all fields are completed.

Clicking the "X" icon closes the dialog and does not save any data




The NEXT button is enabled once all fields are completed.

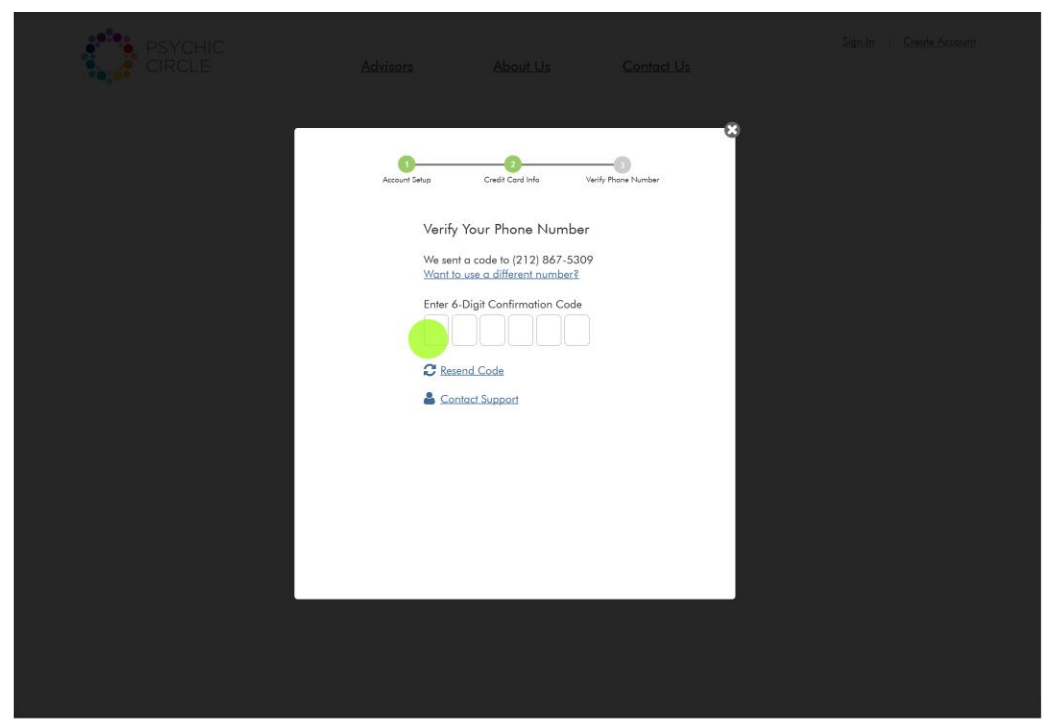



In this step, the PHone Number entered on the previous screen is displayed. This enables the user to view and confirm it in case they've made an error *before* choosing to have the Confirmation Code sent.

The Default selection for method of sending the code is TEXT.

The SEND CODE button is enabled by default, since no action is necessary. The user can change the Send method, but they don't have to in order to go to the next step.

Clicking SEND CODE takes the user to the next page.




Once the user receives clicks SEND CODE, the screen refreshes (but they stay on Step 3).

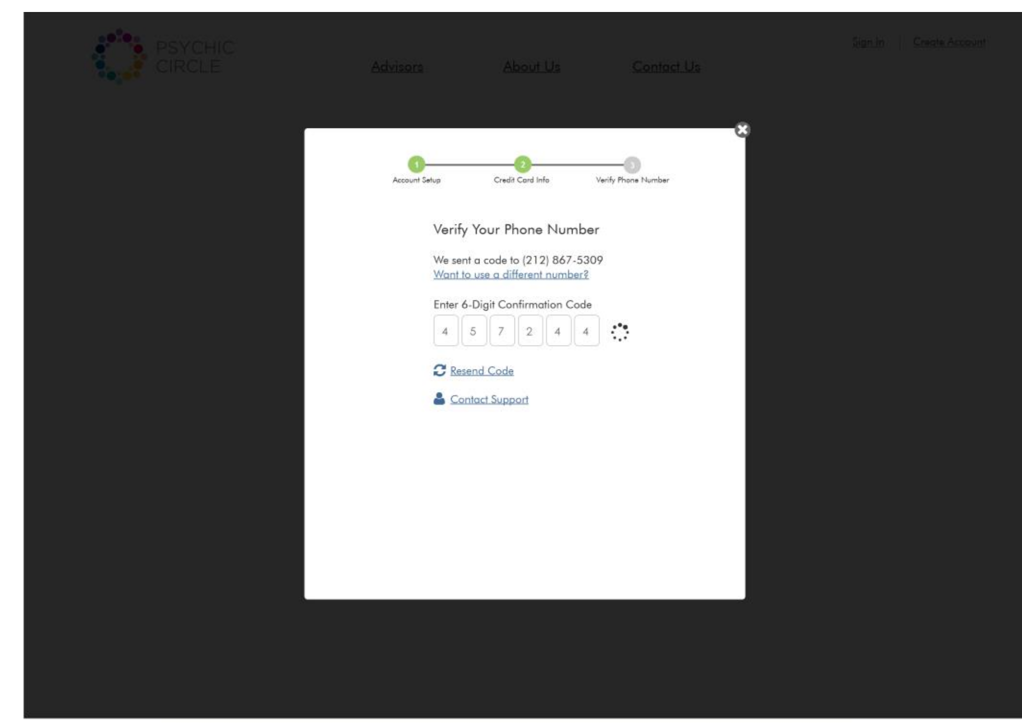
Here, we give the user another opportunity to update the phone number they used to create an account, using the *Want to use a different number* link.

Once the user enters the correct 6-Digit Code, the flow will automatically advance to the next step.

If the incorrect code is entered, an error will display.

If *Send New Code* is clicked, a new code will be sent.

If *Contact Support* is clicked, the user is taken to the *Contact Us* Page.




Once the user receives clicks SEND CODE, the screen refreshes (but they stay on Step 3).

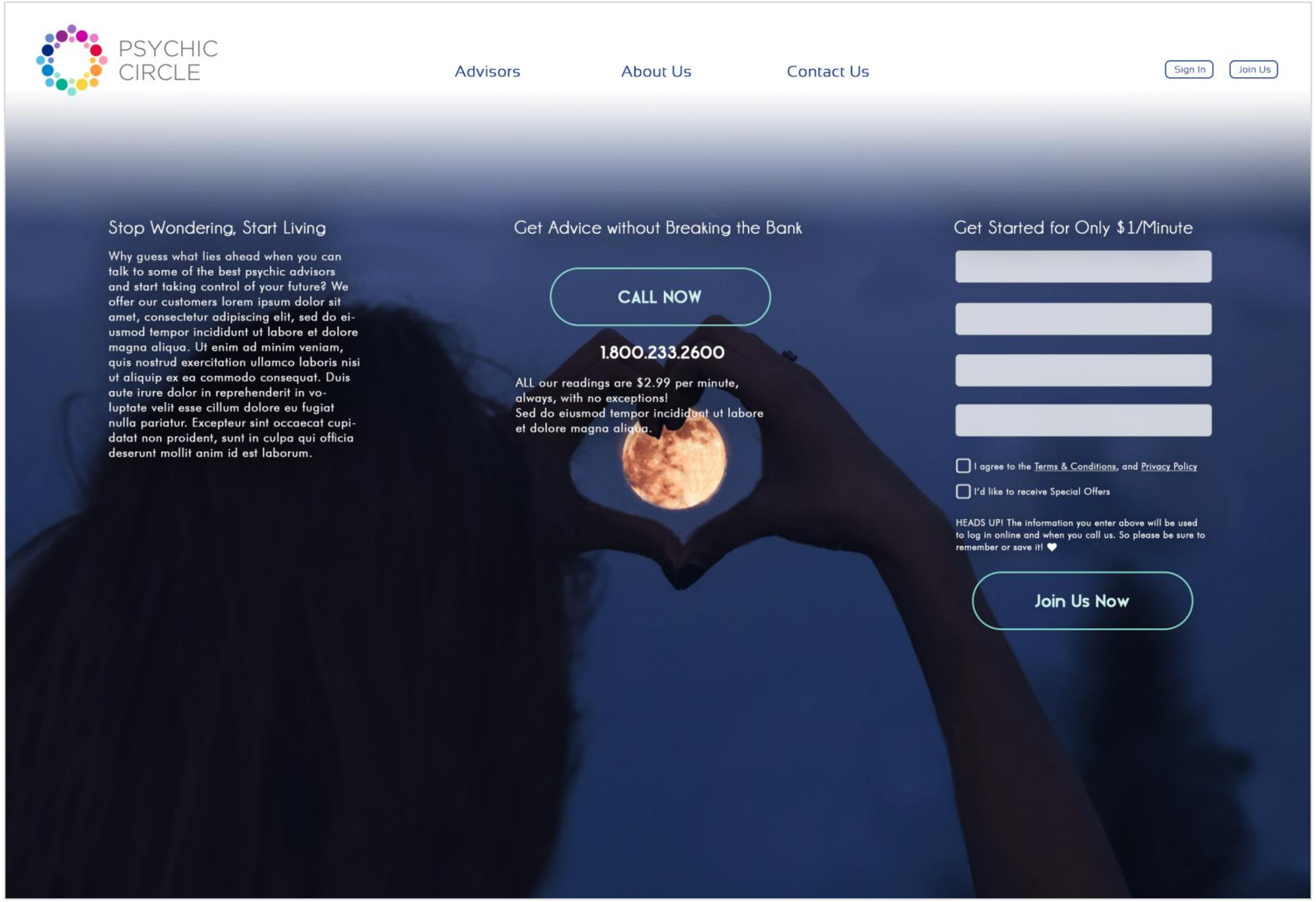
Here, we give the user another opportunity to update the phone number they used to create an account, using the *Want to use a different number* link.

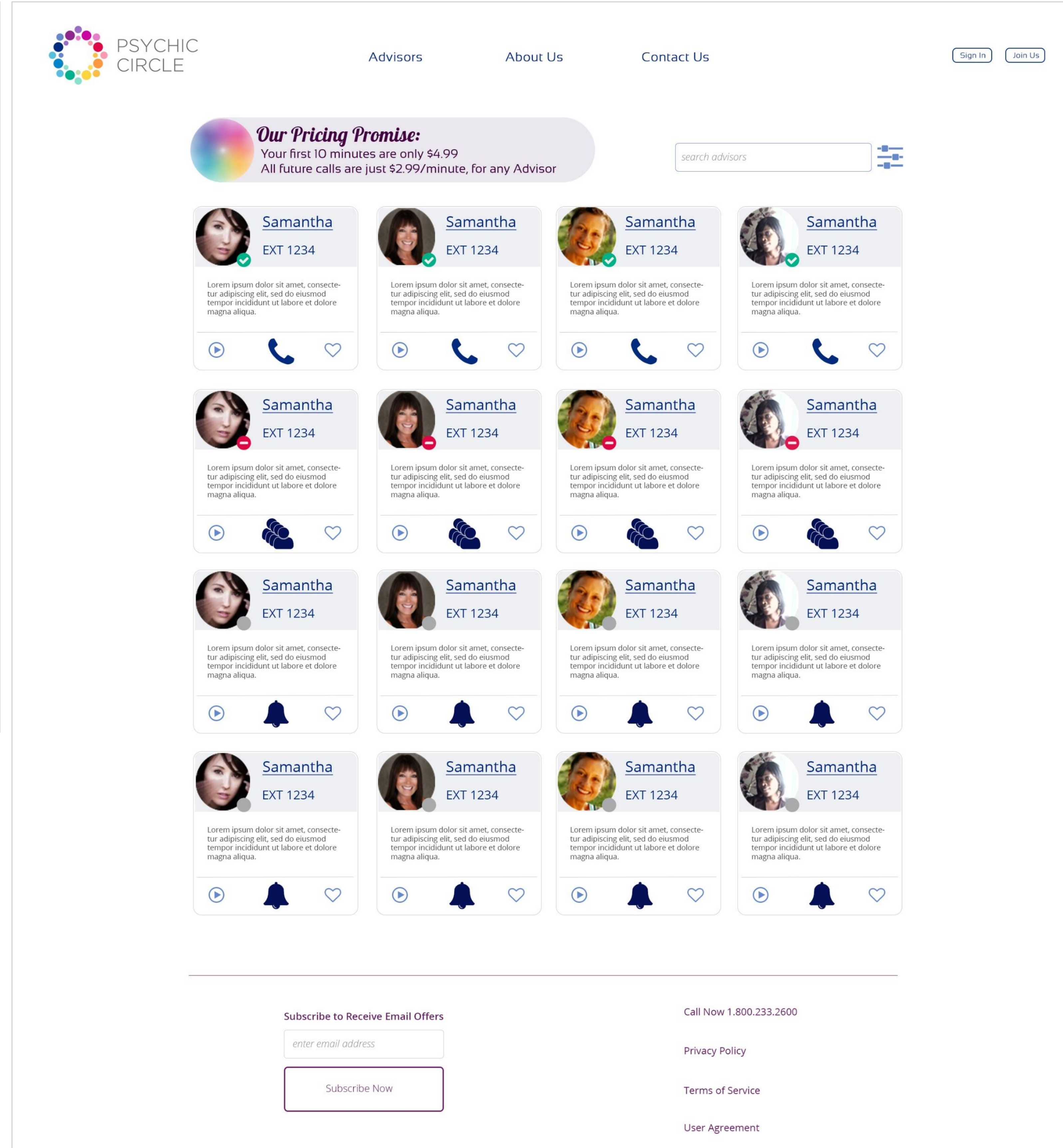
Once the user enters the correct 6-Digit Code, the flow will automatically advance to the next step. Since the validation is done on the server side, a Spinning/Loading animation will display to indicate that the data was received and is being processed.

If the incorrect code is entered, an error will display.

If *Send New Code* is clicked, a new code will be sent.

If *Contact Support* is clicked, the user is taken to the *Contact Us* Page.

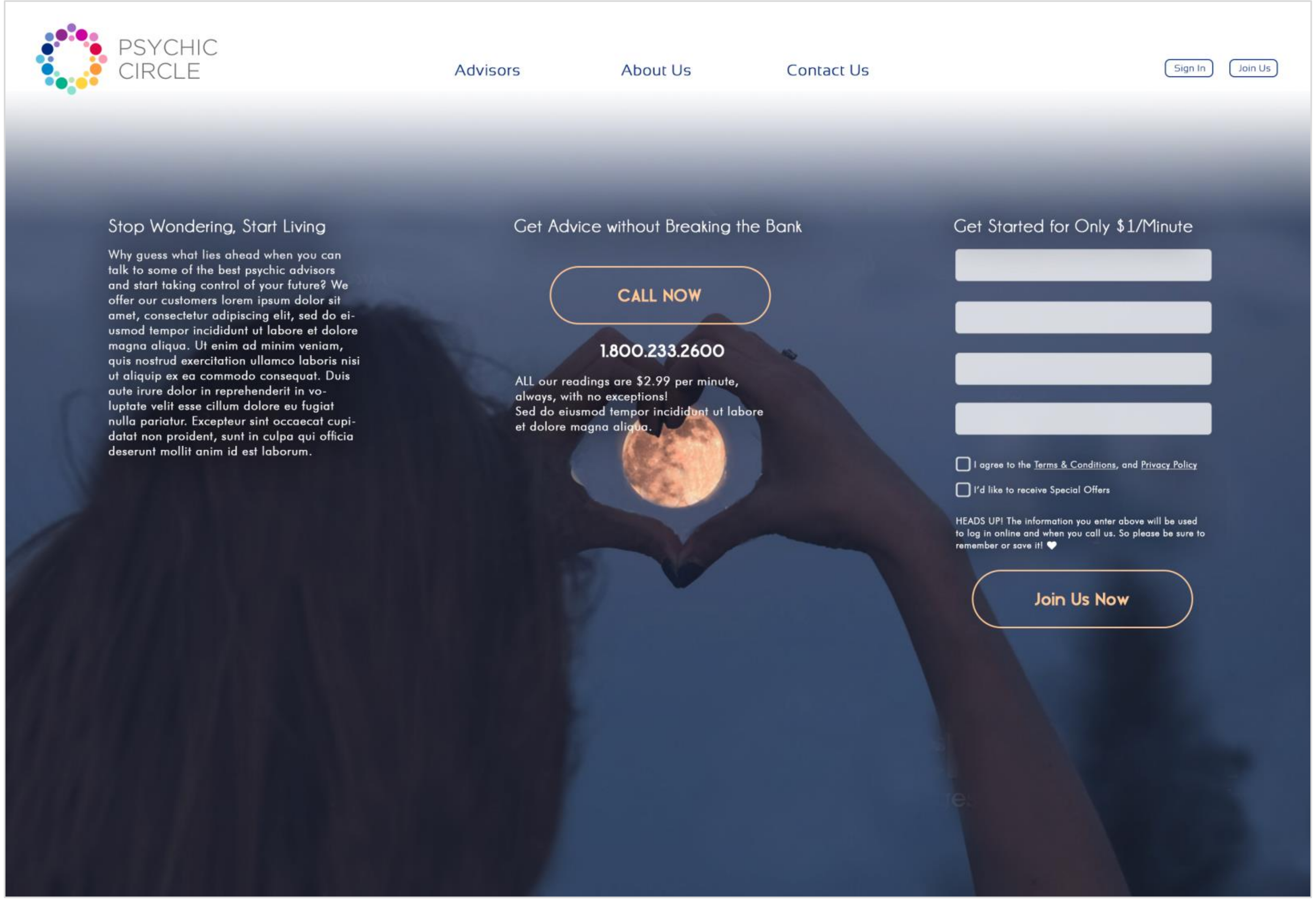


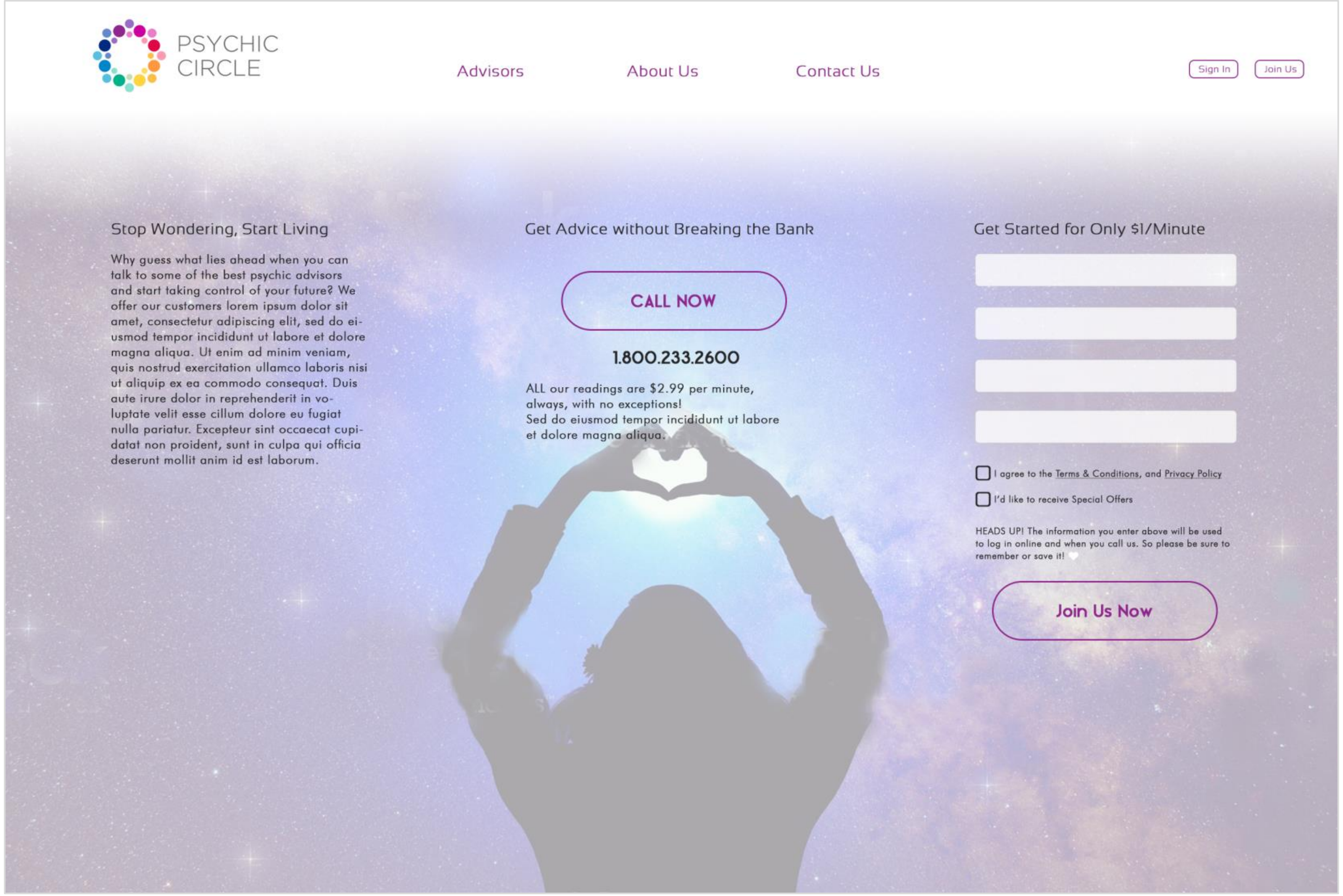




## Design Rationale:

- The client wants to target a younger demographic, so I went with imagery that speaks to the group he described
- Most of the customer base is female, so I selected color palettes that reflect this but are also pulled from the logo they already had designed and aren't too polarizing
- The client wanted circles featured in the visual design

# PSYCHIC CIRCLE: VISUAL DESIGNS

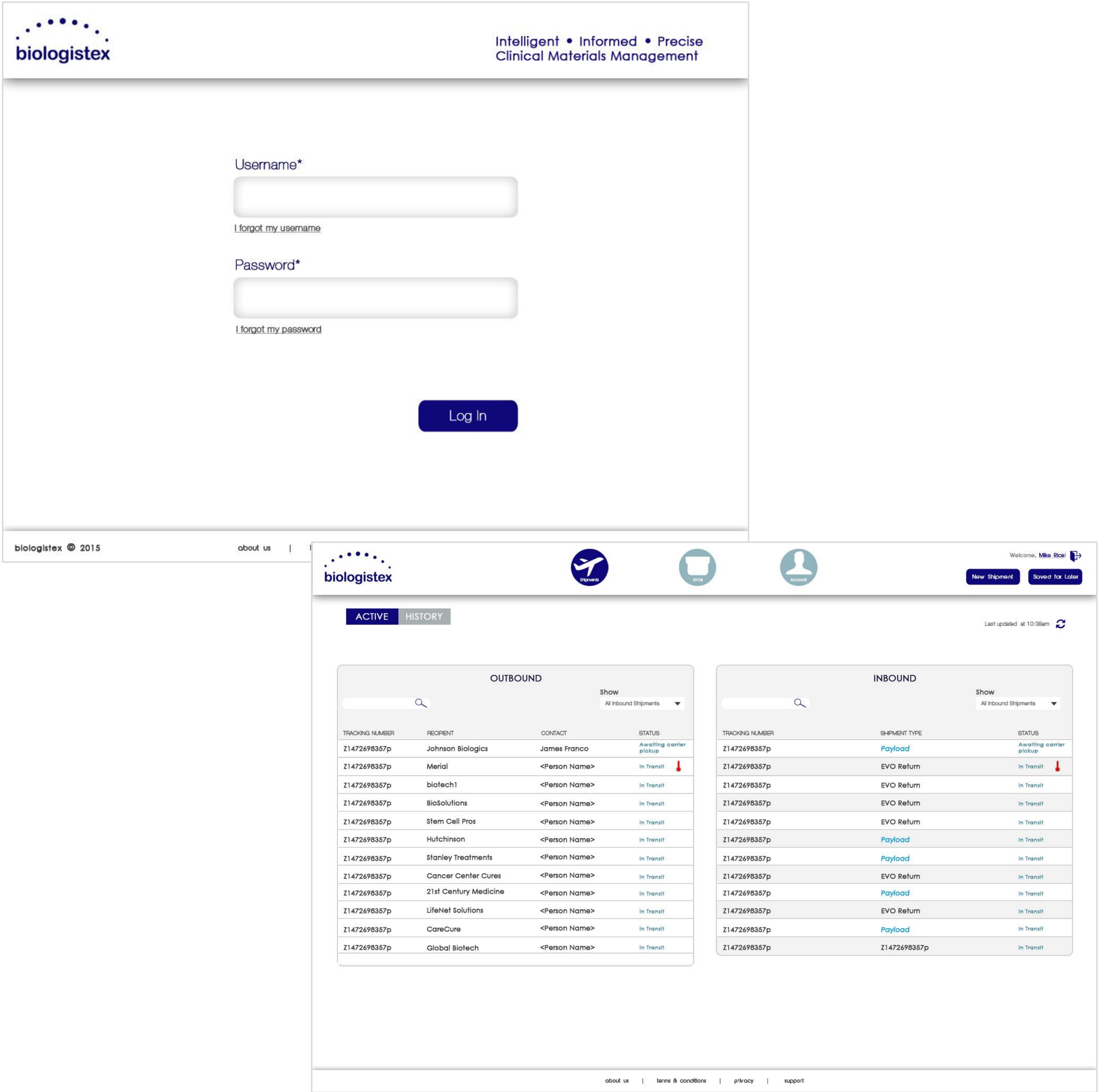



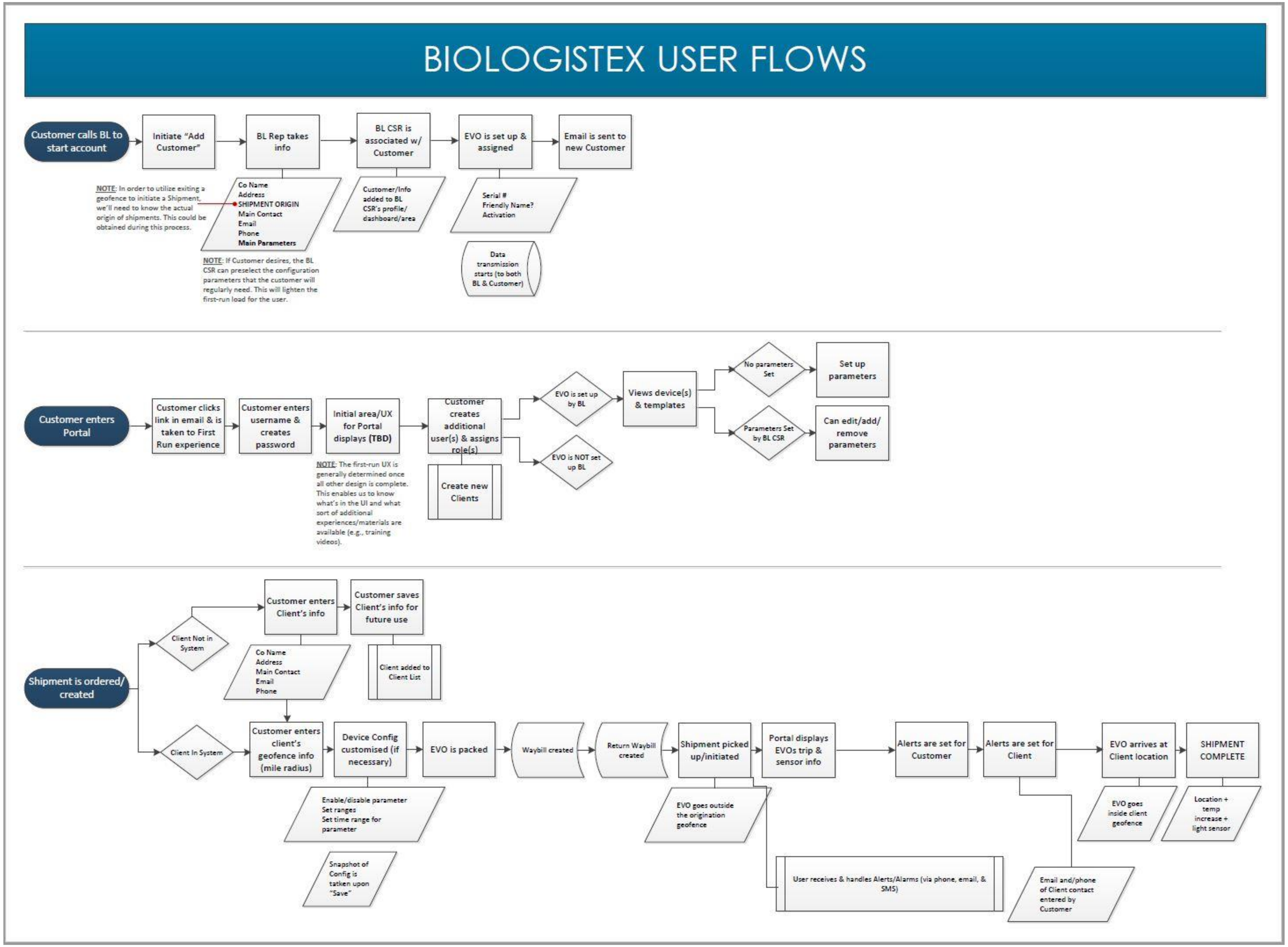
# BIOLOGISTEX

# BIOLOGISTEX: BIOTECH/BIOMATERIALS LOGISTICS

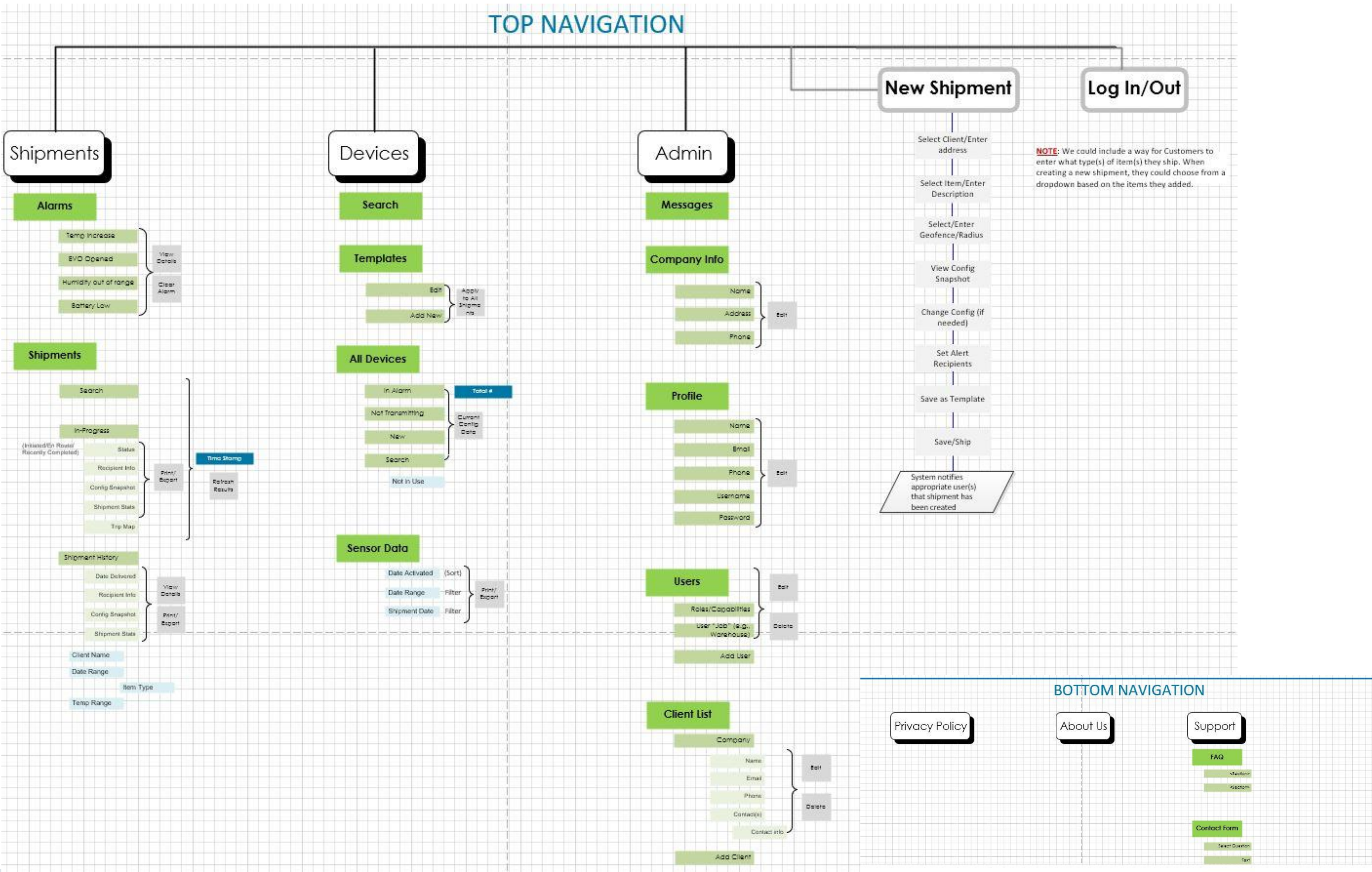
| | |
|---|---|
| Project Description | This brilliant startup identified a startling gap in biotech & healthcare: before their technology, there was no real way to know whether biomaterials were still viable when they arrived at (example) a hospital after being shipped by the biotech firm. For example, if someone is waiting for a lung transplant, by the time the hospital receives the organ, it may no longer be viable due to stresses experienced during shipping. |
| Project Scope | The company was brand new, and while they'd invented & built the shipping box w/extensive tracking & telemetry (the EVO), they had no foundation for the tracking interface.<br>• Create a new shipment creation and tracking interface for logistics employees (and their superiors) at biotech firms<br>• Create a new shipment tracking interface for healthcare establishments & medical staff who are recipients of these shipments |
| Contributions | As sole Design Consultant, I:<br>• Conducted user research & competitive analysis<br>• Researched tracking device & existing tracking portal<br>    • The tracking tech was leveraged from the ankle bracelets worn by house-arrest inmates<br>• Provided consultation & leadership on product & design strategy<br>• Led brainstorming sessions<br>• Created feature spec, user flows, information architecture, wireframes, branding elements, visual designs, style guide, and functional specs |

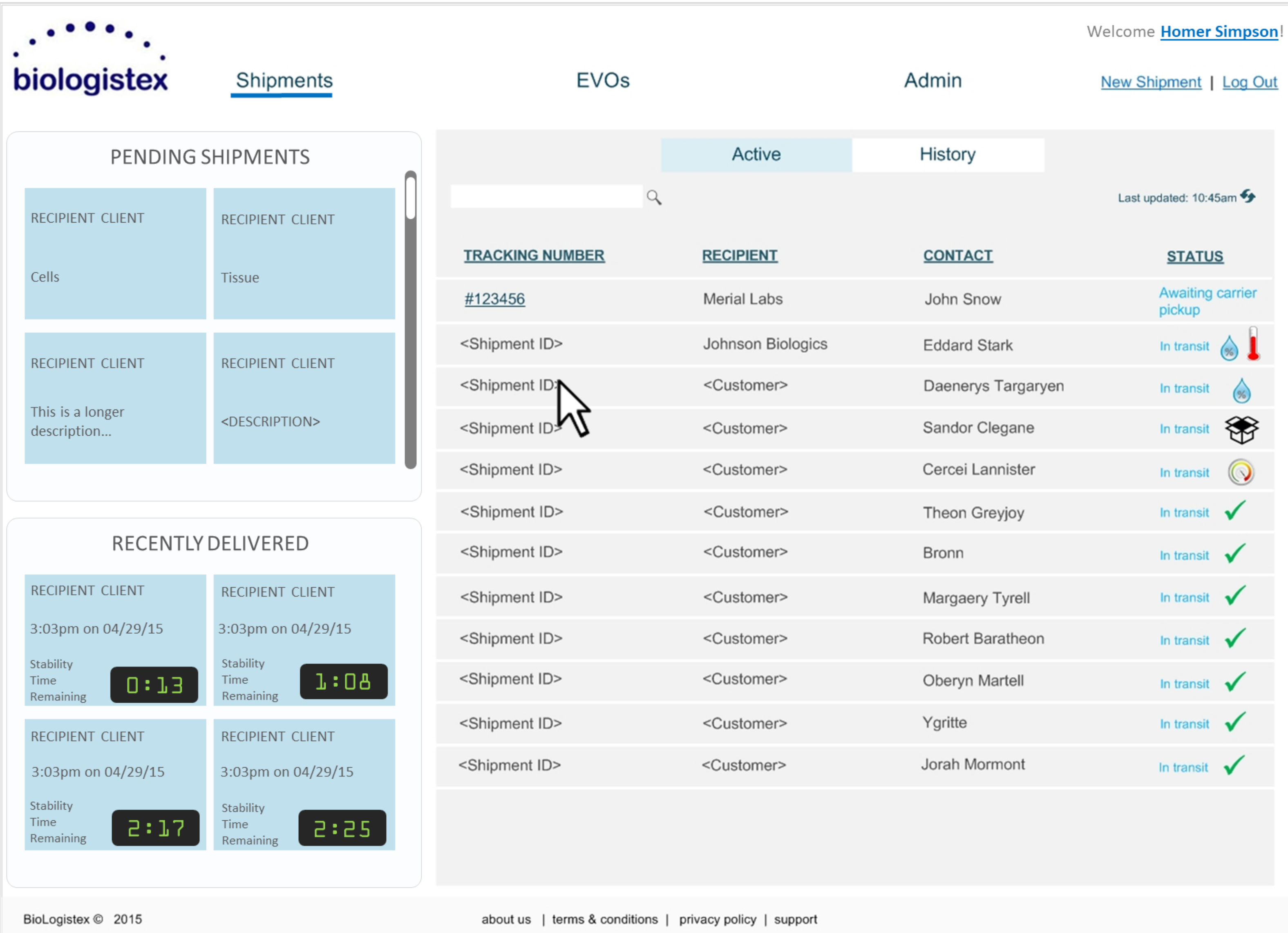


# BIOLOGISTEX: USER FLOWS

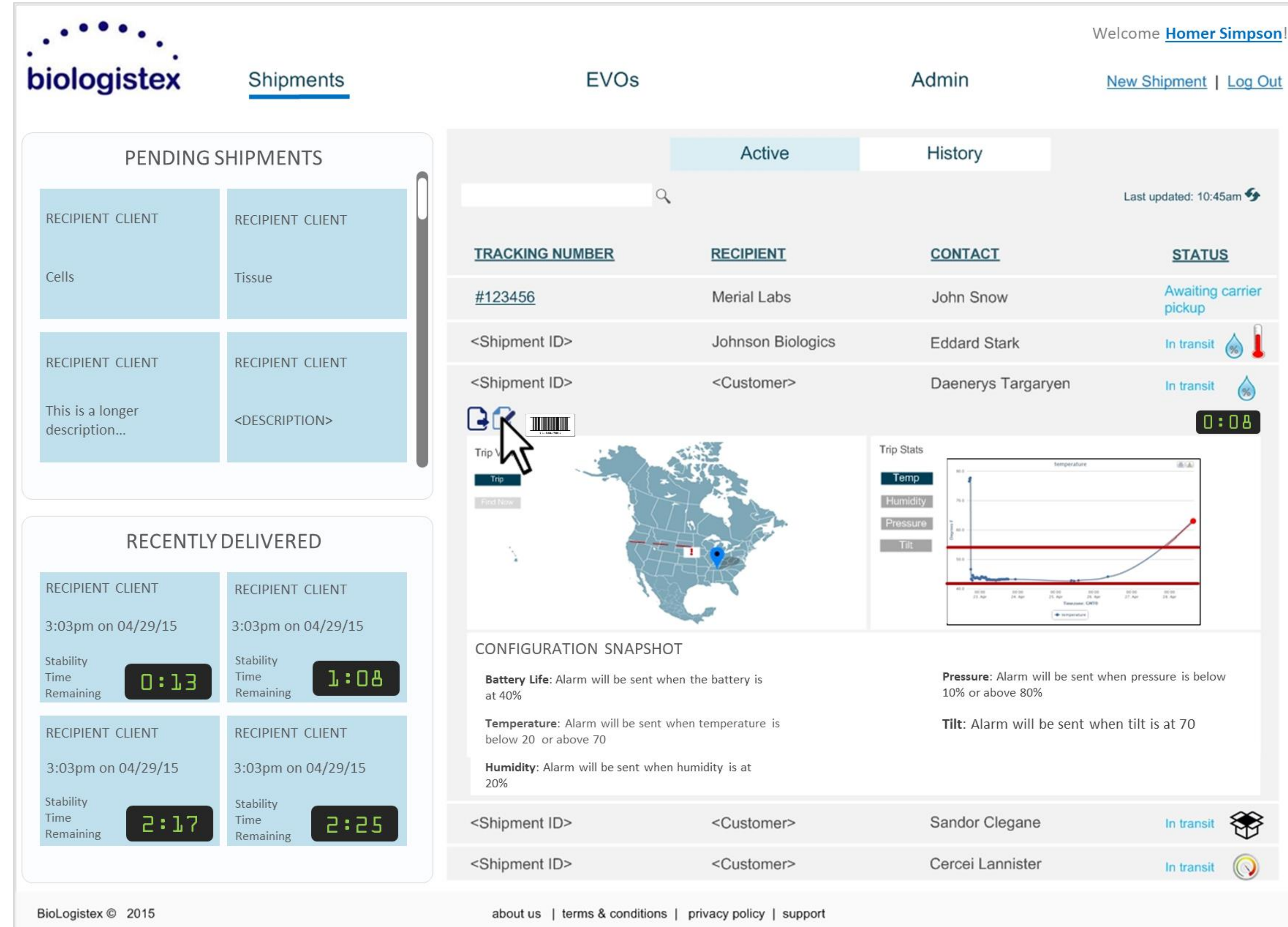


# BIOLOGISTEX : INFORMATION ARCHITECTURE






Clicking on a shipment will expand the row to display Shipment Details.




Shipment Details includes:

- Trip & GPS view
- Sensor Report
- Config snapshot
- Shipment Report
- Edit Shipment
- Stability Timer

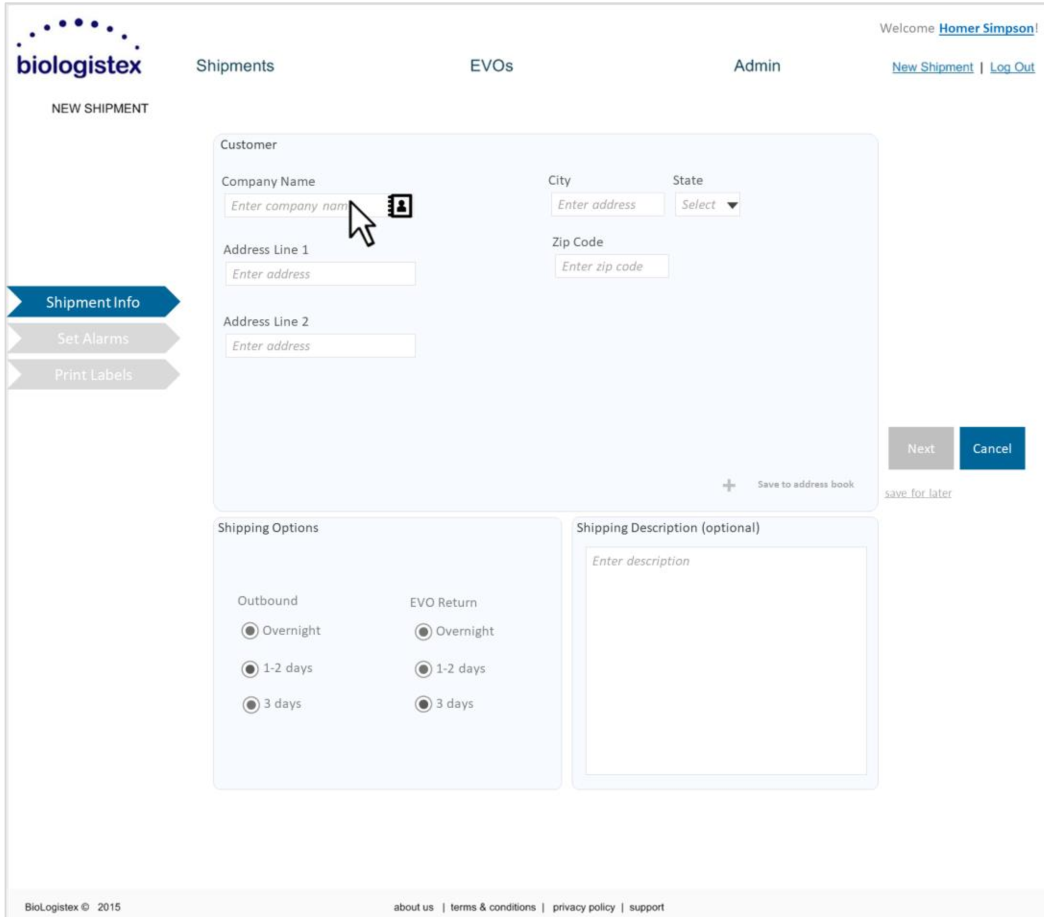
Clicking the Edit icon will invoke the Edit Popover.

## Design Rationale:

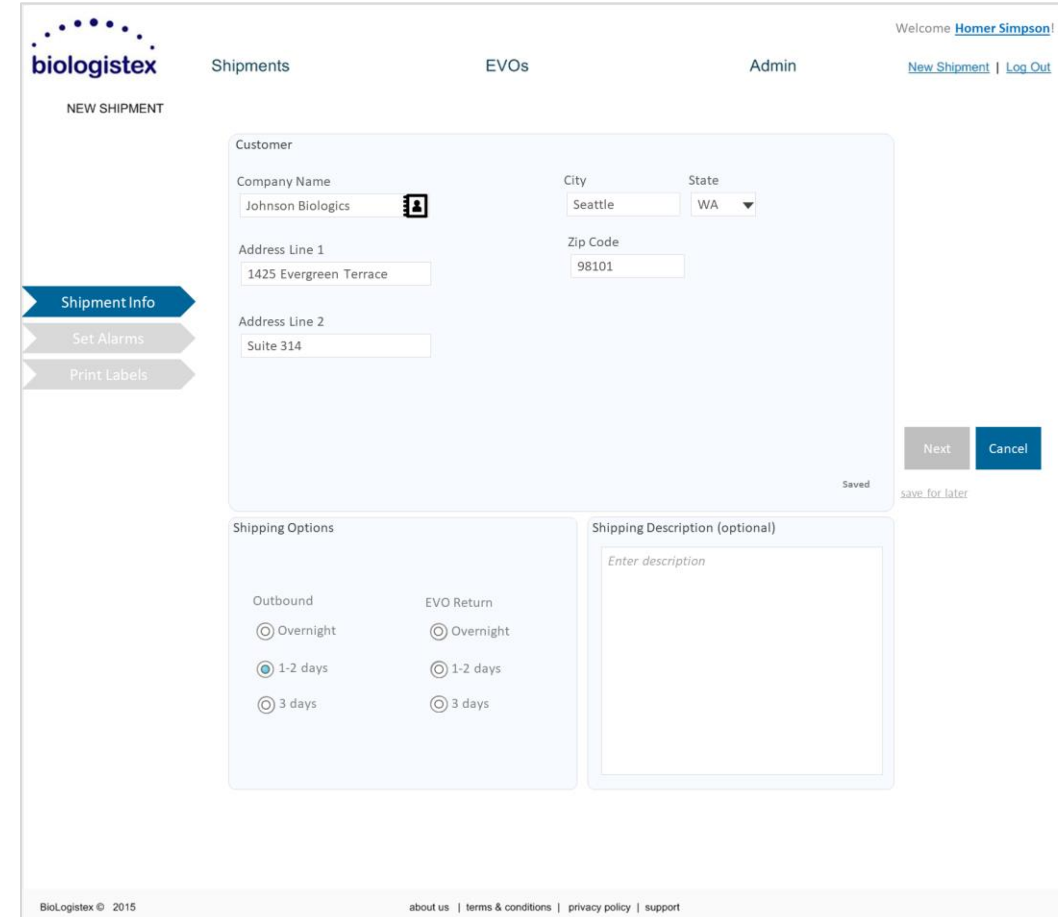
- I sat with some logistics employees at biotech firms to learn how they do their jobs & what their pain points are
    - They're largely using FedEx & UPS or similar, and tracking is disjointed
    - They need to know what's in transit, if there's an issue with a shipment, to see what's been delivered (and its status) and a quick way to get to incomplete shipments
- By giving them more information, though, they'll have *a lot* to consume, so I created a dashboard that only shows the absolutely necessary info at the top level, then drills down or expands to show more when needed

# BIOLOGISTEX : WIREFRAMES (Create a Shipment)

The user can manually enter contact information for the recipient.



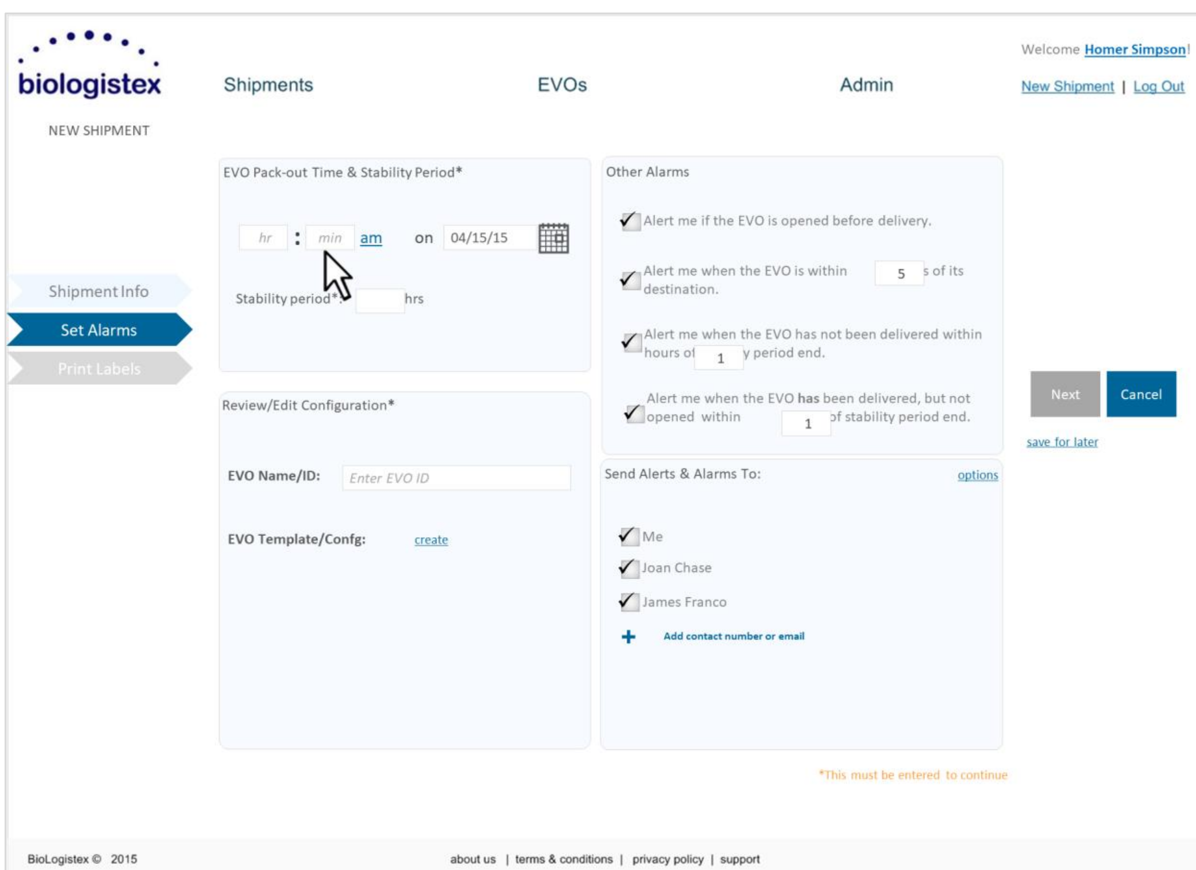

Once saved, the option will be disabled, and the text will change to show that the information has been saved.




The user will need to have an EVO ready, and to enter the pack-out time at the time of creating the shipment.

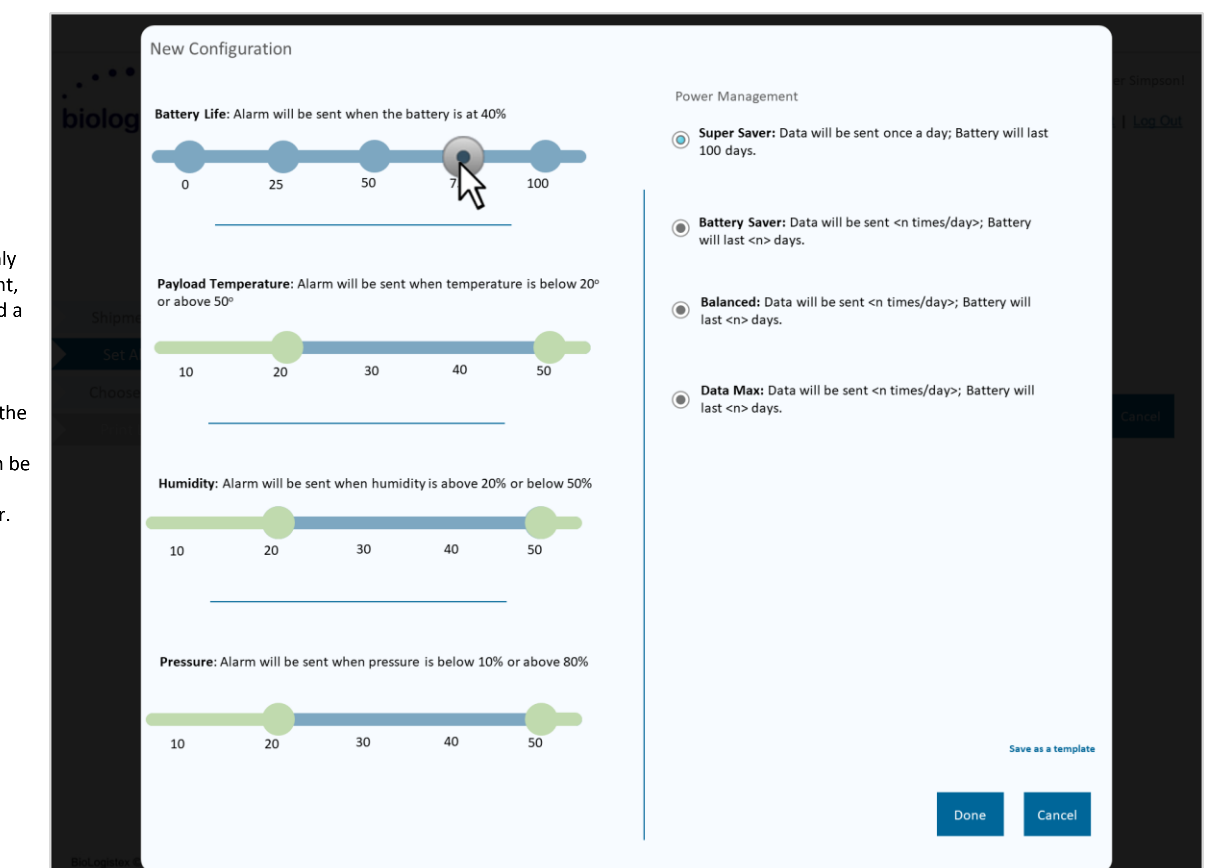
*If they haven't packed the EVO yet,* they won't be able to continue the shipment and will need to save it for later.

<u>**NOTE**</u>: Since we need the user to enter the time in order to let them move to the next step, **there can be no default time in the related fields.**

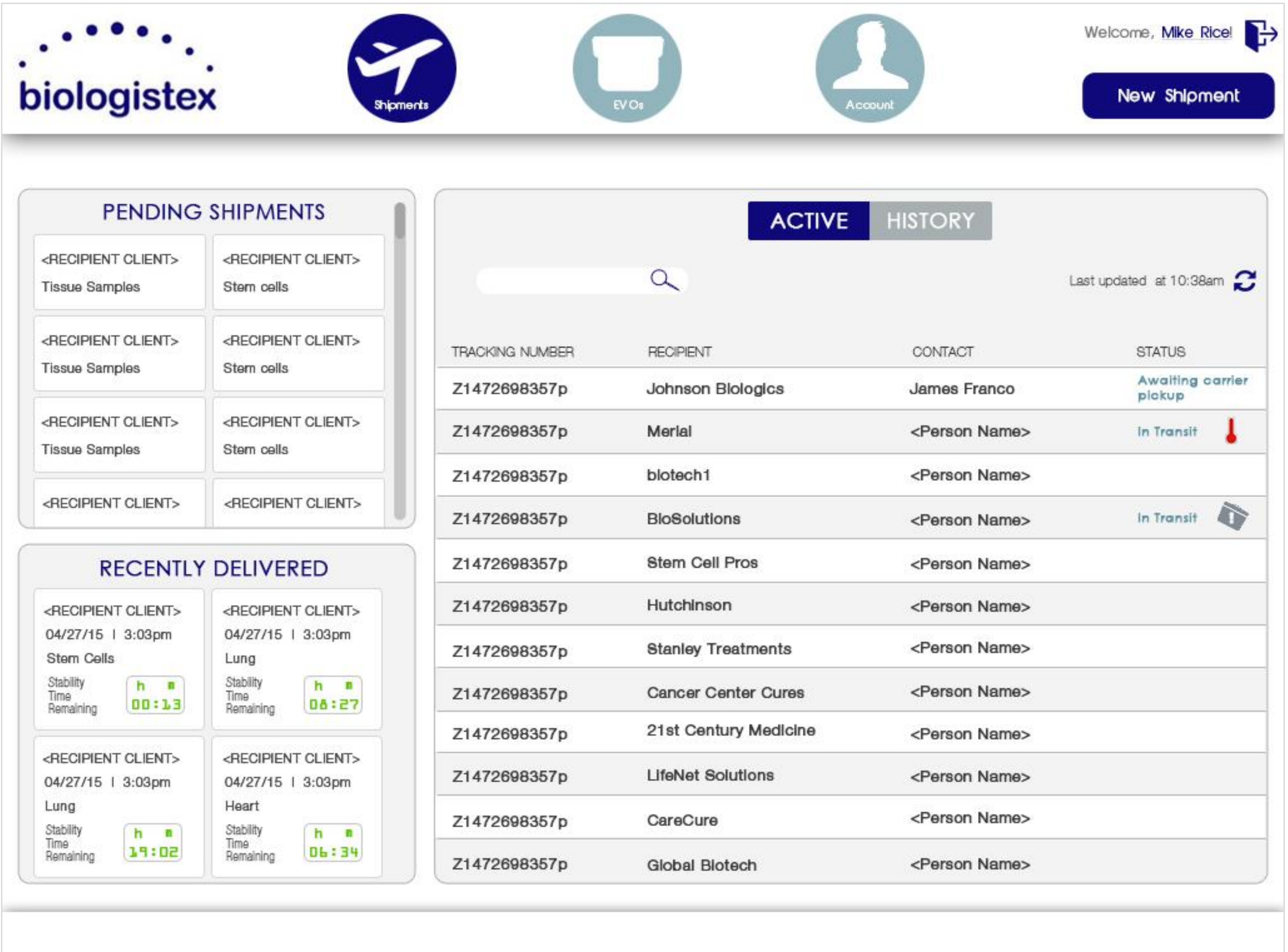


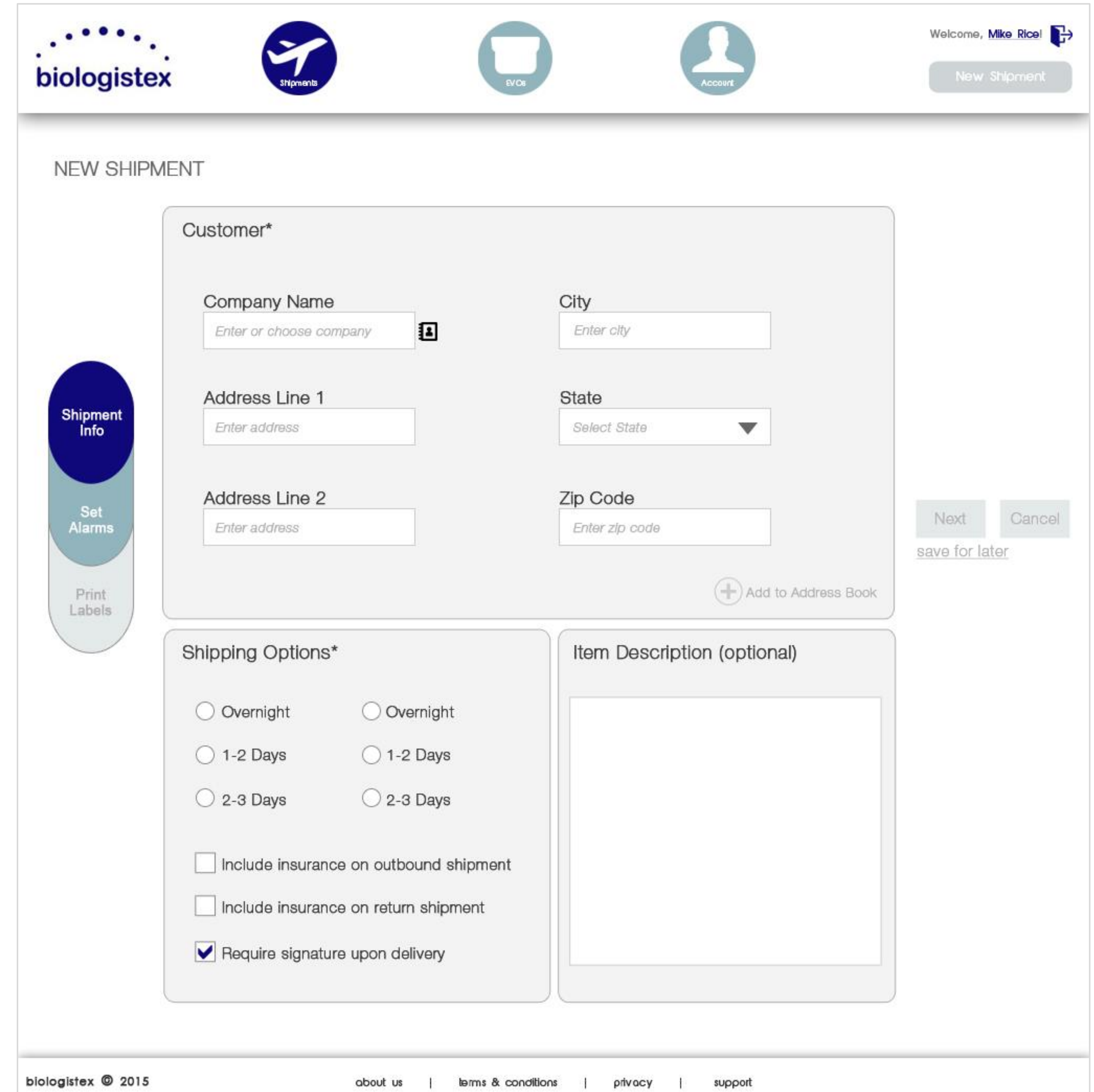

When setting a new configuration, the assumption is that it only applies to THIS shipment, and hence doesn't need a name.

Smart defaults should display here, based on the customer's typical shipment type. This can be set by BL CSRs when setting up the customer.



# BIOLOGISTEX : VISUAL STYLE

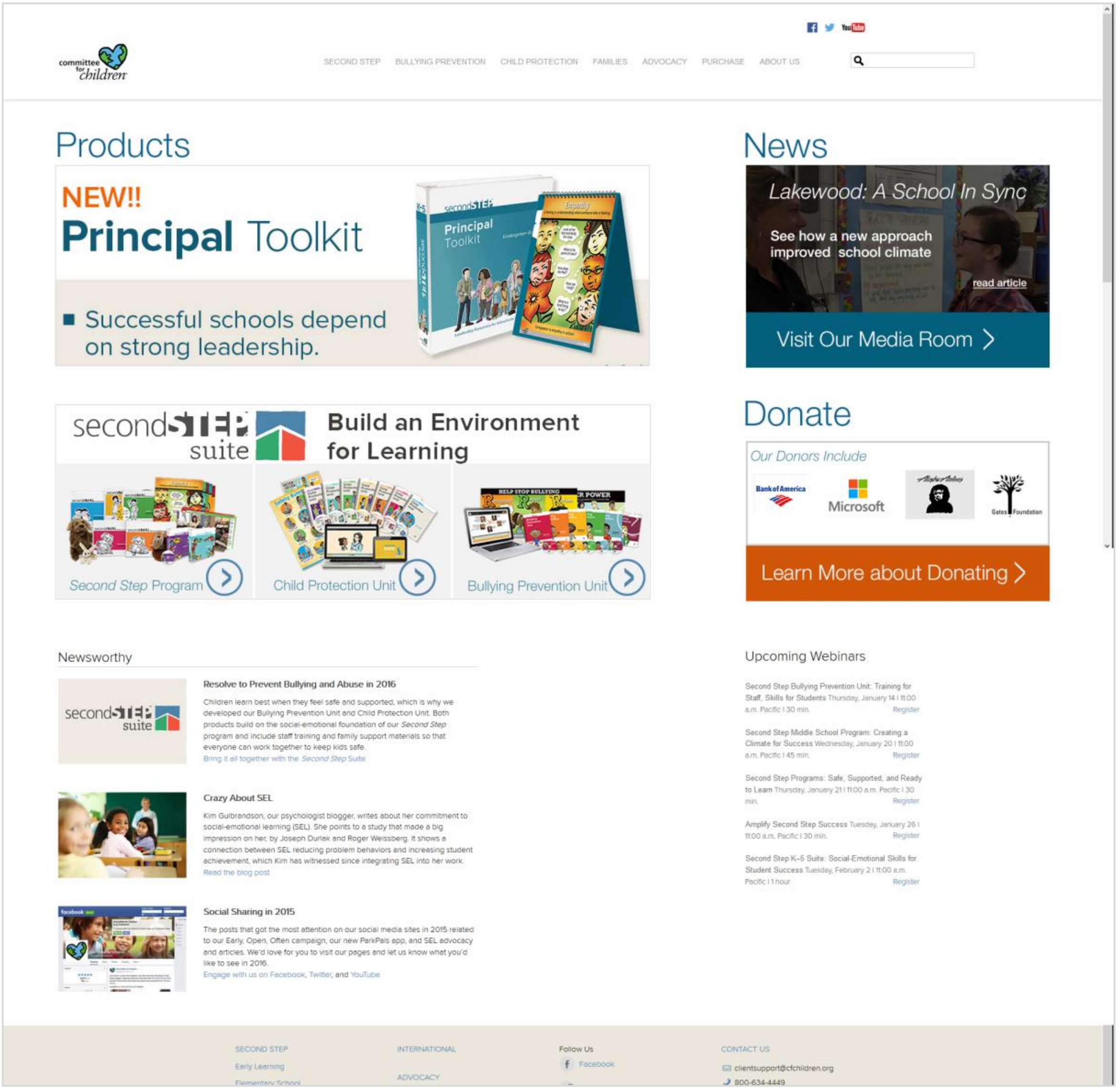


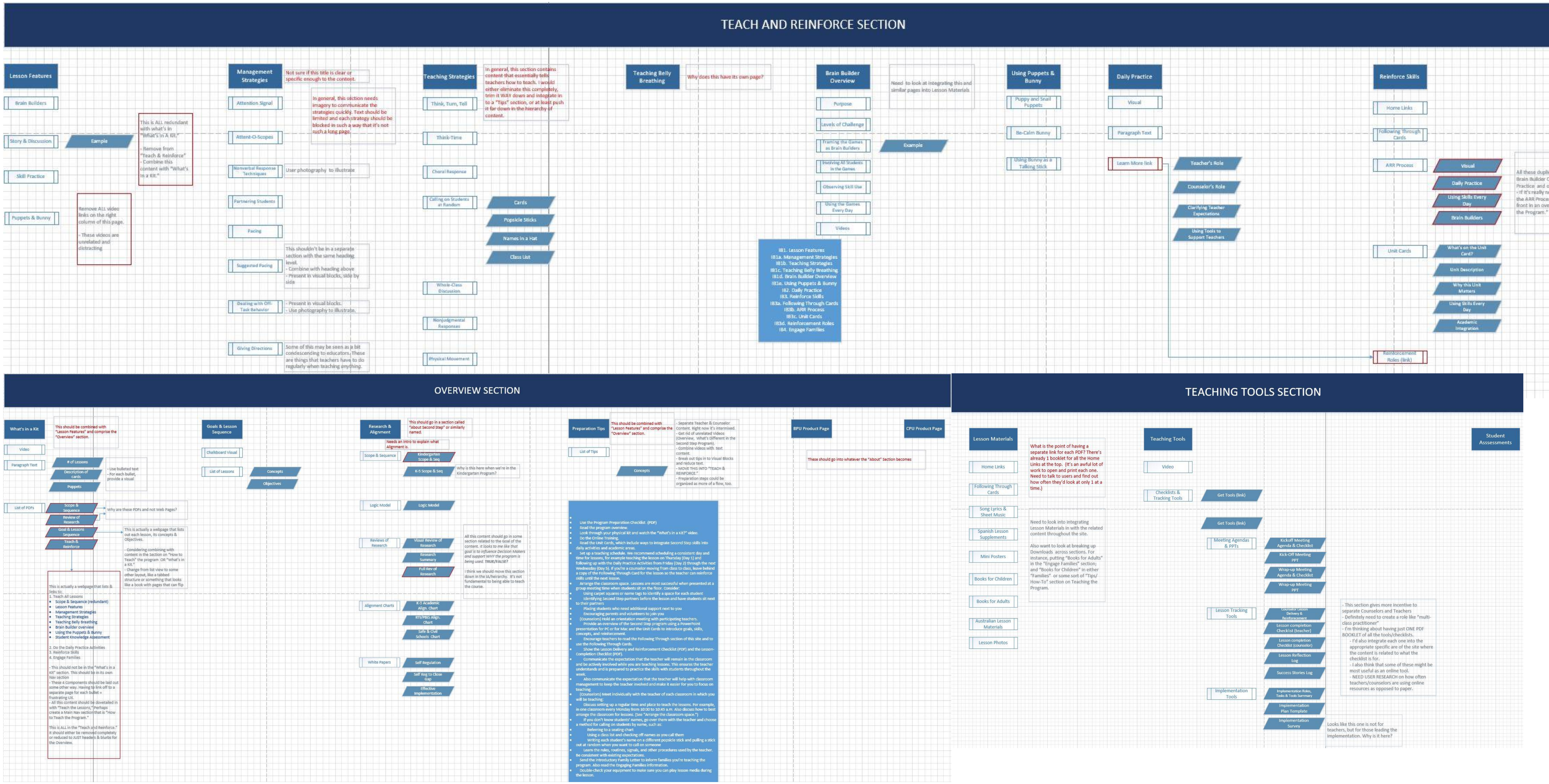
# COMMITEE FOR CHILDREN

# COMMITTEE FOR CHILDREN: LARGE-SCALE SITE REDESIGN

| | |
|---|---|
| Project Description | CFC is an education-focused nonprofit that created the *Second Step Program*, which teaches emotional awareness to children K-12. They had an outdated site that had been created largely by a software development team, and the only design input was from a graphic designer & instructional designers. |
| Project Scope | • Rearchitect the site so that it was streamlined & very usable for busy educators & administrators.<br>• Provide modernized UX & UI |
| Contributions | As sole Design Consultant, I:<br>• Conducted user research & competitive analysis<br>• Documented all existing site & program content<br>• De-duped all content across site<br>• Created new, streamlined IA that significantly reduced site size<br>• Create new UX that grouped content by Lesson & Unit (e.g., based on end user's mental model & usage of the content)<br>• Turned PDF resource library into interactive webpages where possible<br>• Created user flows requirements docs, research docs, wireframes, and functional specs |

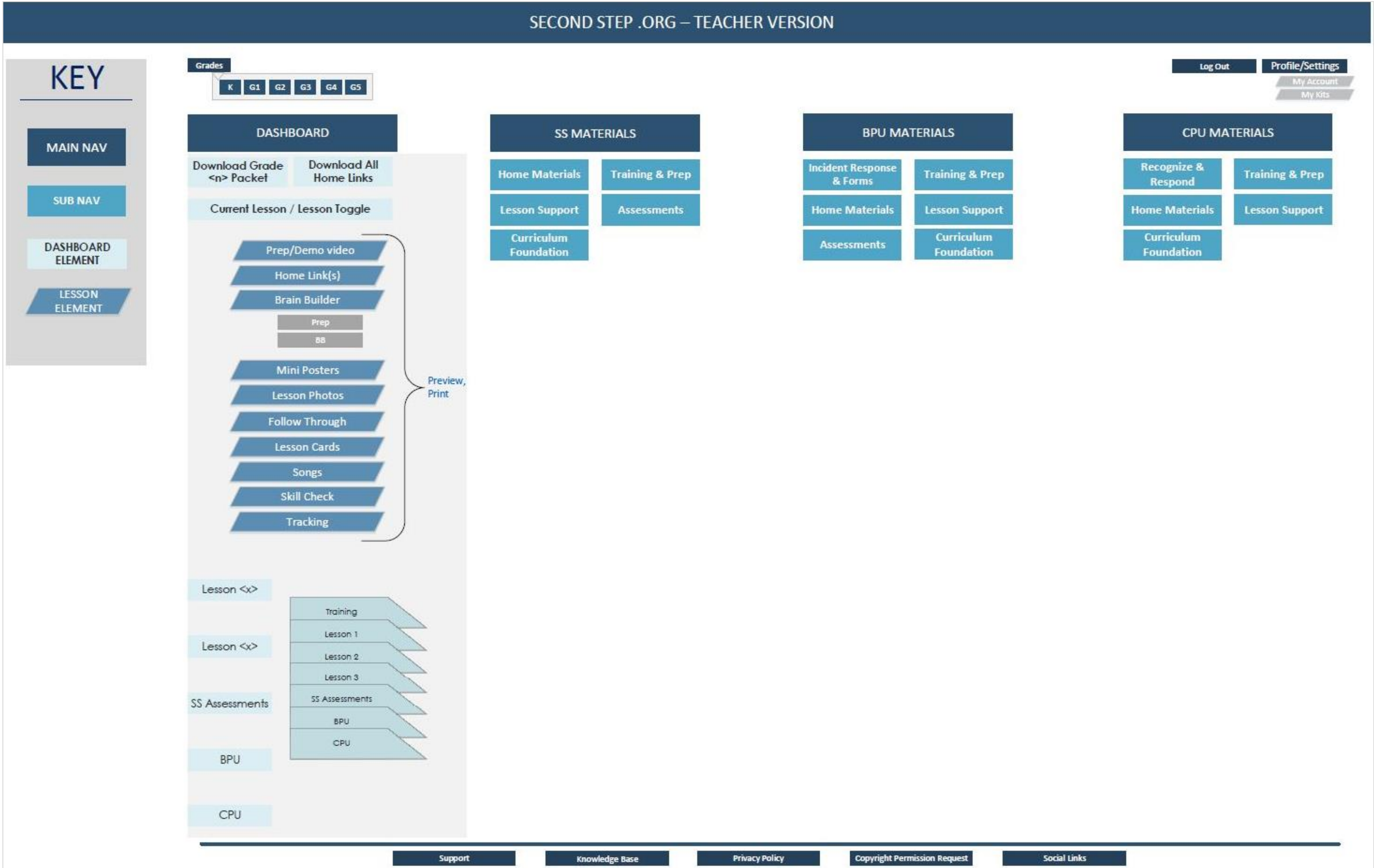


# CFC: *OLD* INFORMATION ARCHITECTURE

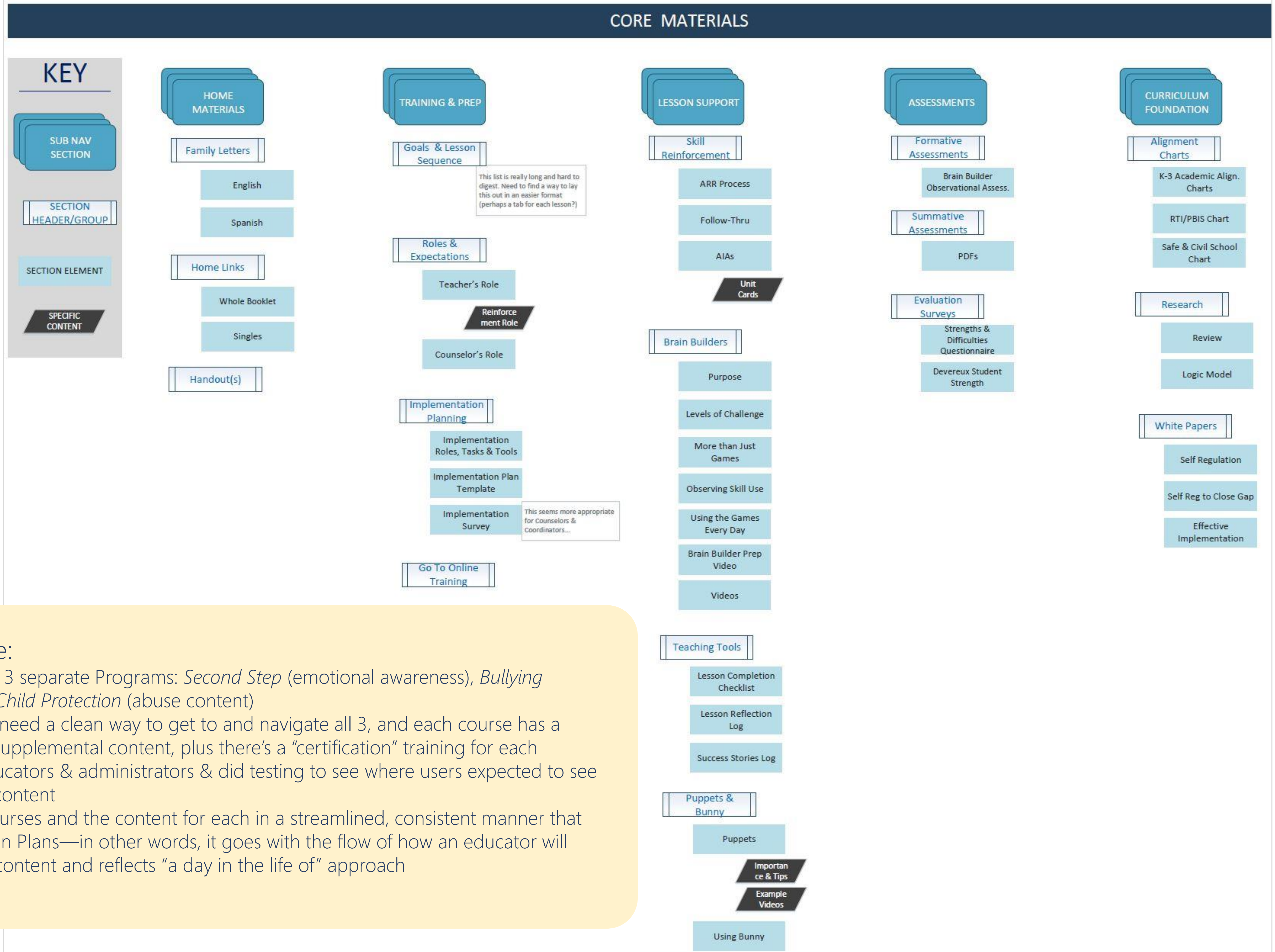



**FOR REFERENCE**: This is just a *part* of the *old* IA, marked up with my comments & questions

# CFC: NEW INFORMATION ARCHITECTURE

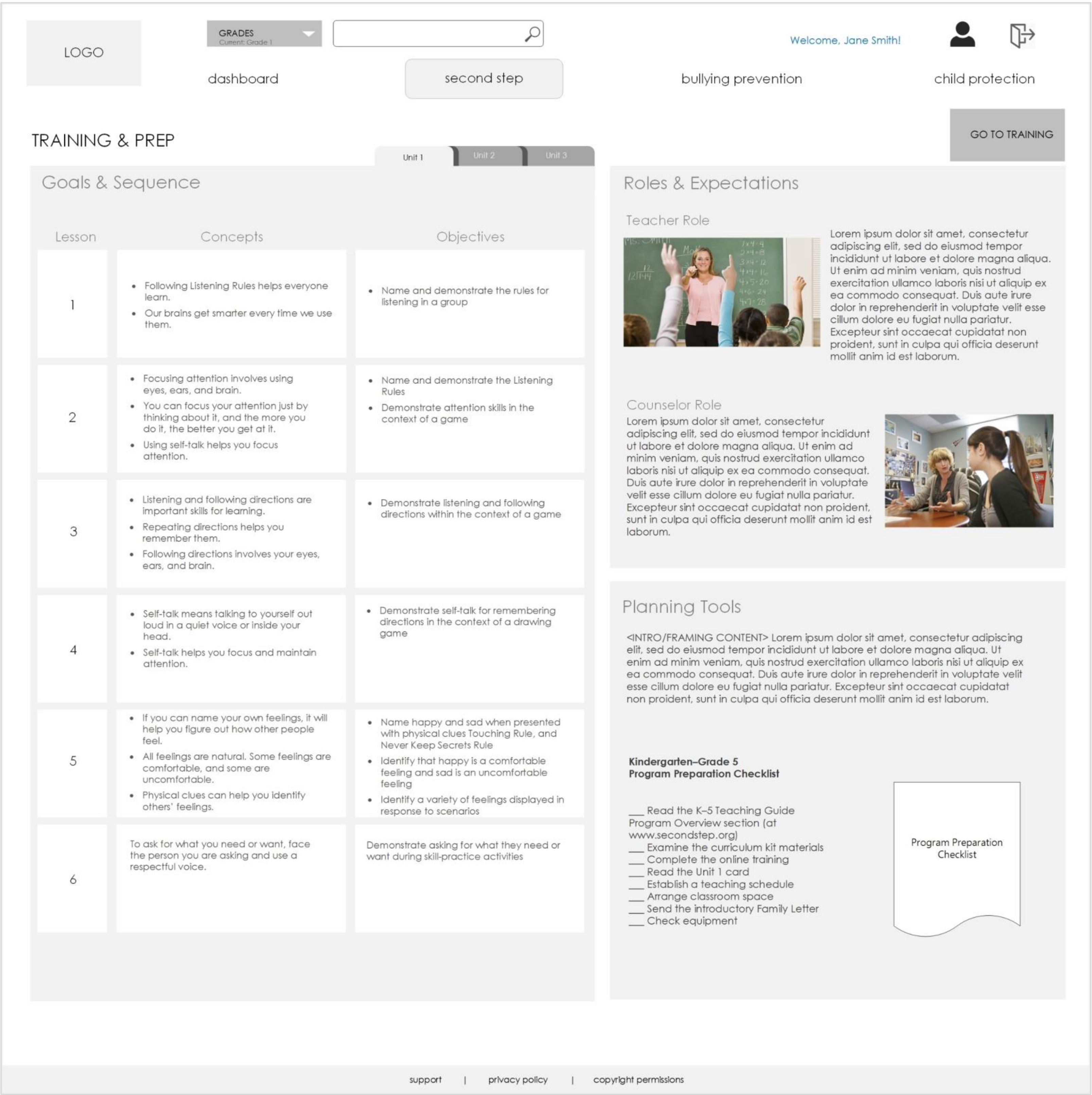


# CFC: NEW INFORMATION ARCHITECTURE




## Design Rationale:

- Second Step has 3 separate Programs: *Second Step* (emotional awareness), *Bullying Prevention*, and *Child Protection* (abuse content)
  - Educators need a clean way to get to and navigate all 3, and each course has a wealth of supplemental content, plus there's a "certification" training for each
- I interviewed educators & administrators & did testing to see where users expected to see which pieces of content
- I chunked the courses and the content for each in a streamlined, consistent manner that follows the Lesson Plans—in other words, it goes with the flow of how an educator will actually use the content and reflects "a day in the life of" approach


LOGO
GRADES
Current: Grade 1
Welcome, Jane Smith!
dashboard
second step
bullying prevention
child protection
TRAINING & PREP
GO TO TRAINING
Unit 1
Unit 2
Unit 3
Goals & Sequence
Lesson
Concepts
Objectives
1
Following Listening Rules helps everyone learn.
Our brains get smarter every time we use them.
Name and demonstrate the rules for listening in a group
2
Focusing attention involves using eyes, ears, and brain.
You can focus your attention just by thinking about it, and the more you do it, the better you get at it.
Using self-talk helps you focus attention.
Name and demonstrate the Listening Rules
Demonstrate attention skills in the context of a game
3
Listening and following directions are important skills for learning.
Repeating directions helps you remember them.
Following directions involves your eyes, ears, and brain.
Demonstrate listening and following directions within the context of a game
4
Self-talk means talking to yourself out loud in a quiet voice or inside your head.
Self-talk helps you focus and maintain attention.
Demonstrate self-talk for remembering directions in the context of a drawing game
5
If you can name your own feelings, it will help you figure out how other people feel.
All feelings are natural. Some feelings are comfortable, and some are uncomfortable.
Physical clues can help you identify others' feelings.
Name happy and sad when presented with physical clues Touching Rule, and Never Keep Secrets Rule
Identify that happy is a comfortable feeling and sad is an uncomfortable feeling
Identify a variety of feelings displayed in response to scenarios
6
To ask for what you need or want, face the person you are asking and use a respectful voice.
Demonstrate asking for what they need or want during skill-practice activities
Roles & Expectations
Teacher Role
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.
Counselor Role
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Planning Tools
<INTRO/FRAMING CONTENT> Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.
Kindergarten–Grade 5
Program Preparation Checklist
___ Read the K–5 Teaching Guide Program Overview section (at www.secondstep.org)
___ Examine the curriculum kit materials
___ Complete the online training
___ Read the Unit 1 card
___ Establish a teaching schedule
___ Arrange classroom space
___ Send the introductory Family Letter
___ Check equipment
Program Preparation Checklist
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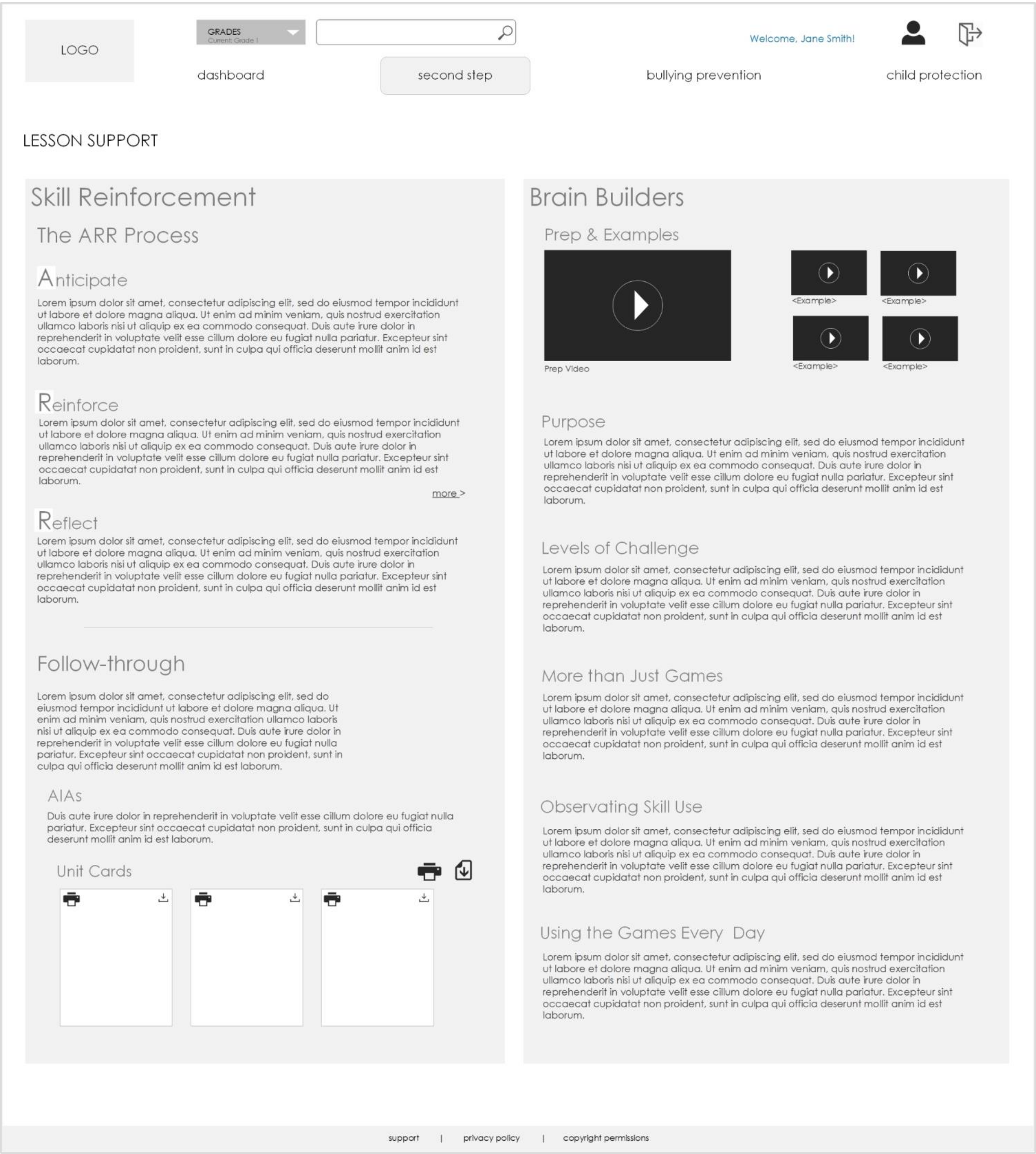
LOGO
GRADES
Welcome, Jane Smith!
dashboard
second step
bullying prevention
child protection
LESSON SUPPORT
Skill Reinforcement
The ARR Process
Anticipate
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.
Reinforce
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more >
Reflect
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Follow-through
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AIAs
Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.
Unit Cards
Brain Builders
Prep & Examples
Prep Video
<Example>
<Example>
<Example>
<Example>
Purpose
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Levels of Challenge
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More than Just Games
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.
Observating Skill Use
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Using the Games Every Day
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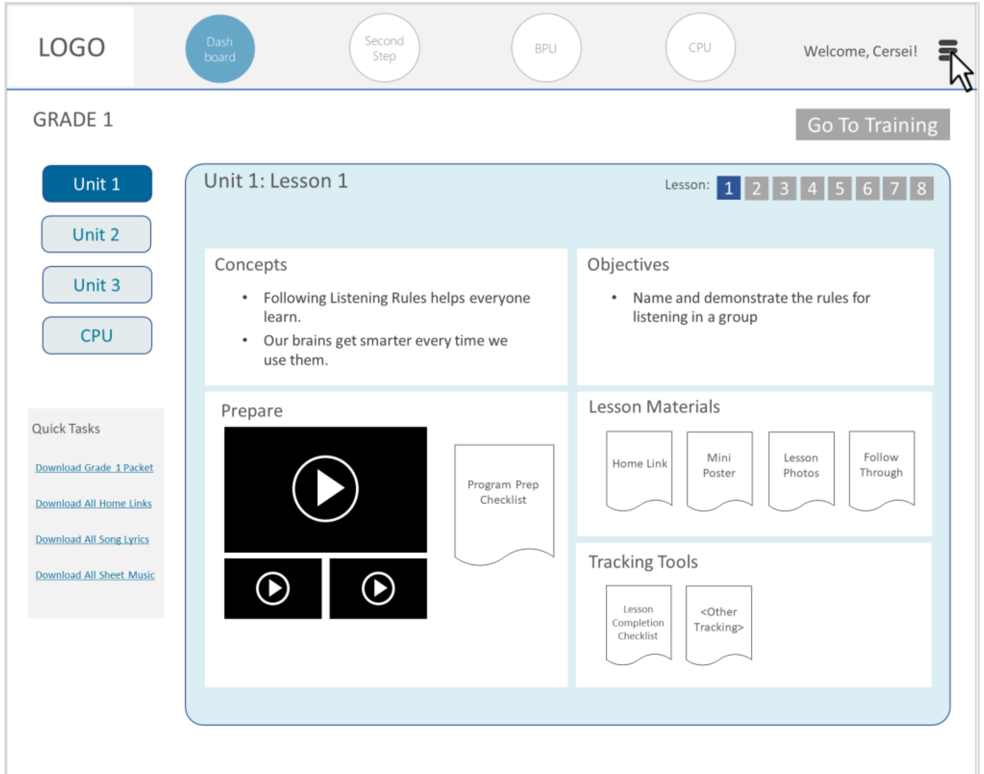
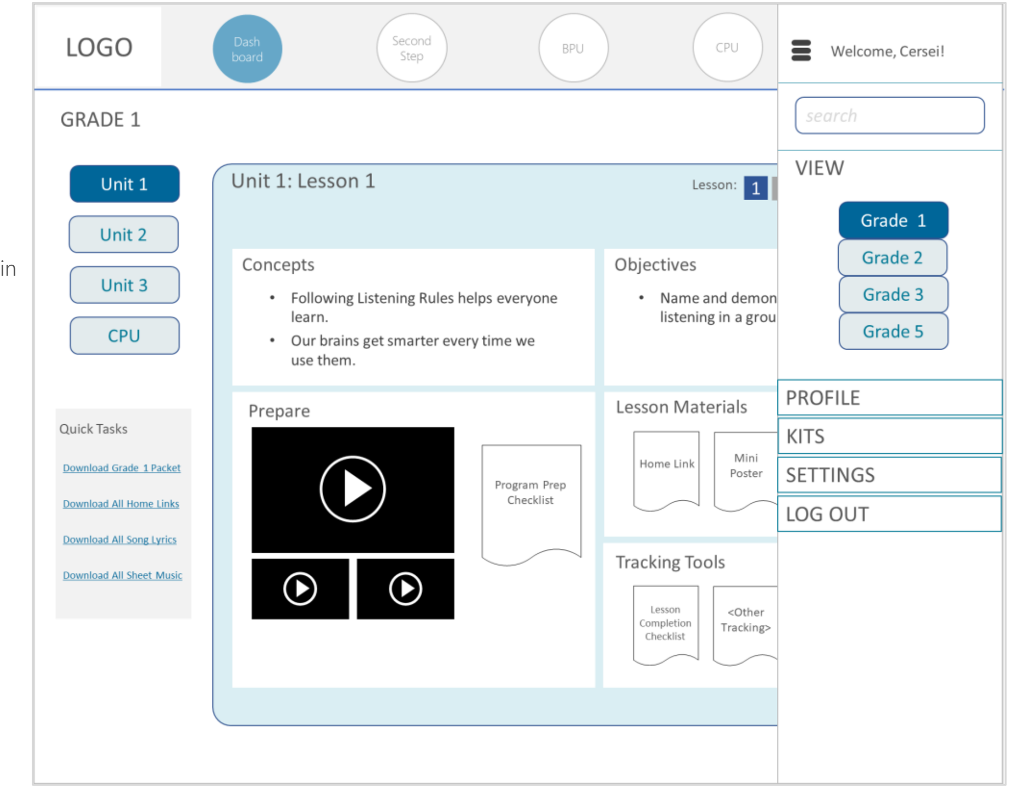
- The Dashboard has selection buttons for each Lesson, as well as BPU & CPU.
- There are Quick Tasks at the bottom for easy access to downloads.
- The main body of the Dashboard is **dynamic.** It will always show the Concept/Goals & Objectives. The other sections of the Main Body will display Lesson Materials, tools, prep videos and other lesson-specific material ***as appropriate.***

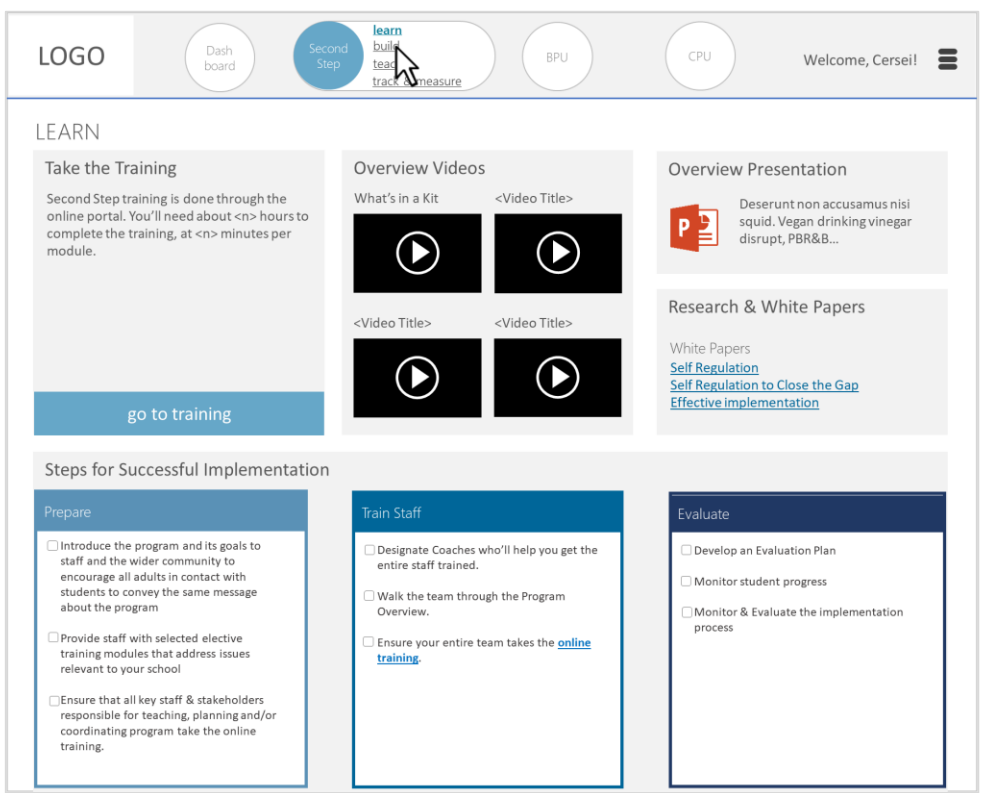



The “hamburger menu” houses Secondary & Tertiary tasks that would otherwise clutter up the Main Nav.




The “Learn” section has been trimmed down to include only

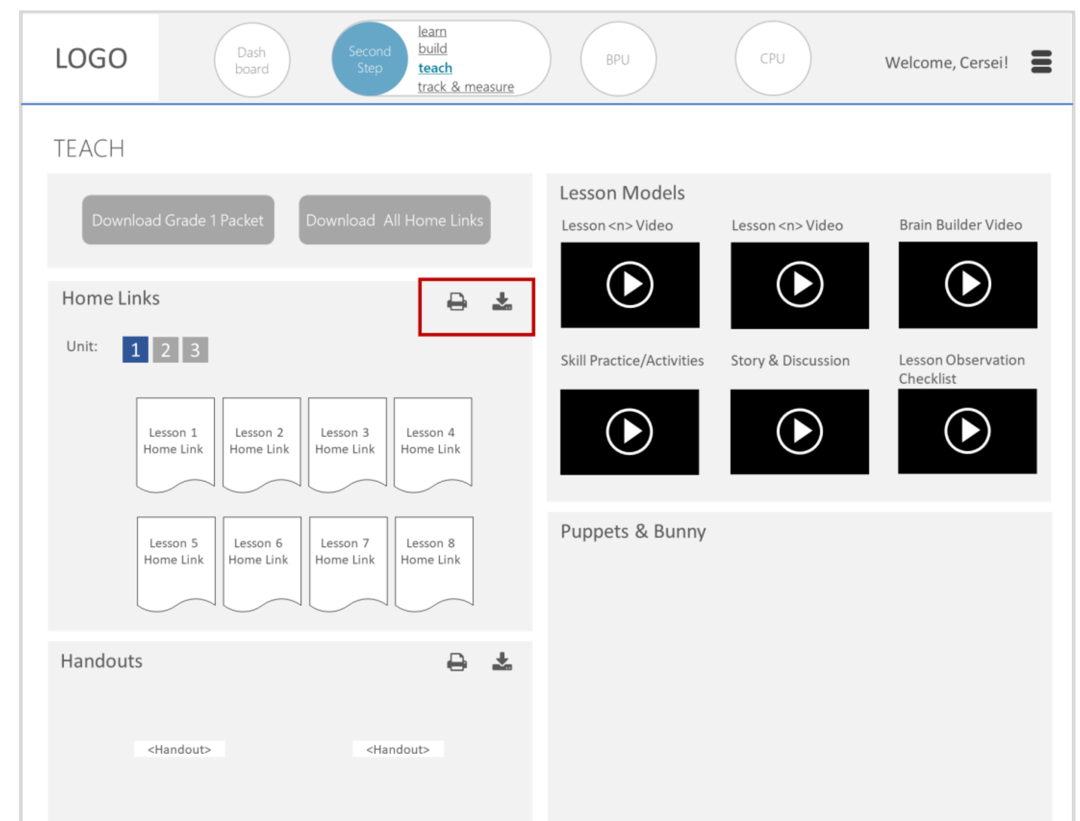
- What is needed on an ongoing basis
- What isn’t included in the walkthrough or training.




There are persistent PRINT & DOWNLOAD buttons for each document section. Clicking either will apply the Print or Download action to ALL documents in the section.

Hovering over any document thumbnail will invoke the PRINT & DOWNLOAD icons for that specific document.

NOTE: These paradigms are consistent throughout the site UI.




## Design Rationale:

- In addition to having 3 programs at the top level, I also had to have an affordance for Grade Levels (which each have different content)
- I wanted the educators to have a Dashboard View that was app-like, which followed their progress & could show them everything relevant to a given lesson in one glance-able place, based on input from users I talked with

# CFC: FUNCTIONAL SPEC



## Introduction

This document describes the updated structure, user experience, and functionality of the Second Step site, based on the V5 redesign. This spec specifically addresses the Teacher version of the website. While the current version includes other user types as well, this redesign has broken out Teachers, Counselors, Program Coordinators and Families. This has been done in light of the significantly different user needs for each user type, as well as the need for significantly simpler site navigation.

| REQUIREMENT | QUESTIONS/COMMENTS |
|---|---|
| The site will be broken up into 2 main overarching views:<br>• Landing/Not logged in<br>• Logged in | |
| The Landing and Logged In views will both be responsive. | |
| | |
| | |
| | |
| | |

# Landing Site

In order to provide users with an improved UX, and to take steps toward decoupling SS and cfchildren.org, a new Landing Site is being designed.

| REQUIREMENT | QUESTIONS/COMMENTS |
|---|---|
| The Landing Site will host marketing content for each product, including:<br>• Second Step<br>• Bullying Prevention<br>• Child Protection | |
| The Landing Site will have the following links in its Main Navigation:<br>• Home<br>• Second Step<br>• Bullying Prevention<br>• Child Protection<br>• Register<br>• Sign In<br><br>These links will be persistent across the whole Landing Site. | |
| The site logo acts as the *Home* link, which goes to the site's Landing Page | |
| Clicking *Second Step* invokes the Product Page for that product. (Design & Content TBD.) | |
| Clicking *Bullying Prevention* invokes the Product Page for that product. (Design & Content TBD.) | |
| Clicking *Child Protection* invokes the Product Page for that product. (Design & Content TBD.) | |
| Clicking *Sign In* invokes the login flyout panel. | |
| Clicking *Register* launches the Registration Wizard. | |





## Register

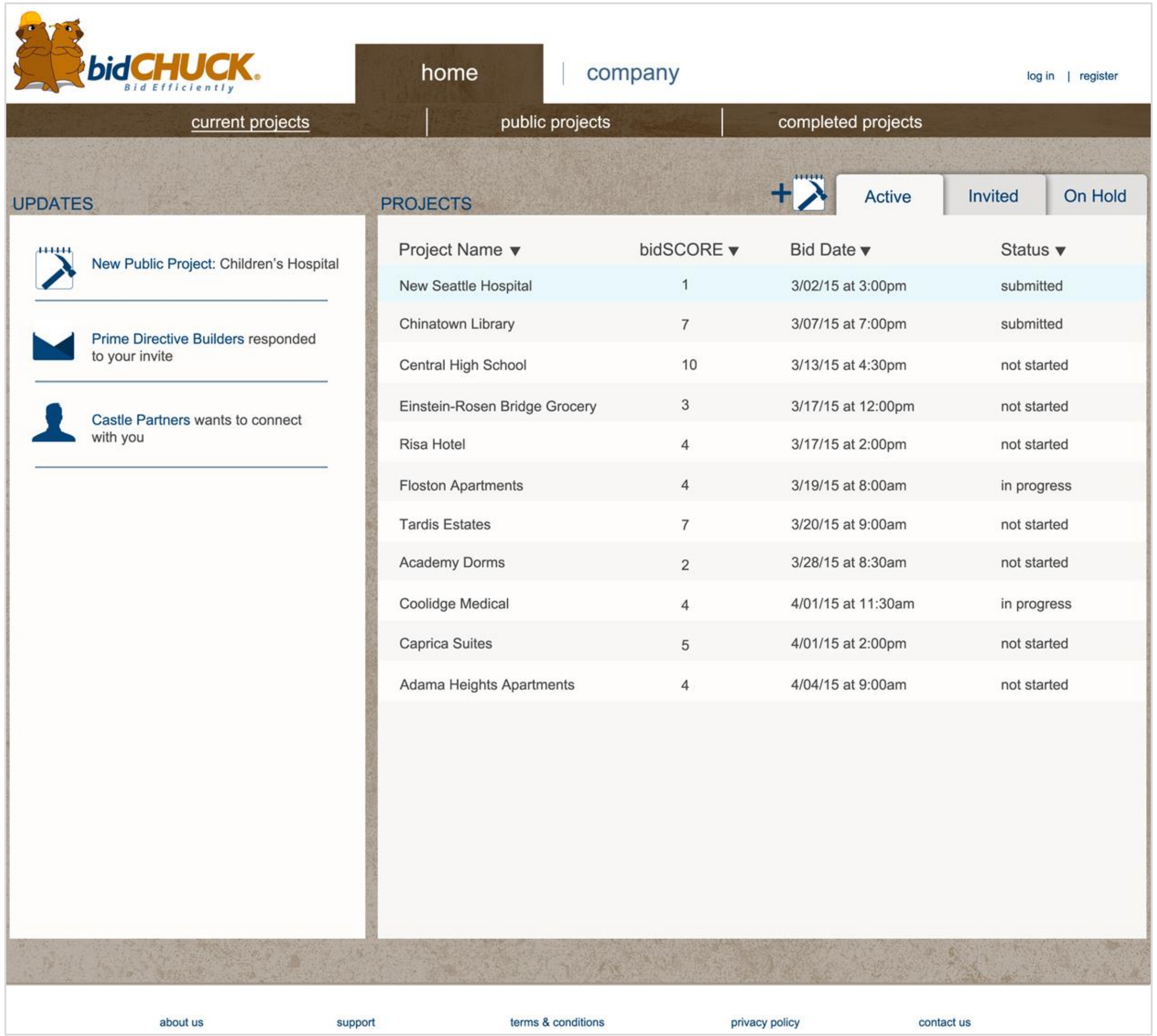
This section describes the registration process for **domestic schools.**

| REQUIREMENT | QUESTIONS/ COMMENTS |
|---|---|
| Upon clicking *Register*, a dialog displays, asking the user if they have a PAK.<br><br>Options:<br>• Yes (I'll register now)<br>• No (I'll register later.<br><br>Clicking No returns the user to the Landing Site on whichever page they were on previously. | |
| Each page of the Registration flow will include a header (*Register*) | |
| A progress indicator will display on each page (excluding the dialog) of the Registration flow. | |
| The first page of the Registration Wizard includes 2 dropdowns:<br>• Select Your Country<br>• What Type of Organization? | |
| The Country selection dropdown will contain any countries appropriate for the list. | |
| The Organization selection dropdown will include Public Schools and any other organization appropriate for the list. | |
| NEITHER dropdown will have a default selection.<br><br>Default field text:<br>• *Select Country*<br>• *Select Organization Type* | |
| Selecting any country outside of the US will fork the user to another flow (TBD). | |
| Selecting any organization other than public school will fork the user to another flow (TBD). | |
| Once the user has made selections, they will advance to the next screen: Enter PAK. | |
| The PAK entry screen includes:<br>• PAK entry field<br>  ○ Default text: *Enter Product Activation Key*<br>• *Add another Product Activation Key* icon and text<br>• *Next* button | |
| The *ADD* button will be disabled by default. | |
| Entering a **valid** PAK will enable the ADD button. | |
| The NEXT button will be disabled by default. | |
| Entering a **valid** PAK will enable the NEXT button. | |
| Upon entering letters/numbers in the PAK field that are the appropriate length, the system will check to validate/invalidate.<br><br>If the PAK is valid, a visual indicator will display to indicate it's valid.<br><br>If the PAK's **in**valid, a visual indicator will display to indicate it's invalid. | |

# BIDCHUCK

# BIDCHUCK: CONSTRUCTION/ARCHITECTURE STARTUP

| | |
|---|---|
| Project Description | bidCHUCK was a startup focused on changing the construction industry. A combination of a LinkedIn approach and existing construction-based technologies, this site would enable architects, contractors & subcontractors to connect, bid on, and track projects. |
| Project Scope | • Create a product and related roadmap for project and company connection focused website<br>• Create revenue model that would enable business to be profitable in short timeframe<br>• Design & develop website, with v1 including functionality for general & subcontractors, and v2 including further features for architects |
| Contributions | As sole Design Consultant, I:<br>• Conducted industry, user research & competitive analysis<br>• Identified business requirements<br>• Collaborated with CEO to develop product strategy & subscription model<br>• Created feature spec, user flows, IA, wireframes, and initial visual design<br>• Collaborated with animator on marketing video<br>• Created sonic branding |



# bidCHUCK: FEATURE SPEC



## bidCHUCK FEATURE SPEC

★= Feature that will also go into the Functional Spec

### GENERAL FEATURES

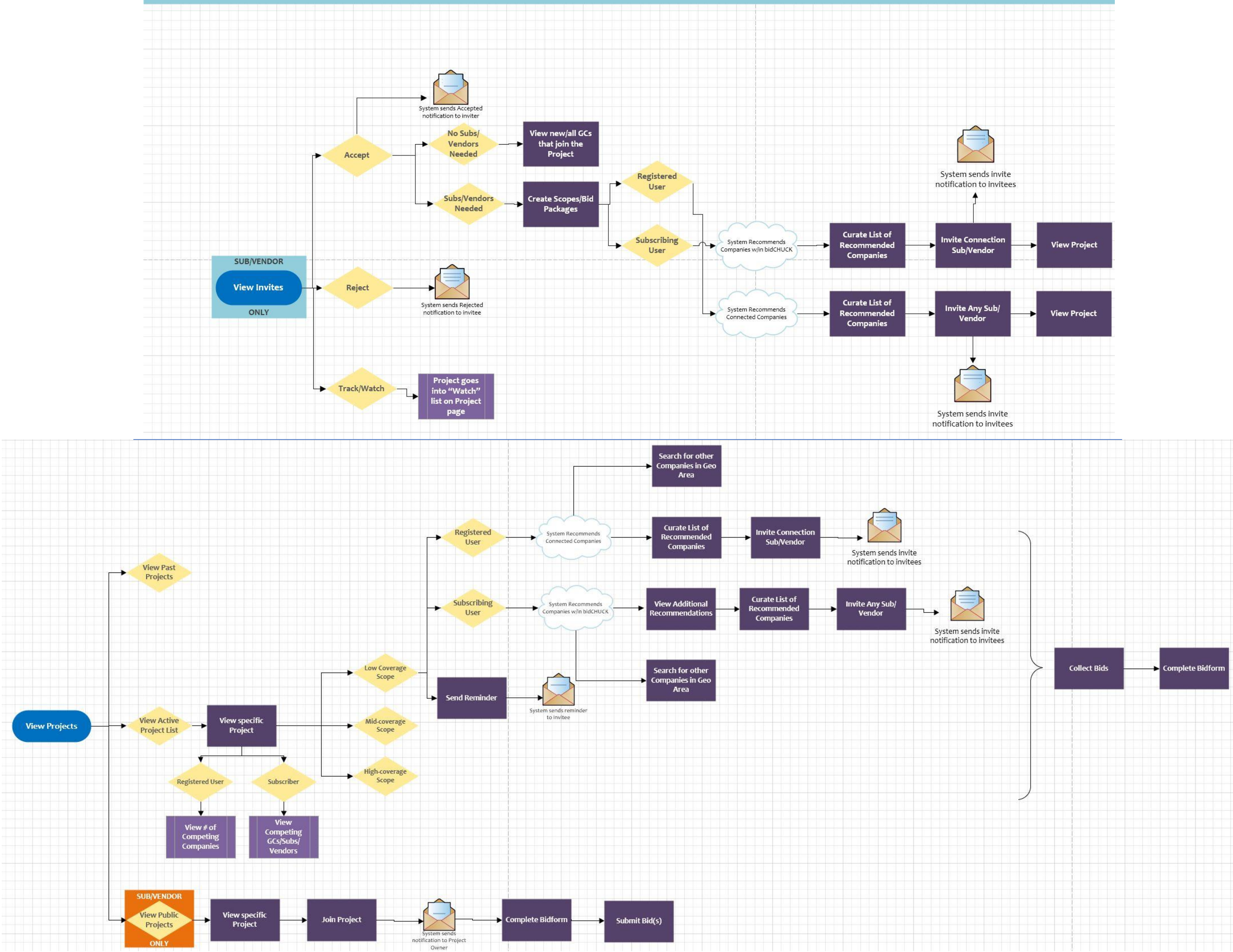
| PRI | RELEASE | FEATURE | COMMENTS/QUESTIONS |
|---|---|---|---|
| | V1 | Users can register for bidCHUCK. | |
| | V1 | Users can subscribe to bidCHUCK for a monthly fee. | |
| | V1 | Users can create a username and password. | |
| | V1 | Users can log in and out of the system. | |
| | V1 | Users can set up a Company Profile.<br>NOTE: The first user (who sets up the profile) will have Admin rights. | |
| | | Company Profiles can have multiple users. | |
| | V1 | Users will have sign-in options (e.g., keep me signed in). | |
| | Admin: V1<br><br>Employee: V2 | Company Profiles have different levels of user permissions.<br>**ADMIN:** First user; sets up profile; can add/delete users; can assign scopes<br><br>**EMPLOYEE:** Can create /manage their own profile | The term "Manager" will confuse users. Admin is a generic term used all over the Internet in profile management scenarios. "Manager" is too specific and may not be true about the user that sets up the account.<br><br>We really need to use the term "Admin" and figure out the far less important scenario of bidCHUCK employees using the site. The site isn't being built for us, after all. |
| | | Admins can publish the Company Profile. | |
| | V2 | Admin Users can add/remove additional Users & Permissions within Company Profile. | |
| | V1 | Admins can cancel their subscription. | |
| | V1 | Admin rights can be revoked by… | |
| | V1 | Users can invite people/companies in their (external) Contact List to connect on bidCHUCK. | |
| ★ | V1 | Invite emails will have an embedded link for recipients to connect or register. | |



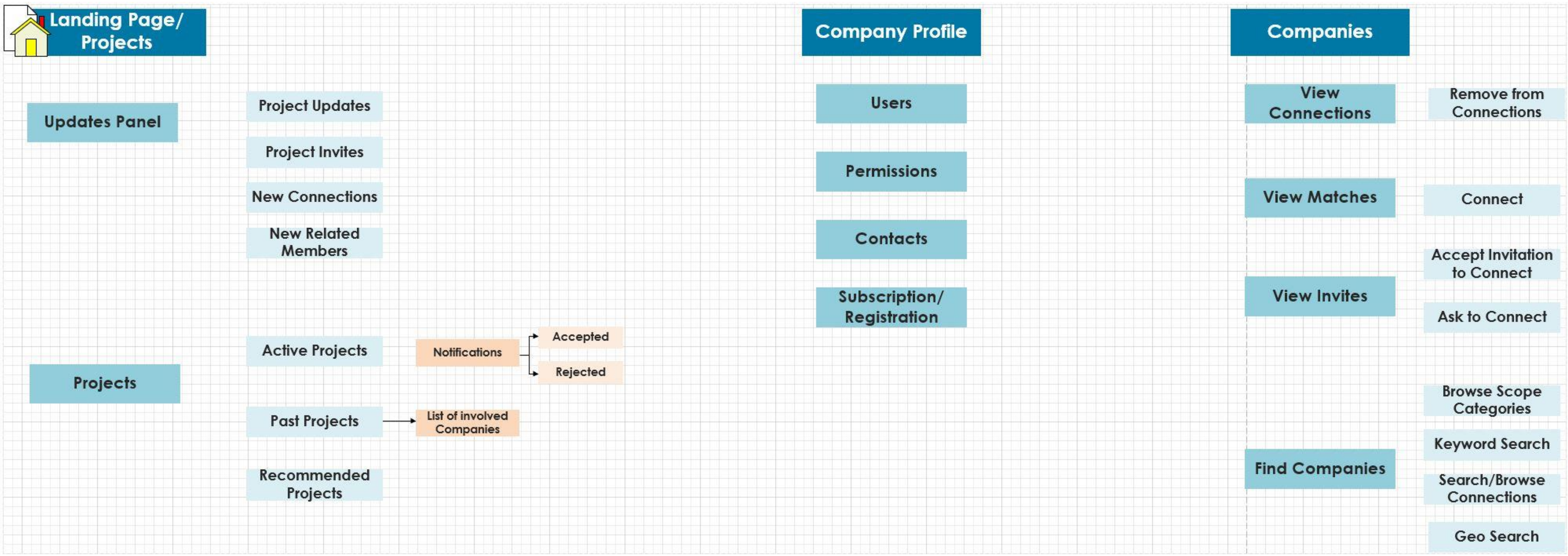


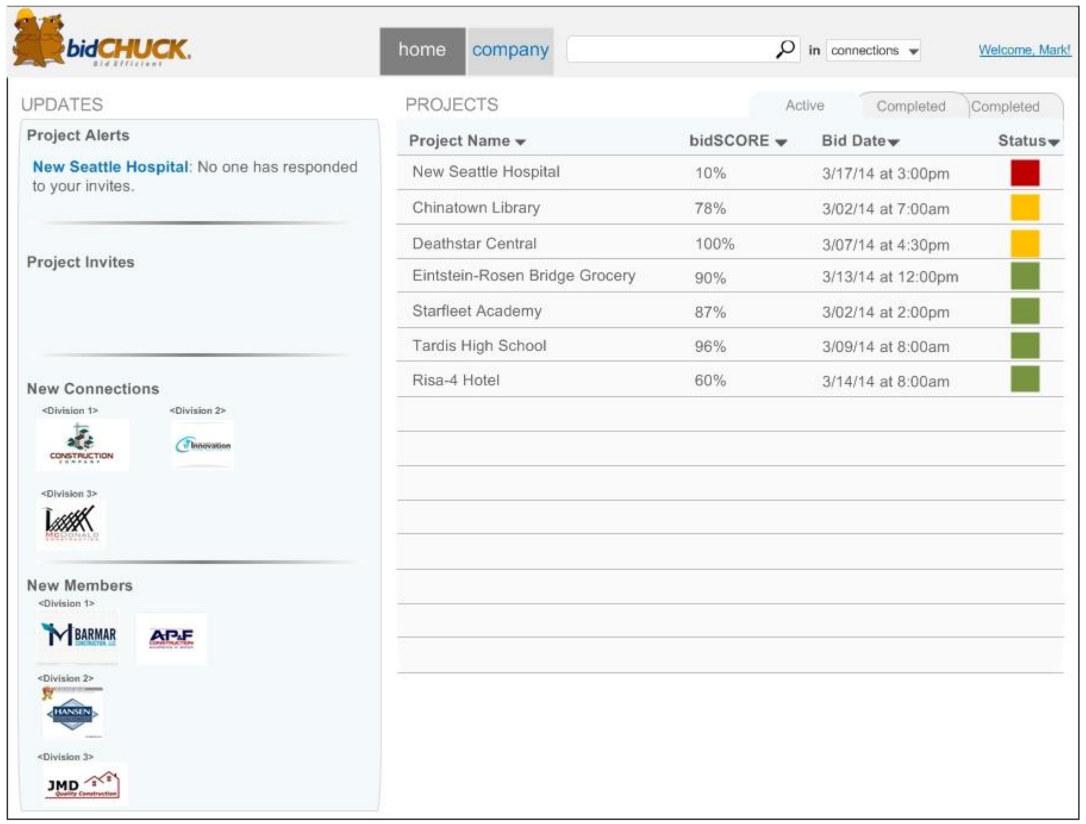
| PRI | RELEASE | FEATURE | COMMENTS/QUESTIONS |
|---|---|---|---|
| | V1 | Subscribers can see all Companies in the bidCHUCK system. | |
| | V1 | Users (registered or subscribing) can invite other companies within bidCHUCK to connect. | |
| | V1 | Users can "Tag" companies with specific (scope-related) attributes. (These attributes will inform the system when Users create a Project with specific Scopes.)<br><br>NOTE: Admin can tag scopes for their own company. Employees can create and assign tags to connected companies. These tags are more business decisions than scope decisions. Examples (Budget, Design-Build, Blacklist, Preferred…) | |
| | V1 | There will be two kinds of tags:<br>1) System-created tags<br>2) User-created custom tags | |
| | V1 | Tags will be managed at the Company level. | |
| | V1 | Users can see a list of all Companies they're connected with. | |
| | V2 | Users can see individual profiles of people at Companies they're connected with. | |
| | V2 | Users can add notes about each Company they're connected with & about the individuals at that Company. | |

# PROJECT/BID COVERAGE MANAGEMENT



# bidCHUCK: INFORMATION ARCHITECTURE

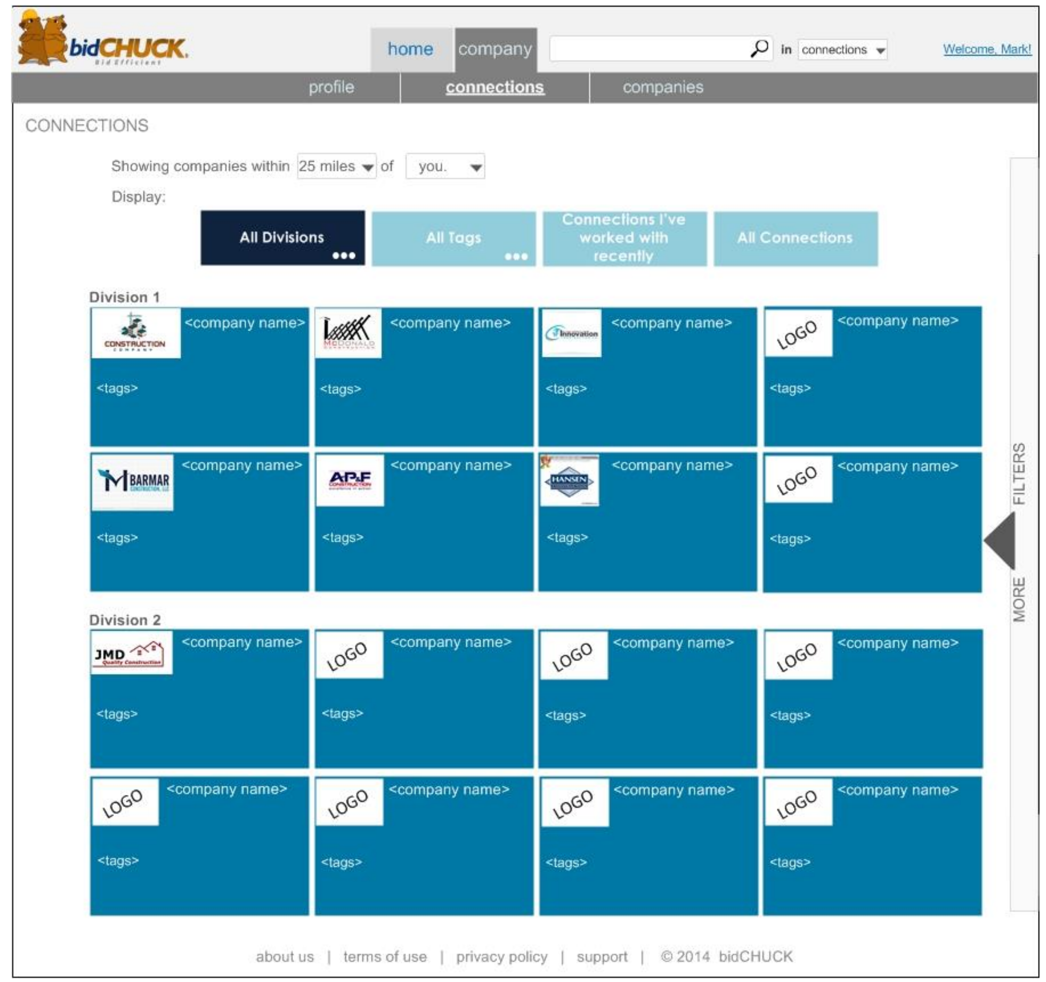





When the user logs in, the "login | register" links will change to a Welcome message.

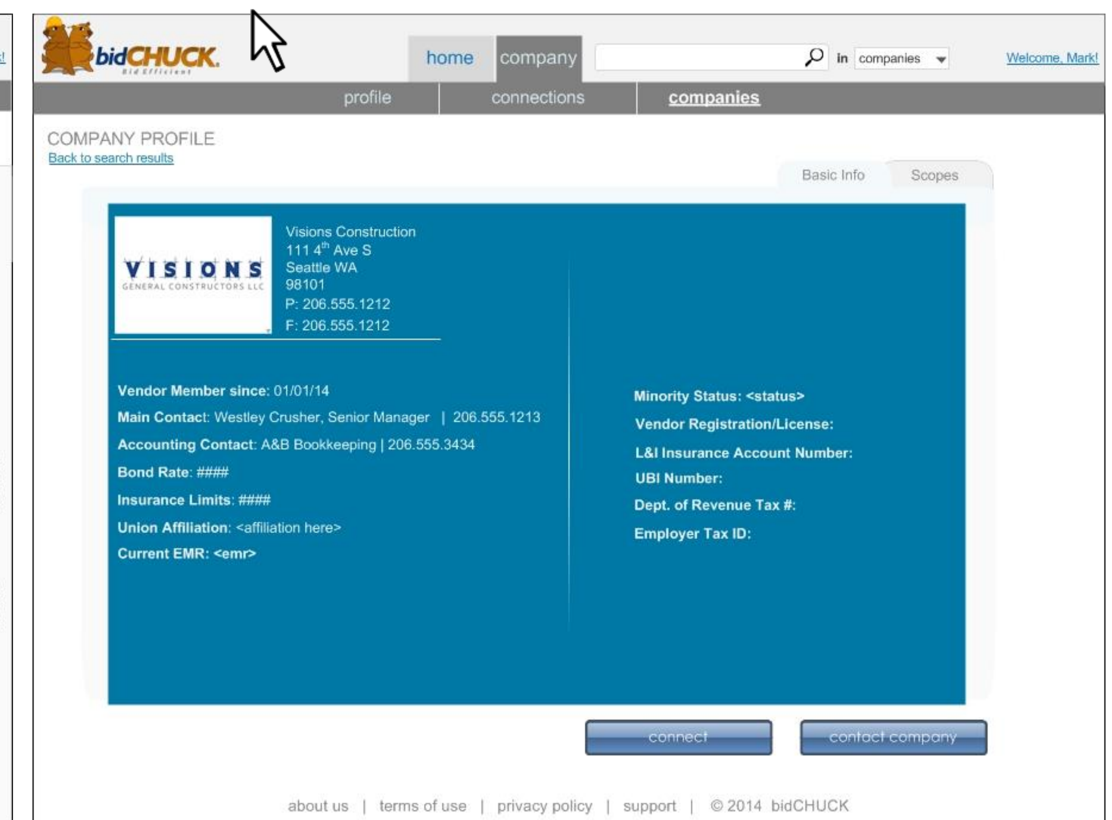
The Home Page has an Updates panel and a Projects section.

NOTE: The Home Page is not complete, given the complexity of interactions with the Project List.




The Connections Page will list all contacts within bidCHUCK.

HOWEVER, it will be prefiltered based on location.




When a user searches for/finds a company, they can drill in to view details on them.

This view of the Company Profile will display all pertinent information that gives them a 360o view of that company.

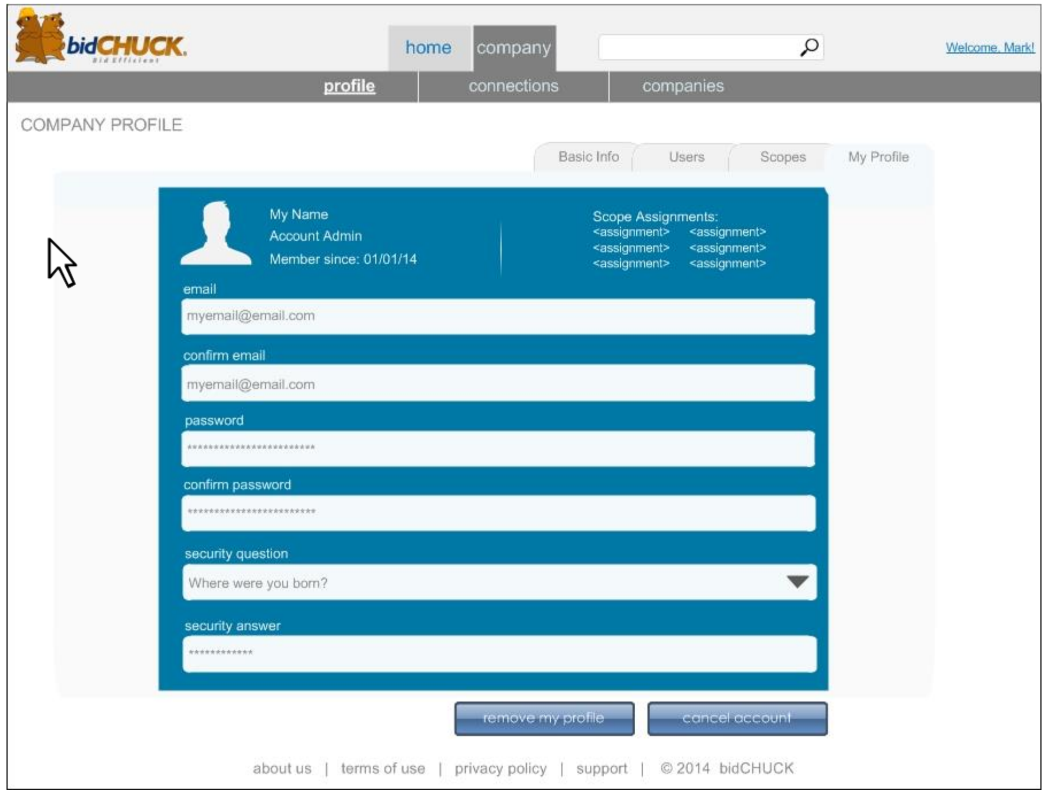
Clicking on the PLUS icon will expand at the Division & 2nd tier levels.

## Design Rationale:

- V1 of the site would target General Contractors, who want to bid on & track projects, so they needed a dashboard view that bubbled up alerts & statuses
  - One alert type is being invited to bid on a given project
- One way to maximize project bid coverage is to connect with companies; hence the Linked-In type approach for browsing/searching & connecting with companies

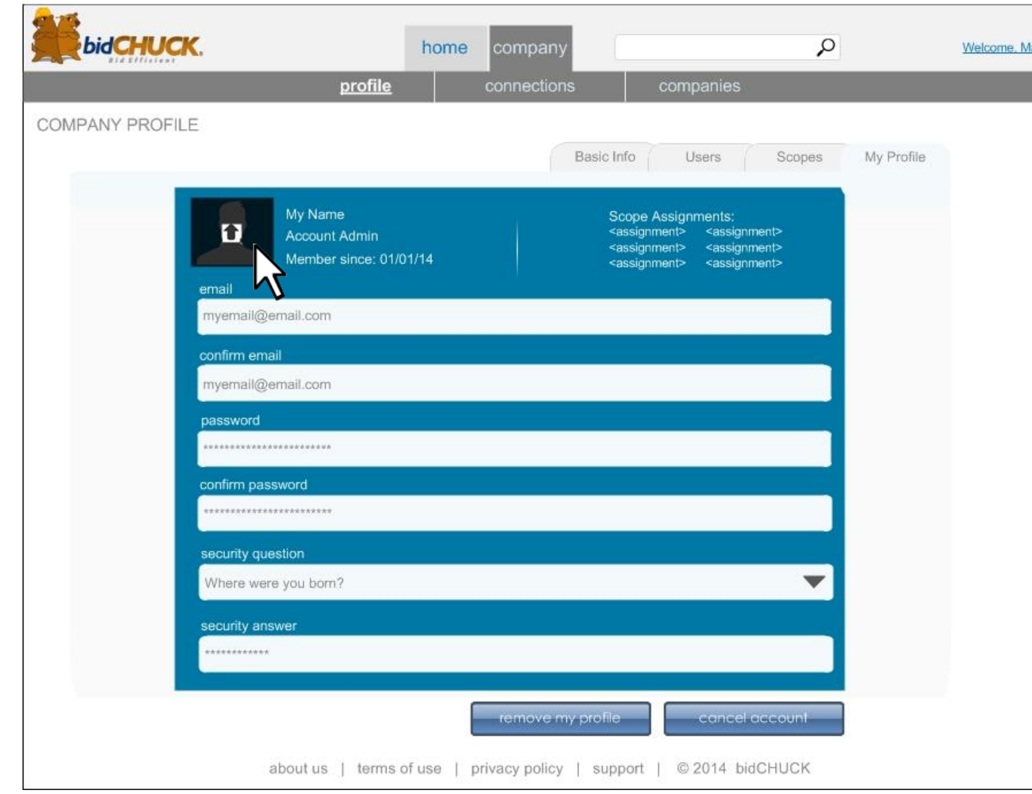
The User Profile will have persistently editable fields. This is because the user has control over their own information and there's not the same risk of error as with editing/deleting other users.

Pressing ENTER will commit changes made to any field.

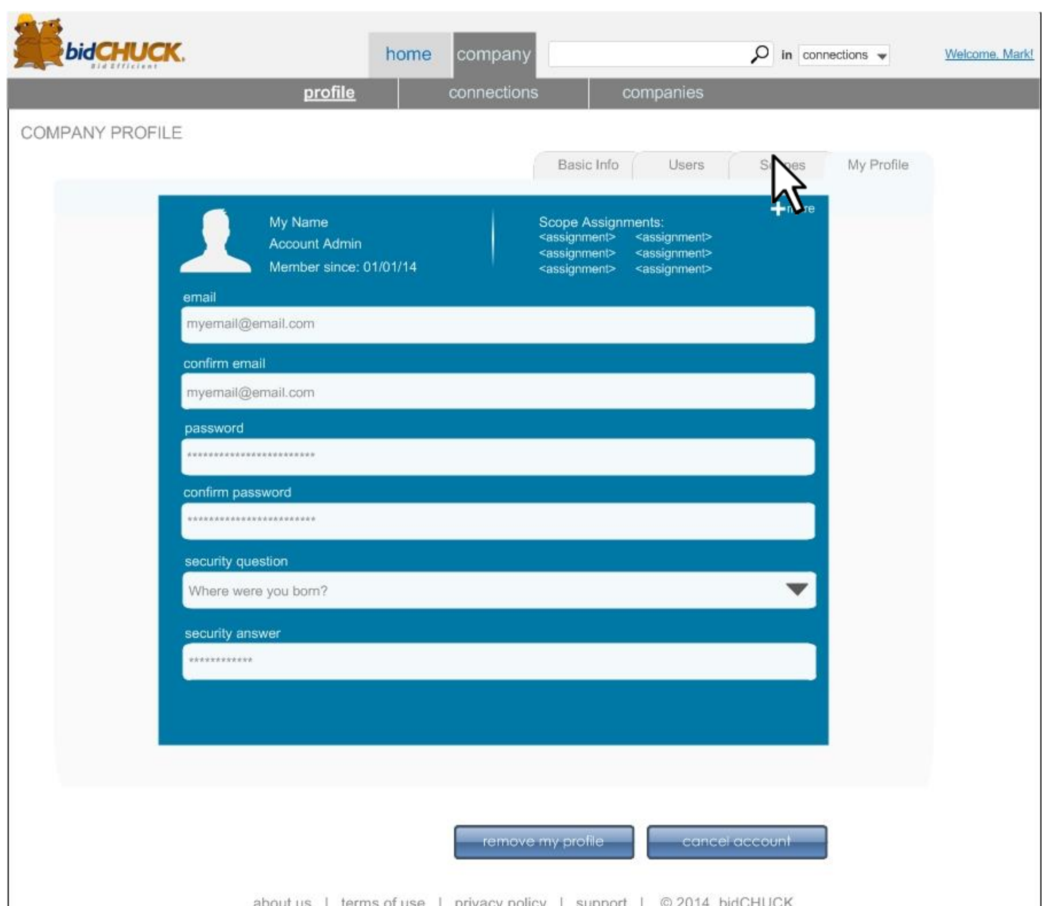



Hovering over the Profile image will invoke the Upload Menu.

Clicking UPLOAD will invoke the standard browse experience based on browser in use.



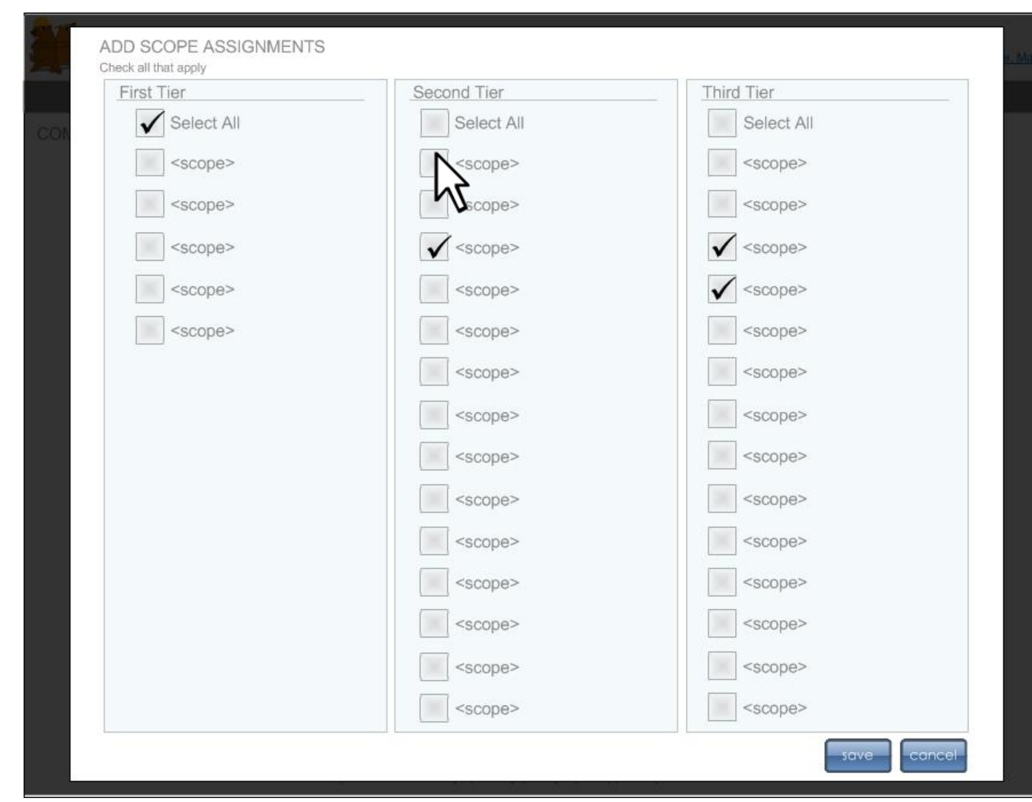

Clicking the ADD MORE button invokes the Scopes popover.




Clicking the ADD MORE button invokes the Scopes popover.

Here, the user can select scope assignments that apply to them.

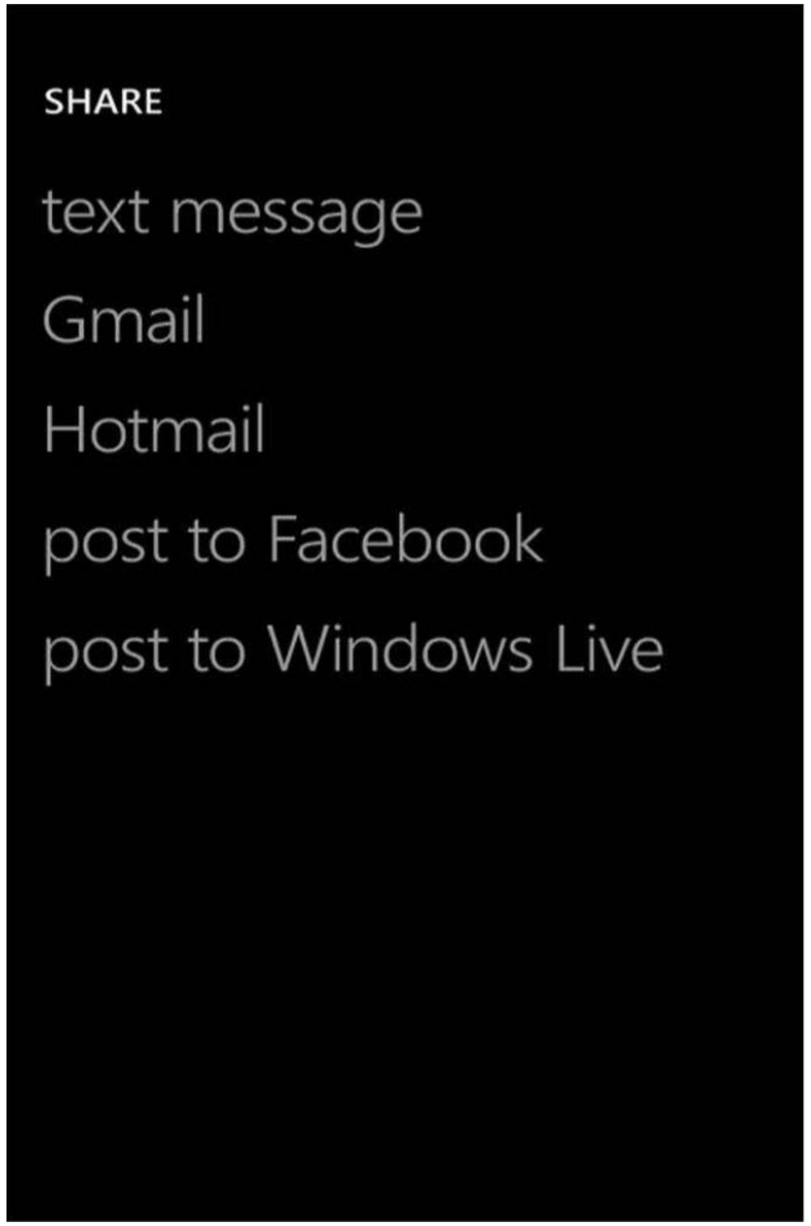
NOTE: If the user has the ability to choose ANYTHING in ANY category, we'll need to duplicate the Scope Selection UI for Companies (later in this deck.



# WINDOWS PHONE SHARING

# WINDOWS PHONE: PLATFORM-WIDE SHARING

| | |
|---|---|
| Project Description | When MSFT decided to launch the first Windows Phone ever (Windows Phone 7), there was no mechanism or UI for sharing content. Photo sharing, link sharing, social sharing—it wasn't "a thing" yet on mobile. |
| Project Scope | I started & managed the effort to<br>a) provide a platform-wide method and UX for sharing *any* type of content<br>b) b) prevent the disparate teams across the org from implementing their own disjointed UX for this.<br><br>This included<br>• Identifying stakeholder teams & representatives<br>• Getting buy-in from immediate & upper management on approach, plan & schedule<br>• Provide modernized UX & UI |
| Contributions | As individual contributor UX Program Manager, I:<br>• Identified stakeholder teams & representatives<br>• Creating platform-wide solution for sharing<br>• Identifying technologies and integration points<br>• Creating & managing project schedule, which involved coordinating 8+ teams across the organization<br>• Getting buy-in & resources from upper management<br>• Managing the development of all sharing UI<br>• Created wireframes, and functional specs |



## Content Sharing – The Basics

**What is Content Sharing?**

For WM7, users will be able to interact with rich content, both local to the device and out there in "The Cloud." One of those interactions is sharing content. Users can send a photo via email, post a link to a Zune song in their status message, or e-mail a link to a Browser object. This document walks through the different scenarios and flows for each sharing interaction.

**On this Page:**

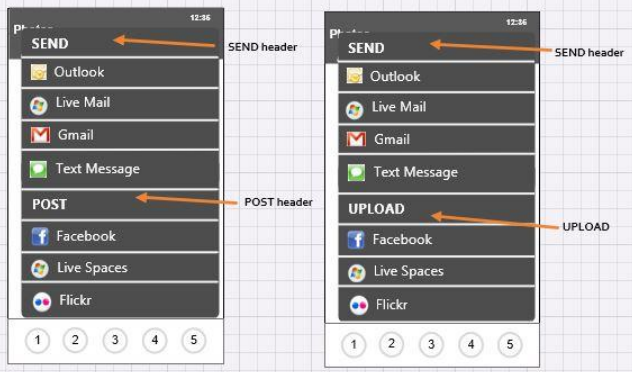
This page covers the basic controls and API components used for Sharing flows. This will help our users have a consistent experience, no matter what they're sharing and from where.

**The Context Menu**

If a user performs the tap-and-hold action on a Sharable content object, the Context Menu will show the SHARE verb.

**The Compose Picker**

When a user taps SHARE, the Compose Picker will display. If the POST option is not available, the UPLOAD header and suboptions will display instead.




**In-app Compose Picker**

If launched from an in-app Sharing Button or Menu item (see below), the Picker will be pared down, based on which button lauched it.


**The Compose Card**

If a user sends something via e-mail (a link or an attachment), the Compose Card will be invoked.


**The Post Dialogue**

If a user chooses to Post a link to Facebook or Windows Live, the Post (task) Dialogue will display.


**In-app Sharing Buttons**

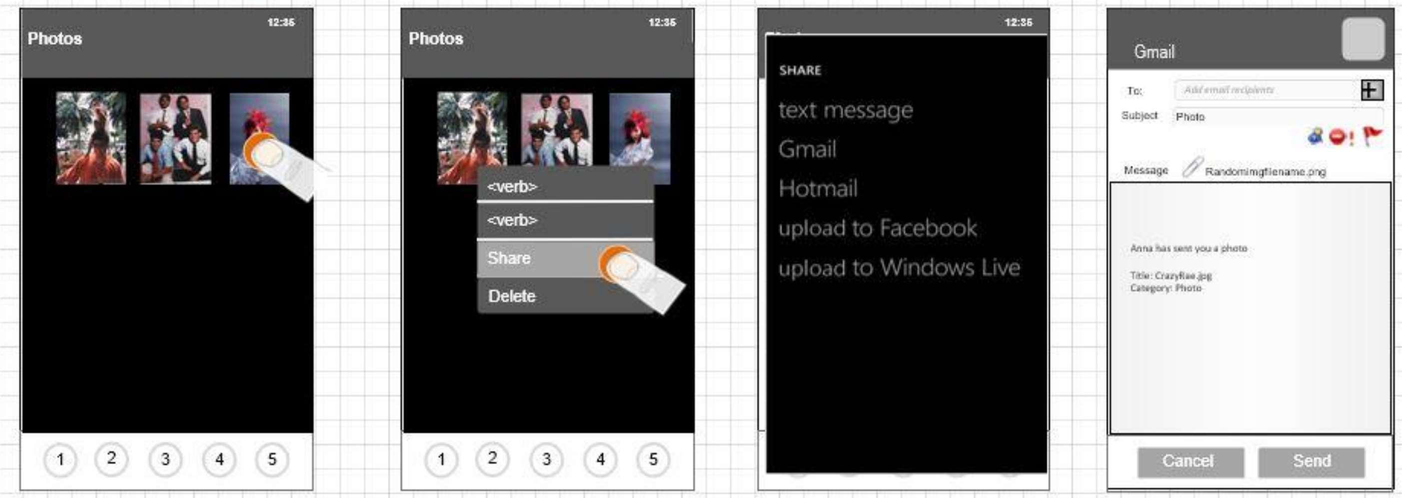
In some cases, apps will have buttons in the App Bar, or items in the App Menu, specifically geared toward Content Sharing.


## Content Sharing – SENDING Local Photos as Attachments

**SCENARIO 7: Anna finds a funny picture in her on-device photo album of her musician friend and wants to send it to a mutual friend, Claire.**

By performing the tap-and-hold action on the Local Photo, a Context Menu is invoked, which has the Share verb. Tapping Share brings up the Compose Picker, from which Anna can choose an e-mail account to use for sending the photo as an attachment.

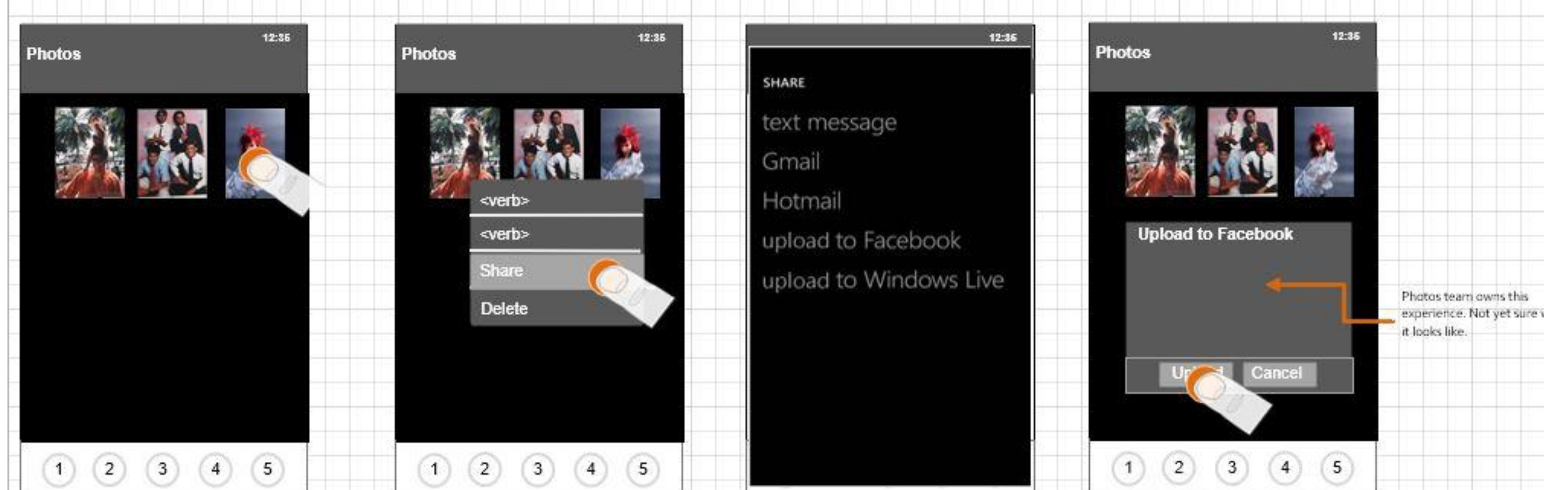
**NOTE: For this Use Case, the user is in Album View on the device. Multi-selection of photos is CUT for RTT, so users can tap and hold on any photo in the album vew to begin the Sharing flow.**




## Content Sharing – UPLOADING Local Photos

**SCENARIO 8: Anna finds a funny picture of her musician friend and wants to upload it to her Facebook photo album.**

By performing the tap-and-hold action on the Local Photo, a Context Menu is invoked, which has the Share verb. Tapping Share brings up the Compose Picker. Since Anna has invoked the picker from a local photo, she can't post the photo into a Status Message (since only photos that are already in her FB album, or a link to a Web photo can be posted in a status message). However, she's given a list of options under the UPLOAD header, and she chooses to upload it to Facebook so all her friends can see it.




## Design Rationale:

- Back when Windows Phone 7 was being developed, the concept was that many actions would be handled through text-based lists (reflective of the Metro Design Language)
- Each team with shareable content would "plug in" to this list, via an API my team created, which we also made available for popular 3rd party apps like Facebook
- I wanted the user to be able to share any piece of content with as few taps as possible, so I did things like having the Email subject & body prefilled upon invocation
    - Design approach was validated through user testing, where we checked to see where they'd look for sharing options (and which options they expected to see)

# WINDOWS PHONE SHARING: FUNCTIONAL SPEC

## 3. Core Feature Scenarios | Objectives

### 3.1 Miles shares music with Anna

Wednesday is a slow day for Miles' job, and he takes some time to enjoy media on his Windows® phone while eating lunch. Zune gave him a recommendation for the band MGMT, so he takes a listen. After hearing song #3, Miles knows he loves this band, and has a feeling Anna will too.

Miles is eager to share this song with Anna, so he taps and holds on the song title to get a Context Menu. He taps "Share" in the menu and chooses to e-mail her the link. A card comes up, which is prefilled with useful info about the album *Oracular Spectacular*, and even has the album art attached.

Anna is at lunch at the office when she receives an e-mail from Miles, when she opens the e-mail, she taps the link and is taken to the Zune Marketplace where she can hear the song Miles sent. She loves it, and downloads the whole album.

### 3.2 Anna shares photos with Miles

Anna loves to take pictures of her family and friends with her Windows® phone, and enjoys the instant gratification of sending them in e-mail or uploading them to Windows Live and Facebook. On Saturday, Anna is at a birthday party for one of Luca's friends. Miles had to work so he couldn't join them, so Anna wants to share the goings-on via her phone.

Anna takes several shots of the kids playing in the sprinkler and the dog eating the ice cream. Since she took the pictures with her phone, she's able to instantly upload the photos to Windows Live. From the Windows Live site, Anna taps and holds on her favourite photo and chooses to send a link to it via her Hotmail account. Miles gets an e-mail on his own Windows® phone and goes to Windows Live to see the pic. He replies to Anna's e-mail letting her know he got it and that it brightened his day.



### 3.3 Anna and Miles trade browser content

On Monday morning while getting ready for work, Miles and Anna get into a debate about whether Hugh Jackman was in *The Illusionist* or *The Prestige*. They don't have time to resolve the question before leaving, so they promise to figure it out at some point during the day. Later that morning, Anna is taking a break and checking her phone when she remembers to go online and look up each film. When she finds a photo of Hugh Jackman on the imdb site for *The Prestige*, she selects the photo and chooses to send it to Miles via e-mail. Miles gets the link to the photo in an e-mail from Anna and checks out the imdb page. He then finds an awesome picture of David Bowie as Tesla on the site and posts a link to the photo in his Facebook status message.

## 4. High-Level Feature Description

As described in the scenarios in Section 3, users may wish to share something they're viewing on their phone to a recipient or a Website/service. The platform-wide Content Sharing solution is designed to provide users with a predictable way to share content, no matter what type of content it is. *Currently, this spec covers the requirements provided by the following teams; the Sharing Feature aims to enable scenarios for these calling apps:*

- Music
- Local Photos & Cloud Photos (e.g., on a service such as Windows Live)
- Browser link
- Browser Photo

For WM7 RTT, users can share the following Content Types from Windows® phones:

1) URL (essentially *text* content)
2) Photos (essentially *binary* content)

For each content type, the following actions may or may not be available:

1) Send via e-mail or SMS/MMS
2) Post a link to the object in a social networking status message
3) Upload to a Website/Service

Users can do one or two of the above with a given content object, but not all sharing actions are available for any one content type.

**EXAMPLES**:

| Content Type | How it can be Shared |
|---|---|
| **URL** | Can be sent via e-mail<br>Can be posted to a social network status message |
| **Local Photo** | Can be sent via e-mail as attachment<br>Can be uploaded to site/service |
| **Web/Browser Photo** | A link to the photo and attachment can be sent via e-mail<br>A link to the photo can be posted to a PSM |



| PRI | REQUIREMENT |
|---|---|
| 1 | The content sharing flow will begin by tap-and-hold on a sharable content object. (Invoking a Context Menu) OR by tapping an item in the App Bar or App Menu. |
| 1 | ***Multiple select is supported by the Sharing api set for SENDING.*** (Some transports will support and some will not. But multi-select is supported by Photos; so the SHARE verb will show up in the Context Menu and e-mail transports will show up in the Picker when multiple photos are selected. |
| 1 | For each content type that can be shared, the related Context Menu will include the SHARE verb.<br>**EXCEPTION**: For photos, there may be TWO verbs:<br>1) Share<br>2) Share to <last><br>**NOTE**: Strings TBD!!! |
| 1 | Tapping the SHARE verb will invoke the Sharing api and Compose Picker. |
| 1 | The Compose Picker will us the List Picker Common Control, provided by Shell. |
| 1 | The items under SEND will be e-mail transports (e.g., Gmail). and TEXT (SMS/MMS). |
| 1 | Links can be shared via e-mail and posting.<br>1) Link to a Web photo<br>2) Music reco link<br>3) Any Browser link |
| 1 | Tapping an e-mail item in the SEND category will launch Messaging Team's Compose Card. |
| 1 | Tapping the Text item in the SEND category will launch the SMS/MMS compose card (The SMS/MMS app will decide which transport to use based on payload length/size). |
| 1 | After completing the SENDING Flow, users should be taken back to where they initiated Sharing. |
| 1 | After completing the POSTING Flow, users should be taken back to where they initiated Sharing. |
| 1 | After completing the UPLOADING Flow, users should be taken back to where they initiated Sharing. |
| 1 | The Compose Card will provide capabilities that have parity with current builds:<br>a) Multi-select for Addressing—contacts selection<br>b) Ability to customize and pre-fill the card based on content, such as Album art and "canned" message |
| 1 | **3rd parties can NOT register to show up in the Compose Picker for RTT.** |
| 1 | **Outside of 1st-tier partners, the Sharing api will be locked down for 3rd parties in RTT.** |
| 1 | If a user taps-and-holds on an item that cannot be shared, *the SHARE verb will *not* appear in the Context Menu.* |
| 1 | Selecting Facebook under POST options will launch internally owned UX.<br>*(Ownership is based on who's launching the Sharing api; e.g., Photos team for Photo upload.)* |
| 1 | Facebook and Windows Live post flows (internally owned) will use the Task Dialogue Common Control. |