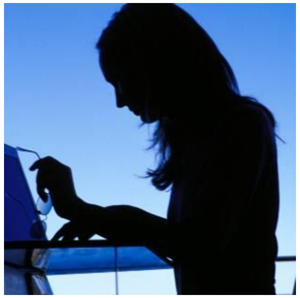


Final Usability Results Review
EFT User Experience (UX) Redesign

David McAlister
Sr. User Experience Designer

Agenda

• **Welcome / Introductions**	Janet Holtz	5 Minutes
• **Project Overview**	David McAlister	5 Minutes
• **Our Process & Findings**	David McAlister	90 Minutes
• **Recommended Priorities (and "Quick Hits"), Project Recap**	David McAlister	10 Minutes
• **Next Steps**	David McAlister	10 Minutes
• **Workflow / Prototype Review**	David McAlister	30+ Minutes
• **Questions / Final Discussions**	David McAlister	10 Minutes

fiserv.

Attendees

• **Vincent Fraker**	Senior Vice President Product Management & Business Development
• **Allison Ellison**	Product Management & Business Development
• **Janet Holtz**	Product Manager, Card Services
• **Chuck Petters**	Product Management & Business Development
• **Dmitry Gladstone**	Technical IT Management
• **Ronald Drake**	Technical Systems Analysis
• **Brian Fletcher**	Technical Systems Analysis
• **Dipen Komar**	IT Architecture
• **David Cox**	Senior Vice President Product Management & Business Development
Peggy Britz	Product Management & Business Development
• **Jeff Zimmerman**	Manager, User Experience Design
• **David McAlister**	Sr. User Experience Designer

Project Overview

Goals & Objectives

Problem

Our Client Central customers are frustrated with how cumbersome and difficult this product is to use.

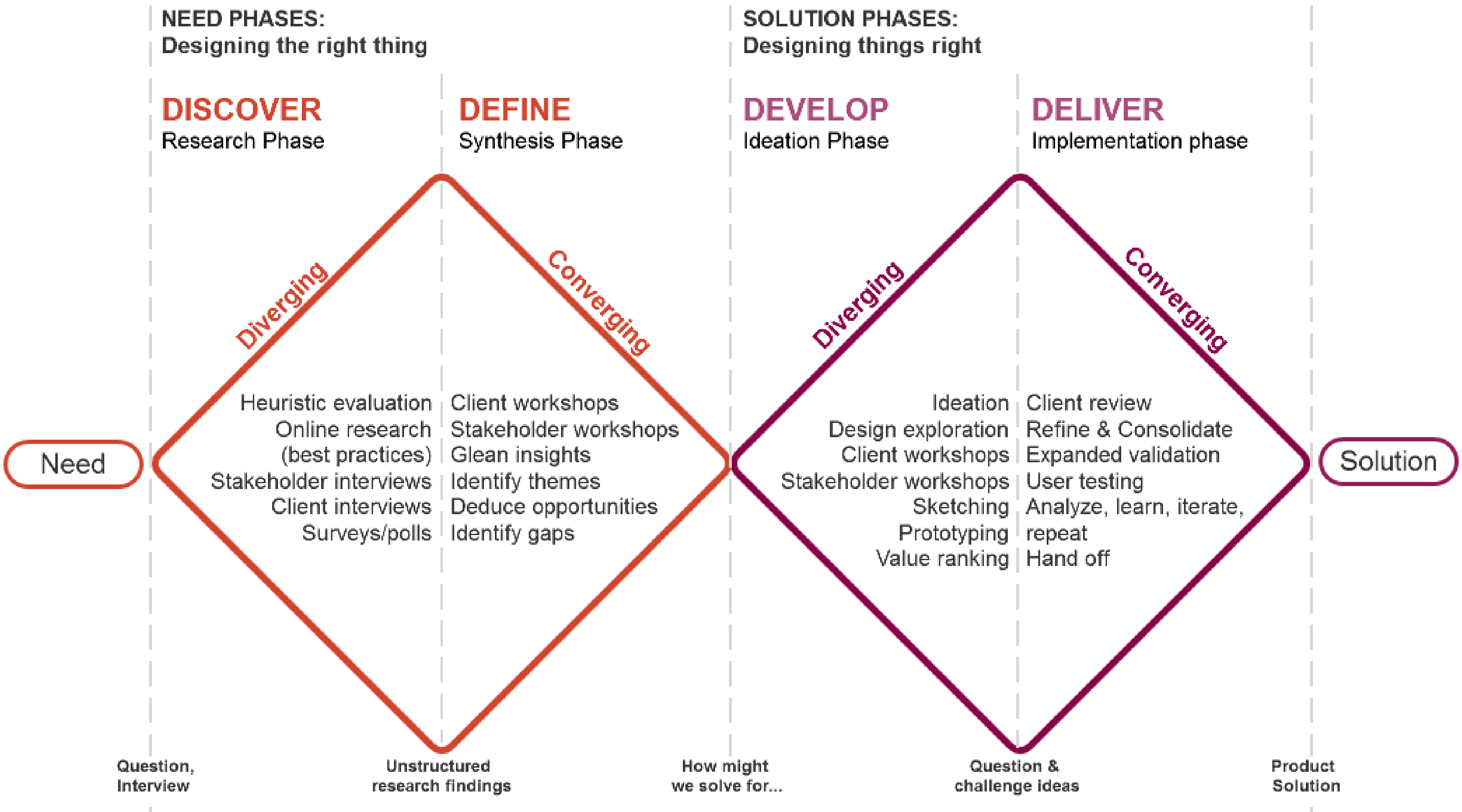
Objective: Design Products People Want and Use

- Understand user's needs, goals, wish lists and pain points
- Provide solutions that incorporate actual user's tasks/workflows
- Simplify user interfaces through good information organization
- Test tasks with real users early on to significantly reduce costs
- Prevent errors by applying affective design
- Reduce training and support costs
- Increased user satisfaction
- Brand reinforcement through good user experience

"Provide the most effective toolset to make our clients successful in servicing their consumers."

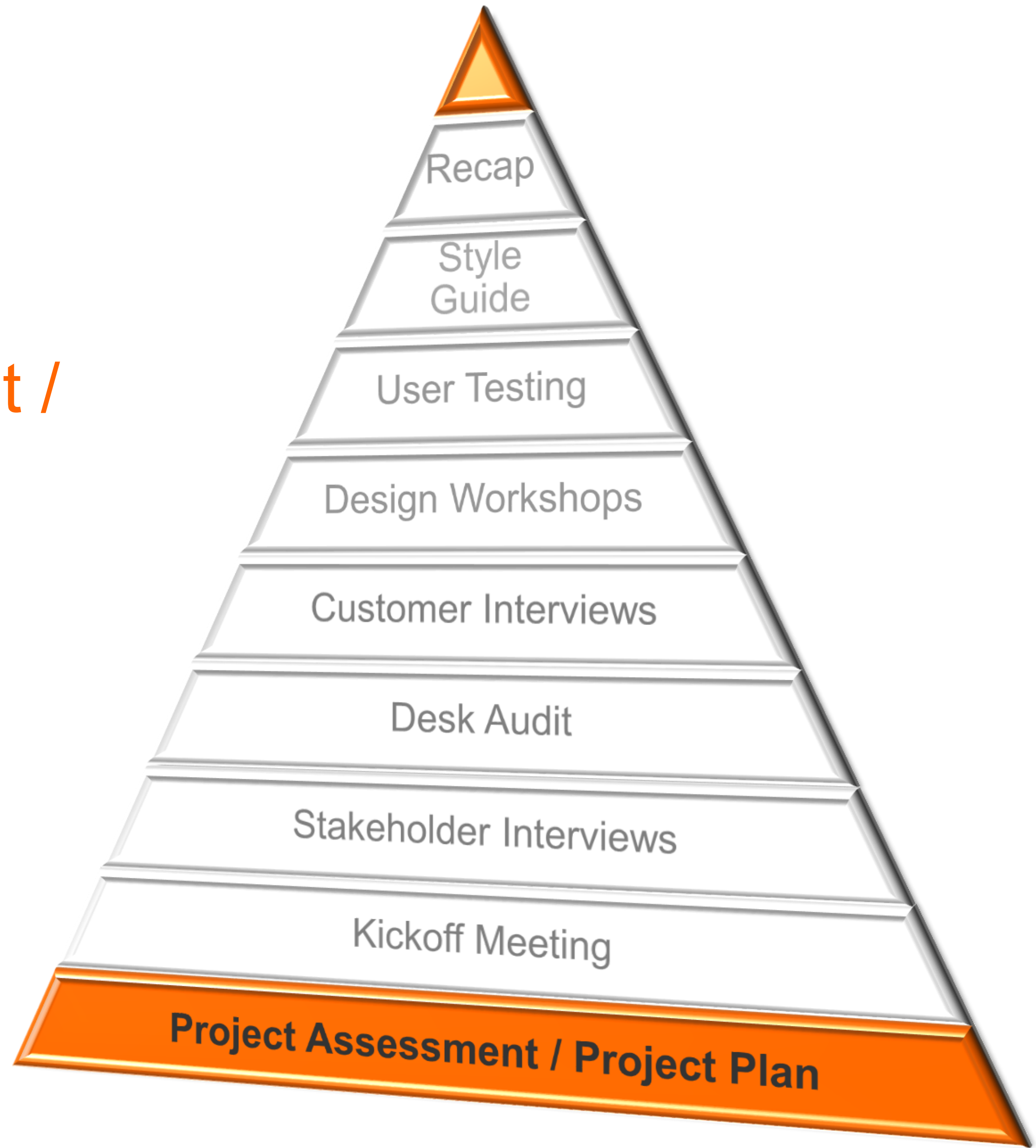
My Standard UX Process*

Based on Double Diamond Standard



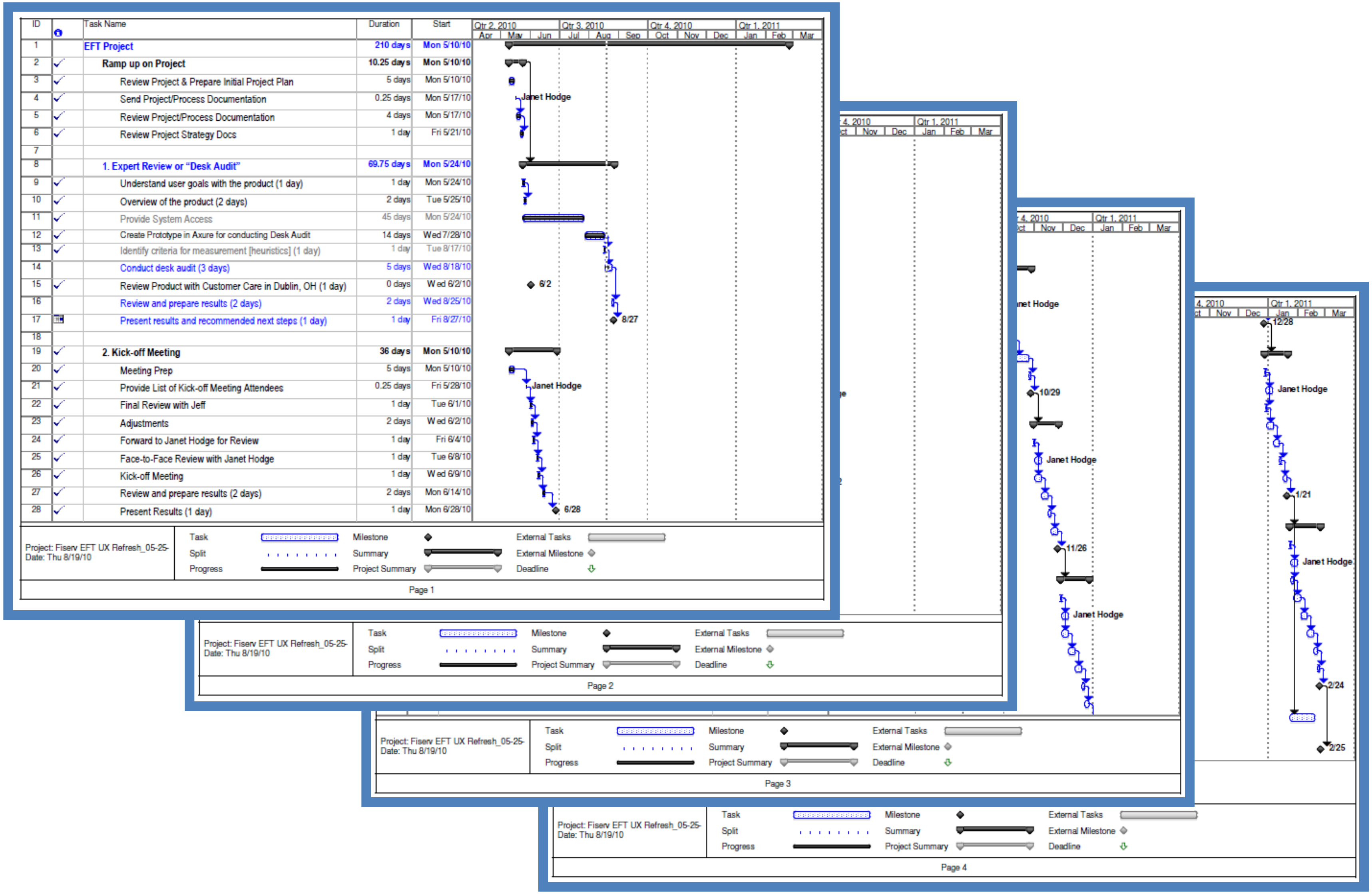
*Depending on Project Scope & Timeline

Project Assessment / Project Plan



fiserv.

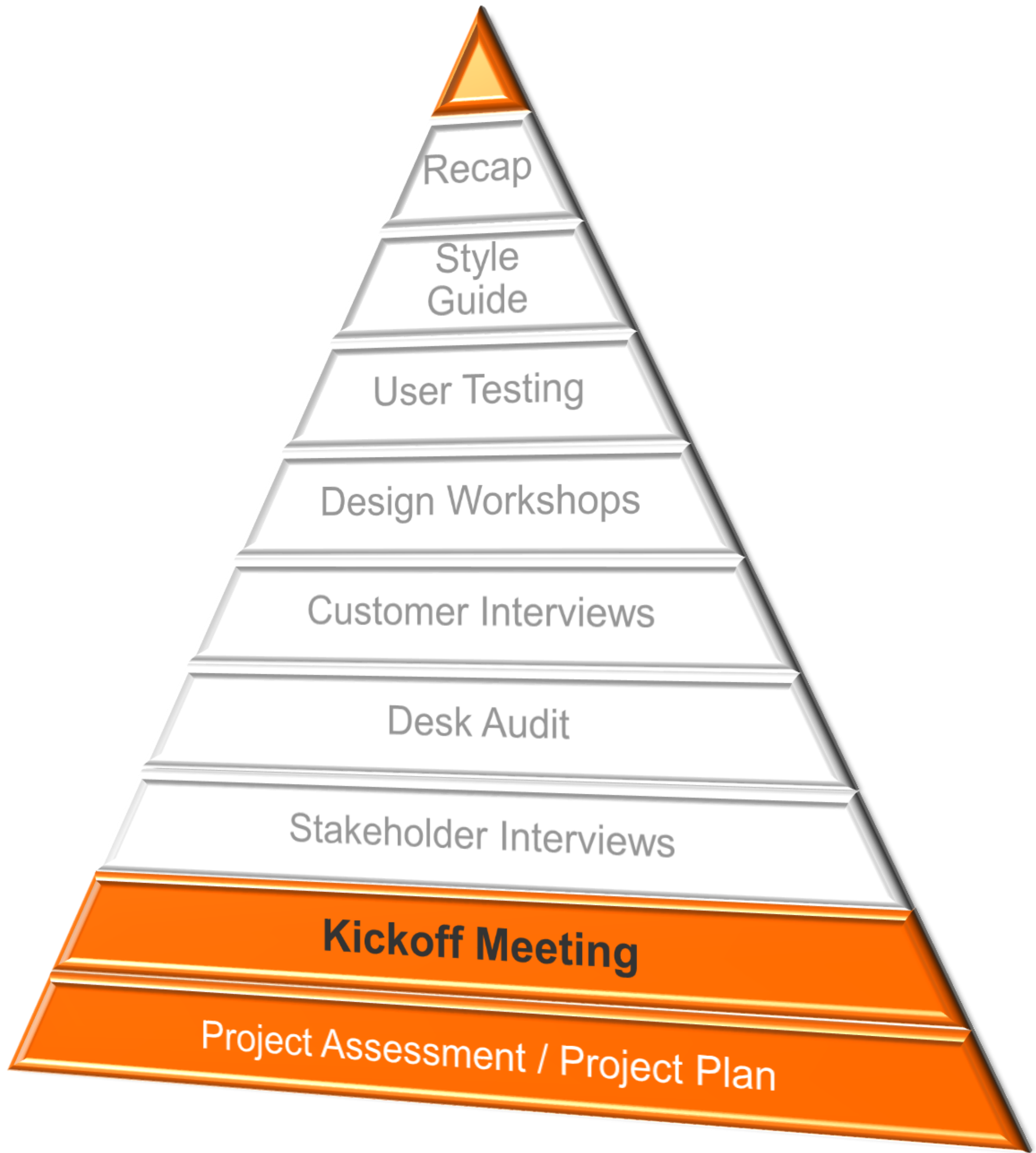
Project Assessment / Project Plan



ID		Task Name	Duration	Start
1		EFT Project	210 days	Mon 5/10/10
2	✓	Ramp up on Project	10.25 days	Mon 5/10/10
3	✓	Review Project & Prepare Initial Project Plan	5 days	Mon 5/10/10
4	✓	Send Project/Process Documentation	0.25 days	Mon 5/17/10
5	✓	Review Project/Process Documentation	4 days	Mon 5/17/10
6	✓	Review Project Strategy Docs	1 day	Fri 5/21/10
7				
8		1. Expert Review or "Desk Audit"	69.75 days	Mon 5/24/10
9	✓	Understand user goals with the product (1 day)	1 day	Mon 5/24/10
10	✓	Overview of the product (2 days)	2 days	Tue 5/25/10
11	✓	Provide System Access	45 days	Mon 5/24/10
12	✓	Create Prototype in Axure for conducting Desk Audit	14 days	Wed 7/28/10
13	✓	Identify criteria for measurement [heuristics] (1 day)	1 day	Tue 8/17/10
14		Conduct desk audit (3 days)	5 days	Wed 8/18/10
15	✓	Review Product with Customer Care in Dublin, OH (1 day)	0 days	Wed 6/2/10
16		Review and prepare results (2 days)	2 days	Wed 8/25/10
17		Present results and recommended next steps (1 day)	1 day	Fri 8/27/10
18				
19	✓	2. Kick-off Meeting	36 days	Mon 5/10/10
20	✓	Meeting Prep	5 days	Mon 5/10/10
21	✓	Provide List of Kick-off Meeting Attendees	0.25 days	Fri 5/28/10
22	✓	Final Review with Jeff	1 day	Tue 6/1/10
23	✓	Adjustments	2 days	Wed 6/2/10
24	✓	Forward to Janet Hodge for Review	1 day	Fri 6/4/10
25	✓	Face-to-Face Review with Janet Hodge	1 day	Tue 6/8/10
26	✓	Kick-off Meeting	1 day	Wed 6/9/10
27	✓	Review and prepare results (2 days)	2 days	Mon 6/14/10
28	✓	Present Results (1 day)	1 day	Mon 6/28/10

(View Project Plan)

Kickoff Meeting



Kickoff Meeting

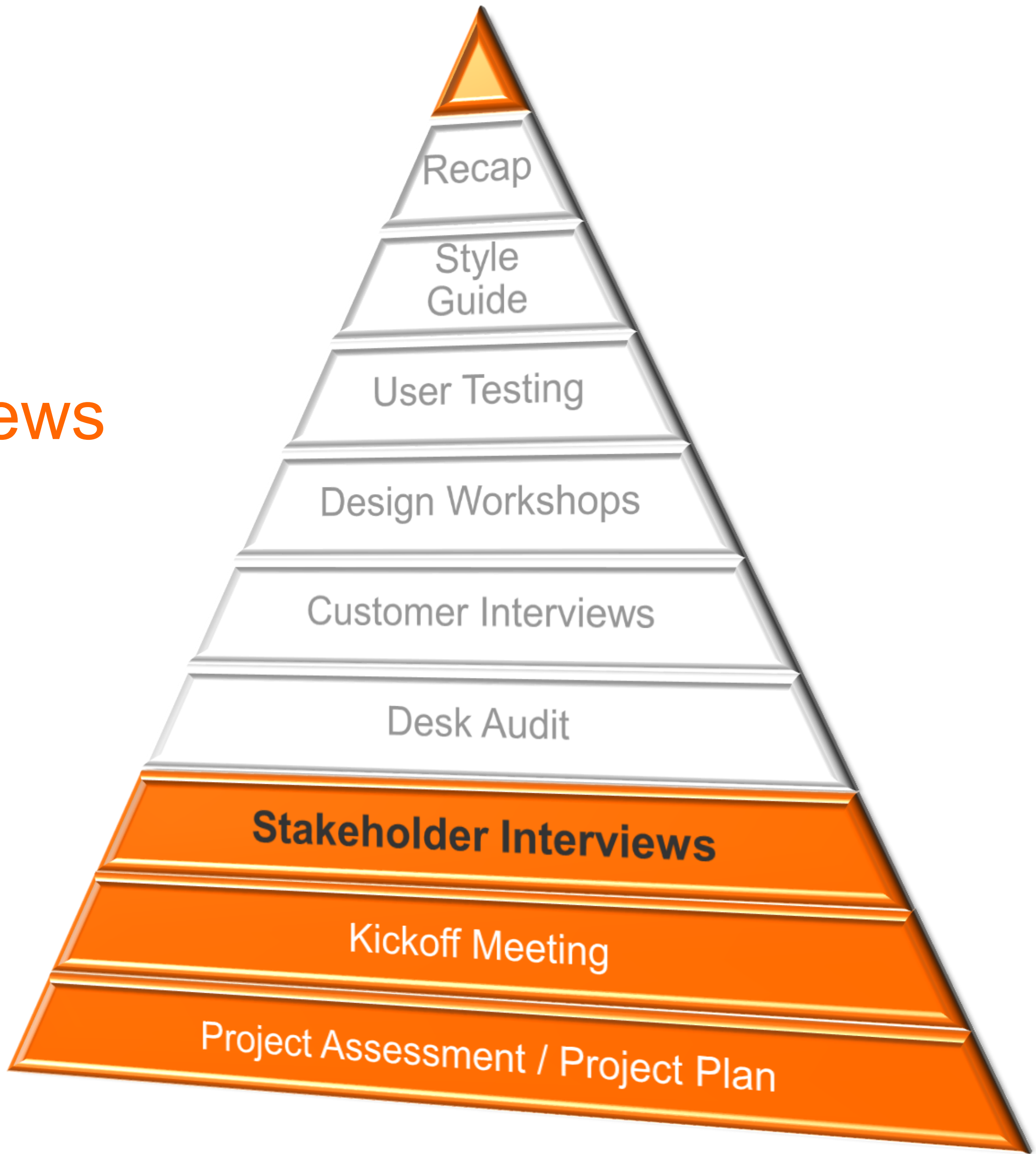
Attendees

- Cross-functional group from multiple disciplines, including:
  - Product Management
  - Business Development
  - Technology
  - User Experience

Objectives/Agenda

- User Experience (UX) Professional Services at Fiserv
- Project Plan
- Working Session
- Next Steps

Stakeholder Interviews



Interview Participants

• **Vincent Fraker**	Senior Vice President Product Management & Business Development
• **Denise Kudlow**	Business Analysis
• **Allison Ellison**	Product Management & Business Development
• **Elizabeth Brock**	Product Management
• **Alberto Montero**	Product Management & Business Development
• **Yosepha Swanson**	Product Management & Business Development
• **Sharon Zinken**	Product Management & Business Development
• **Christina Meyers**	Product Management & Business Development
• **Anita Walch**	Product Management & Business Development
• **Sarah Jacobson**	Training
• **Catherine Derrickson**	Technical Client Services
• **Ray Presley**	Technical Client Services

Stakeholder Interview Recap

What We Did

- Interviewed 12 employees spanning multiple roles and departments.
- Each participant discussed likes and dislikes of the current state of Client Central, and verbalized what different users need to know, do, and accomplish on the future redesigned Client Central.
- Discussion topics included:
  - Mission Statement
  - Goals and Objectives
  - Critical success factors (CSF)
  - Users
  - Pain Points
  - Description of Current and Redesigned Applications
  - Competitors and Best-in-Class Applications
  - Internal/External Project Challenges

fiserv.

Stakeholder Interview Recap

What We Learned

- Everyone had strong opinions about the existing Client Central toolset – and the direction it should be taken.
- Most felt that that overall, Client Central provides a lot of value to our clients; however, everyone felt that significant improvements in usability must be achieved in order to improve client satisfaction – and ultimately increase sales.

Comments

- Captured approximately 175 stakeholder comments
    - Provided tremendous insight into participants' thoughts and priorities
    - Reviewed, validated and referenced throughout the project
- Several categories identified throughout this process,
- Grouped together by key categories or "themes"
- Details *(Tabs: Comments by Question; Comments by Category; Stakeholders Interviewed)*

Key Category :: Vision

Provide the most effective toolset to make our clients successful in servicing their consumers.

It's all about the user… there's nothing else.

Provide an efficient tool for the user – to allow them to do what they need and do it as quickly as possible.

Key is making our clients successful in servicing their customers.

Our existing clients should really like and acknowledge that we made a significant improvement. Get customer agreement that the proposed changes are the right changes for them.

Translating our investments into sales/ability for users to service their customers better.

fiserv.

Key Category :: Navigation/Information Architecture

Logically organize the entire site.

- Allow me to get to specific content from multiple places – especially key information from where I'm at.
- Group like applications within the same tabs.

There is a lot of information in there, but it's not laid out well. We need to take the user into consideration.

Provide a more holistic view of the cardholder, in case cardholder asks a question about a fraudulent charge. Hooking demographic to activity to adjustments would be very critical.

Why can't I get the Terminal documentation while I'm in Terminal? Why should I have to leave Terminal to find its documentation?

Rollovers are KEY! When users mouse over a particular field, users can get field-specific information. Brings a lot of information directly to the users.

Key Category :: General User Experience

Instead of saying that I'm in application "A" which means I can only do "x" functions; we need to look at it as: I have several things to do to help the customer on the phone. How can I easily service this customer from where I am at?

Shouldn't have to be trained on it.

We keep enhancing our systems, which is nice, but they are not always cohesive or designed the best way.

Lack of speed and transmission time an issue with going between apps. Case Tracker is now integrated into one window with Card Management which is much easier.

Minimize the copying/pasting from one application to another.

Enter data, enter it once, not have to toggle… zoom from one field to another to the next.

Key Category :: Work Flows

Our systems and corresponding documentation must work in a workflow process.

Product should function the way I service my customers, not the way a system is bolted together.

Streamline many of our applications and actions. The Cardholder Record should be the central application for any user. From this application you should be able to easily: Order a card, status a card, view transactions, submit corrections.

Each user(s) has their own tasks to do. Why can’t we have multiple workflows based on what they need to accomplish instead of a common workflow? We can determine what those key workflows are and one person may only need to use two of these workflows, where someone else may need to use all of them.

Improve the charge-back process (look at transactions, going in and out of applications and ultimately creating a chargeback.)

Key Category :: Visual Design

Condensing the screens… make them more concise.

Minimize the amount of white space and use larger, more crisp fonts.

Major Category :: Technology

Tokens. What the heck do I need this for? Key for dual authentication, but there are non-physical solutions. They want Transaction Journal to be at every teller, so they don't want to put up with the token.

Timeouts. Can we have different timeouts for internal vs. external?

Persona/Workflow Matrix

Who are our users and how important is each workflow to each persona?

(Note: Highest priority personas/workflows are highlighted in the matrix below)

EXTERNAL ROLES/DEPARTMENTS	PRIORITY*	Premier Analytics	Call Me::Referral Processing	View Cardholder record	Add Cardholder Record	Copy Cardholder Record	Status Cardholder Record	Force Activate	Maintenance	Reset PIN tries	Order Replacement Card	Cancel Order	View Order History	Files Refresh	Institution (IDF)::Establishing Annual Holidays
				Card Management (CM2)											IDF
FINANCIAL INSTITUTIONS		Low	Low	High										Med	Low
Small Financial Institutions															
Settlement / Daily Balancing	1														
Adjustment/Chargeback	1			Low											
Operations – Card Management / Data En	2			High	High	High	High	Low	High	Med	Med	Med	Med	Low	
Operations – Transaction Research	2			High										Low	Low
Risk Management	3			High			Low		Low						
Help Desk / Customer Service	4		Low	High	Low	Low	High	Med	Med	Med	Med	Med	Med		
Operations – ATM Support	4														
New Accounts	5			High	High	High	High		Low		Low	Low	Low		
Audit/Compliance	6			Med											
Security	6														
Accounting	6														
Program Management (Premier Analytics	6	Low													
Teller Line	7			Med											
Third Party Organizations	7		Low	High	Low	Low	Low	Low	Low	Low	Low	Low	Low		
Loan Servicing - Credit Gateway Clients	8			High	Low	Low	Low	Low	Low	Low	Low	Low	Low		
Medium Financial Institutions															
Settlement / Daily Balancing	1														
Adjustment/Chargeback	1			Low											
Operations – Card Management / Data En	2			High	High	High	High	Low	High					Med	
Operations – Transaction Research	2			High										Med	Low
Risk Management	3			High			Low		Low						
Help Desk / Customer Service	4		Low	High	Low	Low	High	Med	Med						
Operations – ATM Support	4														
New Accounts	5			High	High	High	High		Low						
Audit/Compliance	6			Med											
Security	6														
Accounting	6														
Program Management (Premier Analytics	6	Low													
Teller Line	7			Med											
Third Party Organizations	7		Low	High	Low	Low	Low	Low							
Loan Servicing - Credit Gateway Clients	8			High	Low	Low	Low	Low							
Large Financial Institutions															
Settlement / Daily Balancing	1														
Adjustment/Chargeback	1			Low											
Operations – Card Management / Data En	2			High	High	High	High	Low	High					High	
Operations – Transaction Research	2			High										High	Low
Risk Management	3			High			Low		Low						
Help Desk / Customer Service	4			High	Low	Low	High	Med	Med						
Operations – ATM Support	4														
New Accounts	5			High	High	High	High		Low						
Audit/Compliance	6			Med											
Security	6														
Accounting	6														
Program Management (Premier Analytics	6	Low													
Teller Line	7			Med											
Third Party Organizations	7			High	Low	Low	Low	Low							
Loan Servicing - Credit Gateway Clients	8			High	Low	Low	Low	Low							
ATM Owners		Low		Low	Low	Low	Low		Low	Low	Low	Low			
POS Owners		Low													
INTERNAL ROLES/DEPARTMENTS															
Business Development		Low		High											
Call Center			Low	Low			High	Med	High		Low	Low	Low		
Chargeback/Adjustment Team				High											
Communications															
Express Client Services Direct				High	High	High	High	High	High	High	High	High	High	High	Low
Express Client Services Resellers				High	High	High	High	High	High	High	High	High	High	High	Low
Implementation/Service Delivery				Med	Low	Low	Low	Low	Low	Low	Low	Low	Low	Med	
Product Management		Low		Low										Low		Low

EXTERNAL ROLES/DEPARTMENTS	SPC::View Financial Transactions	Initiate Financial Transactions	Dispute/Adjust Financial Transactions	Enter Chargebacks/Representments	Enhanced Chargeback Service Fiserv Provided Service (Apps: SPC)	Terminal::View Details	Terminal::Balance Mid-Point Adjustment	Transaction Journal	Tranview::Transaction Summary View	Tranview::Transaction Summary::Enter Adjustment	Tranview::Existing Adjustment Summary View or Cancel)	Existing Correction Summary (View Only)	Terminal Last Activity Summary (View Only)	Tranblocker Activity Summary (View and Adjust)	Security Tab::Group Member Summary	Security Tab::User Administration
	SPC (Settlement)					Terminal		TJ	RAS Tranview/Settlement						RAS Security	
FINANCIAL INSTITUTIONS	High					Med		High	High							
Small Financial Institutions																
Settlement / Daily Balancing	Low	Low	Low	Low	Low	High	High	Med	Med							
Adjustment/Chargeback	High	High	High	High	High			Low	High	Hight	High	Med	Low	Low		
Operations – Card Management / Data En																
Operations – Transaction Research	High	High	High	High	High			High	High				Low	Low		
Risk Management								High	High					w-High		
Help Desk / Customer Service	Med	Med	Med	Med	Med	Med	Med	High	High				Low	Low		
Operations – ATM Support						High	High	Med	High				Low			
New Accounts								Low								
Audit/Compliance						Low	Low	Low	Low							
Security															High	High
Accounting																
Program Management (Premier Analytics																
Teller Line																
Third Party Organizations	High	High	High	High	High	Med	Med	High	High				Low	Low		
Loan Servicing - Credit Gateway Clients	Low	Low	Low	Low	Low			High	High				Low	Low		
Medium Financial Institutions																
Settlement / Daily Balancing	Low	Low	Low	Low	Low	High	High	Med	Med							
Adjustment/Chargeback	High	High	High	High	High			Low	High	High	High	Med	Low	Low		
Operations – Card Management / Data En																
Operations – Transaction Research	High	High	High	High	High			High	High				Low	Low		
Risk Management								High	High					High		
Help Desk / Customer Service	Med	Med	Med	Med	Med	Med	Med	High	High				Low	Low		
Operations – ATM Support						High	High	Med	High				Low			
New Accounts								Low								
Audit/Compliance						Low	Low	Low	Low							
Security															High	High
Accounting																
Program Management (Premier Analytics																
Teller Line																
Third Party Organizations	High	High	High	High	High	Med	Med	High	High				Low	Low		
Loan Servicing - Credit Gateway Clients	Low	Low	Low	Low	Low			High	High				Low	Low		
Large Financial Institutions																
Settlement / Daily Balancing	Low	Low	Low	Low	Low	High	High	Med	Med							
Adjustment/Chargeback	High	High	High	High	High			Low	High	Hight	High	Med	Low	Low		
Operations – Card Management / Data En																
Operations – Transaction Research	High	High	High	High	High			High	High				Low	Low		
Risk Management								High	High					High		
Help Desk / Customer Service	Med	Med	Med	Med	Med	Med	Med	High	High				Low	Low		
Operations – ATM Support						High	High	Med	High				Low			
New Accounts								Low								
Audit/Compliance						Low	Low	Low	Low							
Security															High	High
Accounting																
Program Management (Premier Analytics																
Teller Line																
Third Party Organizations	High	High	High	High	High	Med	Med	High	High				Low	Low		
Loan Servicing - Credit Gateway Clients	Low	Low	Low	Low	Low			High	High				Low	Low		
ATM Owners	High	High	High	High	High	High	High	High								
POS Owners	High	High	High	High	High			High								
INTERNAL ROLES/DEPARTMENTS																
Business Development																
Call Center	Low	Low	Low	Low	Low	High		High	High					Med		
Chargeback/Adjustment Team	High	High	High	High	High			High	High	High	High	High				
Communications																
Express Client Services Direct	High	Low	Low	Low		High		High	High		Med	Med	Low	High		
Express Client Services Resellers	High	Low	Low	Low		Med		High								
Implementation/Service Delivery	Low					Low		Med	Med							
Product Management	Low					Med		Low	Low							

EXTERNAL ROLES/DEPARTMENTS	Client View Internet (CVI)	CaseTracker::View Case (EnFact/InFact)	CaseTracker::Update Case	CaseTracker::Manage Record Button (Card Mgmt)	Compromised Cards (Card Tracker)	Transblocker::View a Rule	Tranblocker::Add a Rule	Tranblocker::Edit a Rule	Tranblocker::Copy a Rule	Tranblocker::Delete A Rule	Tranblocker::Setting Defaults	User Administration (Security)	Cardholder Preferences (View, Manage, Report)	ATM Manager (Third Party Vendor)	ATM Marketer (Third-Party Vendor)
	CVI	CaseTracker				TranBlocker									
FINANCIAL INSTITUTIONS	M-H	High			High	High						Low	Low	Low	Low
Small Financial Institutions															
Settlement / Daily Balancing	High														
Adjustment/Chargeback	High														
Operations – Card Management / Data En	Med														
Operations – Transaction Research	High														
Risk Management	High	High	High	High	High	High	High	High	High	High	High				
Help Desk / Customer Service	Med	Med	Med	Med	Med	Med									
Operations – ATM Support	Med												Low	Low	Low
New Accounts	Med														
Audit/Compliance	Med	Low	Low	Low	Low	Low									
Security												High			
Accounting	Low														
Program Management (Premier Analytics															
Teller Line															
Third Party Organizations	Med	Med	Med	Med	Med	Med									
Loan Servicing - Credit Gateway Clients	Med	Med	Med	Med	Med	Med									
Medium Financial Institutions															
Settlement / Daily Balancing	High														
Adjustment/Chargeback	High														
Operations – Card Management / Data En	Med														
Operations – Transaction Research	High														
Risk Management	High	High	High	High	High	High	High	High	High	High	High				
Help Desk / Customer Service	Med	Med	Med	Med	Med	Med									
Operations – ATM Support	Med												Low	Low	Low
New Accounts	Med														
Audit/Compliance	Med	Low	Low	Low	Low	Low									
Security												High			
Accounting	Low														
Program Management (Premier Analytics															
Teller Line															
Third Party Organizations	Med	Med	Med	Med	Med	Med									
Loan Servicing - Credit Gateway Clients	Med	Med	Med	Med	Med	Med									
Large Financial Institutions															
Settlement / Daily Balancing	High														
Adjustment/Chargeback	High														
Operations – Card Management / Data En	Med														
Operations – Transaction Research	High														
Risk Management	High	High	High	High	High	High	High	High	High	High	High				
Help Desk / Customer Service	Med	Med	Med	Med	Med	Med									
Operations – ATM Support	Med												Low	Low	Low
New Accounts	Med														
Audit/Compliance	Med	Low	Low	Low	Low	Low									
Security												High			
Accounting	Low														
Program Management (Premier Analytics															
Teller Line															
Third Party Organizations	Med	Med	Med	Med	Med	Med									
Loan Servicing - Credit Gateway Clients	Med	Med	Med	Med	Med	Med									
ATM Owners	Med												Low	Low	Low
POS Owners	Med														
INTERNAL ROLES/DEPARTMENTS															
Business Development															
Call Center	High	Med	Med	Med	Med	Low	Low	Low	Low	Low	Low	Low			
Chargeback/Adjustment Team	High														
Communications															
Express Client Services Direct	High	Med	Med	Med	Med	Med						Low	Low	Low	Low
Express Client Services Resellers	High	Med	Med	Med	Med	Med						Low	Low	Low	Low
Implementation/Service Delivery	Med											Low	Low	Low	Low
Product Management	Med	Low	Low	Low	Low	Low						Low	Low	Low	Low

Heuristic Evaluation / Desk Audit

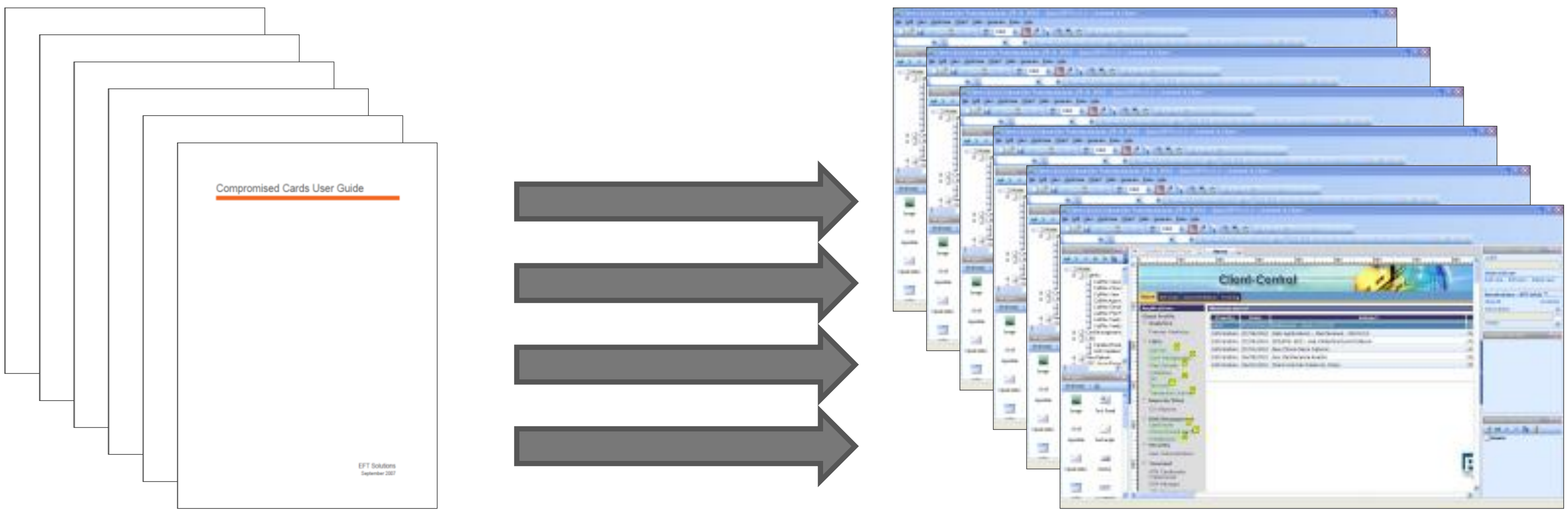
Expert Review – Desk Audit

Initial Challenge

No access to any of the 15 existing products.

Solution

Recreated all products in Axure based on the images and training instructions in their existing training manuals. This process also enabled me to became a subject matter expert.



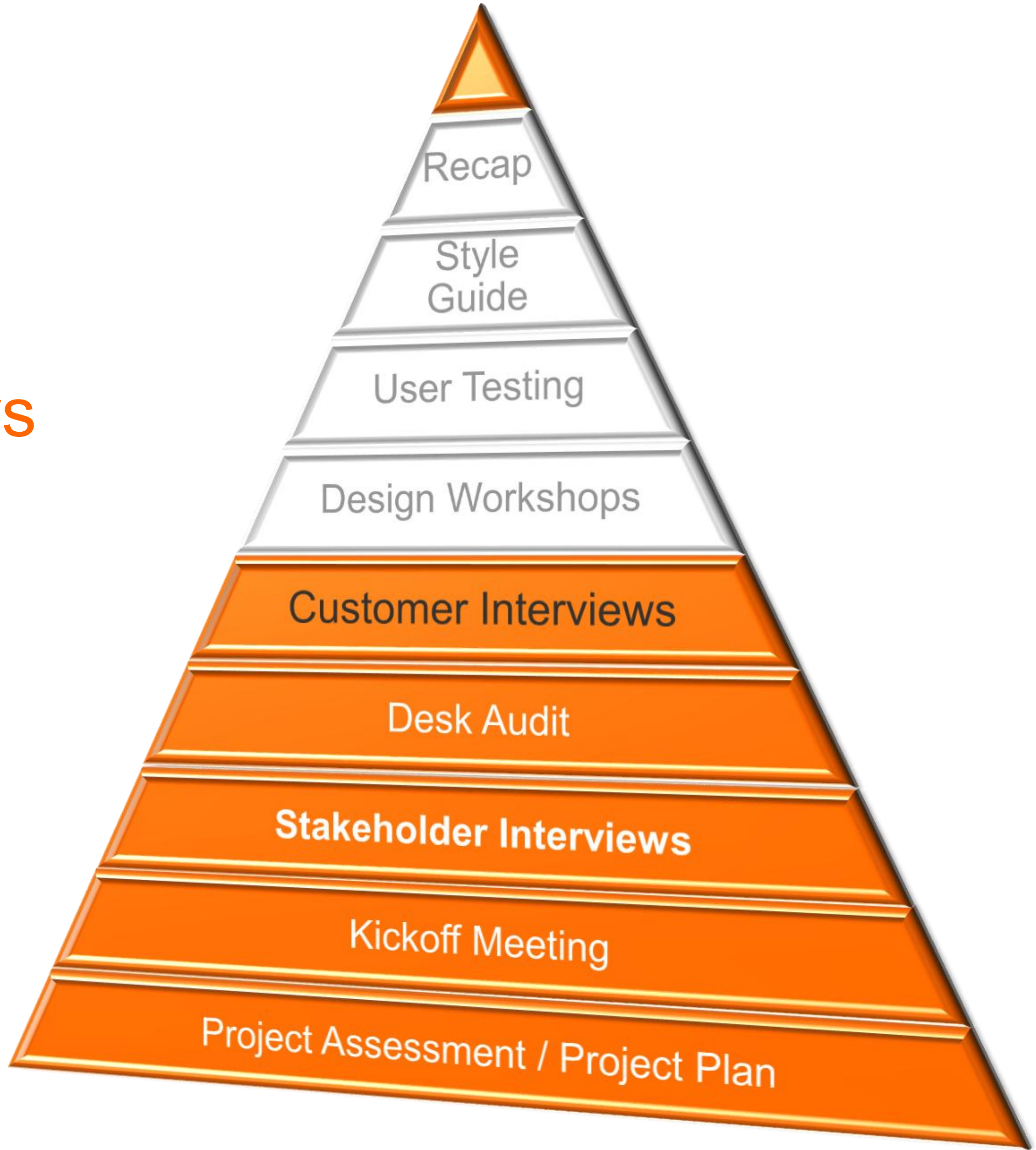
Process

- Analyzed each key application from a user perspective to determine what changes should be considered to streamline/simplify each application and corresponding process.
- Developed ideas/recommendations throughout the entire iterative design process – and incorporated during design workshops.

High Level Findings/Recommendations

- Group, organize and display content elements throughout Client Central – and each corresponding page – in a way that is intuitive to users and streamlines their tasks/workflows.
- Users must have the ability to easily move between applications with all appropriate user and cardholder parameters passed from one application to another.
- Provide more integration of data/functionality between applications.
- Provide hovers whenever possible. This not only quickly bubbles data to the user but provides us an excellent way to translate codes into English/user-centric information.
- Provide date ranges with date pickers whenever possible.
- Utilize layers when appropriate, as this can provide advantages in many areas.
- Allow users the ability to click on items within a search results page when appropriate, instead of having to select an item then clicking an action button at the bottom of the page.
- Extend/eliminate the 90-day rule in TranBlocker.
  - Because of the large number of rules and corresponding expiration dates, many users track/manage these expiration dates in their personal Outlook calendar.
  - Allowing a date to expire by mistake can be a huge financial liability for the FI.
- Allow users to change the expiration date in TranBlocker instead of having to create a new rule/copy an existing rule.

Customer Interviews



Customer Interviews

Customers that matched our profile

- **First Bank:** Large Bank in St. Louis, MO
- **Service Credit Union:** Medium Credit Union in Rochester, NH
- **Clear Mountain Bank:** Small Bank in Bruceton Mills, WV

Interviews

- Conducted 10 interviews with 3 financial institutions within a 7-week timeframe.
- Most felt that that overall, Client Central provides a lot of value to them. However:
  - Everyone felt that improvements in usability and functionality must be made in order to better meet their needs.
  - Everyone also had strong opinions about the existing Client Central toolset – and some of the changes they would like to see.
- Began to socialize/obtain feedback on some of the initial concepts being considered.

Customer Interviews :: General Functionality

We need the ability to easily interact between applications.

Allow users to go from app to app without having to re-enter card numbers.

I would like to be able to specify my own date range to search.

Minimize having to click from here to there to find the information you need.

We HATE these tokens! We like the MC tokens, where you don't have to enter a code to get a code.

Why can't we double-click a row within a table to go to that record?

Card Management

I would like to be able to view and update Names, Addresses, Accounts and all other key information directly on the Details page. That would save me several clicks.

I would really like to have access to recent transactions from Card Management.

When I go to Card Management for additional information, I must reenter all cardholder information again. Why couldn't Card Management open with this cardholder's information already pre-populated?

Why isn't there navigation throughout all of the pages in Card Management? If I'm looking for specific information, but not sure where to find it – or if I need to go from page to page to obtain information – I must continually open a page, cancel out, and then click on the next page. This is very unnecessary and time consuming.

Terminal

I wish it could go back more than four days – especially during holidays. Six or seven days would be ideal.

Transaction Journal / SPC

It would be very helpful to have date ranges in TJ and SPC for searching.

It would be great to use hovers to let users know what specific fields mean.

Is there a way to display the information that I need, where I want it – and in a human readable format?
(To determine why a transaction is denied, I must scroll to the right in the search results screen to find the "response code". I then need to translate this code, using reference chart on my cube wall, which contains a legend of response codes. There has to be a better way!)

The Customized Column view isn't always permanently saved.

I would like my staff to be able to add/remove fields to reports on the fly as we run reports. This way, they can add a field, select that updated view and their current report would reflect this change.

The new design which allows chaining is a great concept, BUT the way it works is very confusing – and hard to use!

TranBlocker

Why are we only limited to 25 Merchant IDs? Because of this limit, we always have unnecessary exposure. We would like to have over 100 rules.

The 90 Day Rule limit is a major pain point for us. I must keep track of all the rule expiration dates in Outlook to make sure a rule doesn't expire – which would be disastrous.

Would it be possible to extend dates instead of creating new rules?

Is it possible to get a Warning that a rule is expiring – with an option to renew from this warning. (Do you want to Renew? Y/N)

CaseTracker

It would be great if we could have access to at least six months – or even a year.

Workflow & Conceptual Design Workshops

Workflow/Conceptual Design Workshops

Workshop Information

- Bridge between the Discovery and Design Phases
- Conducted over 40 cross-functional design workshops
- Validated/modified key workflow list
- Defined requirements needed within each workflow to make them as effective and intuitive as possible for all users
- Defined all content elements, pages and general layout required for each workflow (as well as non-workflow tasks)
- Effectively grouped/displayed all content on each page

Critical Success Factors for these workshops

- Organize the data elements in such a way as to:
  - Make it intuitive for all users
  - Minimize the number of clicks/pages required to accomplish each key workflow
  - Integrate functionality between applications as appropriate

Key Workflow List (Focused on 28 of 34 Key Workflows)

CM2 and Legacy Card Management

- View Cardholder Record
- Add Cardholder Record
- Copy Cardholder Record
- Status Cardholder Record
- Force Activate
- Maintenance
- Reset PIN tries
- Order Replacement Card
- Cancel Order
- View Order History

Terminal

- View Details
- Balance Mid-Point Adjustment

TranBlocker

- View a Rule
- Add a Rule
- Edit a Rule
- Copy a Rule
- Delete a Rule
- Setting Defaults

Transaction Journal

- Research Capabilities

SPC

- View Financial Transactions
- Initiate Financial Transactions
- Dispute/Adjust Financial Transactions
- Enter Chargebacks / Representments
- Enhanced Chargeback Service

Case Tracker

- View Case (EnFact/InFact)
- Tracker::Update Case
- Manage Record Button (Card Mgmt)

Compromised Cards

- View/Status Compromised Cards

Not in Scope for This Project

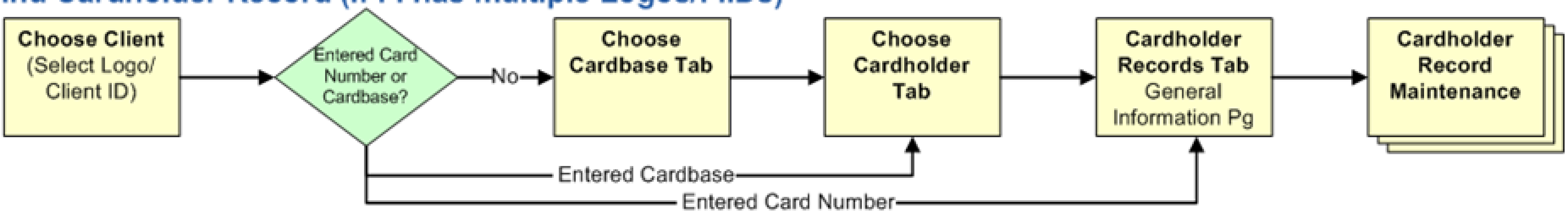
- Premier Analytics
- Call Me
- Files Refresh
- Institution
- Client View Internet (CVi)
- User Administration

Review Existing and Proposed Workflows

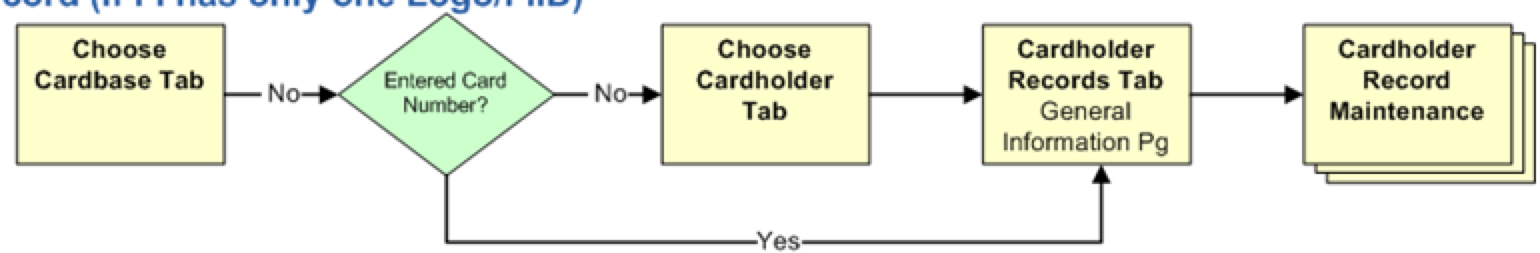
Card Management Workflows::

Finding an Existing Cardholder Record; Adding a New Cardholder Record

Find Cardholder Record (If FI has multiple Logos/FIIDs)



Find Cardholder Record (If FI has only one Logo/FIID)



Review Existing and Proposed Workflows

Card Management Workflows

Card Management Home
Select Cardholder
- Select Client ID/Logo
- Select Cardbase
- Select Cardholder

Add Cardholder Record (Using Wizard Pages)

Current Legacy Workflow (13 Pages)

1. Details Page
2. Accounts Page
3. Accounts Details Page
4. Names/ Addresses Page
5. Names Details Page
6. Names/ Addresses Page (again)
7. Add New Cardholder Name Page (Optional)
8. Cardholder Fraud/Security Page
9. Cardholder Limits Page
10. Cardholder Transaction Types Page
11. Navigation Page (User must select Save)
12. Confirmation Page
13. Print IVR Instructions Page

Current CM2 Workflow (7 Pages – but Missing Some Card Ordering and Balances Functionality)

1. Details Page
2. Risk Page
3. Accounts Page
4. Names Page
5. Limits Page
6. Confirmation Page
7. Print IVR Instructions Page

Proposed Workflow (8 Pages – which includes a Review Page)

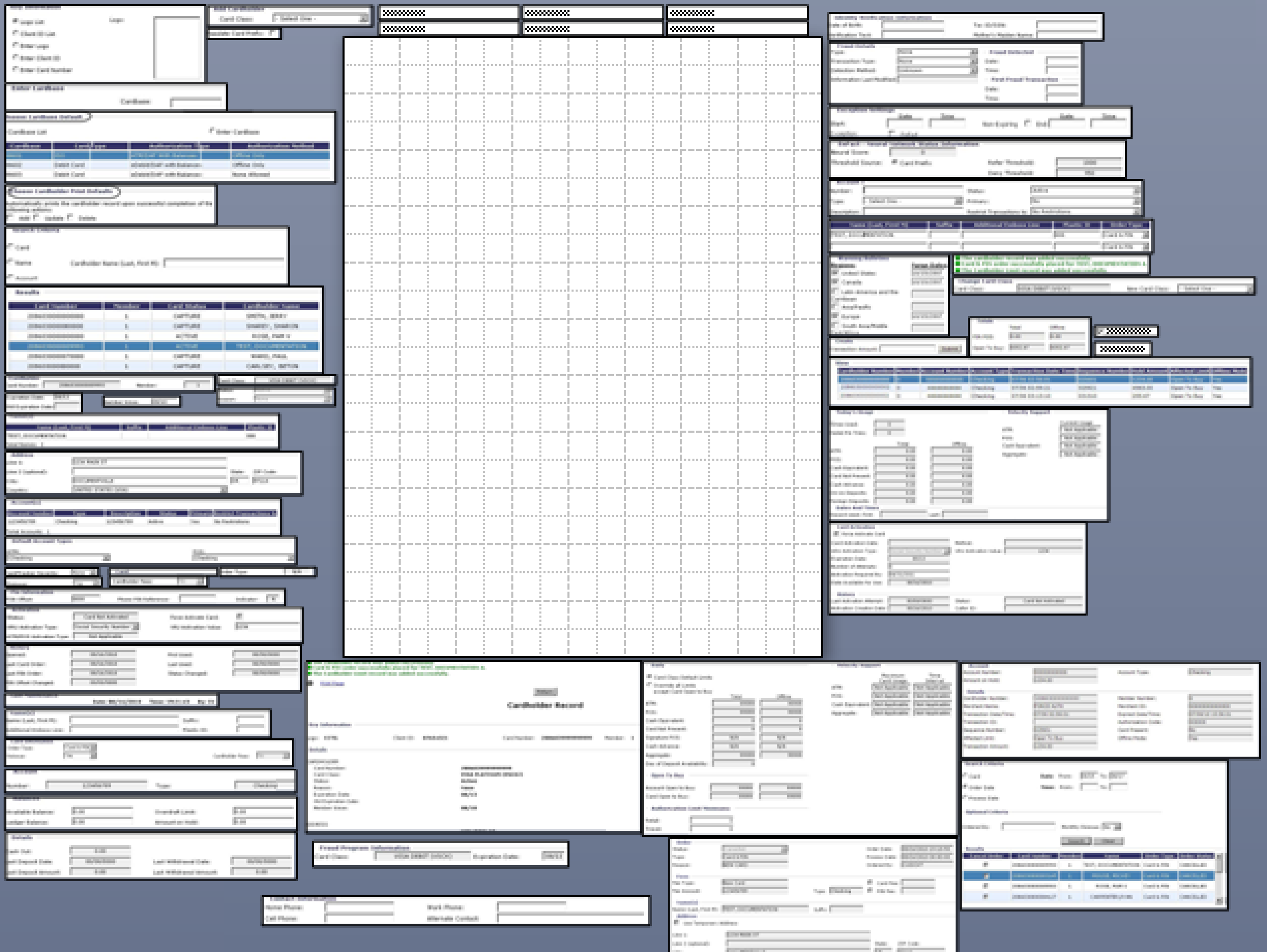
1. General Information Page
2. Card Order Page
3. Balances/ Holds Page
4. Limits Page
5. Risk (Fraud/ Security) Page
6. Review/Submit (Proposed Enhancement)
7. Confirmation Page
8. Print IVR Instructions Page

fiserv.

Workshop Tasks

Define all content elements, pages and general layout

- What content is needed?
  - What existing content elements (information, functionality, buttons, navigation, etc.) should be grouped together into a single “bucket”, to help us simplify/streamline this workflow as much possible.
  - What new content must be incorporated into these buckets?
  - What existing content is no longer required?
- Which pages should be created based on these buckets/groupings.
  - Should multiple buckets/groupings be merged together to create one page?
  - Should this bucket be a page of its own?
  - Should this bucket be divided onto multiple pages?
- How should the content on each page be arranged?


Cardholder Record
Fraud Program Information

Transaction

Card Issuer

Terminal Owner

Network

Transaction Date:	08/16/2004 00:00:25
Journal Date (ET):	08/16/2004 00:00:25
Message Type:	210
Retrieval Reference Number:	016099654501
System Trace Audit Number:	009464432
Sequence Number:	010519
Deposit Type Indicator:	010519
Deposit Link:	A
Amount 1:	0.05
Amount 2:	0.00
Cashback Amount:	0.00
Surcharge Amount:	0.00
Surcharge Reversal Amount:	0.00
Currency:	USA (840)
Conversion Rate:	0001.000000
Response Sub Code:	A
Card Logo:	CMST
Card Client ID:	12345678
Card Number:	2008012222222222
Member Number:	1
Authorization Code:	230026
To Account:	0000000000000000000
Hold on Funds Amount:	
Card Posting Date:	08/16/2004 00:00:25
Card Country:	USA
Card County:	SOMEWHERE
Card State:	NJ
Expiration Date:	
From Account:	000000000001111111111

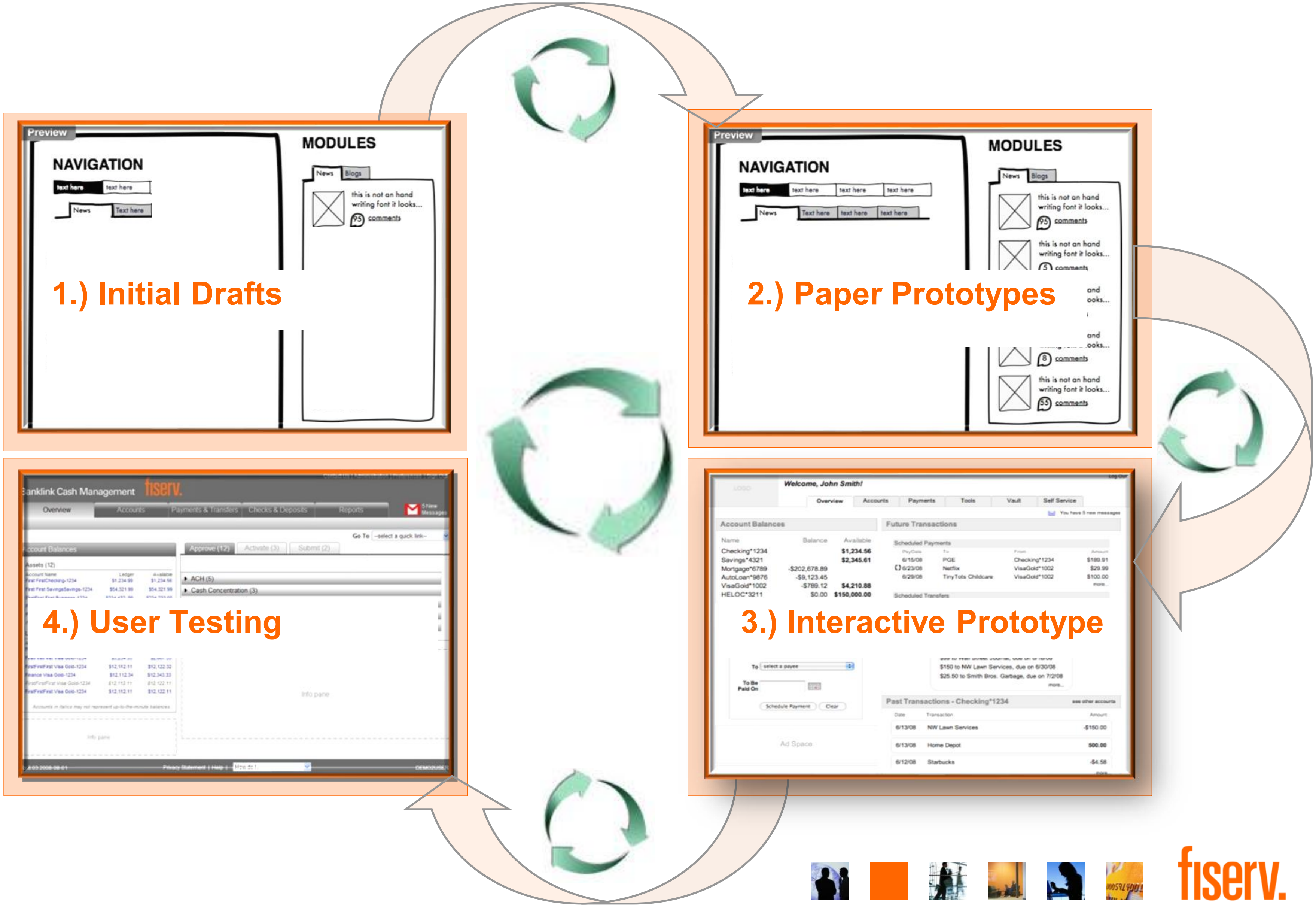
Response Code:	APPROVED - BOTH BALANCES PROVIDED (012)
Transaction Processing Code:	DEPOSIT FROM MONEY MARKET TO CHECKING (202320)
Reversal Code:	DEPOSIT OUT OF BALANCE/APPLIED (037)
Point of Service:	PAN AND EXPIRATION DATE, NO TRACK2 (089)
Terminal Logo:	ABCD
Terminal Client ID:	87654321
Terminal ID:	TERM0001 - POS
Merchant Type:	5812
Merchant Identifier:	FRANCHISE
Reg E Street:	123 ANY ROAD
Reg E City:	ANYWHERE
Reg E State:	NJ
Acquirer Posting Date:	08/16/2004 00:00:25
Terminal Country:	USA
Terminal State:	NJ
ATM Terminal Country:	
Merchant Verification Value:	
Local Amount 1:	0.05
Local Amount 2:	0.00
Network ID:	650000
ECI - Debit MasterCard:	
ECI - Visa:	
Timestamp:	000000000
Issuer's FMC:	000
Acquirer's FMC:	000
Network Indicator:	08
PSI Date:	
Network Posting Date:	08/16/2004 00:00:25
Reference Number:	
Debit MasterCard Acquirer Reference Number:	
Fee Program Indicator:	
Payment Phone Number:	
AAV:	
Transaction Log Address:	00000000

Acquirer Trace Data:	
Transaction Description:	
Network Large Private Data:	

eDebit

Card Holder Address:	
POS Geographic Data:	
AVS Indicator:	
Merchant Advice Code:	

Prototype Design Process



Design Changes

Key Customer Issues/Pain Points

Top three customer Issues/Pain Points

- Provide the ability for users to easily move between applications with all appropriate user and cardholder parameters passed from one application to another.
- Provide more integration of data/functionality between applications.
- Group, organize and display content elements throughout Client Central – and each corresponding page – in a way that is intuitive to users and streamlines their tasks/workflows.

How did we address these issues?

- Global Hidden Navigation (Global)
- Integration of data between applications (Card Management Compromised Cards)
- Completely changing the information architecture (Card Management) (Customer Comment)
- Provide hovers whenever possible (Card Management Terminal CaseTracker)

Other Key Changes

General

- Hidden Left Navigation (TJ/SPC)
- Multi-select preview (TJ/SPC)
- Hovers (Card Management, Terminal, CaseTracker)
- Sortable Headers in most tables (TJ/SPC)
- Single-Click with color changes (TJ/SPC)
- Multiple Customizable Column Views (with drag 'n drop creation) (TJ/SPC)
- Pagination (TJ/SPC)

Card Management

- Add Name & Optional ZIP Code Search
- Key Links
- Recent Transactions
- Multi-select preview within the Transaction Activity
- Link to Transaction Journal (View this list of transactions in TJ)
- Maintenance History

Other Key Changes (Continued)

SPC

- Date Range Option with Date Picker
- Image/Doc Upload Management

Compromised Cards

- View/print Risk Alert information
- Ability to Status one or all cards in one action
- Ability to Reissue one or all cards in one action
- Ability to View one or all cards in Card Management in one action

TranBlocker

- Summary Page with Edit Links
- Ability to extend a rule by just changing the end-date
- Ability to create/update rules with an extended/without an expiration date
- Defaults displayed on each (Countries, MCC and Card Acceptor IDs) page
- Ability to change multiple rows at once (matching changeable defaults)
- Ability to add more rows (as many as they need) dynamically that can match changeable defaults

fiserv.

User Stories

User Story #1 *[Click Reduction of 93.7% – for a very common workflow]*

(Reduction of clicks from 1003 to 63)

- Beth is a supervisor at a large bank who is training an employee how to use Compromised Cards. They received an e-mail from Fiserv that a compromise has occurred.
- They view the severity of the compromise, and which cardholders are affected and see that the severity level is 1. Consequently, they decide to status all cards within this alert as “Stolen” and reissue cards for all cards that they are statusing.

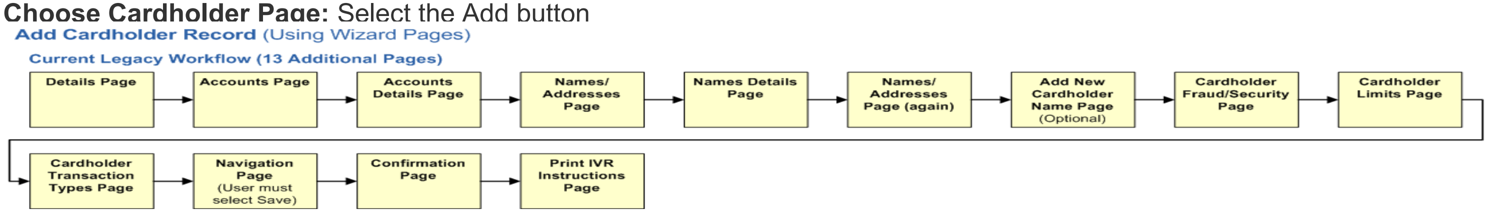
Legacy system *(50 Cards = 1003 Clicks to status & reorder every card)*

Compromised Cards

1. **Select Institution Page:** Enter the Logo or Client ID
2. **Card Alerts Page:** Enter criteria and select Search
3. **Card Alerts Page-Search Results:** Select Alert, then either View Cards or Download Card Numbers to determine which card numbers are impacted in this alert

Card Management

1. **Select Client ID/Logo Page:** Enter cardbase of the first impacted card number
2. **Choose Cardholder Page:** Enter the first card number
3. **Selected Cardholder/Navigation Page:** Select Details from the navigation
4. **Details Page:** Status the first card number
5. **Selected Cardholder/Navigation Page:** Select the Update button
6. **Select Client ID/Logo Page:** Enter cardbase for new cardholder record
7. **Choose Cardholder Page:** Select the Add button
8.



Each subsequent card: Repeat Card Management Steps 1-8 (20 pages per card)

User Stories

User Story #1 (Continued)

New system *(50 Cards = 63 clicks to status & reorder every card*)*

Compromised Cards

1. **Select Institution Page:** Select or Enter Logo/FIID
2. **Card Alerts Page:** Enter criteria and select Search
3. **Card Alerts Page-Search Results:** Select Alert, then either View Cards to see the actual alert and which card numbers are impacted in this alert
4. **Alerts Details Page:** Select All (or specific cards to be statuses)
5. **Compromised Cards – Status Cards layer:** Select the “Select All Card Numbers (or specific cards to be statused) and the “Automatically reissue new cards” checkboxes

***Optional validation in Card Management:** If users want to view each cardholder record for validation, they can select the “View Updated Cards in Card Management” link to view/rotate through each of the 50 cardholder records.

“I like that you actually put the details of the alert in Compromised Cards. Before I would just get the case number, then I’d have to go out to MasterCard, pull up that case number, figure it out what details are at risk.”

Provides more integration of data/functionality between applications.

User Stories

User Story #2 *[Click Reduction of 77.8% – for another common workflow]*

(Reduction of clicks from 90 to 20)

- Sara, an administrator at a medium-sized credit union, received a call from a member stating that she just got married and would like to change her name, address and phone number.
- Sara would like to be able to do this as quickly and easily as possible – for the sake of both her and the member.

Legacy system *(90 Clicks to accomplish task)*

1. **Select Client ID / Logo page:** Enter the member's cardbase
2. **Choose Cardholder Page:** Enter the member's card number
3. **Selected Cardholder/Navigation Page:** Select Details from the navigation
4. **Details Page:** Change name
5. **Selected Cardholder/Navigation Page:** Select Names & Addresses from the navigation
6. **Names & Addresses Page:** Change address
7. **Selected Cardholder/Navigation Page:** Select Risk from the navigation
8. **Risk Page:** Change phone number
9. **Selected Cardholder/Navigation Page:** Select the Update button
   (Another Pain Point: without selecting the Update from the final Navigation page, none of these changes would be saved.)

New system *(20 Clicks to accomplish task)*

1. **Select Client ID / Logo page:** Enter the member's card number
2. **General Information Page:** Change the members name, address and phone number, then select the Save button (at the top or bottom of the screen)

Grouped, organized and displayed content elements throughout Client Central – and each corresponding page – in a way that is intuitive to users and streamlines their tasks/workflows.

fiserv.

Conceptual Design :: Technical Review
(Review with Development and QA)

Project Overview

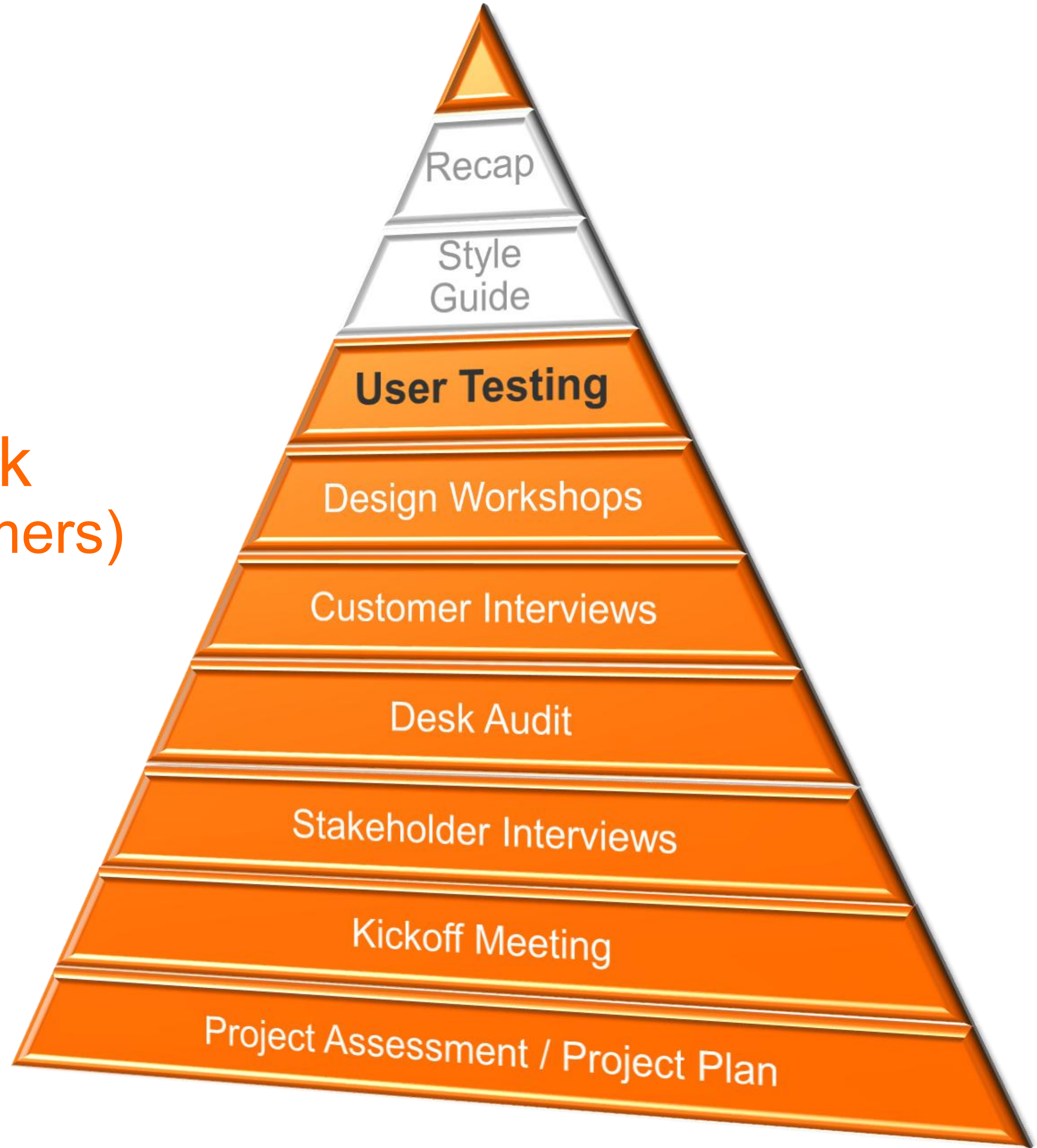
- Project Objectives
- Completed Tasks

Project Status "Where we are now?"

Key Technology Recommendations

- High-Level Discussion
- Prototype Walkthrough and Discussion
- Recap/Q&A

User Testing & Customer Feedback
(From External Customers)



User Testing & Customer Feedback

Provides Critical User Feedback

- Establishes how user-friendly each of the redesigned application is to understand, navigate and use
- Allows us to better understand how participants/users try to accomplish each task
- Uncovers any key pain points that still may be associated with each application
- Allows us to discuss with each participant during or after the test
  - What did & did not work well for them
  - What they liked & disliked about each applications (or the suite as a whole)
  - Recommended changes

User Testing & Customer Feedback

What We Did

- Conducted 9 user testing/customer feedback sessions with external customers
- Included 13 participants spanning multiple roles and departments
- Sessions were based on each participant's understanding/knowledge of a particular application.

Applications & Discussion Areas (Covering 28 of the 34 Key Workflows)

- Card Management (8 Tasks/10 key workflows)
- SPC/TJ (4 Tasks/ 6 key workflows)
- CaseTracker (3 Tasks/ 3 key workflows)
- Compromised Cards (2 Tasks/ 1 key workflow)
- TranBlocker (6 Tasks/ 6 key workflows)
- Terminal* (2 Tasks/ 2 key workflows)
- General Functionality Recommendations (Review & Rate)

** We were to test the Terminal application with First Bank; however, they ultimately decided not to participate in this application.*

fiserv.

Participants

External Customer Participants

- **First Bank; Missouri**
  - **Group participation** Chris Kennedy (VP), Betty Walz, Amber Abrahams, Stephanie, Virginia Wolf
- **Clear Mountain Bank; West Virginia**
  - Traci Samson
  - Sharon Hope
- **Service Credit Union, New Hampshire**
  - Audrey Miller
  - Bobbi Larson
- **Vystar Credit Union, Florida**
  - Christina McDonald
  - Julie Brice
  - Leah Mason
  - Maria Britz

Key Tasks/Workflows

Card Management

- Viewing and Modifying an Existing Cardholder Record
- Reset PIN Tries
- Status a Cardholder Record as “Lost”
- Copy a Cardholder Record
- Add New Cardholder
- Order a Replacement Card
- Cancel a Card Order
- Card Activation

SPC/Transaction Journal

- Review a Transaction
- Initiate and dispute this transaction
- Initiate (and Dispute) a Financial Transaction
- Change Your Column View Settings

CaseTracker

- View Case
- Update a Case
- Manage Record (Link to Card Management)

Key Tasks/Workflows

Compromised Cards

- View/Status Compromised Cards
- Validate Changes in Card Management (Link to Card Management)

TranBlocker

- View a Rule Set
- Edit a Rule Set
- Add a Rule Set
- Copy a Rule Set
- Delete a Rule within a Rule Set
- Setting Rule Defaults

Terminal*

- View Details
- Balance/Midpoint Adjustment

*(*No user testing was completed for this application)*

Key Findings

General Comments

- All tasks throughout the user testing process were accomplished relatively quickly. There were some areas that caused hesitation for participants, but these issues were addressed and tested well with subsequent participants.
- Everyone really liked our proposed changes to the entire Client Central suite of applications! They feel we've been able to focus on the areas that were important and significantly streamline/improve these applications.
- Those who participated in the Customer Interviews felt that we listened to what they said and were able to significantly improving this toolset in a way that makes them far more effective – and successful – in servicing their customers.
- We received a lot of comments, such as:
  - "This all looks great, it's much easier to use!"
  - "I really like everything you've done!"
  - "We currently could not utilize some of the functionality being proposed [in the new prototype]; however, we may try to come up with a way to do this type of processing via Client Central instead of our [internal] CVS system."
    Chris Kennedy, VP First Bank
- Overall – great customer user testing results – and ***Excellent*** response to the new prototype!

Key Findings

Card Management

- Most participants had never attempted to complete some of these tasks before; however, nearly all completed these tasks quickly.
  - There were a couple of areas that caused some hesitation; but were modified and tested well with subsequent users.
- Most participants took time to study many of the pages, especially the General each page; however, they all really liked the content and overall design.
- Nearly everyone commented that these changes would significantly streamline their ability to service their customers.
  - “You have everything encapsulated on this one page…I like being able to do so much from this page.”
  - “We change a lot of names. Before we had to click an additional tab in order to do this and there would be a delay to get to that screen. So it would be great if the names can be changed from this [General Information] screen!”
  - “I like all of the changes, including the updated General Information page design!”
- The “Recent Transactions” tab was another HUGE hit and was rated consistently as one of the top proposed improvements to Client Central.
- Key Links was also highly rated.

Key Findings

SPC/Transaction Journal

"This seems a lot better than what we currently have. Not saying that what we have is bad in any way, but this is much more user-friendly."

- Two of the four participants were new SPC/TJ users and one was a RAS user; however, most tasks were completed relatively quickly.
  - Like many of the applications, there were a couple of areas that caused hesitation; but were modified and tested well with subsequent users.
- Top Rated Enhancements
  - The start and end dates
  - Hovers
  - Single-click selection with color change
  - Multi-select preview
  - Sortable headers
  - Image/document upload management process
- *"This is MUCH Better! The file management is one of the best screens I've seen and will save me a lot of time!"*
- *"Wow!" She really likes the doc upload management functionality. "This seems very user-friendly from what I've been trained on. I do like this, very much."*

Key Findings

CaseTracker

- Everyone completed these tasks quickly.
- Most participants commented that they like the fact that the system will now automatically update Card Management without having to do this manually.

Compromised Cards

- Everyone completed these tasks quickly; however, I made several enhancements as a result of participant feedback.
- All participants were thrilled with the changes in this application – from limited read-only functionality to a tool with significant integration with Card Management.

TranBlocker

- Most participants completed these tasks quickly.
- Like many of the applications, there were a couple of areas that caused hesitation. These areas were modified and tested well with subsequent users.
- Top Rated Enhancements:
  - Ability to extend a rule by just changing the end-date
  - Ability to create/update rules with an extended/without an expiration date
  - Ability to change multiple rows at once (matching changeable defaults)
  - Ability to add more rows (as many as they need) dynamically that can match changeable defaults

Customer Feedback (Click Icons for Sound Bites)

Hidden Navigation: We can tell you right now, that we rank that as a number one. No questions asked…
…This has been the number one usability frustration that we have.

Hidden Navigation: Oh, that's awesome! Because it automatically copies this information to the next screen... I absolutely love that!

Sortable Headers: I like that. I really do. Because we have a difficult time in trying to see all of the transactions for this particular person that are in (code) 5542, the gas station… Oh, That would be great!

Cross Application: The few things that I've seen, and I've heard from people are really the cross-application movement. Not having to re-key somebody's card number or data ranges multiple times between applications. (huge) I just think its a lot friendlier. It's viewing things more dynamically than it was before... Good direction, I like it.

Single Click: I would rank that as phase 1.

Color Change (from single click): I do, I like that a lot. Because that way when you've clicked on something, it's like I've already gone to that one then I can go on to the next one.

Customer Feedback (Click Icons for Sound Bites)

Cross Application: Out of anything I've seen, the one thing that is the most dynamically necessary is being able to move from application to application without having to exit entirely. That really is primary.

Recent Transactions: Oh wow... That would be top of the list!

General Information Page: We change a lot of names. Before we had to click an additional tab in order to do this and there would be a delay to get to that screen. So it would be GREAT if the names can be changed from this [General Information] screen!

Wizard Arrows: I did like how you have the progression arrows at the top, so you can see where it was going to Risk then to Limits...

General Layout Design: It gives a little bit more of a point and click feel, where you can see something. click right on it rather than having to go back. In the current system it feels like you have to go tab to tab… I think this would be more user-friendly for the staff in trying to do some of the things they do.

Date Range: Oh my gosh. Yes, that's very important. It's really difficult for us search the transactions without that. I have to click one by one. That would be really important for me.

More Feedback

General

- Single Click/Color Change
- Hidden Navigation
- Hovering, Hidden Navigation, Date Ranges

SPC

- Document Management
- More than 100 Transaction

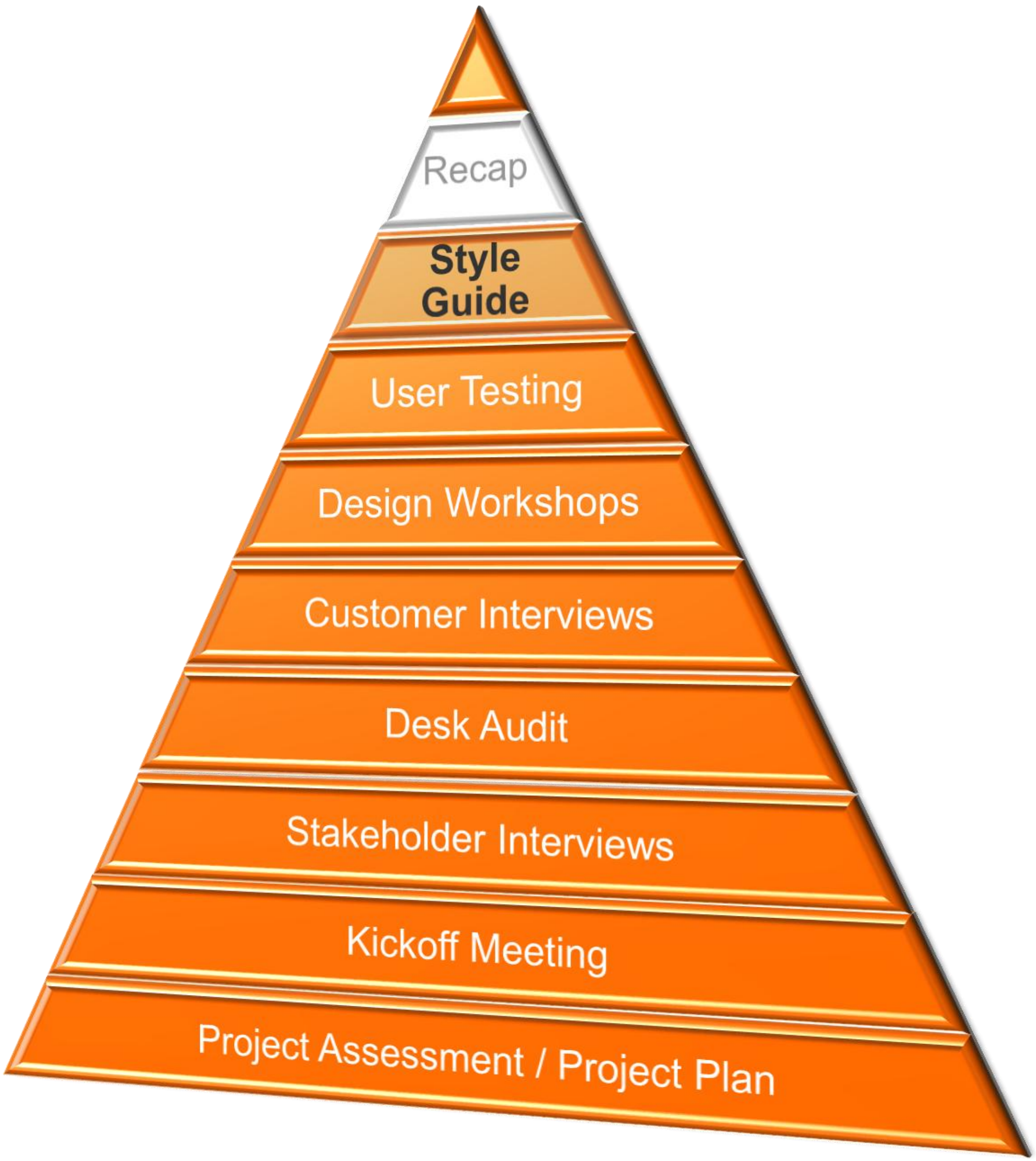
Compromised Cards

- Alert Details
- Hovers

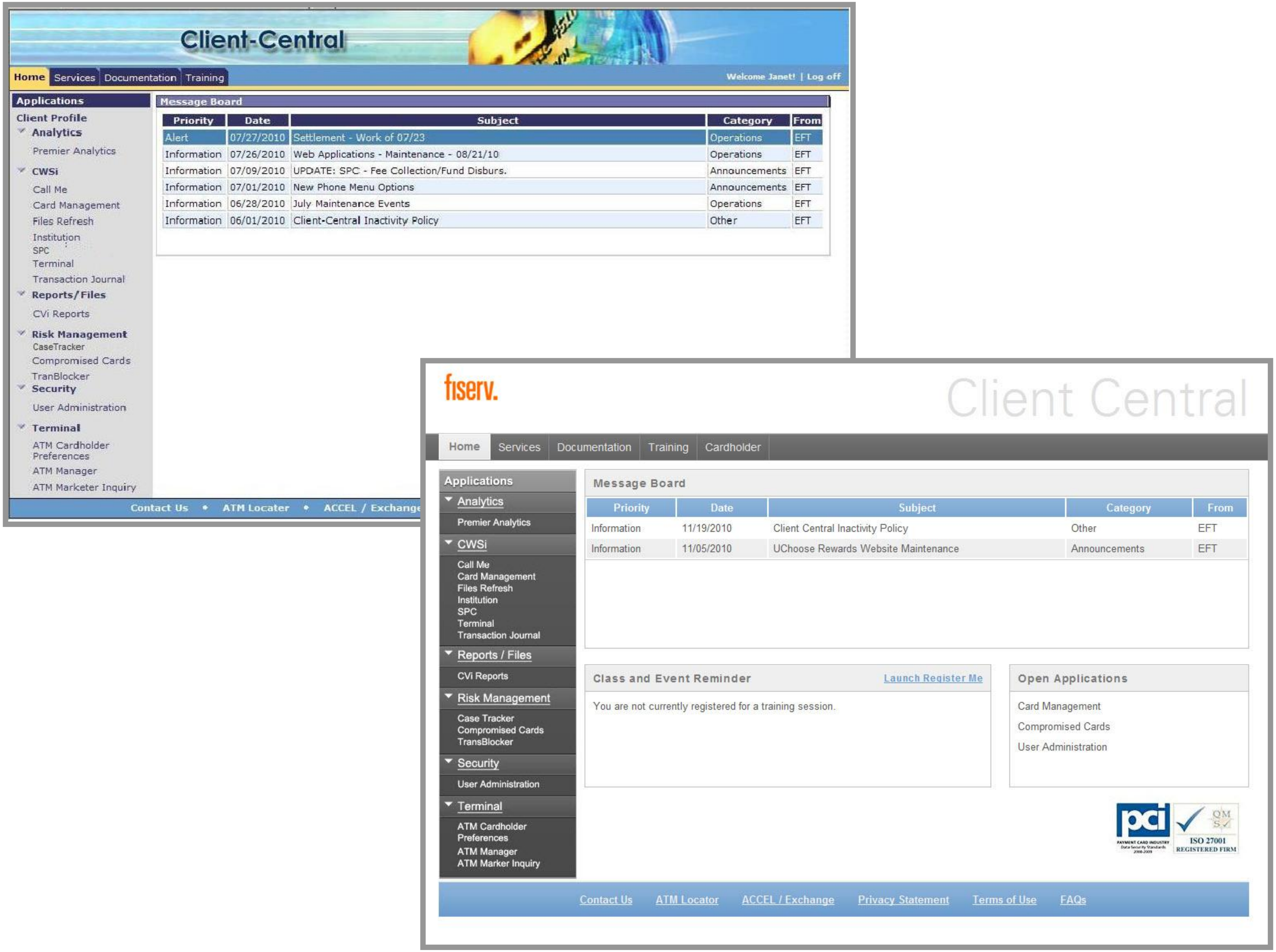
TranBlocker

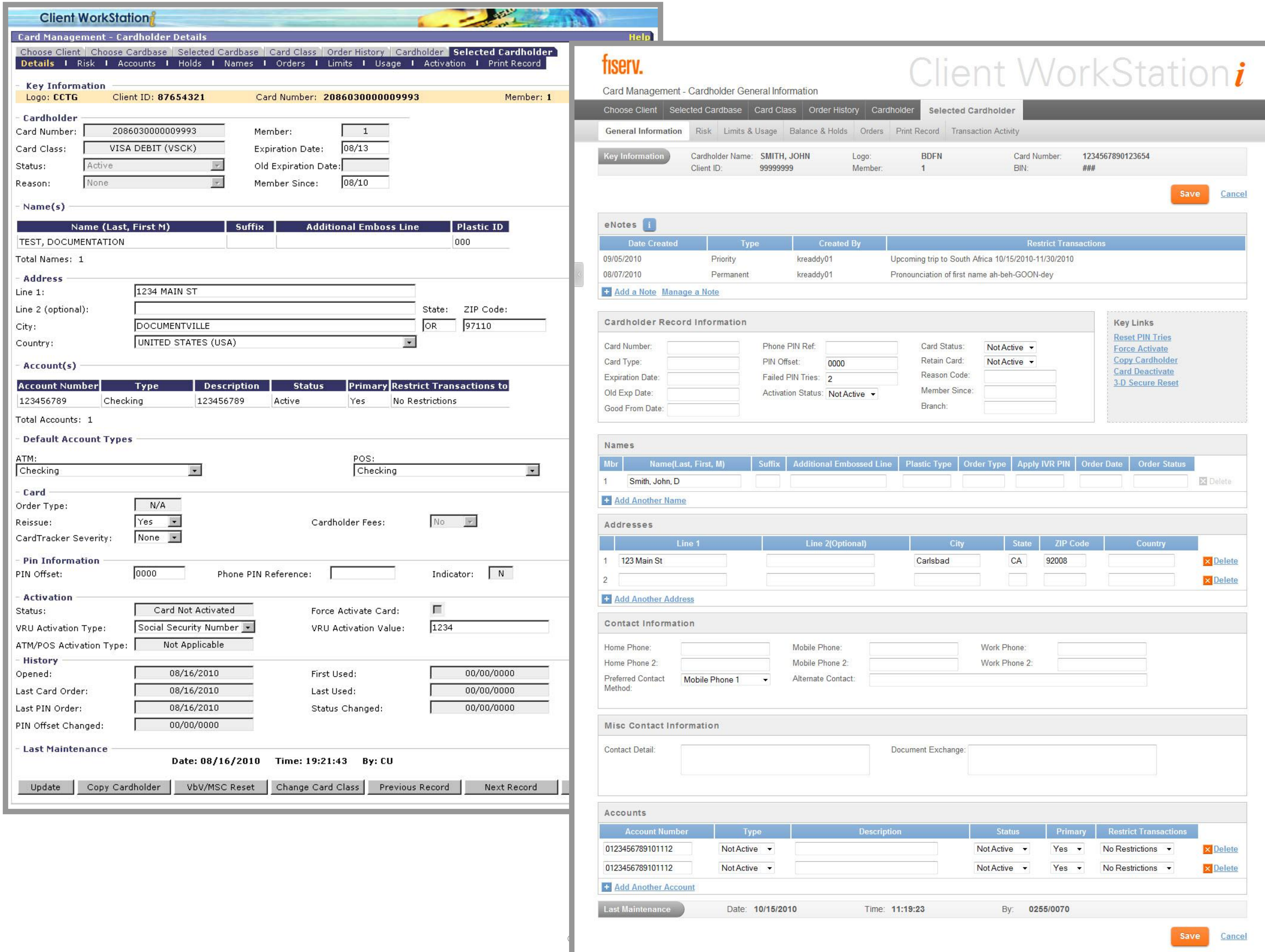
- Extended – or No Expiration Dates
- Customer Feedback
- Multiple MCCs
- Summary Page with Edit Links

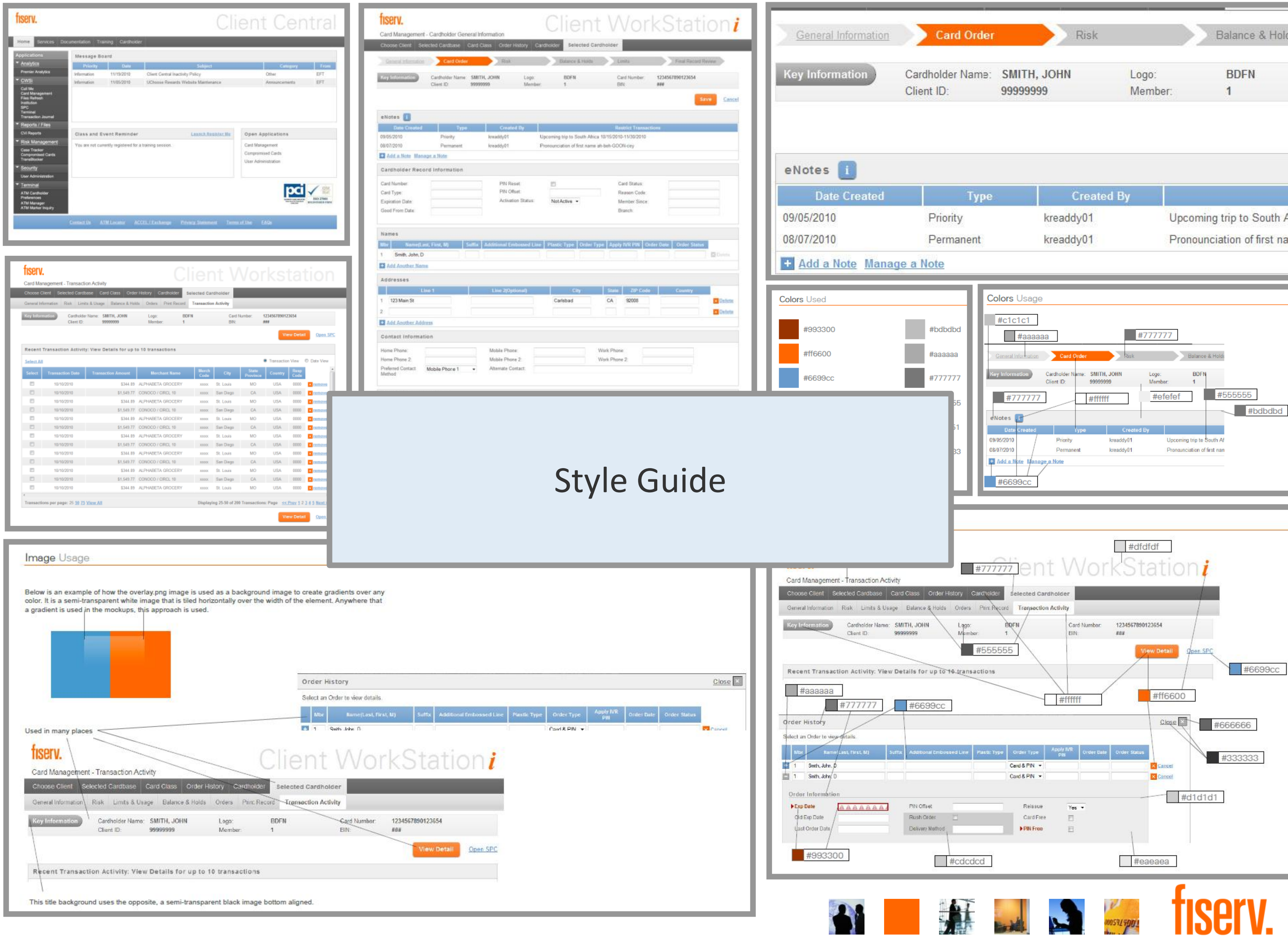
Style Guide



fiserv.

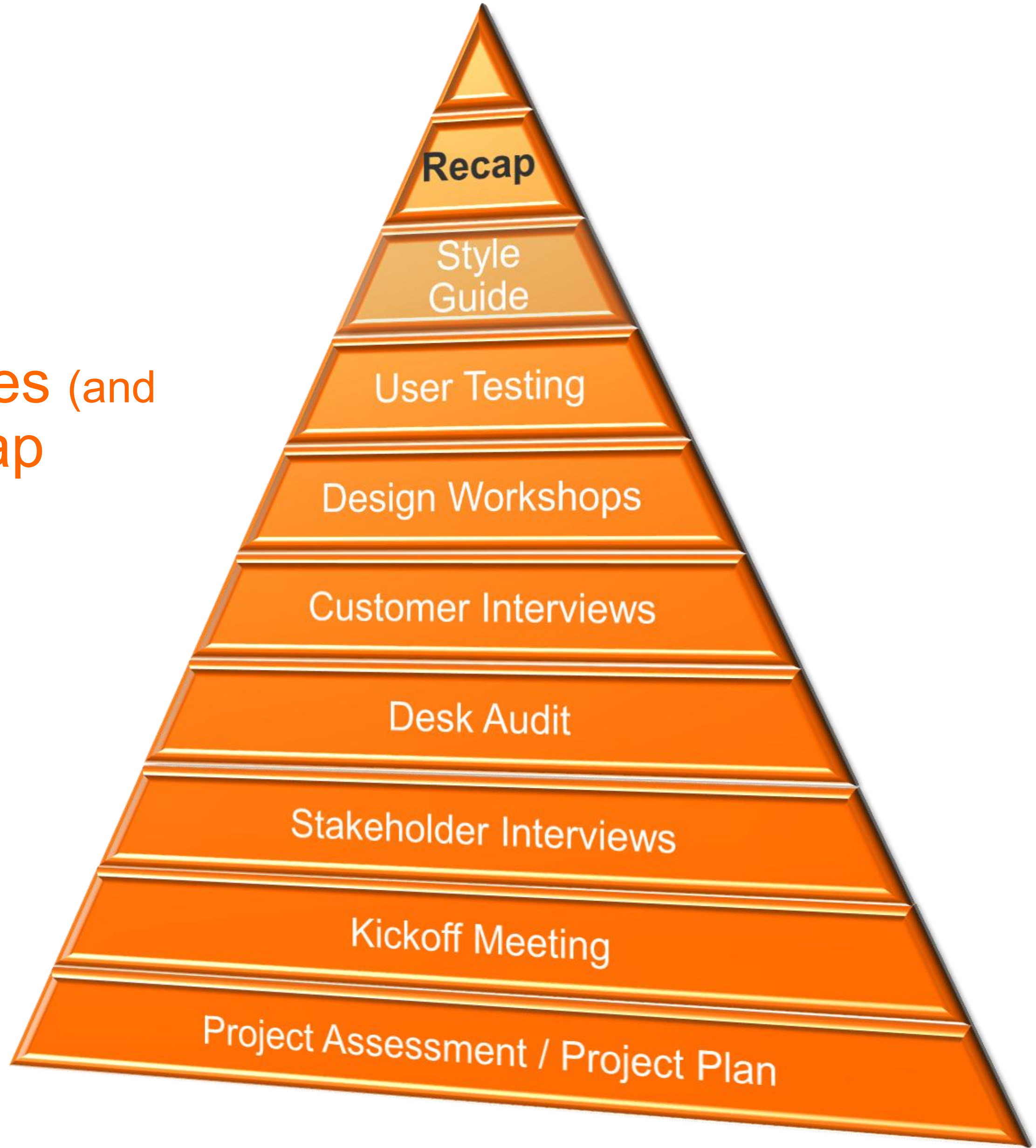

Client-Central
Home
Services
Documentation
Training
Welcome Janet! | Log off
Applications
Client Profile
Analytics
Premier Analytics
CWSi
Call Me
Card Management
Files Refresh
Institution
SPC
Terminal
Transaction Journal
Reports/Files
CVi Reports
Risk Management
CaseTracker
Compromised Cards
TranBlocker
Security
User Administration
Terminal
ATM Cardholder Preferences
ATM Manager
ATM Marketer Inquiry
Message Board
Priority
Date
Subject
Category
From
Alert 07/27/2010 Settlement - Work of 07/23 Operations EFT
Information 07/26/2010 Web Applications - Maintenance - 08/21/10 Operations EFT
Information 07/09/2010 UPDATE: SPC - Fee Collection/Fund Disburs. Announcements EFT
Information 07/01/2010 New Phone Menu Options Announcements EFT
Information 06/28/2010 July Maintenance Events Operations EFT
Information 06/01/2010 Client-Central Inactivity Policy Other EFT
Contact Us • ATM Locater • ACCEL / Exchange
fiserv.
Client Central
Home
Services
Documentation
Training
Cardholder
Applications
Analytics
Premier Analytics
CWSi
Call Me
Card Management
Files Refresh
Institution
SPC
Terminal
Transaction Journal
Reports / Files
CVi Reports
Risk Management
Case Tracker
Compromised Cards
TransBlocker
Security
User Administration
Terminal
ATM Cardholder Preferences
ATM Manager
ATM Marker Inquiry
Message Board
Priority
Date
Subject
Category
From
Information 11/19/2010 Client Central Inactivity Policy Other EFT
Information 11/05/2010 UChoose Rewards Website Maintenance Announcements EFT
Class and Event Reminder
Launch Register Me
You are not currently registered for a training session.
Open Applications
Card Management
Compromised Cards
User Administration
pci
ISO 27001 REGISTERED FIRM
Contact Us
ATM Locator
ACCEL / Exchange
Privacy Statement
Terms of Use
FAQs


Client WorkStation
Card Management - Cardholder Details
Help
Choose Client | Choose Cardbase | Selected Cardbase | Card Class | Order History | Cardholder | Selected Cardholder
Details | Risk | Accounts | Holds | Names | Orders | Limits | Usage | Activation | Print Record
Key Information
Logo: CCTG Client ID: 87654321 Card Number: 2086030000009993 Member: 1
Cardholder
Card Number: 2086030000009993
Member: 1
Card Class: VISA DEBIT (VSCK)
Expiration Date: 08/13
Status: Active
Old Expiration Date:
Reason: None
Member Since: 08/10
Name(s)
Name (Last, First M) | Suffix | Additional Emboss Line | Plastic ID
TEST, DOCUMENTATION | | | 000
Total Names: 1
Address
Line 1: 1234 MAIN ST
Line 2 (optional):
State:
ZIP Code:
City: DOCUMENTVILLE OR 97110
Country: UNITED STATES (USA)
Account(s)
Account Number | Type | Description | Status | Primary | Restrict Transactions to
123456789 | Checking | 123456789 | Active | Yes | No Restrictions
Total Accounts: 1
Default Account Types
ATM: Checking
POS: Checking
Card
Order Type: N/A
Reissue: Yes
Cardholder Fees: No
CardTracker Severity: None
Pin Information
PIN Offset: 0000
Phone PIN Reference:
Indicator: N
Activation
Status: Card Not Activated
Force Activate Card:
VRU Activation Type: Social Security Number
VRU Activation Value: 1234
ATM/POS Activation Type: Not Applicable
History
Opened: 08/16/2010
First Used: 00/00/0000
Last Card Order: 08/16/2010
Last Used: 00/00/0000
Last PIN Order: 08/16/2010
Status Changed: 00/00/0000
PIN Offset Changed: 00/00/0000
Last Maintenance
Date: 08/16/2010 Time: 19:21:43 By: CU
Update | Copy Cardholder | VbV/MSC Reset | Change Card Class | Previous Record | Next Record
fiserv.
Client WorkStation i
Card Management - Cardholder General Information
Choose Client | Selected Cardbase | Card Class | Order History | Cardholder | Selected Cardholder
General Information | Risk | Limits & Usage | Balance & Holds | Orders | Print Record | Transaction Activity
Key Information
Cardholder Name: SMITH, JOHN
Client ID: 99999999
Logo: BDFN
Member: 1
Card Number: 1234567890123654
BIN: ###
Save
Cancel
eNotes
Date Created | Type | Created By | Restrict Transactions
09/05/2010 | Priority | kreaddy01 | Upcoming trip to South Africa 10/15/2010-11/30/2010
08/07/2010 | Permanent | kreaddy01 | Pronounciation of first name ah-beh-GOON-dey
Add a Note
Manage a Note
Cardholder Record Information
Card Number:
Card Type:
Expiration Date:
Old Exp Date:
Good From Date:
Phone PIN Ref:
PIN Offset: 0000
Failed PIN Tries: 2
Activation Status: Not Active
Card Status: Not Active
Retain Card: Not Active
Reason Code:
Member Since:
Branch:
Key Links
Reset PIN Tries
Force Activate
Copy Cardholder
Card Deactivate
3-D Secure Reset
Names
Mbr | Name(Last, First, M) | Suffix | Additional Embossed Line | Plastic Type | Order Type | Apply IVR PIN | Order Date | Order Status
1 | Smith, John, D
Delete
Add Another Name
Addresses
Line 1 | Line 2(Optional) | City | State | ZIP Code | Country
1 | 123 Main St | | Carlsbad | CA | 92008
2
Delete
Delete
Add Another Address
Contact Information
Home Phone:
Home Phone 2:
Preferred Contact Method: Mobile Phone 1
Mobile Phone:
Mobile Phone 2:
Alternate Contact:
Work Phone:
Work Phone 2:
Misc Contact Information
Contact Detail:
Document Exchange:
Accounts
Account Number | Type | Description | Status | Primary | Restrict Transactions
0123456789101112 | Not Active | | Not Active | Yes | No Restrictions
0123456789101112 | Not Active | | Not Active | Yes | No Restrictions
Delete
Delete
Add Another Account
Last Maintenance
Date: 10/15/2010
Time: 11:19:23
By: 0255/0070
Save
Cancel


Client Central
Client WorkStation i
General Information
Card Order
Risk
Balance & Holds
Key Information
Cardholder Name: SMITH, JOHN
Client ID: 99999999
Logo: BDFN
Member: 1
eNotes
Date Created
Type
Created By
09/05/2010
Priority
kreaddy01
Upcoming trip to South Af
08/07/2010
Permanent
Pronounciation of first nan
Add a Note
Manage a Note
Colors Used
#993300
#ff6600
#6699cc
#bdbdbd
#aaaaaa
#777777
Colors Usage
#c1c1c1
#efefef
#555555
#ffffff
#dfdfdf
#666666
#333333
#d1d1d1
#cdcdcd
#eaeaea
Image Usage
Below is an example of how the overlay.png image is used as a background image to create gradients over any color. It is a semi-transparent white image that is tiled horizontally over the width of the element. Anywhere that a gradient is used in the mockups, this approach is used.
Used in many places
Order History
Select an Order to view details.
Card Management - Transaction Activity
View Detail
Open SPC
Recent Transaction Activity: View Details for up to 10 transactions
This title background uses the opposite, a semi-transparent black image bottom aligned.

Style Guide

Recommended Priorities (and "Quick Hits"), Project Recap and Recommended Next Steps



Recommended Priorities and "Quick Wins"

Customer Priorities

General

- 5: Information Architecture Redesign
- **5: Hidden Left Navigation**
- 5: Multi-select preview
- **5: Hovers**
- **5: Sortable Headers in most tables**
- **5: Single-Click with color changes**
- 3: Multiple Customizable Column Views (with drag 'n drop creation)
- 3: Pagination

Card Management

- 3: Add Name & Optional ZIP Code Search
- **5: Key Links**
- **5: Recent Transactions**
- **5: Multi-select preview within the Transaction Activity**
- **5: Link to SPC (View this list of transactions in SPC)**
- 4: Maintenance History

Rating Scale 1-5: 1 is Low Importance 5 is High Importance
Bold are "Quick Hits"

Customer Priorities(Continued)

SPC

- **5: Date Range Option with Date Picker**
- 4: Image/Doc Upload Management

Compromised Cards

- **5: View/print Risk Alert information**
- 4: Ability to Status one or all cards in one action
- 4: Ability to Reissue one or all cards in one action
- **5: Ability to View one or all cards in Card Management in one action**

TranBlocker

- 3: Summary Page with Edit Links
- **5: Ability to extend a rule by just changing the end-date**
- **5: Ability to create/update rules with an extended/without an expiration date (huge win)**
- 4: Defaults displayed on each (Countries, MCC and Card Acceptor IDs) page
- 4: Ability to change multiple rows at once (matching changeable defaults)
- **5: Ability to add more rows (as many as they need) dynamically that can match changeable defaults**

Project Recap