

# P O R T F O L I O

# M E T H O D O L O G Y

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INFORMATION ARCHITECT / USER EXPERIENCE EXPERT



**1 Initiate**  
Client/Stakeholder Meetings  
Requirements Gathering  
User Research, Personas  
Baseline/Competitor Heuristics

**2 Analyze**  
Requirements Backlog  
Usability Tests  
Baseline/Competitor  
Heuristics Presentation  
Content Strategy  
Site Map  
Process Flows / Use Cases

**3 Design**  
Wireframes  
Schematics  
Storyboards  
Content Inventory

**4 Build**  
Features / Stories  
Prototypes  
Content Structure

**5 Test**  
QA Validations  
User Acceptance

**6 Implement**  
Exit Documentation  
Tutorial/Training





# INITIATE

## Client / Stakeholder documentation

### Technical Specifications

#### 1. Purpose of Conversion

The following processes and screen shots will accommodate the customer experience of migrating NCF Consumer Lending Prospects who are currently accessing systems and information via the nbcbank.com, ccbonline.com and walmartmoneycenter.com Web sites.

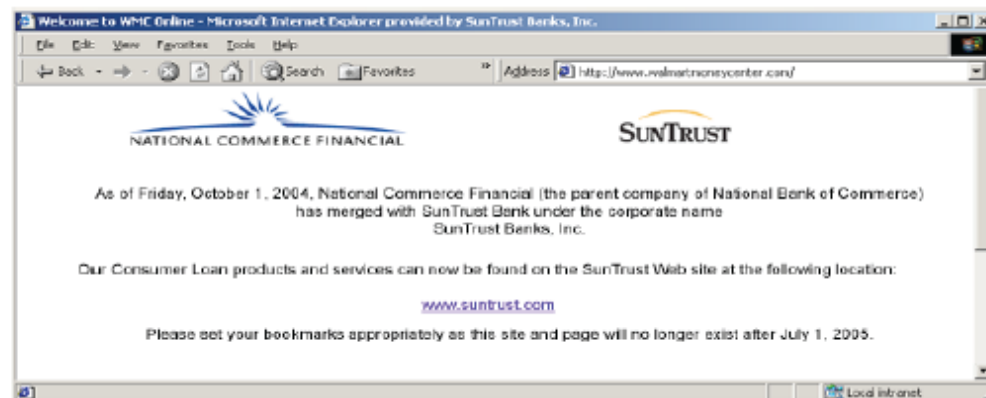
#### 2. Placement

Jan. 15, 2005 -- We will be turning off the option to "Save" a loan application in process option on all NCF Web sites (only). Since applicants are allowed to have up to 30 days to save and submit a loan, this process is happening in advance of the actual Feb. 22, 2005 conversion.

Feb. 22, 2005 -- For the purpose of catching all NCF Lending Web surfers and users via browser bookmarks and favorite files, we will be replacing *all* NCF Lending links with the redirect migration page and link outlined below.

#### 3. Redirect Design Details

The actual pages to which all screens will be redirected will be  
<http://www.suntrust.com/personal/Loans/silo.asp?bhcp=1>



#### 4. Requested Production Dates

These links are required as part of the NCF merger timeline for NCF Consumer Lending services on all NCF sites:

- The required production date for turning off the Save function on applications within the NCF sites ONLY is Jan 15, 2005.
- The required date for redirecting all consumer lending links from NCF sites is February 22, 2005.



# INITIATE

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## 4.2 Content Recommendations

Engauge recommends implementing the inverted pyramid approach to content and function such that the consumer is presented with items in a "need/desire to know" format. The content should quickly lead the consumer to our intended call to action - minimizing unnecessary contents along the visitor's intended path.

To successfully achieve this goal, the verbal and visual content of the site must be audited, re-written, and reassessed. Audit factors will be established based on the content's merit and its ability to address the Primary Business Objectives outlined above.

### 4.2.1 Messaging Recommendations

- Site must more aggressively articulate this value proposition as a selling point.
- Team will illustrate the holistic "we're here for you" aspects of partnering with THD as an accountable and long-term partner in the quality and maintenance of the consumer's home.
- Pre-sale site will demonstrate the advantages of the post-sale site components.
- Team will focus appropriate testimonials to illustrate successful problem resolutions or commendations based on key brand merits.

## 4.3 Taxonomy Recommendations

Engauge will seek homedepot.com site-wide solutions that address nomenclature issues with the name "Home Services". We recognize that as this is the client's name (an issue which is not -- at this time -- open for discussion) there will be the need to help the consumer more easily locate and understand the Home Services area of the site within the contexts available.

Within the Home Services section of homedepot.com, we'll offer solutions to address discrepancies among the multiple verticals and diminish jargon.

We'll work with Home Depot's search optimization partner (Response Mine) to provide metadata and keywords that more effectively lead clients to the appropriate levels of contexts within the HS site offerings.

## 4.4 Functional Recommendations

### 4.4.1 Pre-sales Wizards and Educational/Project Calculators

THD Home Services has limited prior experience with these technologies. Some online wizards and product calculators, such as those being designed for flooring, have been used on microsites, but need to be incorporated into the main site's content.

### 4.2.3 Pre-Sales Videos and Flash

THD Home Services has limited prior experience with these technologies. Educational and inspirational interactives throughout the Home Services online sites should be re-evaluated for success and potential.

### 4.2.4 Click to Call / Click to Chat

As a means to quickly and easily support the lead generation process, these applications would allow the sales team (or call center) to more quickly steer solid leads to the attach/close process.

Implementation would require an assessment of available technologies and challenges.

# Requirements Gathering




# INITIATE

## User Research / Personas

**Nancy** New Stay-At-Home Mom

HomeBase Logo



"This is our first child and we're new to this area. I want to find other moms nearby."

**Goals & Motivations**

- Communicate with other moms
- Learn tips and tricks of staying organized
- Learn tips of being a new mom
- Find online bargains for moms
- Find nearby stores for moms

**Functional Needs**

- Calendar/Organizer
- Message other members
- Find/Create groups of/for locals


**Scenarios**

Scenario A: Meeting other moms

1. Nancy accesses HomeBase and creates her profile.
2. Based on her input, "HomeBase Recommends" information begins to send to her My HomeBase screen.
3. Nancy searches the site for other moms within her proximity and demographics.
4. Nancy finds Lynda65 and checks her profile.
5. Determining Lynda65 has similar interests and demographics, Nancy arranges to coordinate playdates.

**Nancy** New Stay-At-Home Mom

HomeBase Logo



**Mom Experience:**  
3 Months

**CHO Experience:**  
3 Years

"Being new in town, I'm trying to figure out what's going on, where to shop, where to get the best coffee, and where to work out. I'd also like to know about the local tennis scene."

**Goals & Motivations**

- Communicate with other moms
- Learn tips and tricks of staying organized
- Learn tips of being a new mom
- Find online bargains for moms
- Find nearby stores for moms

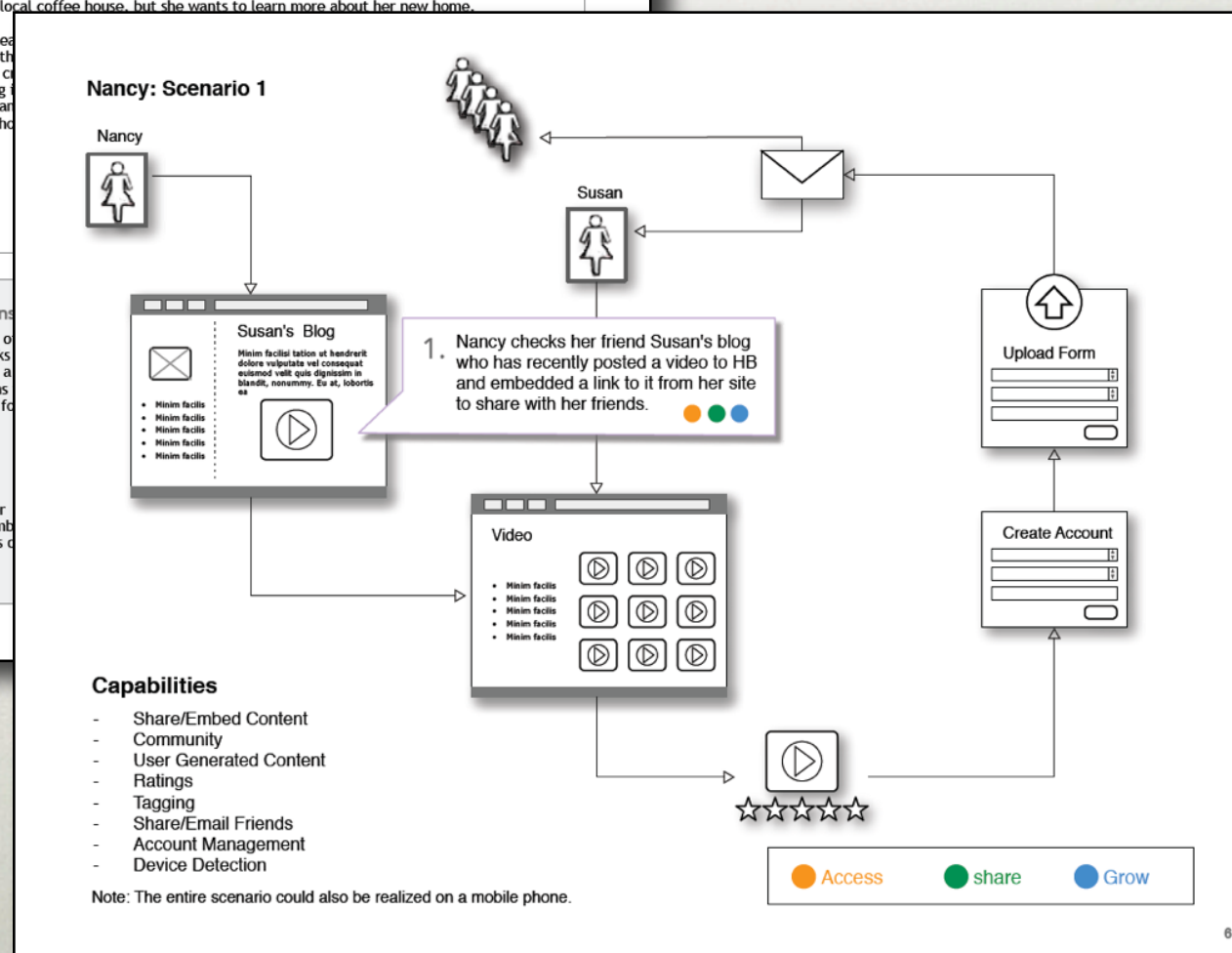
**Functional Needs**

- Calendar/Organizer
- Message other members
- Find/Create groups of/for locals

Nancy is a 28-year-old stay-at-home mom. She has a 3 month old daughter, Samantha, and used to work full-time as a project manager in a large corporation. Nancy is planning on taking a year or two off from work to raise their daughter. At her old job, Nancy used tools to manage her projects. Now that she's home, her needs have changed. The tools that she's used at work are overkill at home, but her need to stay organized remains.

Having recently relocated, Nancy is unfamiliar with everything her new location has to offer. She's met a couple of moms at a local coffee house, but she wants to learn more about her new home.

Nancy would like to learn more about the local scene. She wants to learn about the best coffee shops, where to get the best coffee, and where to work out. She's not too far from her home.





# INITIATE

## Baseline / Competitor Heuristics



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LOOK AND FEEL .....	
COMPETITIVE SITES .....	
SUPPORTING SECONDARY RESEARCH .....	

Internet Retailer – Gender Matters .....	
1. Men's inner shopper is awakened; women's inner shopper is enriched .....	
2. Women scan; men dig .....	
3. Men are enticed by product, then lifestyle; women are enticed by lifestyle, then product .....	
4. Women expand the mission; men stick to the mission .....	
Nielsen Norman Group Report, E-Commerce User Experience .....	
• Provide the product details customers want and need .....	
• Speak the customer's language: avoid jargon and clever names .....	
• Be specific .....	
• Don't present too much detail at once .....	
• Product Images .....	
• Price, Other Costs, and Availability .....	
• Specifying Product Options .....	
• Taking Action .....	
Jakob Nielsen Interview, E-Commerce Site Design .....	
• Use a clearly descriptive title, and if possible a photo .....	
• Provide ALL the information a shopper will need .....	
• State product availability and, when appropriate, delivery time .....	
• Link to your site's guarantee policy, and, if possible, the manufacturer's warranty .....	
• Prominently display the "Call to Action" button .....	
• Make Detailed Information Available through Layers .....	

OVERALL RECOMMENDATIONS FOR REDESIGN .....	
Consumer Psychology Priming .....	
1. Design for Decision Making and Information Gathering .....	
2. Design for Nomadic Behavior .....	
3. Leverage Positive Reinforcement .....	
Customer-Centered Communication Best Practices .....	
Include the Right Information Types .....	
Emphasize the Right Information Topics to Support Decision Making .....	
Include the Right Persuasive Appeals to Influence Decision Making .....	
Write for the Web .....	

SUMMARY OF TACTICAL RECOMMENDATIONS .....	
Technical/Structural Recommendations .....	
Call to Action Recommendations .....	
Content/Organizational Recommendations .....	

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### Benchmarks Charting

Based on the information in the seven categories above, our overview analysis suggests the following grades on a scale of 0 (unacceptable) to 5 (Best in class)

	FCS	AllState	Cotton Bowl
Navigation	Not well defined.  2	Ok, but blandly implemented.  3	Better than most.  3.5
Organization	3	3	4
Taxonomy	Fair  3	Too many acronyms.  2	Some Acronyms  4
Content	Poorly edited for audience.  1.5	Well written.  4	Well written  4
Features and Functionality	Not an exciting augmentation to the sport.  2	Too staid in design and execution.  2	Could be better  3
Call to Action	Either misplaced or not used.  1	Poorly executed.  2	Too big, too many spots, not enough other information  3
Look/Feel	An online ransom note.  1	Bland but not uninviting.  4	Good but could be more  4
OVERALL SCORE/avg.	13.5/ 1.9	20/ 2.8	23/ 3.5

- Take the site back to square one. Remove items that don't present a unique online slant/value to the FCS visitor.
- Remove the "Bling." The site needs a stronger Brand strategy first. Then, make certain that flash, rollovers, pulldowns, and all other onsite functions meet the criteria of that strategy.

### 6. Calls to Action

"Call to Action" refers to how the site **communicates and successfully completes hand-off** of a visitor to a next [preferred] stage in the experience.

However, the visitor does not have to be presented with the opportunity to complete every transaction online. The FCS site should provide adequate information so that the visitor is allowed [better: WISHES] to proceed to the next stage of a desired task.

As an example:

**Wrong:** For more information, call us.

**Right:** For more information, contact [FCSports now!](#)

[1-\(800\)-555-1234 \(Monday-Friday, 8am to 7pm, EST\).](#)

### 6.1 Issue: State Value. Provide Value. Restate Value. Lead the Visitor to the Next Value.

- The site doesn't appear to have any motivation. The copy on the "About..." page is dry and unmotivating.
- The site is weak on imperatives.

### 6.2 Competitive Benchmarks:

Allstate Sugar Bowl

- As with the FCS site, we couldn't figure out why anyone would want to go to this site (other than to purchase tickets or memorabilia that could more easily have been found elsewhere).

Cotton Bowl



# ANALYZE

## Requirements Backlog

### Functional Description

<b>Requirement Description:</b>	Login/Registration Page
<b>Timing Constraints:</b> (Optional)	
<b>Comments/Assumptions</b>	This page will be linked to from other web pages currently in use. This page will not be linked to for State of Mississippi (Retirement plan) which will have its own version of this page. This page will not vary for different types of users. All error messages appear on this page (page refreshes) unless otherwise noted. CSRs will not have the ability to view these pages through the CSR View functionality.
Requirements Descriptions	Acceptance Criteria
<b>INPUT / PROCESSING / OUTPUT</b>	
User lands on page	Screen displays, there is no pre-filling of data, and links are all enabled.
User ID field displays	Entry field that will hold a maximum of 50 characters. Screen defaults with cursor in this field. Tabbing from this field goes to Password field.
Password field displays	Entry field that will hold a maximum of 50 characters. Tabbing from this field goes to Go button.
Go button displays	Clickable button that will initiate login process for the user-entered User ID and Password. Tabs to "Forgot your User ID" link.
Go button is clicked and User ID and Password are valid	User is brought to Home page, Forced Password Change, or Inactivity Security Question as appropriate. If successful, Audit log entry created: <del>LogType</del> = 'Login' <del>SubType</del> = 'Login' and message = 'Login'
Go button is clicked with no User ID entered	Error message displays: "User ID or Password is incorrect. Please re-enter."
Go button is clicked with no Password entered	Error message displays: "User ID or Password is incorrect. Please re-enter."
Go Button is clicked with valid User ID/password, but User ID is on Administrative lock.	Error message displays: "Your account has been locked. If you are unaware of the reason for this please navigate to the <a href="#">contact us page</a> ."
Go Button is clicked with valid User ID/password, but User ID is on non-Administrative lock from a previous session.	Error message displays: "Your account has been locked. To unlock your account, please navigate to the <a href="#">contact us page</a> ."
Go Button is clicked with invalid User ID/Password combination (1 <sup>st</sup> and 2 <sup>nd</sup> try)	Error message displays: "User ID or Password is incorrect. Please re-enter."
Go Button is clicked with invalid User ID/Password combination (3 <sup>rd</sup> or later try using one User ID)	Error message displays: "Your account has been locked because you have exceeded the allowed number of entry attempts. To unlock your account, please navigate to the <a href="#">contact us page</a> ." Email is sent to email address on record:



# ANALYZE

## Usability Tests

- Event Organization and Prep
- Focus Groups
- Wizard of Oz and Prototype Walkthroughs
- Card Sorting Exercises
- Review and Analysis

ING				Thursday, March 3, 2011					
Time	Name	Age	Gender	Web Exp. Level	How purchase Life Insurance	Companies hold policies with	Types of Life Insurance own	How long ago bought most recent policy	Income
9:00 AM	Victor A.	43	Male	a, b, c, d	Agent	New York Life The Travelers	Term & Variable Universal Life	10 + years	\$100k+
9:00 AM	Nekita W.	31	Female	a, b, c, d	Employer	All State	Universal Life	1 - 3 years	\$40-60K
10:00 AM	Mike P.	59	Male	a, b, c, d, e	Agent & Employer	Northwest Mutual MetLife	Term & Variable Universal Life	10 + years	\$100k+
10:00AM	David L.	39	Male	a, b, c, d, e	Agent	Northwest Mutual Pacific Life	Term & Whole Life & Variable Universal Life	within the year	\$100k+
11:00 AM	Errol B.	26	Male						
11:00 AM	Denise P.	40	Female						
12:00 PM	Ray M.	64	Male						
12:00 PM	Gary M.	55	Male						

### USABILITY EVENT SCREENER

5. Which industries were your focus groups or web-usability studies for?

TERMINATE IF IN LIFE INSURANCE

6. Which of these types of insurance do you currently have? (READ LIST. IMPORTANT TO READ ENTIRE LIST AND RECORD RESPONSES BELOW.)

Home Owners or Renters ( )  
Auto Insurance ( )  
Flood Insurance ( )  
Life Insurance ( ) – CONTINUE if checked  
Long-term care insurance ( )

7. We understand that shopping for and choosing financial services, including insurance, is handled differently in different households. When it comes to making the decision to purchase the Life Insurance policies that you currently have or to make changes to them now, which of the following statement fits you best:

I am the primary decision maker ( ) CONTINUE  
I make the decisions equally with my partner or spouse ( ) CONTINUE  
I have input in the decision making but do not make the final decision ( ) TERMINATE  
I have little or no input into life insurance policy decisions ( ) TERMINATE

8. We are interested in speaking with people with different levels of web-based experience. Please tell me if you routinely do any of the following:

a) Rarely if ever go onto the Internet ( ) TERMINATE  
Surf the web at home or at work ( )  
b) Use Email ( )  
c) Use web-banking to pay bills or transfer money ( ) CONTINUE  
d) Make purchases online ( )  
e) Make changes to your 401(k) or other investment accounts online( ) CONTINUE

NOTE: MUST CHECK EITHER c) OR e) TO CONTINUE

Page: 37  
Benchmarks



# ANALYZE

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- 1. HOME PAGE.....
- 2. OVERVIEW PAGE.....
- 3. CONTENT PAGE.....
- 4. LIST PAGE.....
- 5. ANNOTATED LIST PAGE.....
- 6. CALLOUT.....
- 7. SLIDESHOW.....

SITE ARCHITECTURE.....

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APPENDIX C: CONTENT INVE.....

APPENDIX D: SITE ARCHITEC.....

APPENDIX E: SITE ORGANIZA.....

DEFINED.

APPENDIX F: EMORY WEB ST.....

DEFINED.

CLIENT SIGNATURES.....

MACQUARIUM SIGNATURES.....


## APPENDICES

**APPENDIX A: CURRENT SITE OUTLINE (AS OF 12/6/07)**  
The following outline includes only those screen pages that are in the format of [www.emory.edu](http://www.emory.edu).  
*Italicized items launch a new browser window.*

- I. Admission
  - A. Undergraduate Admission
  - B. Graduate & Professional School
  - C. Campus Security Report
- II. Schools
- III. Research
  - A. Research Administration
  - B. Research & Teaching Resources
  - C. Health Sciences
  - D. Other Research
- IV. Health Sciences
  - A. Education
  - B. Patient Care (Hospitals)
  - C. Research
  - D. Clinical Trials
  - E. Emergency Healthcare
- V. Libraries
- VI. Arts & Athletics
  - A. The Arts
  - B. Athletics & Recreation
- VII. About Us
  - A. Administration
  - B. Accreditations
  - C. Facts and Figures
  - D. Virtual Tour
  - E. Visitor Information
  - F. Campus Security
  - G. Emergency Information
  - H. SafetyNet
    - a. Security Report
  - I. News
  - J. Publications
  - K. Community Resources
    - a. Center for Lifelong Learning
    - b. Community Partnerships
    - c. Continuing Medical Education
  - L. Sustainability
- VIII. Alumni
  - A. Emory Alumni Association
- IX. Students
  - A. Overview
  - B. Academics
    - 1. Academic Calendars
      - a. Emory College
      - b. Oxford College
      - c. Candler School of Theology
      - d. Graduate School of Theology
      - e. Rollins School of Public Health
      - f. School of Law
      - g. School of Medicine
      - h. School of Nursing
    - 2. Emory Pathways to Academic Success

MACQUARIE®  
INTELLIGENT COMMUNICATIONS

## 2. Children's Museum of Atlanta



**MOVIE INFO**  
**DIRECTIONS PARKING**

**EVENT CALENDAR**  
**MEMBERSHIP**

**SUMMER CAMP**  
**PARTIES**

**DOMESTIC HOWE**  
**TECHNICAL FIELD TRIP**

**PRESS AREA**  
**EXHIBIT EXHIBITS**

**VOLUNTEERS**  
**CONTACT US**

THE CHILDREN'S MUSEUM OF ATLANTA

# **MUSEUM INFORMATION**

**Museum Board • Staff • Staff Job Listings • Partners and Sponsors • Bus • Store**

**Imagine** is a place in the heart of downtown Atlanta where children are the number one priority.


**Imagine** is a place where children and grandparents can learn and play together, while the wonder of a first experience is the most powerful image.

**Imagine** is a place where a child who has never held a paintbrush learns the joy of playing with color and a father discovers that his daughter loves to build.

**Imagine** is a place where children learn of all walks of life play and learn together – a place where children can touch, feel, open, drop, stop, draw, show, safely, throw, dig, pedal, push and twist – and where the fun between learning and fun is immediate.

**Mission and Values**

The mission of Imagine IT! The Children's Museum of Atlanta is to create environments and activities where young children experience the power of imagination and the pure delight of learning with each other and with grandparents.



**Hours of Operation:**

**Monday-Friday:**  
10:00 a.m. – 5:00 p.m.

**Saturday & Sunday:**  
10:00 a.m. – 5:00 p.m.

**Closed Thanksgiving Day & Christmas Day**

**Admission:**

Admission is \$11 plus tax for persons aged 2 and above. Children under the age of 2 are free.


Discounted tickets are available for groups of 10 or more with advance reservation.

**Food:**

Snacks and drinks are available in our Eat-In and Take-Out area. In addition, Chica-PA provides a limited menu during lunch hours. Families and groups may also bring brown bag lunches from home and enjoy their meals in our Town Square area. However, we ask that parents bring in only water or juice – no soda – into the museum.

The Museum is also walking distance from The Chix Center and several downtown restaurants. To see a map of the area go to [www.imagineitatlanta.com](http://www.imagineitatlanta.com).

**Click HERE to buy tickets**



**Imagine IT! The Children's Museum of Atlanta**  
 275 Centennial Olympic Park Drive NW  
 Atlanta, GA 30313-1627  
 Phone: 404.959.6437

[Security Information \(SAK PDF File\)](#)

Click **HERE** to Take a Virtual Tour of **Imagine IT!**

**⊗ Content:**  
The site lacks content or functionality that speaks directly to children (interactive games, for example).

**❌ Organization:**  
Links to purchase museum tickets and view a virtual tour are buried in text at the bottom of the Museum Information page.



# ANALYZE

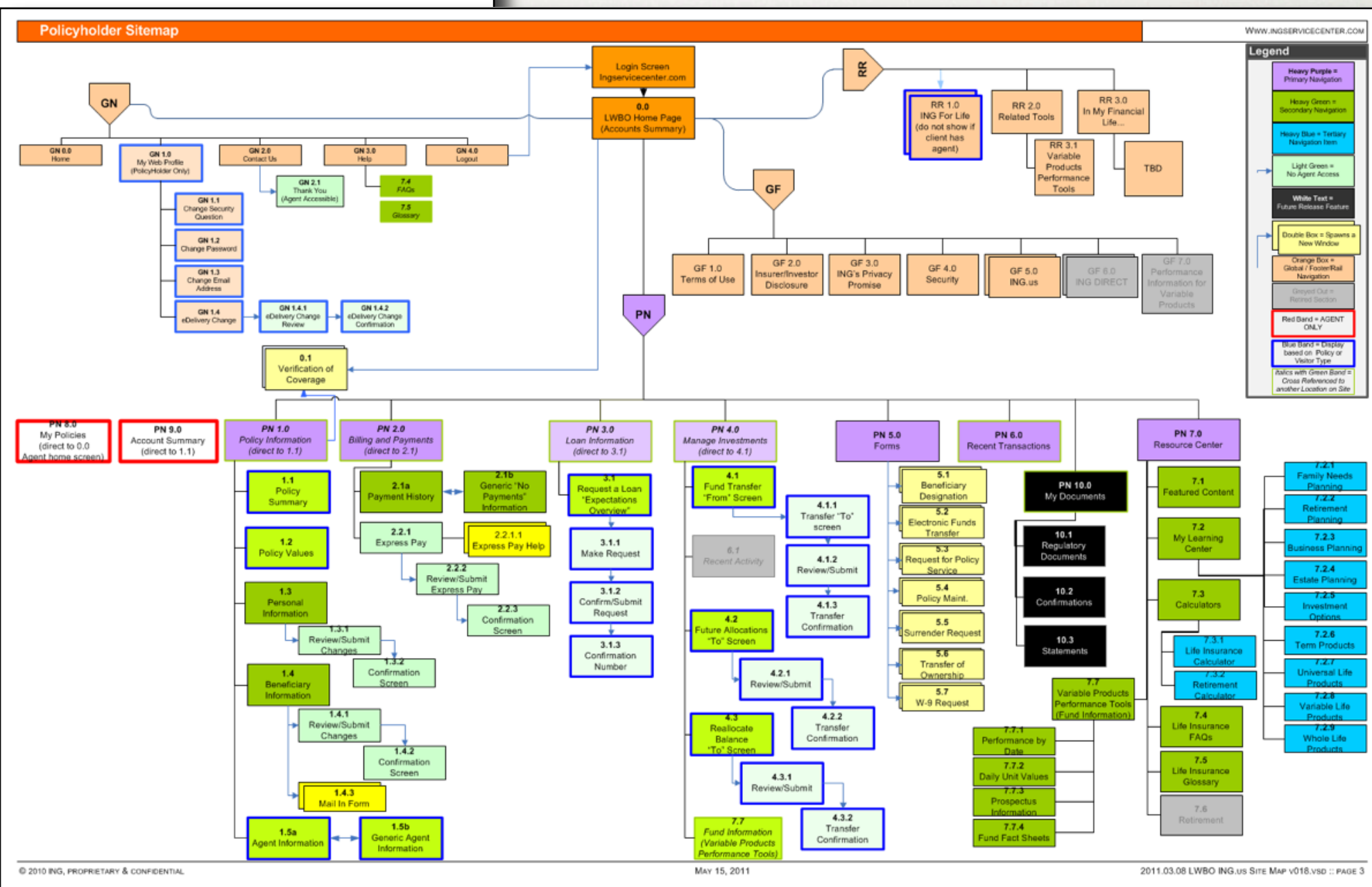
## Sitemapping

### APPENDICES

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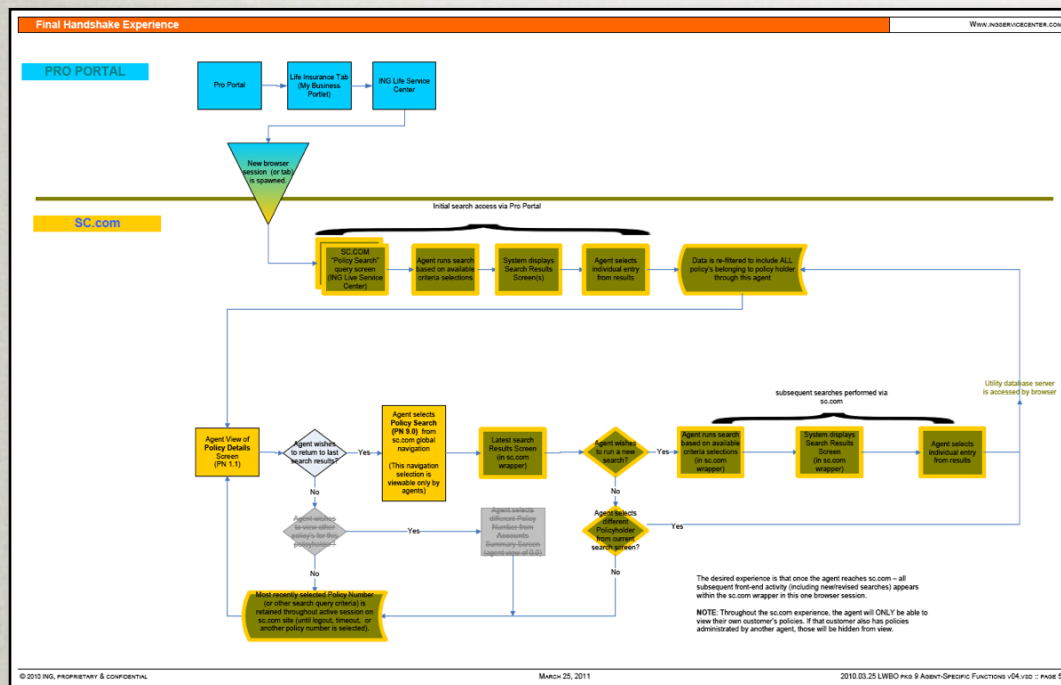
- I. Admission
  - A. Undergraduate
  - B. Graduate & Professional
  - C. Campus Security
- II. Schools
- III. Research
  - A. Research Administration
  - B. Research & Teaching
  - C. Health Sciences
  - D. Other Research
- IV. Health Sciences
  - A. Education
  - B. Patient Care (Hospitals)
  - C. Research
  - D. Clinical Trials
  - E. Emory Healthcare
- V. Libraries
- VI. Arts & Athletics
  - A. The Arts
  - B. Athletics & Recreation
- VII. About Us
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  - B. Accreditations
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  - E. Visitor Information
  - F. Campus Security
  - G. Emergency Information
  - H. SafetyNet
    - a. Security
  - I. News
  - J. Publications
  - K. Community Resources
    - a. Center for Community Engagement
    - b. Community Outreach
    - c. Continuing Education
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  - A. Emory Alumni Association
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  - A. Overview
  - B. Academics
    - 1. Academic Calendar
      - a. Emory College
      - b. Oxford College
      - c. Candler School of Theology
      - d. Graduate School
      - e. Rollins School of Business
      - f. School of Nursing
      - g. School of Public Health
      - h. School of Social Work
    - 2. Emory Pathway





# ANALYZE

## Process Flows & Use Cases



### REQ-RP-FB-26 Calculate Monthly Forecast Seat Occupancy

The Application will calculate forecasted seat occupancy.

High-Level Functional Requirement Reference

Actor/User

Application

Input Fields

N/A

Output Fields

Seat Occupancy %

Business Rule

N/A

Formulas

Seat available = (seating capacity x day)

Seat Occ% hourly = (seat available by hour / total seat occupied) or RevPASH/Avg Check

ASH (available seat hour) = seat capacity X operating hour

RevPASH (revenue per available seat hour) = (revenue/available seat hour)

Messages

N/A

### REQ-RP-FB-27 Calculate Monthly Forecast Average Per Check

The Application will calculate forecasted daily average per check.

High-Level Functional Requirement Reference

N/A

Actor/User

Application

Input Fields

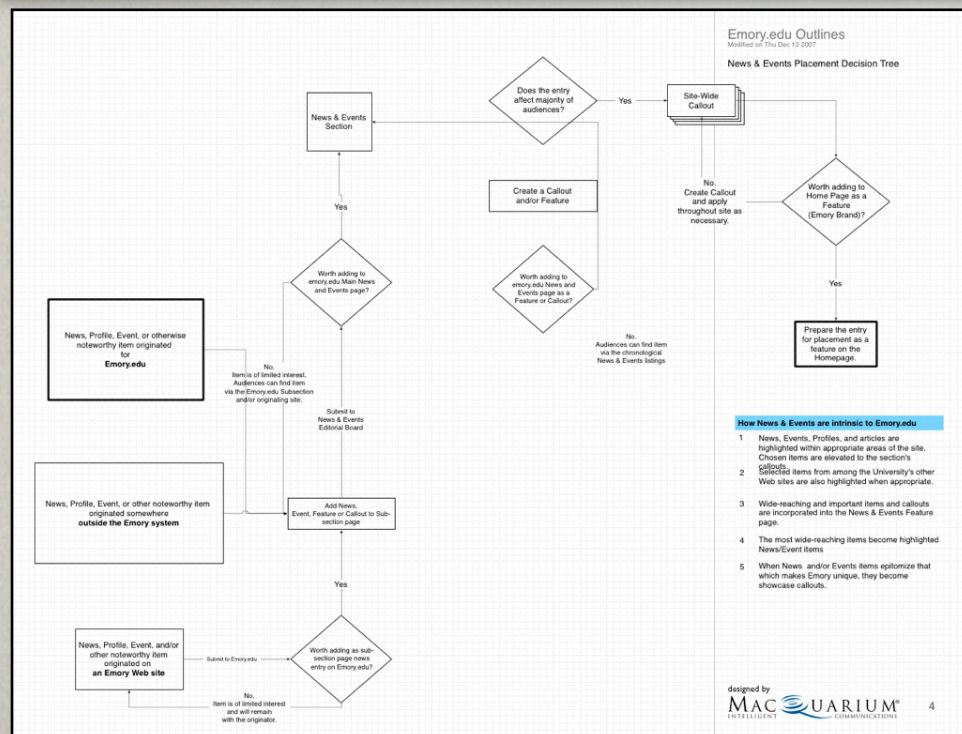
N/A

Output Fields

Average Per Check

Business Rule

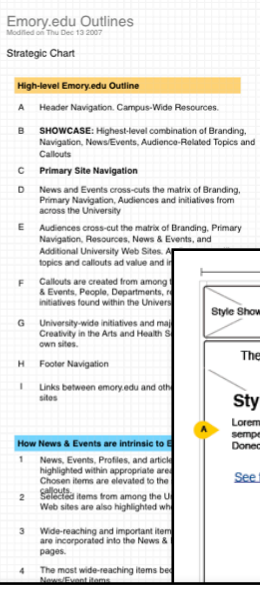
N/A





# DESIGN

## Wireframes and Schematics



**Emory.edu Outlines**  
Modified on Thu Dec 13 2007

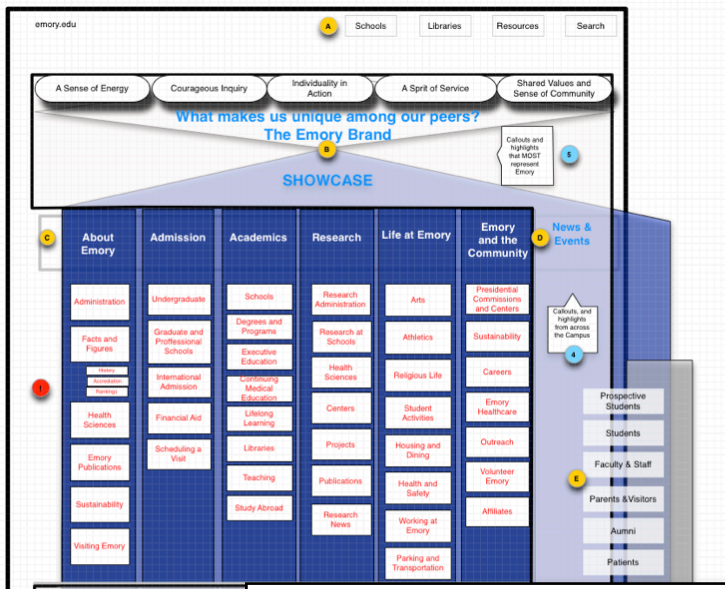
**Strategic Chart**

**High-level Emory.edu Outline**

- A Header Navigation, Campus-Wide Resources.
- B **SHOWCASE:** Highest-level combination of Branding, Navigation, News/Events, Audience-Related Topics and Callouts
- C **Primary Site Navigation**
- D News and Events cross-cuts the matrix of Branding, Primary Navigation, Audiences and initiatives from across the University
- E Audiences cross-cut the matrix of Branding, Primary Navigation, Resources, News & Events, and Additional University Web Sites. Audiences topics and callouts add value and interest
- F Callouts are created from among & Events, People, Departments, Initiatives found within the University
- G University-wide initiatives and major Creativity in the Arts and Health Sciences own sites.
- H Footer Navigation
- I Links between emory.edu and other sites

**How News & Events are intrinsic to Emory.edu**

- 1 News, Events, Profiles, and article highlighted within appropriate area. Chosen items are elevated to the global, selected items from among the University Web sites are also highlighted within
- 2 Wide-reaching and important items are incorporated into the News & Events pages.
- 3 The most wide-reaching items are News/Events items



emory.edu

Schools Libraries Resources Search

A Sense of Energy Courageous Inquiry Individuality in Action A Spirit of Service Shared Values and Sense of Community

What makes us unique among our peers? The Emory Brand

SHOWCASE

Callouts and highlights that MOST represent Emory

Callouts and highlights from across the University

Prospective Students  
Students  
Faculty & Staff  
Parents & Visitors  
Alumni  
Patients

1 About Emory  
2 Admission  
3 Academics  
4 Research  
5 Life at Emory  
6 Emory and the Community  
7 News & Events

Administration  
Undergraduate  
Graduate and Professional Schools  
International Admissions  
Financial Aid  
Scheduling & Visit  
Sustainability  
Visiting Emory

Degrees and Programs  
Executive Education  
Continuing Medical Education  
Libraries  
Teaching  
Study Abroad

Research Administration  
Research at Schools  
Health Sciences  
Centers  
Projects  
Publications  
Research News

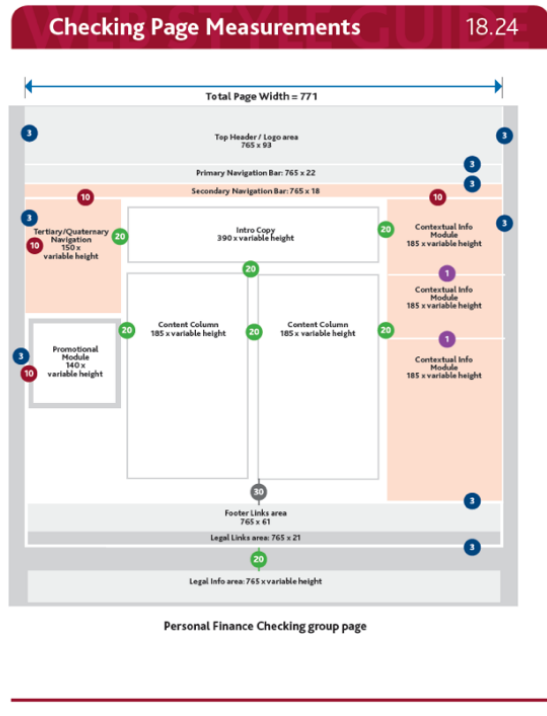
Arts  
Athletics  
Religious Life  
Student Activities  
Housing and Dining  
Health and Safety  
Working at Emory  
Parking and Transportation

Presidential Commissions and Centers  
Sustainability  
Careers  
Emory Healthcare  
Volunteer Emory  
Affiliates

1 2 3 4 5 6 7

CALLOUTS CALLOUTS

Home Contacts



**Checking Page Measurements** 18.24

Total Page Width = 771

Top Header / Logo area: 765 x 93

Primary Navigation Bar: 765 x 22

Secondary Navigation Bar: 765 x 18

Intro Copy: 390 x variable height

Content Column: 185 x variable height

Contextual Info Module: 185 x variable height

Promotional Module: 140 x variable height

Footer Links area: 765 x 41

Legal Info area: 765 x variable height

Personal Finance Checking group page

**PAGE WIDTH:**


- Fixed at 771 pixels.
- Gray background: scale to fit the 771-

**ALIGNMENT:**

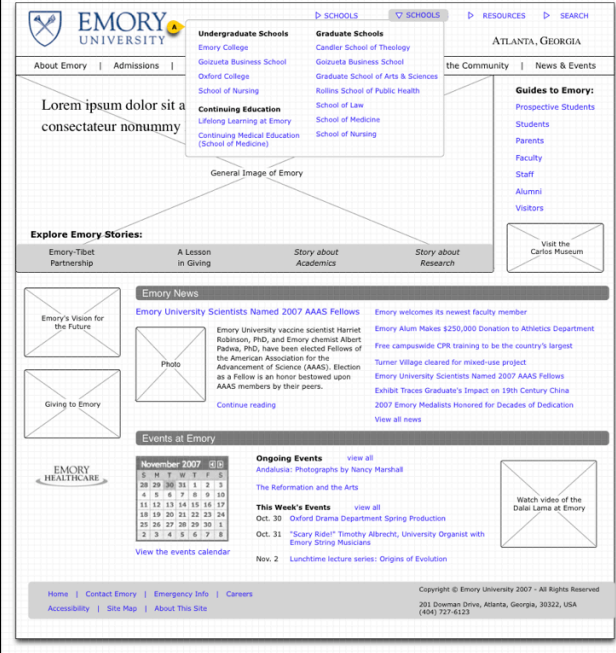
- Centered horizontally within the browser
- Always flush to the top of the window

**WHITE MARGINS:**

- 3-pixel margin around page/between
- 10-pixel margin
- 20-pixel vertical margin
- 15-pixel vertical margin
- 1-pixel margin
- 26-pixel vertical margin
- 30-pixel vertical margin



SUNTRUST



EMORY UNIVERSITY

Atlanta, Georgia

Undergraduate Schools  
Emory College  
Goizueta Business School  
Oxford College  
School of Nursing

Graduate Schools  
Candler School of Theology  
Goizueta Business School  
Graduate School of Arts & Sciences  
Rollins School of Public Health  
School of Law  
School of Medicine  
School of Nursing

Explore Emory Stories:  
Emory-Tibet Partnership  
A Lesson in Giving  
Story about Academia  
Story about Research

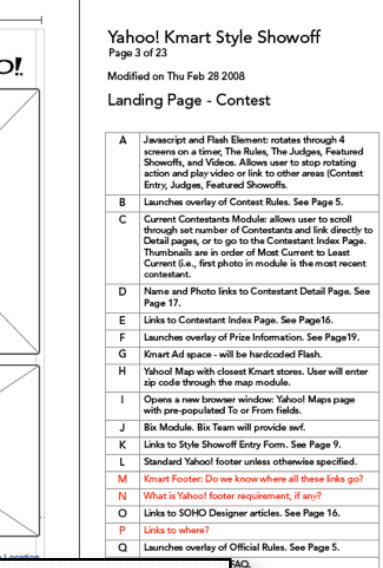
Emory News:  
Emory University Scientists Named 2007 AAAS Fellows  
Emory welcomes its newest faculty member  
Emory Alum Makes \$250,000 Donation to Athletics Department  
Free campuswide CPR training to be the country's largest  
Summer Village cleared for mixed-use project  
Emory University Scientists Named 2007 AAAS Fellows  
Exhibit Traces Graduate's Impact on 19th-Century China  
2007 Emory Medalists Honored for Decades of Dedication  
View all news

Events at Emory:  
November 2007  
Ongoing Events  
This Week's Events  
Oct. 30 Oxford Drama Department Spring Production  
Oct. 31 "Scary Ride" Timothy Albracht, University Organist with Emory String Musicians  
Nov. 2 Luncheon lecture series: Origins of Evolution

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(404) 727-6223

designed by MAC UARUUM



Powered by YAHOO!

Shoo Kmart.com

The Contest Videos The Judges The Showoffs

Style Showoff Contest

See the Prizes >>>

AdPromo

Map of Closest Kmart

1 2 3

1 Javascript and Flash Element: rotates through 4 screens on a timer. The Rules, The Judges, Featured Showoffs, and Videos. Allows user to stop rotating action and play video or link to other areas (Contest Entry, Judges, Featured Showoffs).

2 Launches overlay of Contest Rules. See Page 5.

3 Current Contestants Module: allows user to scroll through set number of Contestants and link directly to Detail pages, or to go to the Contestant Index Page. Thumbnails are in order of Most Current to Least Current (i.e., first photo in module is the most recent contestant).

4 News and Photo links to Contestant Detail Page. See Page 17.

5 Links to Contestant Index Page. See Page 16.

6 Launches overlay of Prize Information. See Page 19.

7 Kmart Ad space - will be hardcoded Flash.

8 Yahoo! Map with closest Kmart stores. User will enter zip code through the map module.

9 Opens a new browser window: Yahoo! Maps page with pre-populated To or From fields.

10 Bix Module. Bix Team will provide avf.

11 Links to Style Showoff Entry Form. See Page 9.

12 Standard Yahoo! footer unless otherwise specified.

13 Kmart Footer: Do we know where all these links go?

14 What is Yahoo! footer requirement, if any?

15 Links to SOHO Designer articles. See Page 16.

16 Links to where?

17 Launches overlay of Official Rules. See Page 5.

18 Kmart.com Terms of Use?

19 Kmart.com Privacy Policy?

20 Links to where?



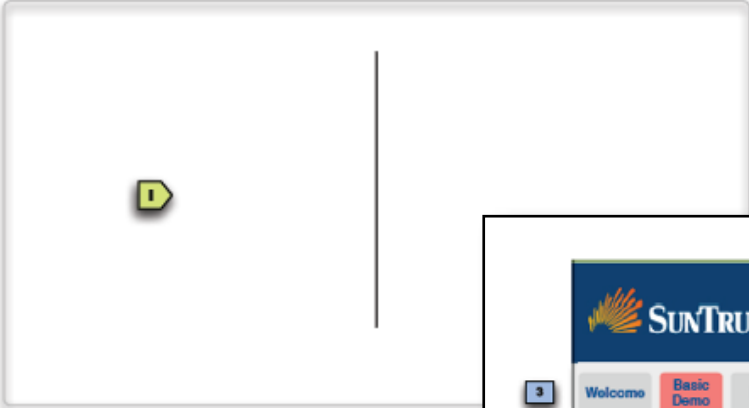
21 Launches overlay of Code of

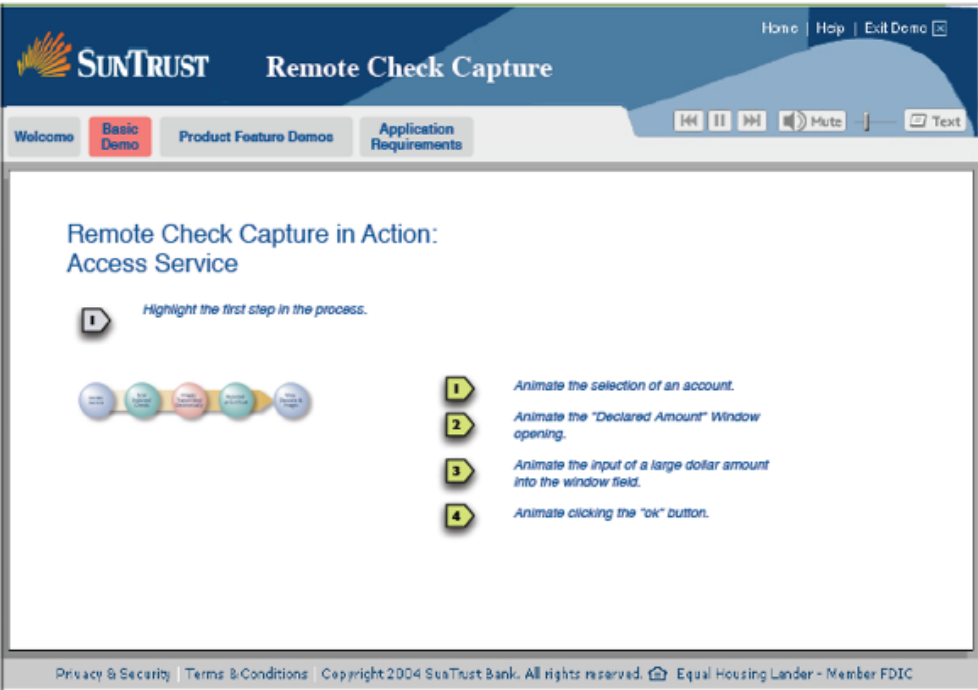
22 Kmart.com License Information?



# DESIGN

## Storyboards





**Text:**

You'll begin your session by selecting the account that you intend to post your deposit to.

Here, the system will prompt you to enter the expected deposit total.

Remote Check Capture uses this information to identify any discrepancies in amounts captured during the check scanning process.

This helps ensure a balanced deposit.

Once you've entered your declared amount, click the "OK" button.

**SunTrust RCC Demo Wireframes**  
Page 6 of 43  
Modified on Mon Jan 15 2007

**Demo part 2**

**Voiceover:**

- 1 Begin your session by selecting the account that you intend to post your deposit to.
- 2 The system will prompt you to enter the expected deposit total.
- 3 Remote Check Capture uses this information to identify any discrepancies in amounts captured during the check scanning process. This helps ensure a balanced deposit.
- 4 Once you've entered your declared amount, click the "OK" button.

**Legend**

- 1 Stop with script.
- 1 Stop independent of script.
- 2 Pattern Library Reference

*Italics indicate an action that takes place on screen - not visible text.*







# DESIGN

## Taxonomy

	A	B	C	D	E	F
	Reference #	Preferred term	Variants	Parent (Broader term)	Children (Narrower term)	Date added
1	<input type="button" value="sort"/>	<input type="button" value="sort"/>		<input type="button" value="sort"/>		<input type="button" value="sort"/>
2	F	Adjudication & Alerts	judgment, scoring, pass/fail scoring		Adjudication & Scoring, Alert Solutions	07/2007
3	F.01.01	Adjudication & Scoring	pass/fail scoring, alerts, decision matrix, judging services	Adjudication & Monitoring		07/2007
4	F.02	Alert Solutions	monitoring, alert service, hits, notification, warnings, red flag, batch	Adjudication & Monitoring, Technology Solutions	National Criminal Alert	07/2007
5	A.01.01	Applicant Tracking System Integration	ATS, applicant entry, hiring management, management tool, resume management, recruiting, candidate tracking, applicant, electronic application, recruitment, staffing, TMS, talent management systems, managed service delivery, HRIS, Human Resources Information System, self-service, Applicant Tracking System, HR XML, XML Exchange, XML, API	Integration & Technology Solutions		07/2007
6	E	Assessments	Testing, personality test, skill testing, assess applicant, assess candidate, aptitude testing, personality assessment		Stanton Assessments	07/2007
7	A.01.03	ATS Services for small to medium sized businesses	Applicant Tracking Systems, small businesses, medium businesses, SMB, HRIS, Human Resources Information System, self-service, Applicant Tracking System, Software as service, SAS	Integration & Technology Solutions		07/2007
8	C	Background Screening	background checks, employee screening, screening services, screening process, backgrounds, verifications, employment background checks, employment research, investigations, screens, candidate screening, background search, comprehensive screening, record check, pre-employment, background screen, pre-employment screening, screening, employment screening, talent screening		Verification & Qualification Services, Criminal History, Sanctions & Specialty Searches	07/2007
9	D.02	Biometrics Services	identification, biology, electronic fingerprinting, fingerprint	Occupational Health & Biometrics	Fingerprinting Services	07/2007
10	C.01.03	ChoicePoint National Criminal File Alert	monitoring, alert service, hits, notification, warning, National Criminal File, NCrf, batch, batch screening, post-employment	Criminal History, Alert Solutions		07/2007
	C.01.02	ChoicePoint National Criminal File PLUS Search	NCrf, NCF, Database Criminal Search, Criminal records, felony, misdemeanor, national database, national criminal history, US criminal record, United States criminal record, nationwide criminal search, federal crimes, national security, fugitive file, prison, parole, parole record, national criminal database search, national criminal search, national criminal records database, DOC, AOC, Department of Corrections, Administrative Office of the Courts,	Criminal History		



# DESIGN

## Branding

### Branding Image Selection Guidelines

18.39



**Each SunTrust LOB has a distinct branding image.**

- Images should appear as natural and unstaged as possible.
- Look for interesting compositional qualities, such as dynamic cropping or unexpected shot angles
- Use a single image at a time – do not use collages, composites, or layered images

#### **PERSONAL FINANCE:**

Branding images for the Personal Finance site use colors that are bright, sunny, and friendly – yet natural. Avoid images with colors that have been manipulated to an unnatural degree. Should contain at least one human subject in a consumer-oriented setting, such as scenes of children or family.

#### **BUSINESS BANKING:**

Branding images for the Business Banking site should use colors that are rich and natural, but a more muted and sophisticated palette than the Personal Finance images. Images should contain at least one human subject depicted in a business setting.

#### **CORPORATE & INSTITUTIONAL:**

Branding images for the the Corporate & Institutional site are always black and white. They are subtle, understated, crisp, visually clear, and elegant. May contain human or non-human subjects.



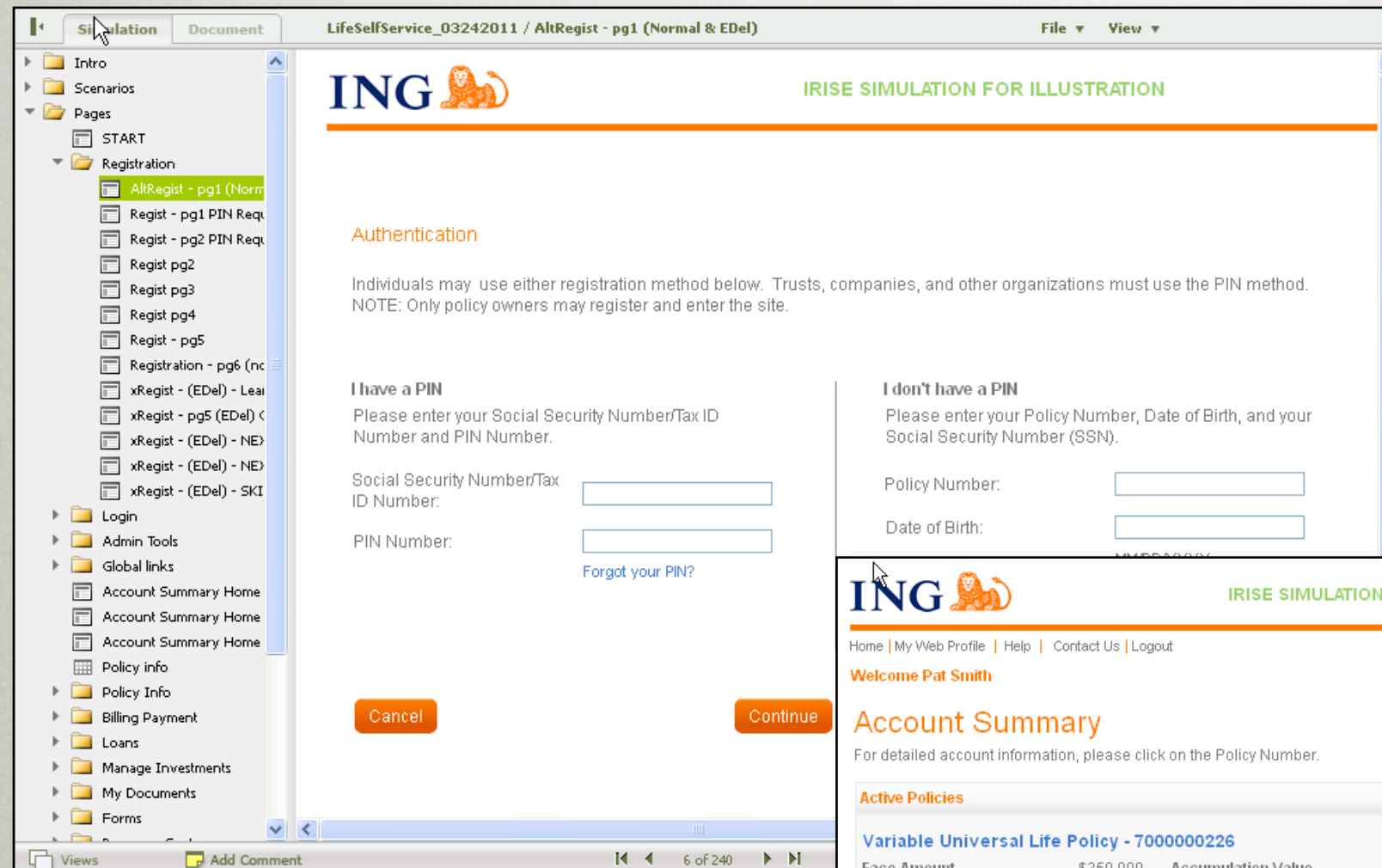
# BUILD

## Agile Features and Stories

Feature ID	Feature Name	Story ID	Points	Story Description	Story Validation	Sprint	Comments	Related Story	Status in Sprint?	Priority
W-024	New Customer Orders Wireless and Internet	P-006	2	Paula sets a discount to ensure customers purchasing Internet On-the-Go 5GB are eligible for a discount if either subscribe to or have Internet service in their cart	Discount is associated to Internet On-the-Go 5GB	16		2.3		
W-024	New Customer Orders Wireless and Internet	P-007	1	Paula sets up Double Plays, Triple Plays and Quad Plays that include Wireless Plans	Products are set up in CRM	16	List of products to be provided by Content Mgmt team			
W-024	New Customer Orders Wireless and Internet	P-008	1	Paula adds Content to Double Plays, Triple Plays and Quad Plays that include Wireless Plans	Product Content is added to CRM	16	Content to be provided by Content Mgmt team			
W-024	New Customer Orders Wireless and Internet	P-009	1	Paula adds List Price to Double Plays, Triple Plays and Quad Plays for Wireless and Core	Product List Price is added to CRM	16	Price to be provided by Content Mgmt team			
W-063	Wireless Contracts	P-001	3	Paula sets up Contract Product model	Contract products are set up in CRM	16				
W-063	Wireless Contracts	P-002	5	Paula updates Product Pricing Engine based on Contracts	Pricing is updated in CRM based on contracts	16				
W-108	Phone Filtering	P-001	1	Paula adds features and feature benefits to filter Wireless Equipment	Features are added Wireless Equipment in CRM with values as Y/N	16	Please reference spreadsheet to get a complete Filter Feature list			
W-111	Phone Image Integration	P-001	1	Paula adds image names (features), tags (benefit) to all Wireless Equipment	Image features + benefits added to CRM	16	Default image will be the lowest-sequenced image	S-001		
W-111	Phone Image Integration	P-002	1	Paula adds Part Number to Wireless Equipment	Part Number is added to Wireless Equipment	16			k	
W-113	Wireless Legal/Contracts Analysis	P-001	2	Analysis	TBD	16				
W-125	Phone Sorting	P-001	2	Paula adds New Arrival date and Brand to Wireless Equipment Content to enable sorting capabilities in	New Arrival Date and Content features are added to Equipment in CRM	16	Brand, Price, Arrival Date; Pricing data is already available to Storefront and therefore will not need to be			
W-126	Customer at Active House (Existing) Orders Wireless (Family Plan)	P-001	3	Paula sets up all Family Voice Plan Products (OKC, OMA)	Family Plan Products are added to CRM	16		S-001, S-002		
W-126	Customer at Active House (Existing) Orders Wireless (Family Plan)	P-002	0	Paula adds Content to all Family Plans (OKC, OMA)	Product Content is added to CRM	16		S-001, S-002, S-004		
W-126	Customer at Active House (Existing) Orders Wireless (Family Plan)	P-004	0	Paula adds List Price to all Family Plans (OKC, OMA)	Product List Price is added to CRM	16		S-001, S-002, S-004		
W-126	Customer at Active House (Existing) Orders Wireless (Family Plan)	P-010	2	Prototype validation for Family Plans	Validation of Family Plans	16	Messaging Plan is one for all phones (eg \$30 total)	S-007, S-008		
W-126	Customer at Active House (Existing) Orders Wireless (Family Plan)	P-003	0	Paula sets rules to require between 2 and 7 devices (Handsets) with one Family Voice Plan, and viceversa	Configuration is set in CRM to ensure that Min and Max Cardinality on Additional lines reflects the total.	16		S-004, S-006, S-008, S-009, S-013	k	
W-126	Customer at Active House (Existing) Orders Wireless (Family Plan)	P-005	0	Paula adds Terms and Conditions to all Family Plan Offers (OKC, OMA)	T&C added	16		S-004, S-006, S-008, S-009, S-013		
W-127	Customer at Active House (Existing) with Internet Orders Wireless (Mobile Broadband)	P-009	1	Paula administers Wireless Catalog Offers for Mobile Broadband Plans	TBD	16	Support story for Storefront			
W-127	Customer at Active House (Existing) with Internet Orders Wireless (Mobile Broadband)	P-011	2	Paula updates the MBB Product Model	TBD	16	Support story for Storefront			
W-127	Customer at Active House (Existing) with Internet Orders Wireless (Mobile Broadband)	P-012	2	Paula sets eligibility rules to ensure that subscription with any Core Services is required for any wireless plan and navigation data is associated to the rules	Rules with Navigation data are added to CRM	16				
W-127	Customer at Active House (Existing) with Internet Orders Wireless (Mobile Broadband)	P-013	1	Paula sets up the U3XX On-The-Go Modem and adds content and List Price	Product is set up, and Content and List Price are added to CRM	16	Content to be provided by Content Mgmt team			

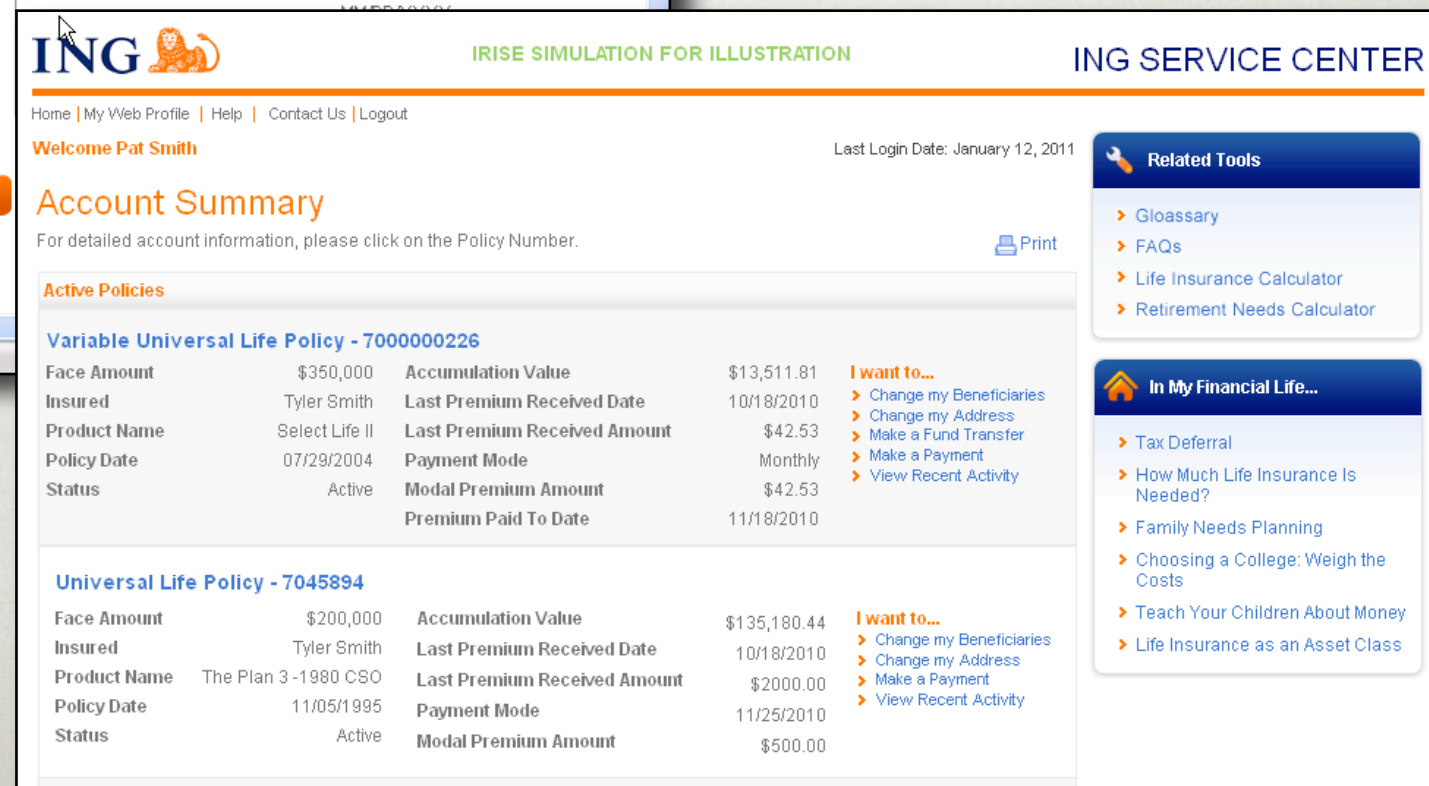


# BUILD



## Prototypes

- Basic HTML
- Visio
- Graffle
- iRise





# TEST

## Functional Description

<b>Requirement Description:</b>	Login/Registration Page
<b>Timing Constraints:</b> (Optional)	
<b>Comments/Assumptions</b>	This page will be linked to from other web pages currently in use. This page will not be linked to for State of Mississippi (Retirement plan) which will have its own version of this page. This page will not vary for different types of users.

Feature ID	Feature Name	Story ID	Points	Story Description	Story Validation	Sprint	Comments	Related Story	Status in Sprint?	Parity
W-024	New Customer Orders Wireless and Internet	P-006	2	Paula sets a discount to ensure customers purchasing Internet On-the-Go 5GB are eligible for a discount if either subscribe to or have Internet service in their cart	Discount is associated to Internet On-the-Go 5GB					

		Characters: Screen displays with cursor in this field. Tabbing from this field goes to Password field.
	Password field displays	Entry field that will hold a maximum of 50 characters. Tabbing from this field goes to Go button.
	Go button displays	Clickable button that will initiate login process for the user-entered User ID and Password. Tabs to "Forgot your User ID" link.
	Go button is clicked and User ID and Password are valid	User is brought to Home page, Forced Password Change, or Inactivity Security Question as appropriate. If successful, Audit log entry created: LogType = 'Login' SubType = 'Login' and message = 'Login'
	Go button is clicked with no User ID entered	Error message displays: "User ID or Password is incorrect. Please re-enter."
	Go button is clicked with no Password entered	Error message displays: "User ID or Password is incorrect. Please re-enter."
	Go Button is clicked with valid User ID/password, but User ID is on Administrative lock.	Error message displays: "Your account has been locked. If you are unaware of the reason for this please navigate to the <u>contact us</u> page."
	Go Button is clicked with valid User ID/password, but User ID is on non-Administrative lock from a previous session.	Error message displays: "Your account has been locked. To unlock your account, please navigate to the <u>contact us</u> page."
	Go Button is clicked with invalid User ID/Password combination (1 <sup>st</sup> and 2 <sup>nd</sup> try)	Error message displays: "User ID or Password is incorrect. Please re-enter."
	Go Button is clicked with invalid User ID/Password combination (3 <sup>rd</sup> or later try using one User ID)	Error message displays: "Your account has been locked because you have exceeded the allowed number of entry attempts. To unlock your account, please navigate to the <u>contact us</u> page." Email is sent to email address on record.

### USABILITY EVENT SCREENER

5. Which industries were your focus groups or web-usability studies for?

TERMINATE IF IN LIFE INSURANCE

6. Which of these types of insurance do you currently have? (READ LIST. IMPORTANT TO READ ENTIRE LIST AND RECORD RESPONSES BELOW.)

Home Owners or Renters ( )  
Auto Insurance ( )  
Flood Insurance ( )  
Life Insurance ( ) – CONTINUE if checked  
Long-term care insurance ( )

7. We understand that shopping for and choosing financial services, including insurance, is handled differently in different households. When it comes to making the decision to purchase the Life Insurance policies that you currently have or to make changes to them now, which of the following statement fits you best:

I am the primary decision maker ( ) CONTINUE  
I make the decisions equally with my partner or spouse ( ) CONTINUE  
I have input in the decision making but do not make the final decision ( ) TERMINATE  
I have little or no input into life insurance policy decisions ( ) TERMINATE

8. We are interested in speaking with people with different levels of web-based experience. Please tell me if you routinely do any of the following:

a) Rarely if ever go onto the Internet ( ) TERMINATE  
Surf the web at home or at work ( )  
b) Use Email ( )  
c) Use web-banking to pay bills or transfer money ( ) CONTINUE  
d) Make purchases online ( )  
e) Make changes to your 401(k) or other investment accounts online ( ) CONTINUE

NOTE: MUST CHECK EITHER c) OR e) TO CONTINUE



# IMPLEMENT

## Tutorials & Training

Introduction .....	1
■ Class Participants .....	1
■ The Goals of this Class .....	1
■ What You Won't Learn Today .....	1
■ Class Format .....	1
Lesson One: Create a Routine Workflow .....	2
■ Up Front: About This Lesson .....	2
■ Accessing the Teamsite Environment .....	2
■ Navigate to Your Teamsite Workarea .....	2
■ Discussion: What is a Routine Workflow? .....	2
■ Creating a New Routine Workflow .....	2
■ Review/Revise a Workflow Job .....	2
■ Adding Files to Your Job Using the Tasks screen .....	2
■ Discussion: Review the Task Detail Screen .....	2
■ Adding Files to the Routine Workflow Job .....	2
■ Submit the Routine job to the eBusiness Group for Release .....	2
■ Recap .....	2
Lesson Two: Create an Expedited Workflow .....	2
■ Up Front: About this lesson .....	2
■ Access the Teamsite Environment .....	2
■ Discussion: What is an Expedited Workflow? .....	2
■ Creating a New Expedited Workflow .....	2
■ Review/Revise an Expedited Workflow Job .....	2
■ Adding Files to the Job using the Tasks screen .....	2
■ Submit the Expedited job to the eBusiness Group for Release .....	2
■ Recap .....	2
Lesson Three: Create A Non-Compliance Workflow .....	2
■ Up Front: About This Lesson .....	2
■ Access Teamsite .....	2
■ Discussion: What is a Non-Compliance Workflow? .....	2
■ Creating a New Non-Compliance Workflow .....	2
■ Review/Revise a Non-Compliance Workflow .....	2
■ Adding Files to the Job using the Tasks screen .....	2

### LESSON FOUR: ACTING AS A WORKFLOW PARTICIPANT

#### ■ UP FRONT: ABOUT THIS LESSON

##### PRE-REQUISITES

This lesson assumes...

- You've successfully completed Lessons 1-3: Create a Routine, Expedited, and Non-Compliance Workflows.
- You have a comfortable understanding of the creation, review, and revision processes for workflow jobs and tasks.

##### LESSON DETAILS

- This lesson will take approximately 30 minutes in the classroom setting.
- Lesson will include short discussion segments (illustrated here in red) as well as hands-on work.
- At the end of this lesson, you should be able to perform the following tasks:
  - Recognize and access workflows and participation requests via their various system-generated emails
  - Recognize and access workflows from within the Teamsite interface
  - Approve a workflow to its next logical stage
  - Rejecting a workflow
  - Cancel a workflow
  - Demonstrate an understanding of participant roles

#### ■ REVIEW: THE WORKFLOW PROCESS

- Recall that in Lesson One we determined that most workflows aren't established until after the files have been created and/or modified by the creative staff.
- The creative staff member – acting on behalf of a job "requester" – assigns the files and submits the workflow request to eBusiness.
- The System alerts eBusiness that a job is pending approval.
- eBusiness, in turn, approves ("releases") the workflow request.
- The System performs several actions including sending an



**1 Initiate**  
Client/Stakeholder Meetings  
Requirements Gathering  
User Research, Personas  
Baseline/Competitor Heuristics

**2 Analyze**  
Requirements Backlog  
Usability Tests  
Baseline/Competitor  
Heuristics Presentation  
Content Strategy  
Site Map  
Process Flows / Use Cases

**3 Design**  
Wireframes  
Schematics  
Storyboards  
Content Inventory

**4 Build**  
Features / Stories  
Prototypes  
Content Structure

**5 Test**  
QA Validations  
User Acceptance

**6 Implement**  
Exit Documentation  
Tutorial/Training

