CONCORDE INC.

Unified Dashboard Discovery

Summary Report

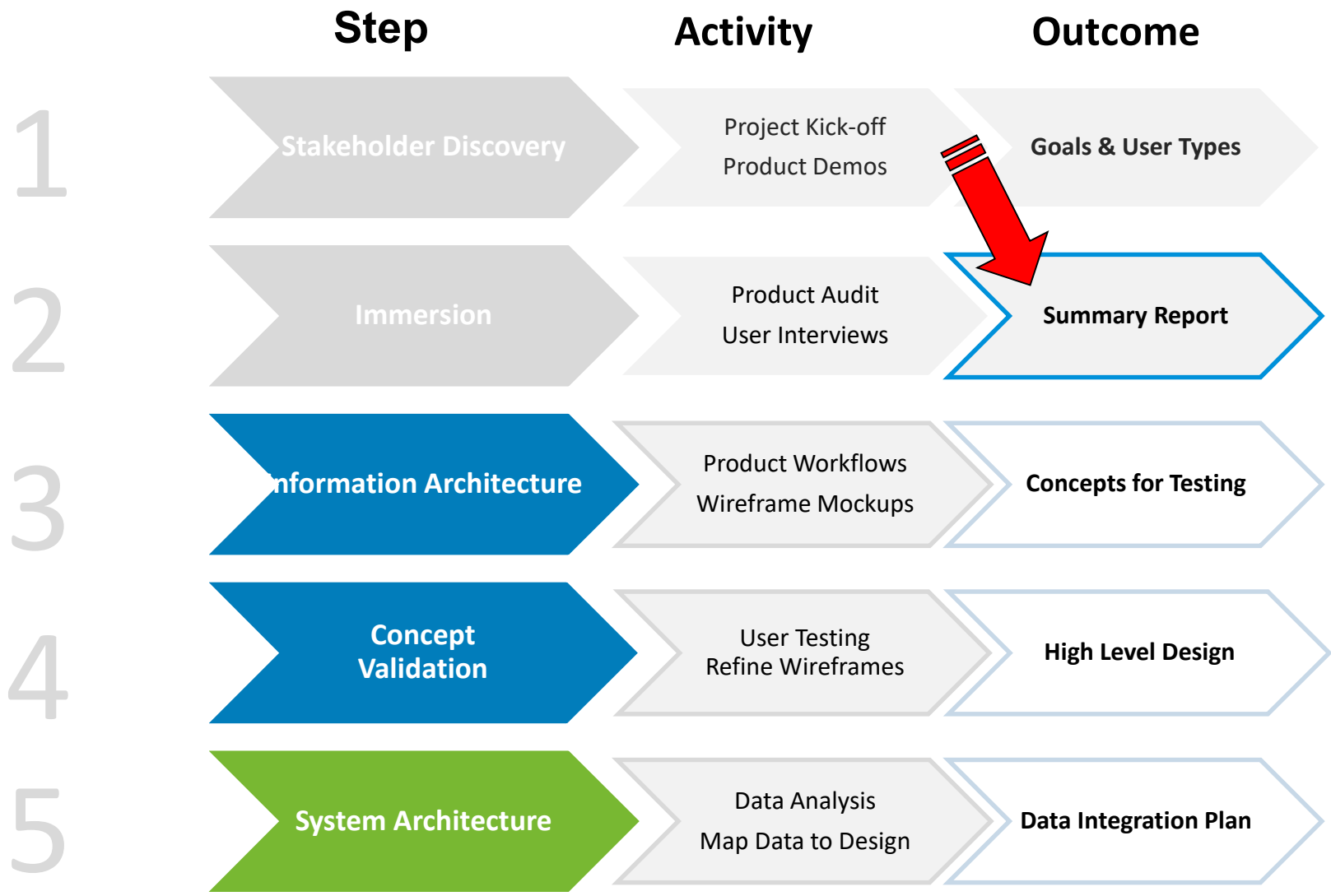
June 17, 2015

e·city·interactive

Agenda

- What We Heard
- What We Did (Immersion Process)
- User Interview Findings
- User Groups
- Recommendations
- Wrap-up

Discovery & Design



	Step	Activity	Outcome
1	Stakeholder Discovery	Project Kick-off Product Demos	Goals & User Types
2	Immersion	Product Audit User Interviews	Summary Report
3	Information Architecture	Product Workflows Wireframe Mockups	Concepts for Testing
4	Concept Validation	User Testing Refine Wireframes	High Level Design
5	System Architecture	Data Analysis Map Data to Design	Data Integration Plan

e·city·interactive

What we heard

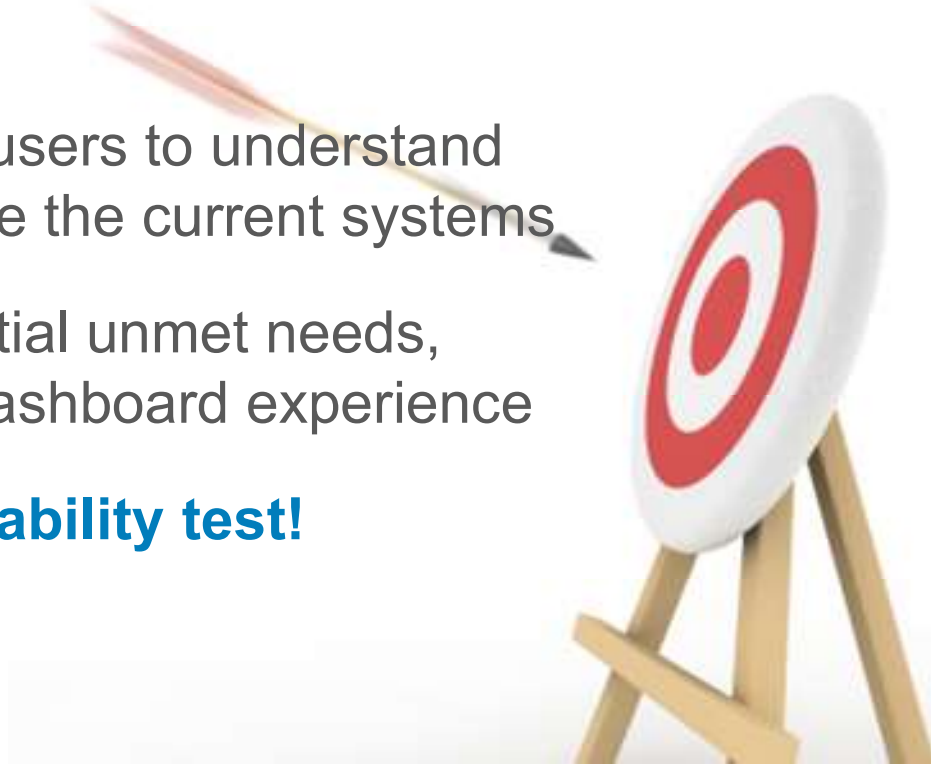
Goals & Success

Project Goal

- Design a unified dashboard to serve as a user-facing integration point for DQ-it, SMART, & RANDOMS products

Study Objectives

- **Context of Use** - Speak with users to understand who they are and how they use the current systems
- **Unmet Needs** - Identify potential unmet needs, particularly around a unified dashboard experience
- **Study NOT intended as a usability test!**



Pain Points

- Current system **data not integrated**. Concorde has to manually move information from one system to the other
- **Multiple sign-in accounts** cumbersome and causing confusion since users forget credentials
- Current products not good at **cross-promoting** other available products and services. Desire for the products to better support sales efforts
- Begin the process of improving the overall **user experience**

What we did.

(Immersion Process)

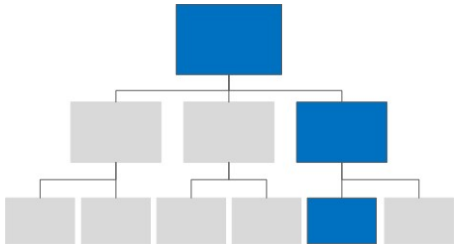
Immersion Activities

1. Audit Product Training and Sales Materials
2. Review User Types & Accounts
3. Application Heuristics Review
4. Competitive Evaluation
5. Traffic Analytics
6. **User Interviews**

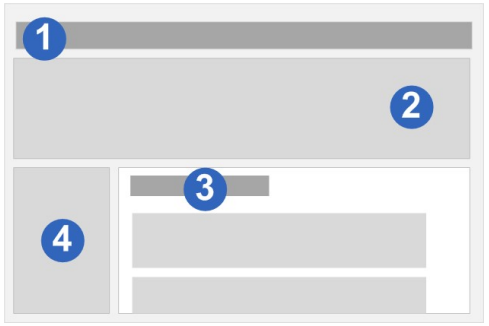
Heuristics Review

Application Heuristics

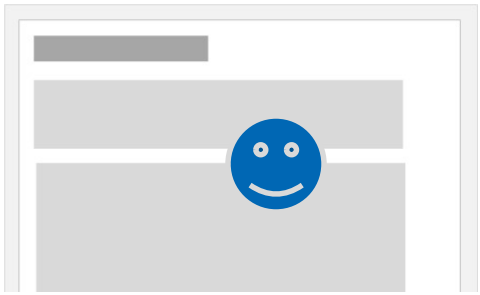
1. **Navigation & Wayfinding**
   How well users can find information across sections of the site?



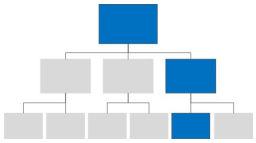
2. **Screen Layouts**
   How easy or difficult is it to consume information on the screen?



3. **Screen Content**
   Is the content relevant and accessible?



Navigation & Wayfinding



Supporting Users' Content Exploration

A. **Current Locator**
   "Where am I?"

B. **Clear Navigation Method**
   "Where can I go?"

C. **Trace Route**
   "How do I get back?"

Navigation & Wayfinding

Supporting Navigation

✓ Primary Menu

✓ Secondary Menu

✓ Confirming Breadcrumbs

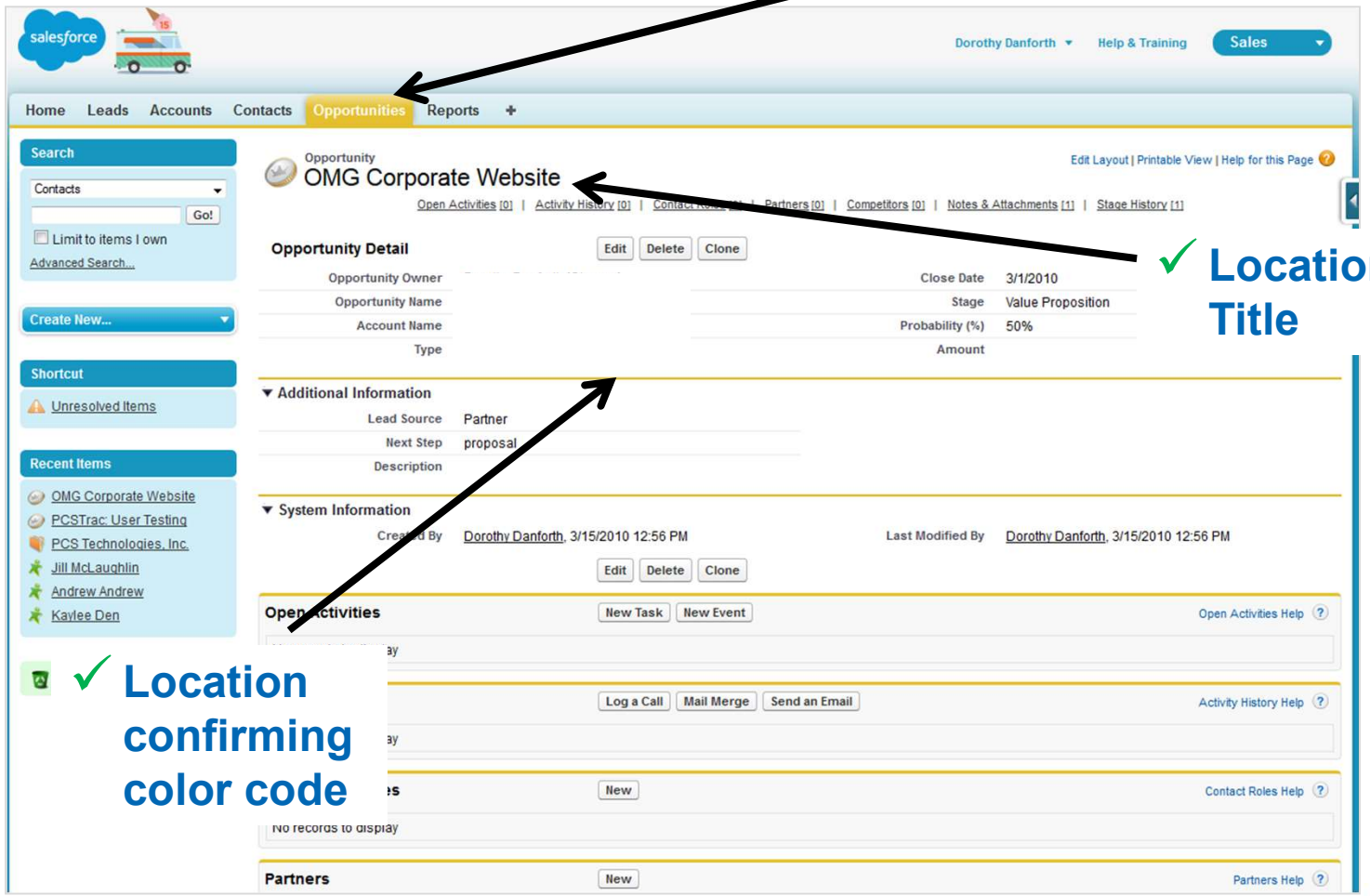
✓ 3rd Level Menu

A. Current Location

e·city·interactive

Supporting Navigation

✓ Primary Menu Selected



✓ Location Title

✓ Location confirming color code

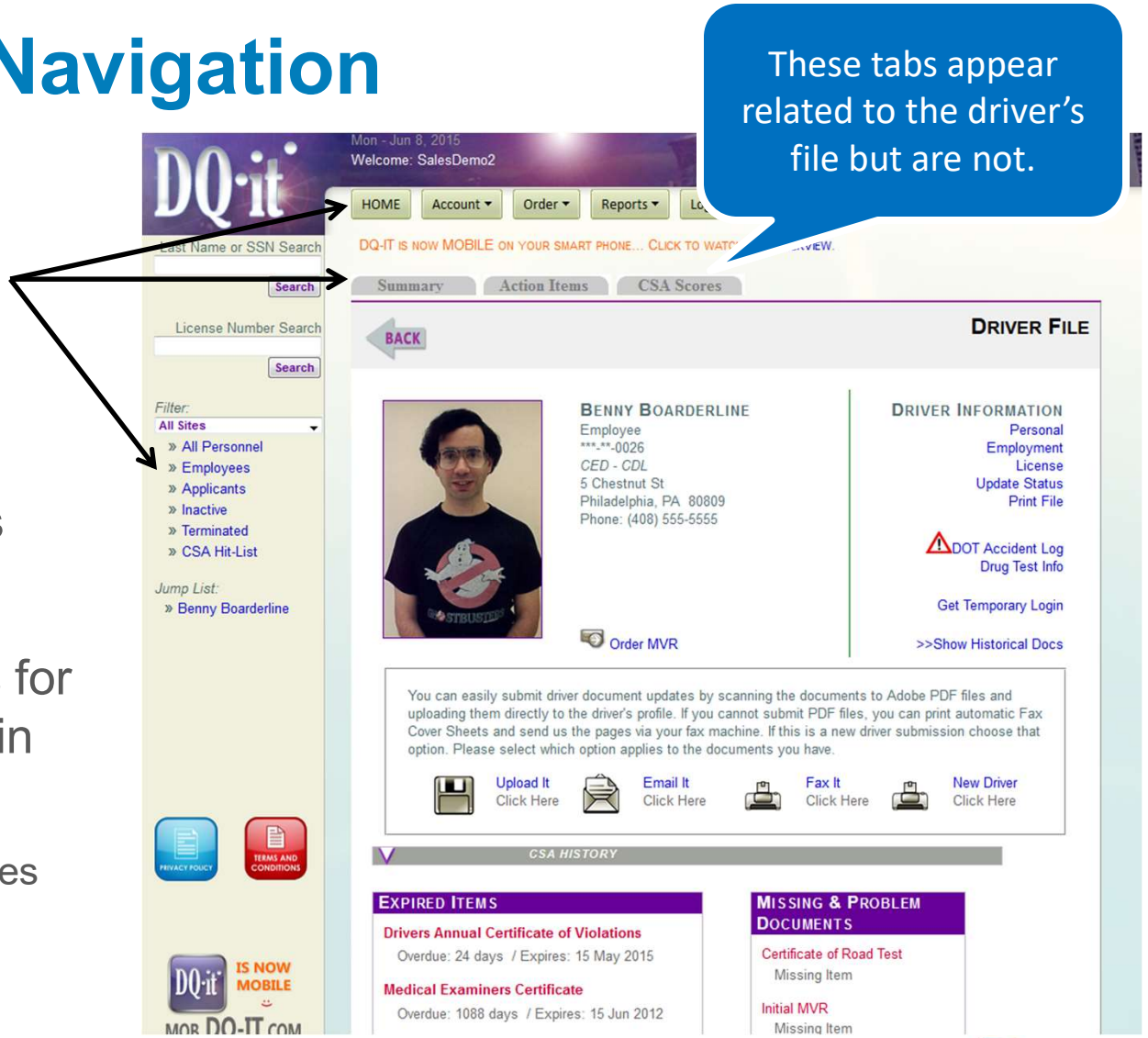
e·city·interactive

Supporting Navigation

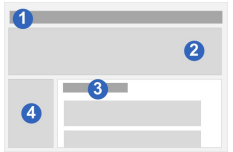
- Multiple areas of unconnected navigation menus
- Multiple visual treatments for navigation options

  Buttons, tabs, links
- Minimal indicators for where the user is in the system

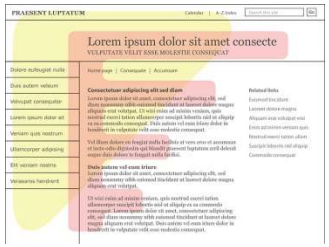
  Personnel → Employees → Driver



Page Layouts



Users “Scan” before they read

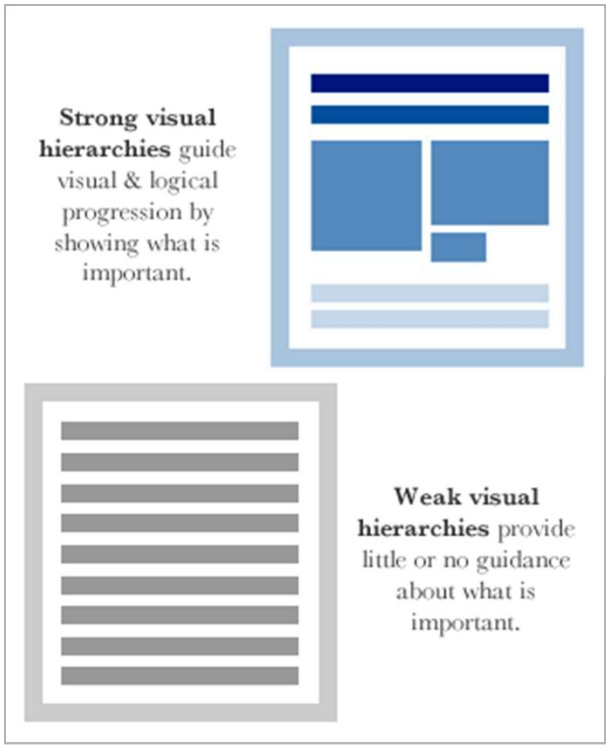


Users initially visually move through a screen in an “F” pattern “scanning” content for information

Creating Visual hierarchy and moving towards an F-pattern layout guides user to key content via natural behaviors

- **How?**
- Prioritize information based on key tasks
- Clear labels and content groupings
- Size, shape, color, etc

Visual hierarchy.
What’s important here?



e·city·interactive

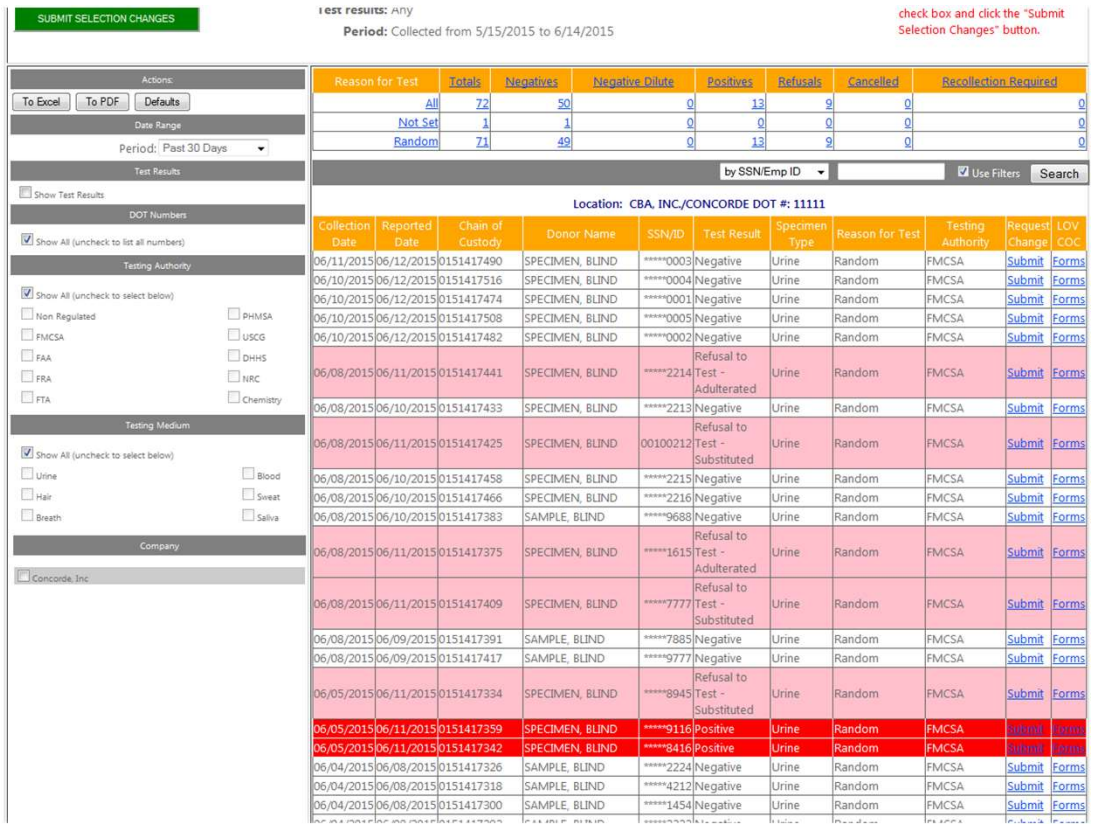
Prioritize by Top Tasks

- Better prioritizing page layouts to support top tasks will improve ease of use
- Large portion of top area used for secondary reference information
- Key task information (missing files) down at bottom of screen

This doesn't mean all important things at the top. It means designing a layout mindful of priorities and how users will initially visually "scan" it and supporting that process.

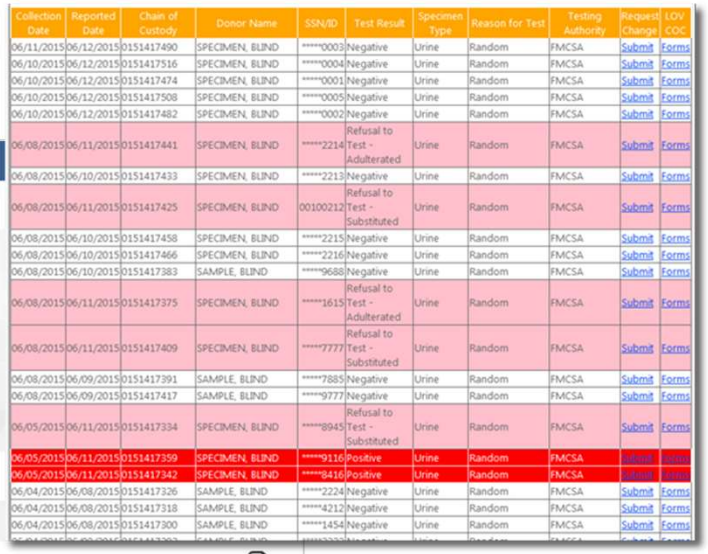
Visual Prioritization

- Bold colors distract user from visually scanning for relevant record information
- Visually dense and cluttered with no “white space.” Eye has no where to “rest” to absorb content
- Potentially too much information at once. More than what’s necessary to find relevant record



e·city·interactive

Visual Prioritization



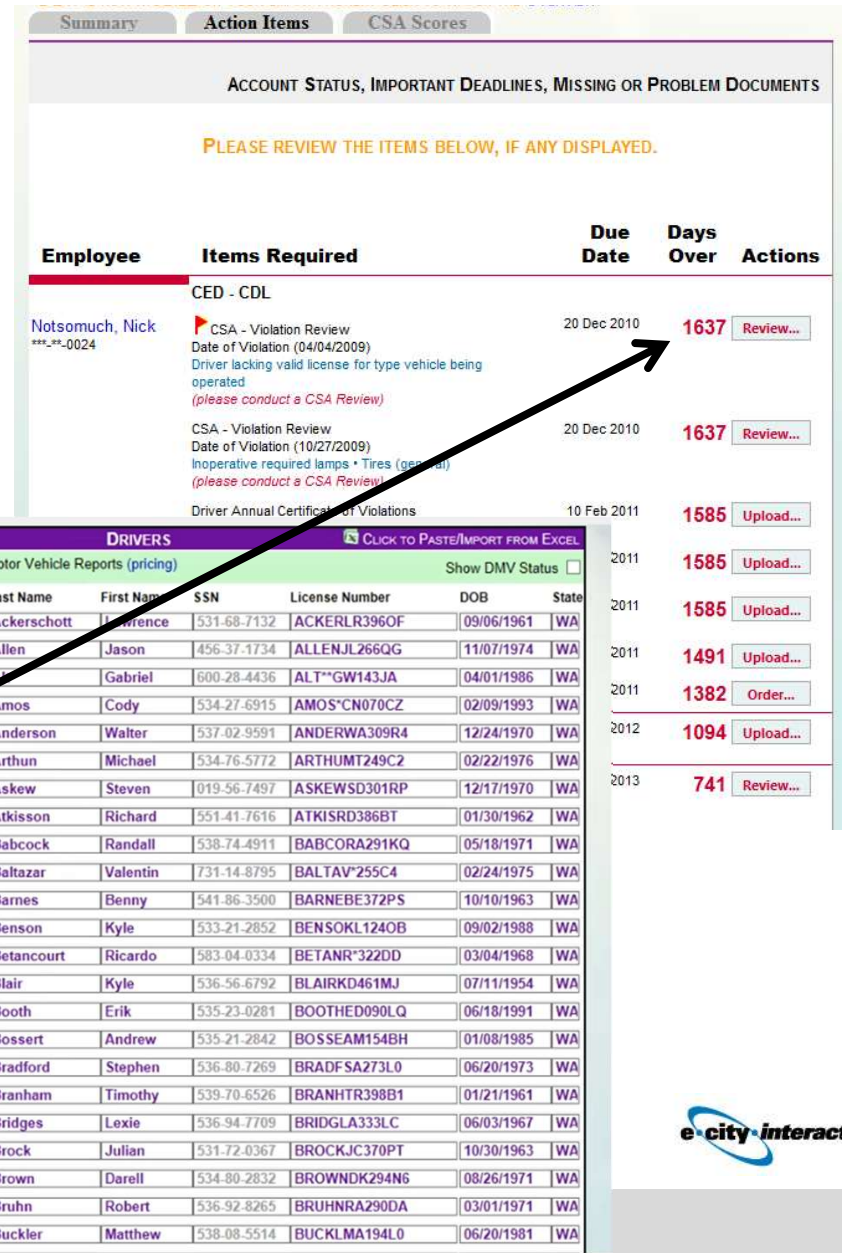
Collected	Lab Reported	Donor Name	Donor SSN	Test Result	Reason	COC Form	Specimen			
6/4/2015	6/8/2015	Blind Specimen	211112222	Negative	Random	0151417292	Urine			
6/4/2015	6/8/2015	Blind Specimen	221121454	Negative	Random	0151417300	Urine			
6/8/2015	6/10/2015	Blind Specimen	001002215	Negative	Random	0151417458	Urine			
6/8/2015	6/10/2015	Blind Specimen	001002213	Negative	Random	0151417433	Urine			
6/10/2015	6/12/2015	Blind Specimen	216940002	Negative	Random	0151417482	Urine			
6/10/2015	6/12/2015	Blind Specimen	216940001	Negative	Random	0151417474	Urine			
6/10/2015	6/12/2015	Blind Specimen	216940005	Negative	Random	0151417508	Urine			
6/10/2015	6/12/2015	Blind Specimen	216940004	Negative	Random	0151417516	Urine			
6/11/2015	6/12/2015	Blind Sample	216940003	Negative	Random	0151417490	Urine	View	Request	
5/20/2015	5/22/2015	Blind Sample	104329112	Positive	Random	0151417193	Urine	View	Request	
5/20/2015	5/22/2015	Blind Specimen	216549812	Positive	Random	0151417201	Urine	View	Request	
6/2/2015	6/8/2015	Blind Specimen	204962516	Positive	Random	0151417235	Urine	View	Request	
6/2/2015	6/8/2015	Blind Specimen	102964327	Positive	Random	0151417276	Urine	View	Request	
6/5/2015	6/11/2015	Blind Specimen	209968416	Positive	Random	0151417342	Urine	View	Request	
6/5/2015	6/11/2015	Blind Sample	145459116	Positive	Random	0151417359	Urine	View	Request	
6/8/2015	6/11/2015	Blind Specimen	214201615	Refusal	Random	0151417375	Urine	View	Request	
6/8/2015	6/11/2015	Blind Specimen	001002214	Refusal	Random	0151417441	Urine	View	Request	
6/5/2015	6/11/2015	Blind Specimen	243218945	Refusal	Random	0151417334	Urine	View	Request	
6/8/2015	6/11/2015	Blind Specimen	212447777	Refusal	Random	0151417409	Urine	View	Request	
6/8/2015	6/11/2015	Blind Specimen	00100212	Refusal	Random	0151417425	Urine	View	Request	
5/20/2015	5/21/2015	Blind Specimen	154993469	Negative	Random	8955905	Urine	View	Request	

- Supports “F” pattern
- Uses color as accent to guide
- Progressive disclosure; only most relevant options shown

e·city·interactive

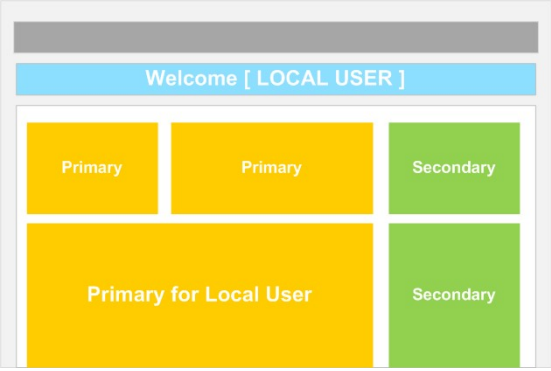
Layout Consistency

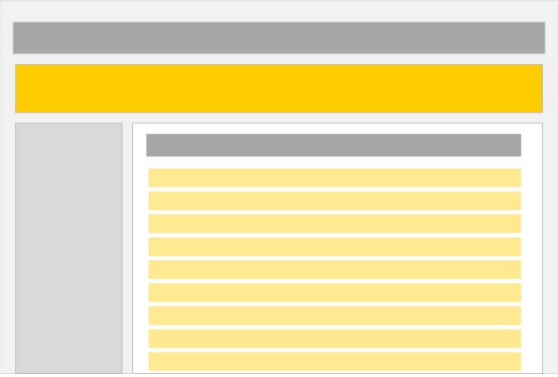
- Standardized layouts & interactions (pattern templates) per “type” of screen let users build a mental model of how your system works…
  - Builds trust and confidence in system
  - Supports way-finding
  - Reduces training effort
- Example: Action buttons on right hand of screen vs action buttons on left hand of screen.
- Title right aligned vs center aligned, etc.

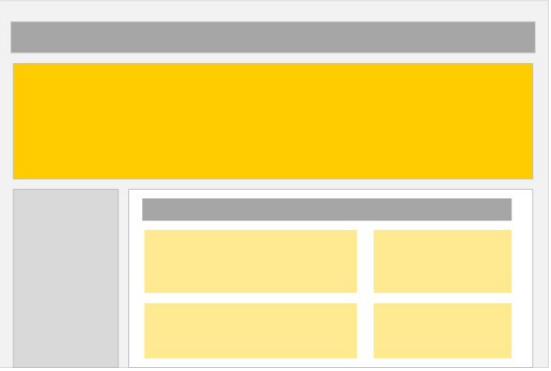


e·city·interactive

Example of Templates







1

Home Template

1. Broadest Focus
2. Prioritized by top tasks for the user group

2

Listing Template

1. Common scenario; listing in a data grid
2. How do we handle listing of things?
3. Variations based on user goals/tasks

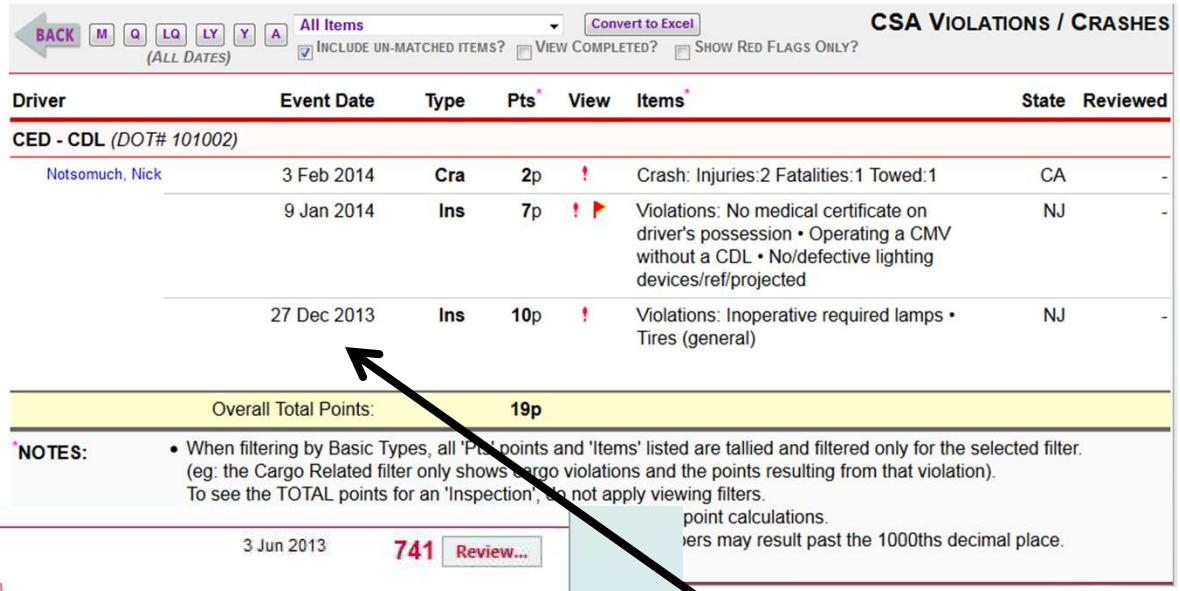
3

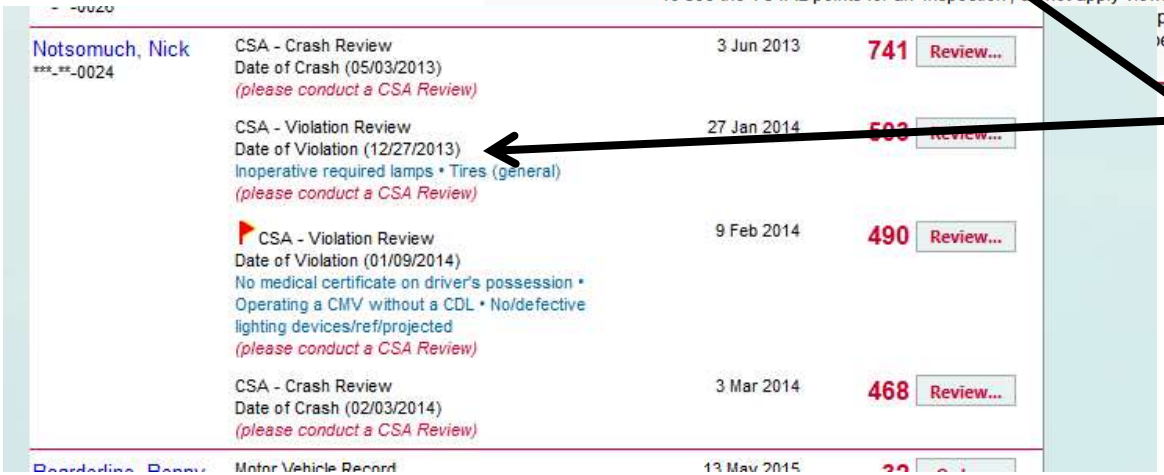
Detail Template

1. Common scenario; detailed displays
2. How do we handle showing a profile screen that correlates with listing screens?

Screen Content

- Same content should be represented in a similar manner with changes only to support primary task





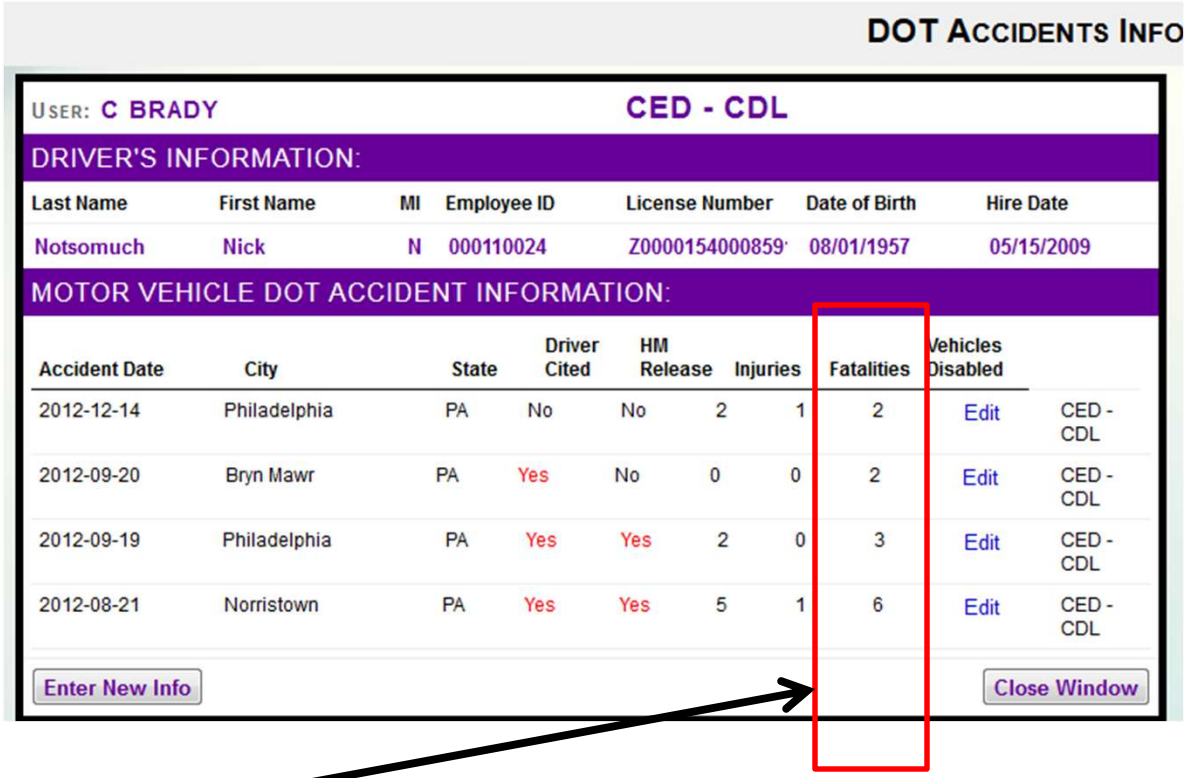
User has to re-orient to determine out how content relates.

"Is this Action Item the same violation as on the CSA Hit-list?"

e-city interactive

Clarity of Information

- Good example of how layout and data presentation consistency can impact clarity of information



DOT ACCIDENTS INFO

USER: C BRADY — CED - CDL

DRIVER'S INFORMATION:

Last Name	First Name	MI	Employee ID	License Number	Date of Birth	Hire Date
Notsomuch	Nick	N	000110024	Z0000154000859	08/01/1957	05/15/2009

MOTOR VEHICLE DOT ACCIDENT INFORMATION:

Accident Date	City	State	Driver Cited	HM Release	Injuries	Fatalities	Vehicles Disabled	
2012-12-14	Philadelphia	PA	No	No	2	1	2	Edit CED - CDL
2012-09-20	Bryn Mawr	PA	Yes	No	0	0	2	Edit CED - CDL
2012-09-19	Philadelphia	PA	Yes	Yes	2	0	3	Edit CED - CDL
2012-08-21	Norristown	PA	Yes	Yes	5	1	6	Edit CED - CDL

Enter New Info — Close Window

- How many fatalities did this driver have?
- **Answer: 2** (…not 13!)

Traffic Analysis

Application Usage Comparison

Unique Visitors	DQ-it	SMART	RANDOMS
Annual	24,073	10,280	3,061
Month Avg.	1,756	857	255
Daily Avg.	64	28	8
		49% of DQ-it	**15% of DQ-it**
*Daily Avg. Logins	16	2.4	0

- Unique visitors represent both new and returning users who visit the site. Represents a single individual session.
- For example, on a given day, DQ-it will get 64 unique user sessions. When compared loosely to login data, this would indicate the same individual logging in multiple times.

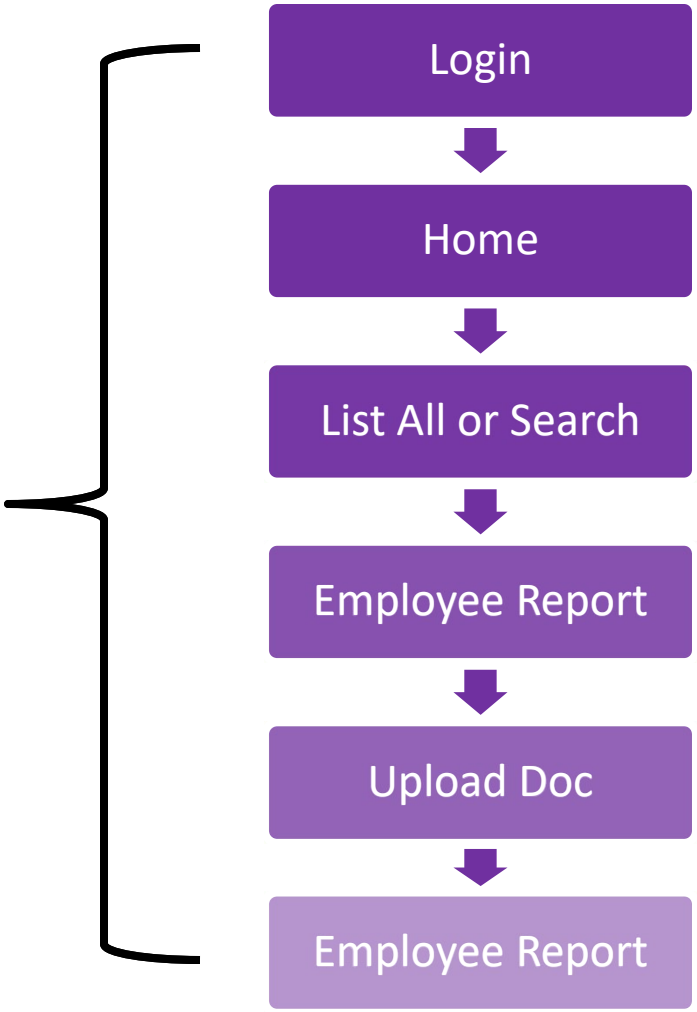
* Log data numbers are much higher than indicated by account login data provided so either logins given did not include Concorde users, or the stats software is recording multiple logins by same person as a new visitor.

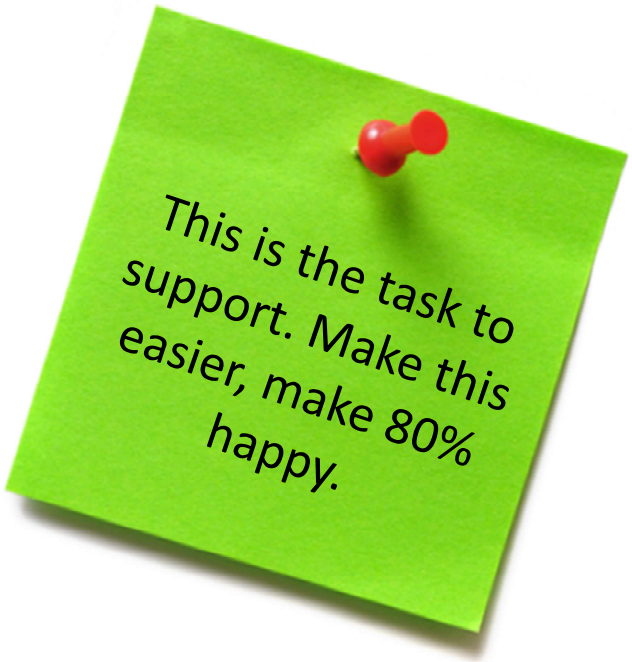
DQ-it Page Visits

Page	Annual Visits	Avg. Monthly
Home	80k	6,700
Employee Reports	64k	5,400
Order Exams	6,802	567
Reports (Tab)	5,790	483
Batch Order MVRs	5,555	463
Add Employee	4,598	383
CSA Scores	1,210	101
CSA Hit List	976	81
CSA Reports	698	58
View Report (All)	364	30
Advanced Reports	272	22

DQ-it Primary User Path

Path for 1658 visits in the past year





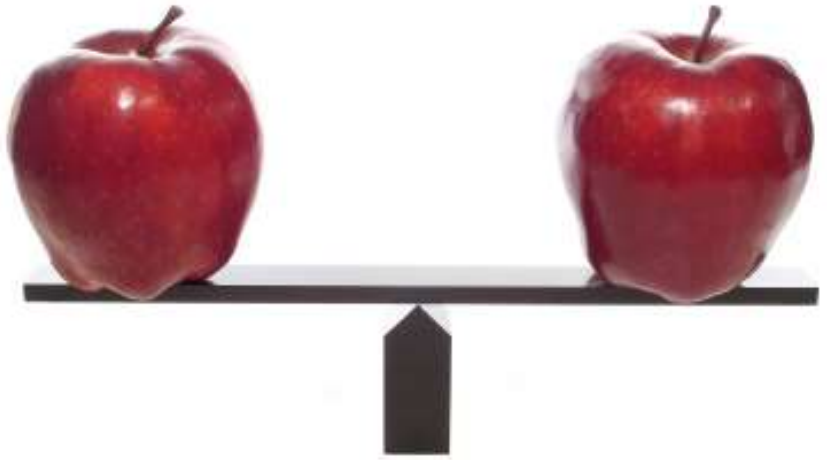
Recommendations

- Improve distinctiveness of content areas for better tracking of application usage. For example, split out individual reports
- Investigate discrepancy between logged visitor data and user sign-ins
- Consider a web analytics package that allows deeper insight into log data

COMPARABLES REVIEW

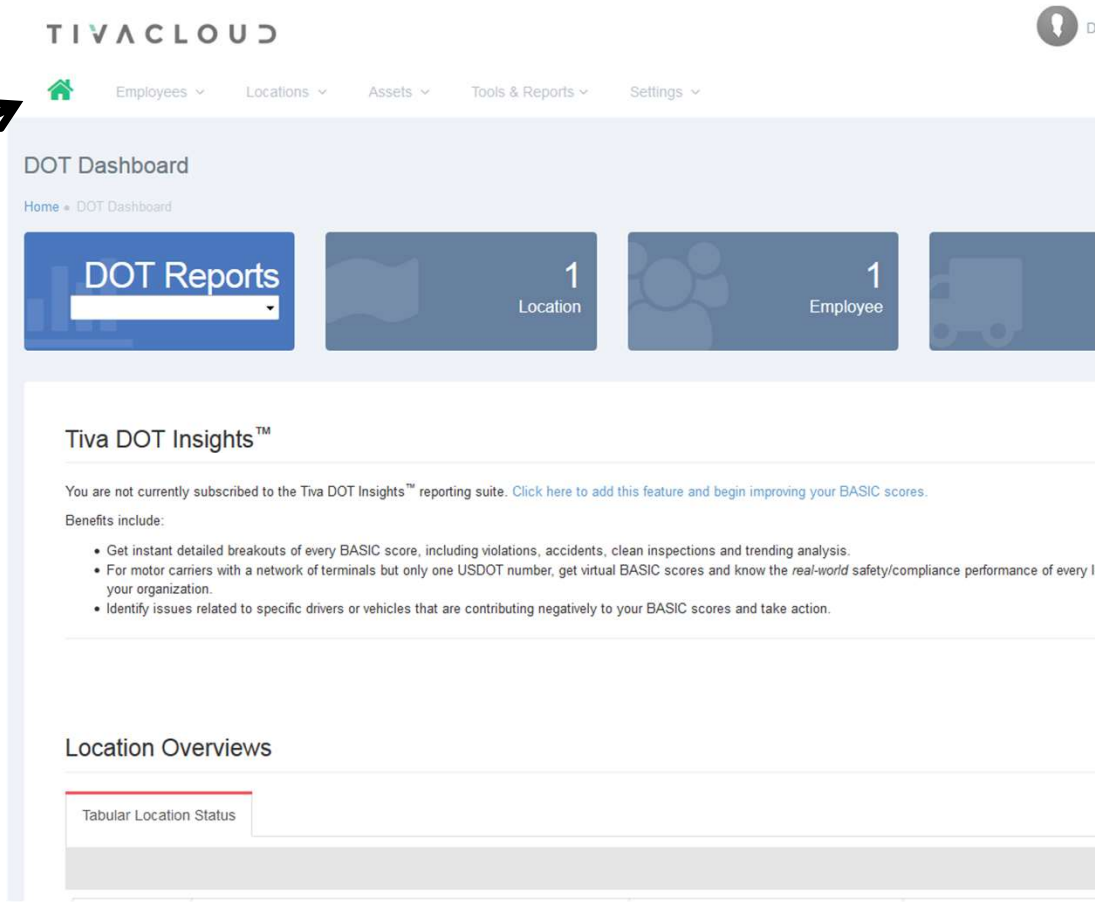
Comparables Review

- **Goal: Get a sense of how other companies handle similar content**
- Applications Reviewed
  - Tiva Cloud
  - Beacon Insights
  - RAIR
- Review for…
  - Dashboard
  - General Layout
  - Information Display
  - Interaction Design
- Limited access to competitor screens…



Tiva Cloud

- Clean layouts
- **Good, clear navigation** (to a point)
- Visually pleasing
- Some visual prioritization, not great
- Not goal focused or prioritized task-based
- Poor ‘Dashboard”
- Some nice interactions

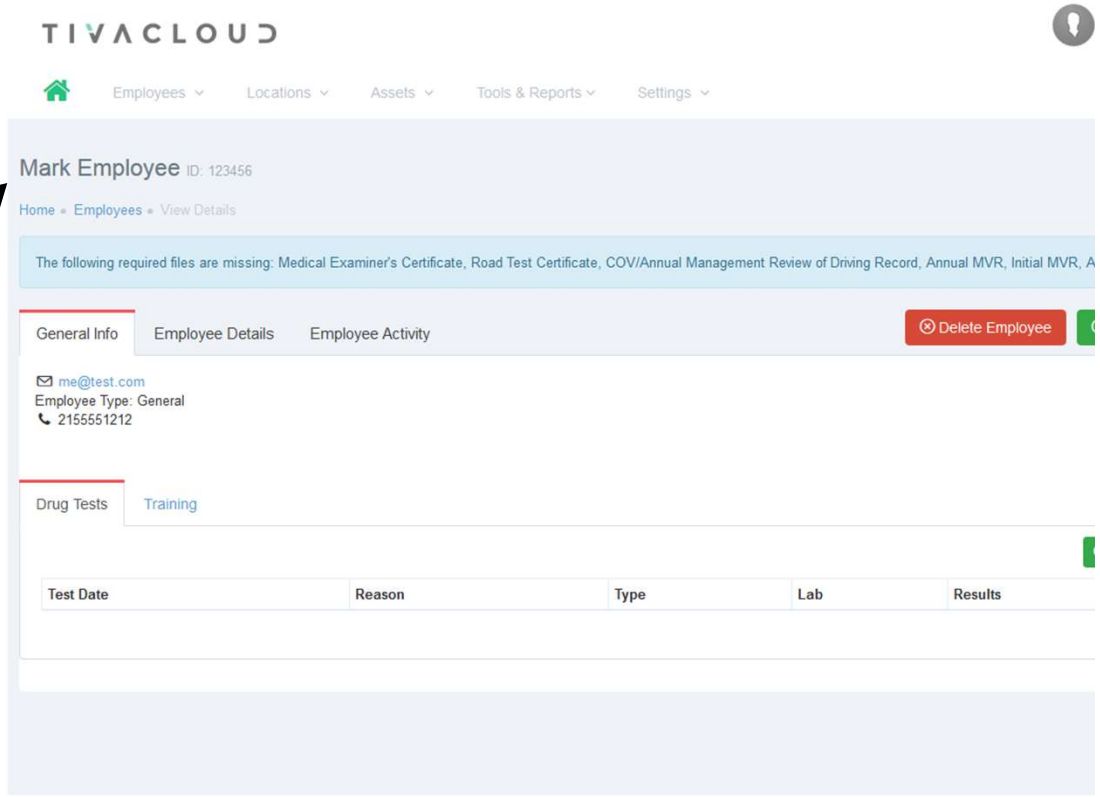


Free trial at https://my.tivacloud.com/

e-city interactive

Tiva Cloud

- Clean layouts
- Good, clear navigation (to a point)
- Visually pleasing
- **Some visual prioritization, not great**
- Not goal focused or prioritized task-based
- Poor ‘Dashboard”
- Some nice interactions

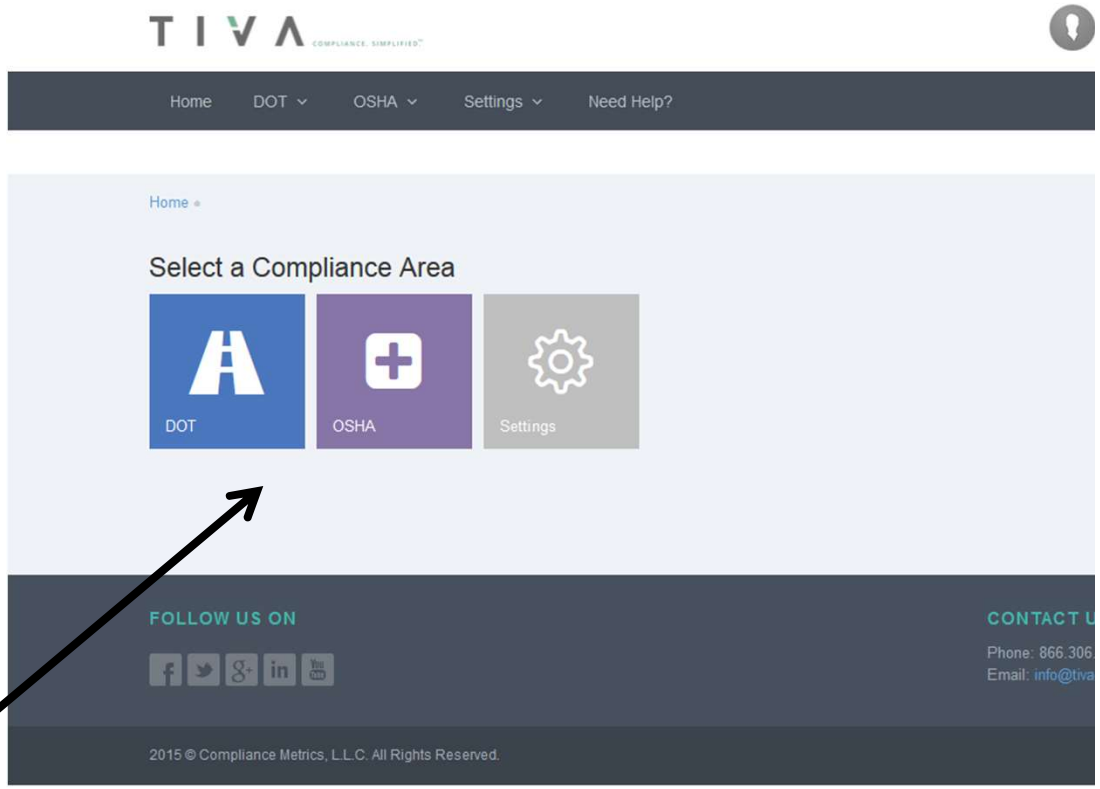


Headers and “alerts” potentially too subtle

e·city·interactive

Tiva Cloud

- Clean layouts
- Good, clear navigation (to a point)
- Visually pleasing
- Some visual prioritization, not great
- Not goal focused or prioritized task-based
- **Poor ‘Dashboard”**
- Some nice interactions

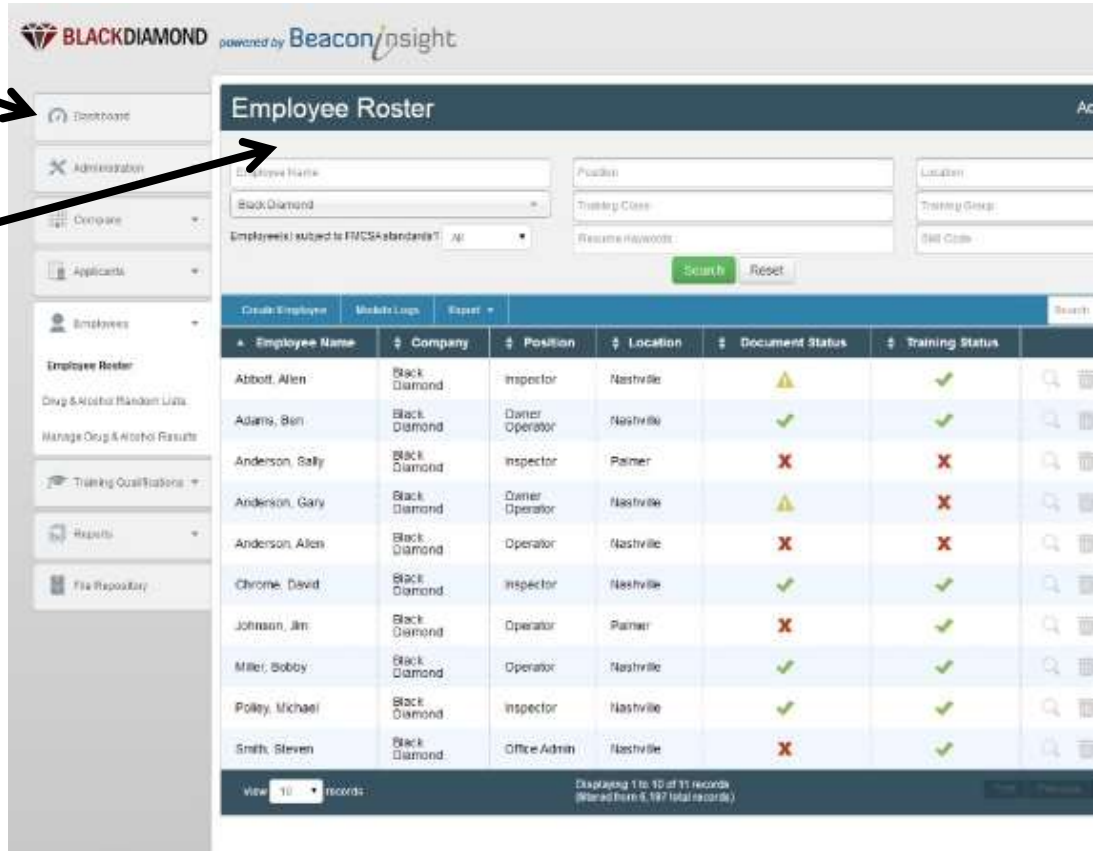


All navigation. No content to support “**information foraging**.” Poor use of space.

e·city·interactive

Beacon Insights

- **Strong navigation and way-finding indicators**
- **Strong headers and data labels**
- Consistent page layouts and data-grids
- Could utilize more progressive disclosure
- Some visual contrast issues, not A11Y compliant

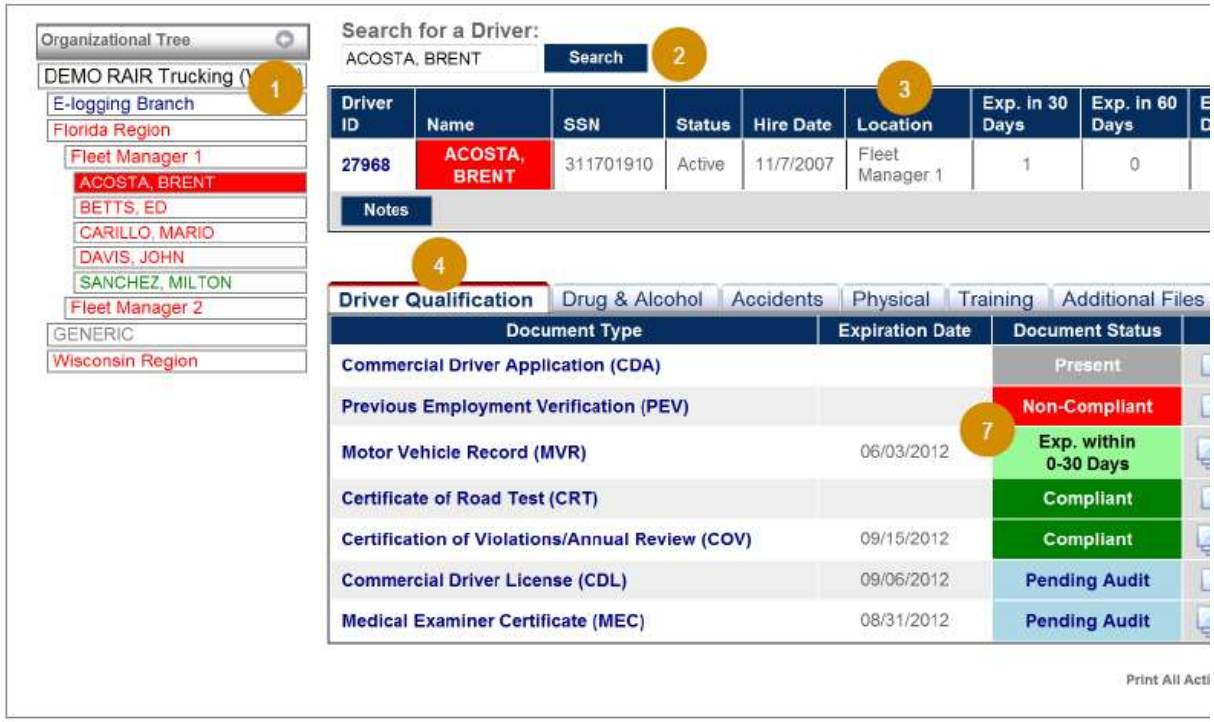


Note: limited screen views of system

e-city interactive

RAIR

- Good navigation (though poorly visualized)
- Ham-handed visual prioritization
- Difficult to process relevant information due to various colors competing for attention
- Does not appear to be professionally designed



Note: limited screen views of system

e-city interactive

User Interviews

“I’m actually really thrilled that you guys are doing this type of interview, it’s really refreshing, you know? …We never had that with the two other companies.”

- Few times a week DQ-it user

Study Methodology

- A qualitative **Contextual Inquiry** was conducted where representative users were interviewed to understand how they use Concorde products, observed doing their own work tasks by recreating specific past work they've completed in the applications
- **7 participants** were individually interviewed, one to one with the moderator for an hour each. Interviews were conducted via GoToMeeting.
- **Discussion Agenda:**
  1. Technology Use – Software used, comfort level, competitive products
  2. Job Role – Whey they do, how it related to product use
  3. Concorde System Usage – Most recent task, common tasks
  4. Product Usage Observation – Observe completing recent tasks
- Full session **audio and screen actions** were recorded and are available.

** Qualitative results are not statistically significant or predictive of future behavior.*

Participants

Of the 7 total participants…

- **4** were women, **3** were men
- **3** indicated a local job focus, **3** indicated regional, and **1** corporate
  - **3** day to day, **3** mid-level oversight, **1** CSA report focused user
- **3** were from FL, the rest were from KY, MA, WA, AZ
- **4** were 55+, **2** were 35-45, and **1** was 25-34
- 1 20yrs in role, 1 14 yrs, 1 8 yrs, 4 under 5 years
- **All** used DQ-it; **2** use it daily, **5** use it few times a week
- **5** of the **7** have used a competitive product to Concorde
- **All** med-high level of familiarity with system and general comfort
- Observed **7** using DQ-it, **3** using SMART, none using RANDOMS

Participants

Participant Titles:

- Manager, Area Safety
- Safety Program manager
- Administrative Assistant (2)
- Site manager
- Director EHS
- Regional Safety Director

Additional Notes…

- Participants were engaged with Concorde, bias sample
- 6 participants were sufficient for the study

MAJOR THEMES

“So, we’ve gone from managing [DQFs] locally to, literally, having one person maintain all these documents.”

- Daily DQ-it user

“I like the fact that it lets me know when something’s due. If I had to manually keep track of all that, it would be a nightmare.”

- Few times a week DQ-it user

“

Whenever we do have questions you guys over there help us out tremendously.

- Few times a week DQ-it user

”

Concorde Service

- Participants were generally satisfied with functionality that Concorde provides
  - Most participants indicated the site was easy to use once they learned it. However, most also indicated areas they felt could be improved.
- Participants indicated appreciation with Concorde responsiveness, and raved about customer service
  - Customer service was listed as a differentiator for at least 3 participants when discussing former competitive providers
- SMART and to a lesser degree DQ-it's non-use is due to the reminder emails that generally seemed to be valued

White Glove Service

“Concorde is just a tool I use to make sure that everyone is compliant…I’m normally going in for a reason.”

- Few times a week DQ-it user

Goal-focused Targeted Use

- Highly targeted use; access due to trigger or planned event. Low exploration.
- Goals (and therefore content needs) differ by different user level
  - Upload documents, manage personnel
  - Exception management, compliance oversight
  - Regional CSA reporting

“I had difficulties learning how to navigate [DQ-it] for a while, until I said ‘I’m sick of this thing I’m going to get it down’…It just doesn’t have an intuitive user interface.”

- Daily DQ-it user

“Some of my frustration has been with trying to generate reports.”

- Few times a week DQ-it user

Common Tasks vs. Exploration

- The applications successfully supports daily users with common tasks once they initially learn how to complete the tasks
- Participants indicated a willingness to click around, two mentioned "it won't break anything"
- However, exploration not well supported, so participants struggled with report generation and less common tasks…

“We started with drug testing and two years later the corporate office saw it was doing well and brought us on to DQ-it”

- Few times a week DQ-it user

“Just to stop the confusion, if you don’t have access to something I think it would be a lot better if you couldn’t see it.”

- Few times a week DQ-it user

Competitive Product Use

4 of the 7 participants had used a competitive product to Concorde in the past…

- 3 participants described the change to Concorde
  - 2 mention RAIR, 1 1st Lab (using RAIR)
  - Both indicated these companies as not being responsive; response time from reps too slow, not given a single point of contact, lost files on transition

Consideration… Improving usability and value (perceived and real) of Concorde products will promote add-on product sign-up more than "grayed out" product options

Findings by Screen

Findings by Screen

- **Not User Testing** – A contextual inquiry is not a user testing study. The goal is to understand how people use a given application or system, not to evaluate the system's effectiveness or usability.
- As usability issues and comments were found they were captured. The follow list is not a comprehensive evaluation of the system's usability or a log of all issues encountered.

Octopus Home Screen

DQ-it Home Screen

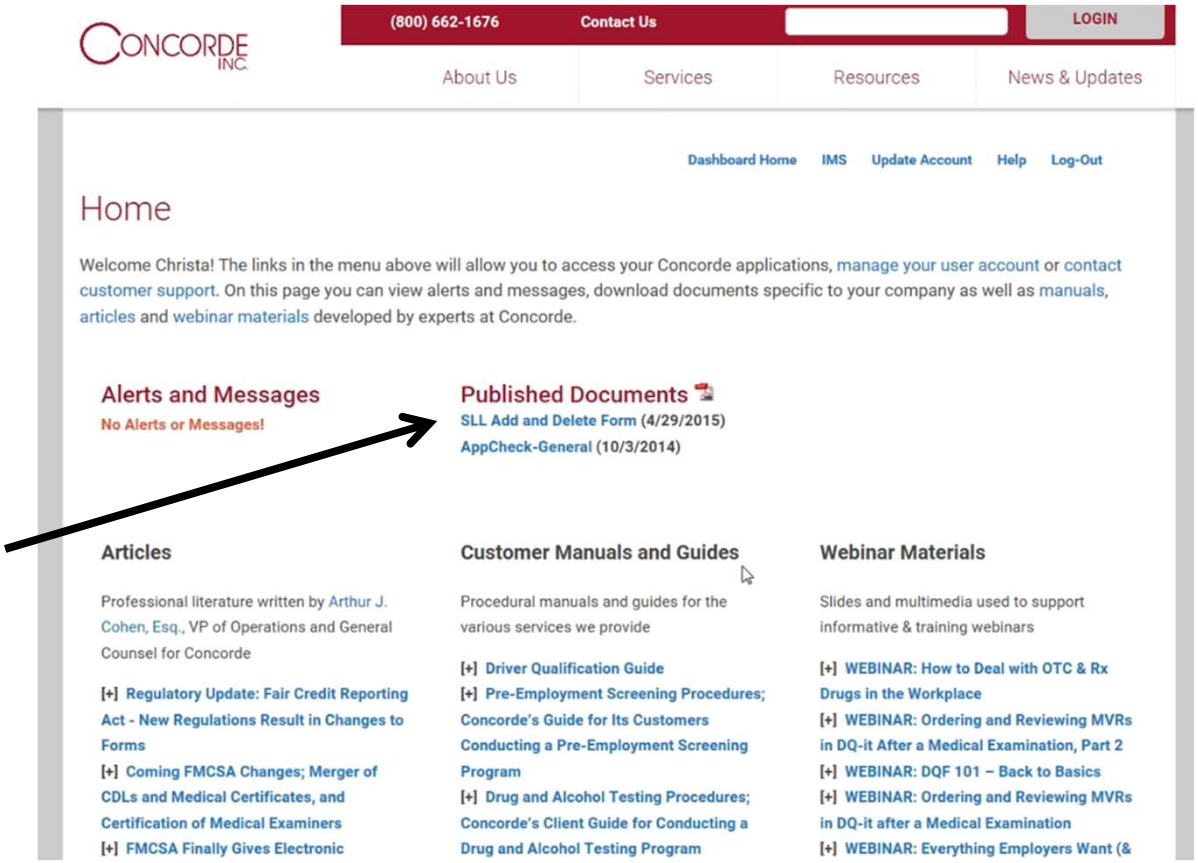
- Employees Listing
- Employee Detail
- Batch MVRs
- CSA Hit-list
- CSA Reports
- CSA Scores
- CSA Advanced
- Reports: Driver Info Detail

SMART

- Smart Home Screen

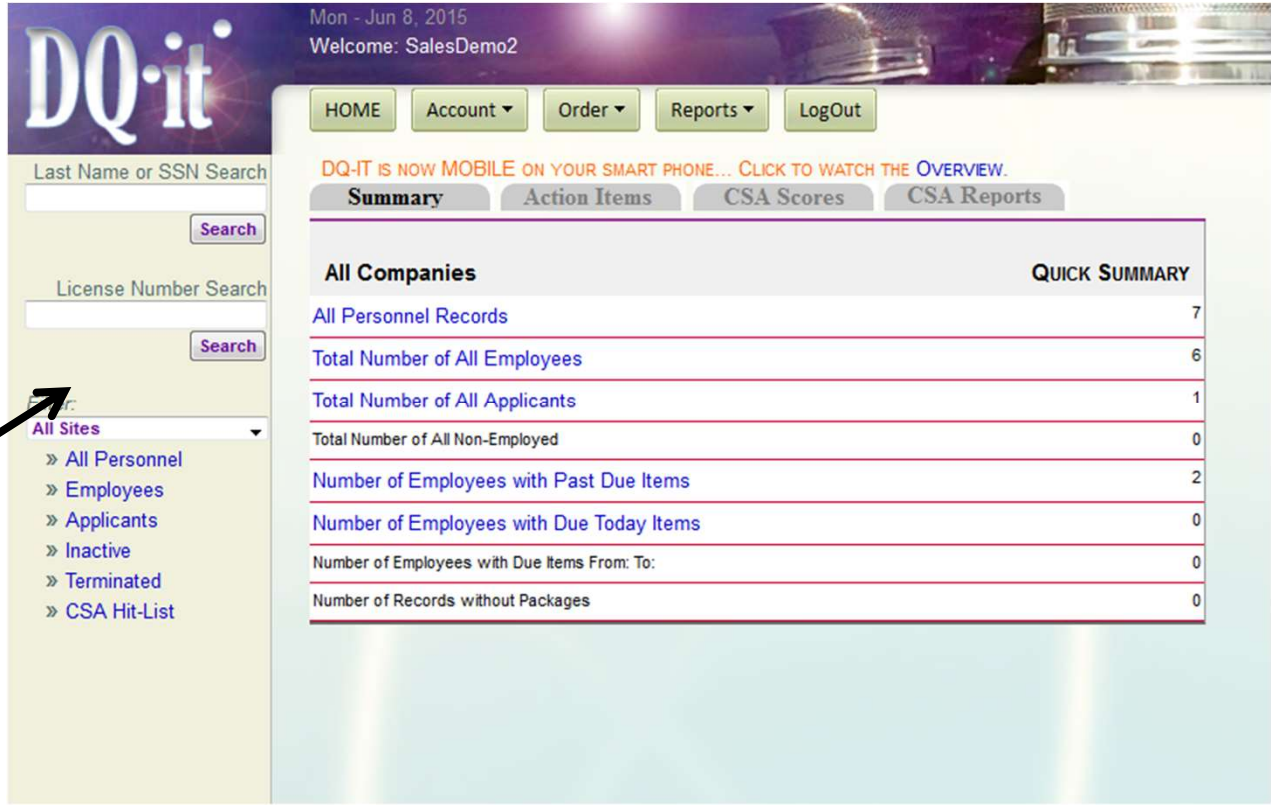
Octopus Home Screen

- Participants were not sure what “Octopus” meant or what it was
- 3 participants indicated having used content on this screen
- One participant indicate having to log out to access content here (Pre-employment files)
- One participant liked when Random results had been posted here
- Clicked on “IMS” because they were trained to, but it’s DQ-it
- **Consider** – Including reference content in the application after login



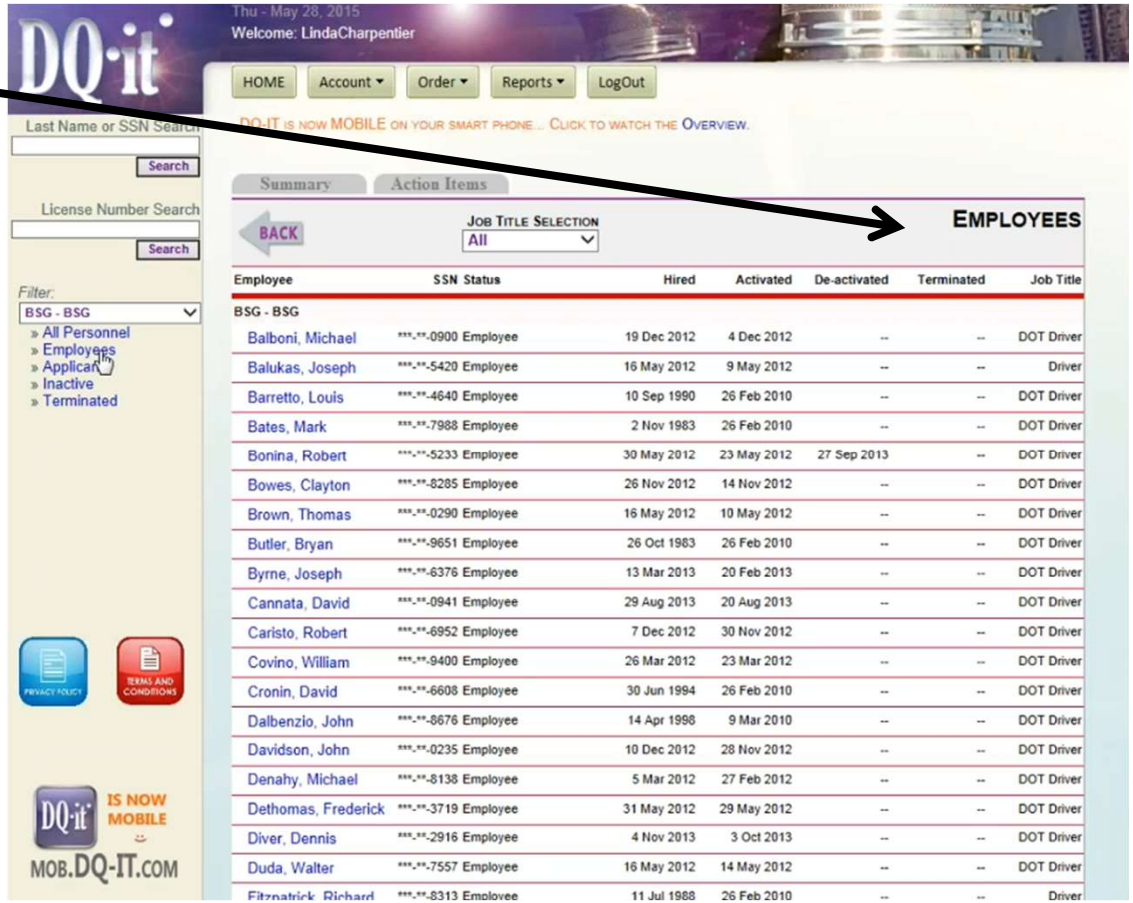
DQ-it Home Screen

- **All participants ignored the "Quick Summary" content**
  - Get it in email
  - My boss uses it
  - Too detailed
- Most Participants head for left side of screen
- Only data point mentioned as relevant was "# Employees with Past Due Items"
- **Consider**, re-imagining this screen with more relevant content



DQ-it Employees Listing

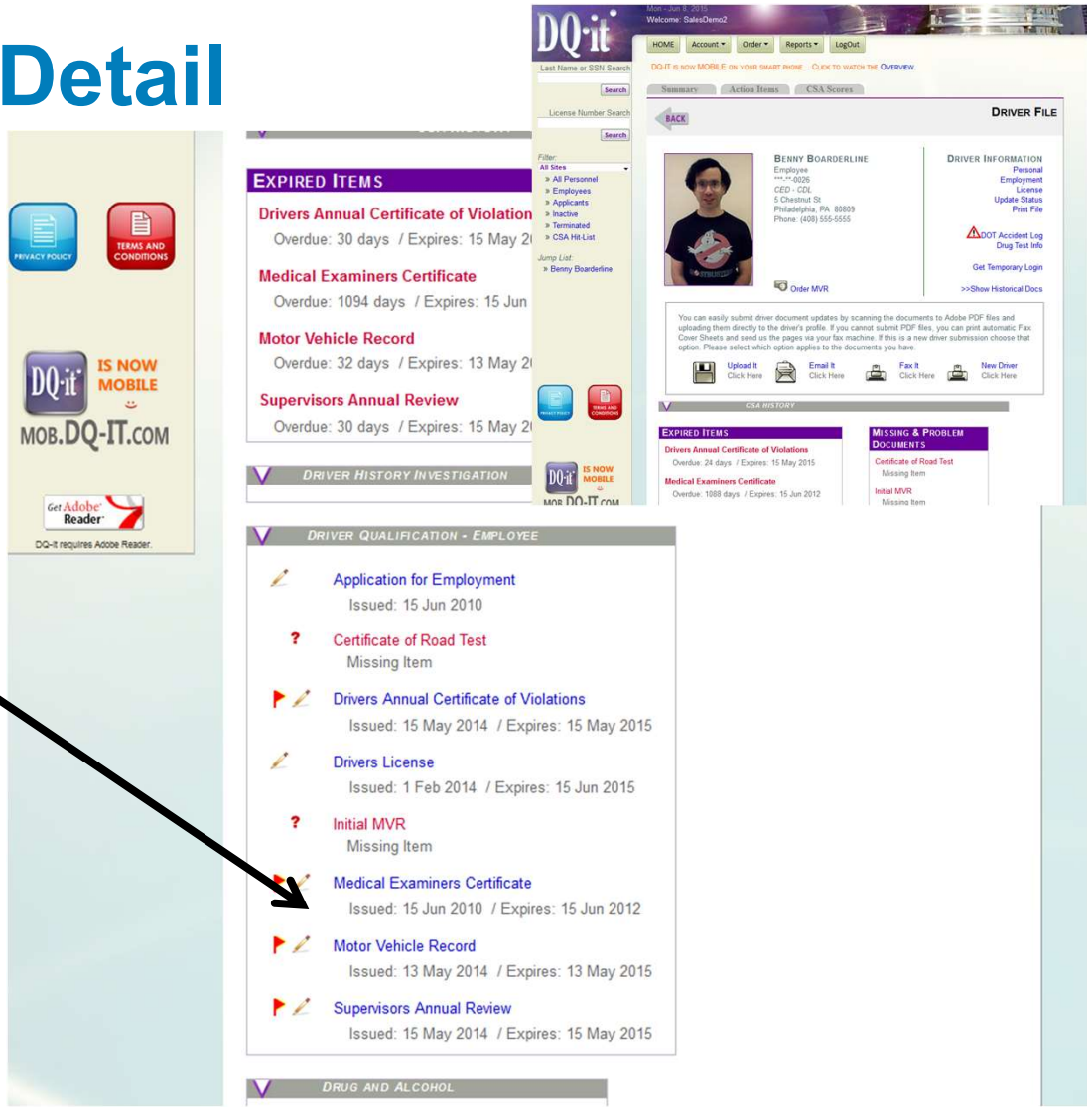
- All participants ended up here at some point
  - One indicated rarely using this screen
- Screen successful, participants able to find appropriate personnell



DQ-it Employees Detail

- 3 participants indicated recurring update area as particularly important
  - i.e. priority on documents that need renewals at various intervals
- Participant indicated this section took some time to figure out, not intuitive. Could be improved

Consider – Reprioritize content on this screen

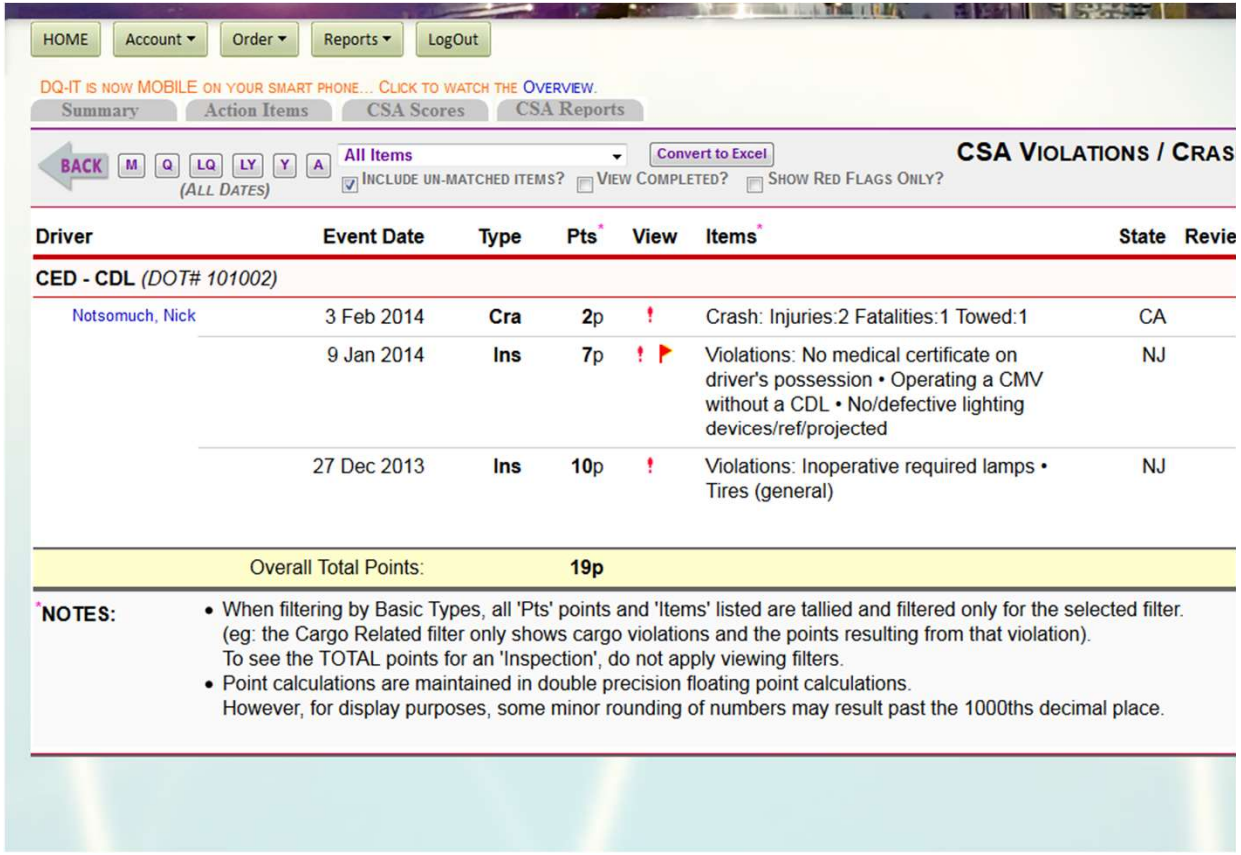


Batch Order MVRs

- One participant demonstrated this screen
- MVRs run annually (low frequency of use)
- Did not know what purple indicator was for. New employee?
- Had to scroll to bottom of screen to find out icon meaning, however liked the information provided
- **Consider** – tool tips to indicate icon meaning, removing from pop-up window, standardizing look with other screens

CSA Hit-list

- Multiple participants discussed this screen, indicated it as helpful
- Difficulty finding it (looking under reports)
- One participant uses this screen to manually log violations by area
- **Consider** – Improved navigation will make this screen more findable



CSA Report

- Participant indicated difficulty that this report is not exportable and cannot sort. Manually copies and pastes into a spreadsheet
- **Consider** – Removing from pop-up window, allowing export, allowing sorting of content in screen

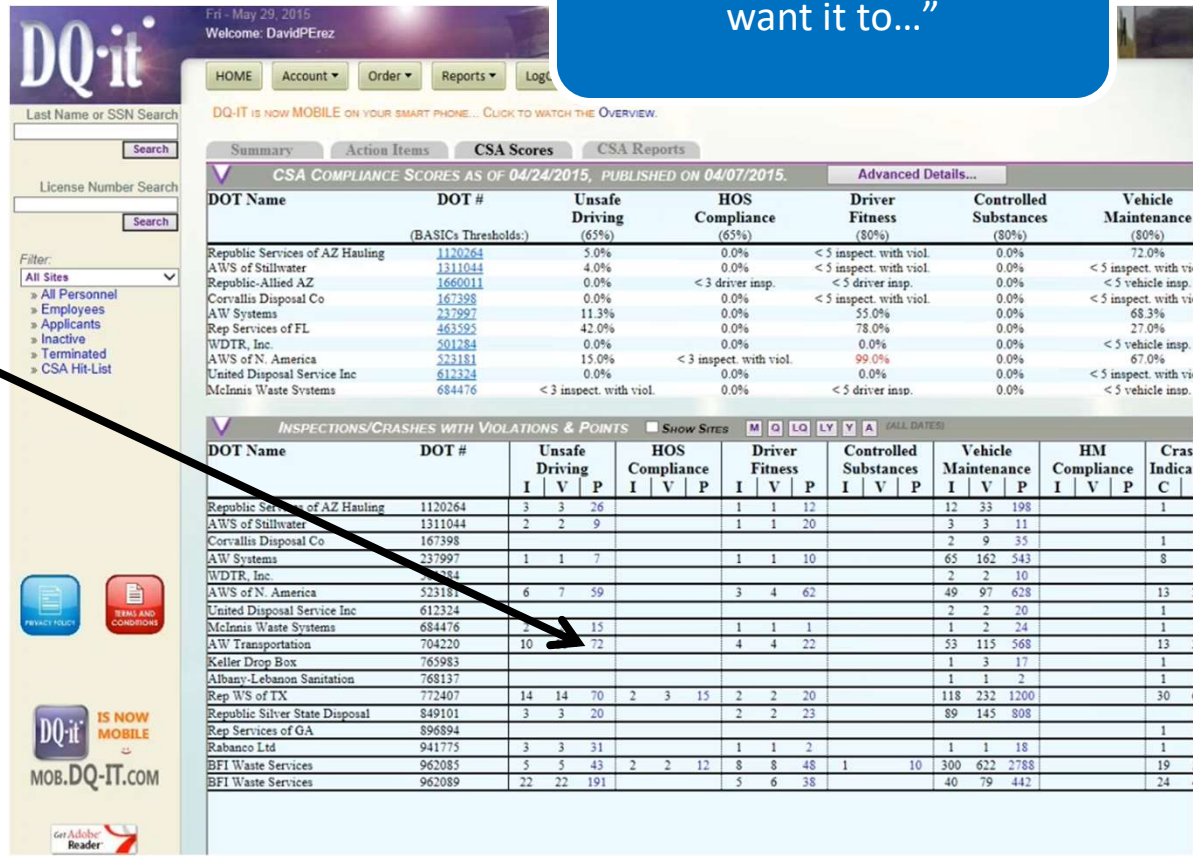
Violations By Location Report

	Inspection Date	Level	Location	Last Name	First Name	State	Basic	Code
1.	11/03/2014	3	ADS-21170 - St Paul	TAYLOR	LUCAS	MN	UnsafeDriving	392.2C
2.	09/02/2014	2	ADS-21170 - St Paul	MCGRATH	JOHN	MN	VehicleMaint	393.55(c)(2)
3.	09/02/2014	2	ADS-21170 - St Paul	MCGRATH	JOHN	MN	VehicleMaint	396.3A1T
4.	09/02/2014	2	ADS-21170 - St Paul	MCGRATH	JOHN	MN	VehicleMaint	392.9(a)(2)
5.	08/15/2014	1	ADS-21170 - St Paul	BRYAN	DOUGLAS	MN	VehicleMaint	396.5(b)
6.	08/15/2014	1	ADS-21170 - St Paul	BRYAN	DOUGLAS	MN	VehicleMaint	393.75(c)
7.	08/15/2014	1	ADS-21170 - St Paul	BRYAN	DOUGLAS	MN	VehicleMaint	393.100(a)
8.	07/24/2014	2	ADS-21170 - St Paul	LARSON	RICHARD	MN	VehicleMaint	393.95(f)
9.	07/24/2014	2	ADS-21170 - St Paul	LARSON	RICHARD	MN	VehicleMaint	393.45(b)(2)
10.	07/24/2014	2	ADS-21170 - St Paul	LARSON	RICHARD	MN	VehicleMaint	396.5(b)
11.	07/24/2014	2	ADS-21170 - St Paul	LARSON	RICHARD	MN	VehicleMaint	393.55(c)(2)
12.	07/24/2014	2	ADS-21170 - St Paul	LARSON	RICHARD	MN	VehicleMaint	396.3A1T
13.	07/24/2014	2	ADS-21170 - St Paul	LARSON	RICHARD	MN	VehicleMaint	396.7
14.	07/24/2014	2	ADS-21170 - St Paul	LARSON	RICHARD	MN	VehicleMaint	393.43
15.	07/24/2014	2	ADS-21170 - St Paul	LARSON	RICHARD	MN	VehicleMaint	392.9(a)(1)
16.	07/24/2014	2	ADS-21170 - St Paul	LARSON	RICHARD	MN	VehicleMaint	393.75(f)
17.	07/24/2014	2	ADS-21170 - St Paul	LARSON	RICHARD	MN	VehicleMaint	393.41
18.	07/24/2014	2	ADS-21170 - St Paul	LARSON	RICHARD	MN	VehicleMaint	393.60EWS
19.	06/23/2014	2	ADS-21170 - St Paul	BUTLER	DOUGLAS	WI	VehicleMaint	393.9
20.	06/23/2014	2	ADS-21170 - St Paul	BUTLER	DOUGLAS	WI	VehicleMaint	393.25(f)
21.	05/01/2014	2	ADS-21170 - St Paul	JOHNSON	CHRISTOPHER	MN	VehicleMaint	393.11
22.	05/01/2014	2	ADS-21170 - St Paul	JOHNSON	CHRISTOPHER	MN	VehicleMaint	393.9
23.	03/19/2014	1	ADS-21170 - St Paul	CURTIS	BRYCE	MN	VehicleMaint	393.45(d)
24.	03/19/2014	1	ADS-21170 - St Paul	CURTIS	BRYCE	MN	VehicleMaint	393.95(f)
25.	03/13/2014	2	ADS-21170 - St Paul	LOPEZ	LUIS	MN	VehicleMaint	393.100(a)
26.	03/13/2014	2	ADS-21170 - St Paul	LOPEZ	LUIS	MN	UnsafeDriving	392.2C
27.	03/13/2014	2	ADS-21170 - St Paul	LOPEZ	LUIS	MN	VehicleMaint	396.5B-HWSLOW
28.	03/04/2014	2	ADS-21170 - St Paul	LARSON	RICHARD	WI	VehicleMaint	393.9
29.	03/04/2014	2	ADS-21170 - St Paul	LARSON	RICHARD	WI	DriverFitness	383.91(a)
30.	02/14/2014	3	ADS-21170 - St Paul	ROMANO JR	GARY	MN	UnsafeDriving	392.2C
31.	02/03/2014	3	ADS-21170 - St Paul	LARSON	RICHARD	WI	UnsafeDriving	392.2-SLLS2
32.	10/22/2013	2	ADS-21170 - St Paul	FRITZE	JOHN	MN	UnsafeDriving	392.2-SLLS2
33.	09/26/2013	3	ADS-21170 - St Paul	GADBOIS	DANIEL	MN	UnsafeDriving	392.82A1
34.	07/17/2013	1	ADS-21170 - St Paul	BASIC	MICHAEL	MN	VehicleMaint	393.78
1.	07/30/2013	2	ADS-21200 - Bethany	WILMES	ROLAND	MO	VehicleMaint	393.30
1.	12/17/2014	3	ADS-21205 - St Cloud	PIKKARAINE	DAVID	MN	UnsafeDriving	392.2C
2.	11/05/2014	3	ADS-21205 - St Cloud	LEE	JAMES	MN	UnsafeDriving	392.16
3.	09/10/2014	2	ADS-21205 - St Cloud	BEHRENDT	ANDREW	MN	VehicleMaint	396.5(b)
4.	09/10/2014	2	ADS-21205 - St Cloud	BEHRENDT	ANDREW	MN	VehicleMaint	393.55(c)(2)
1.	04/25/2014	3	ADS-21235 - Chilton	THEIS	MATTHEW	WI	UnsafeDriving	392.2-SLLS3
1.	04/15/2014	2	ADS-21245 - Columbia MO	CHESTER	KEVIN	MO	VehicleMaint	393.45(d)
1.	02/19/2014	2	ADS-21300 - Fort Atkinson	FRIEND	PHILLIP	WI	VehicleMaint	393.25(a)

e-city interactive

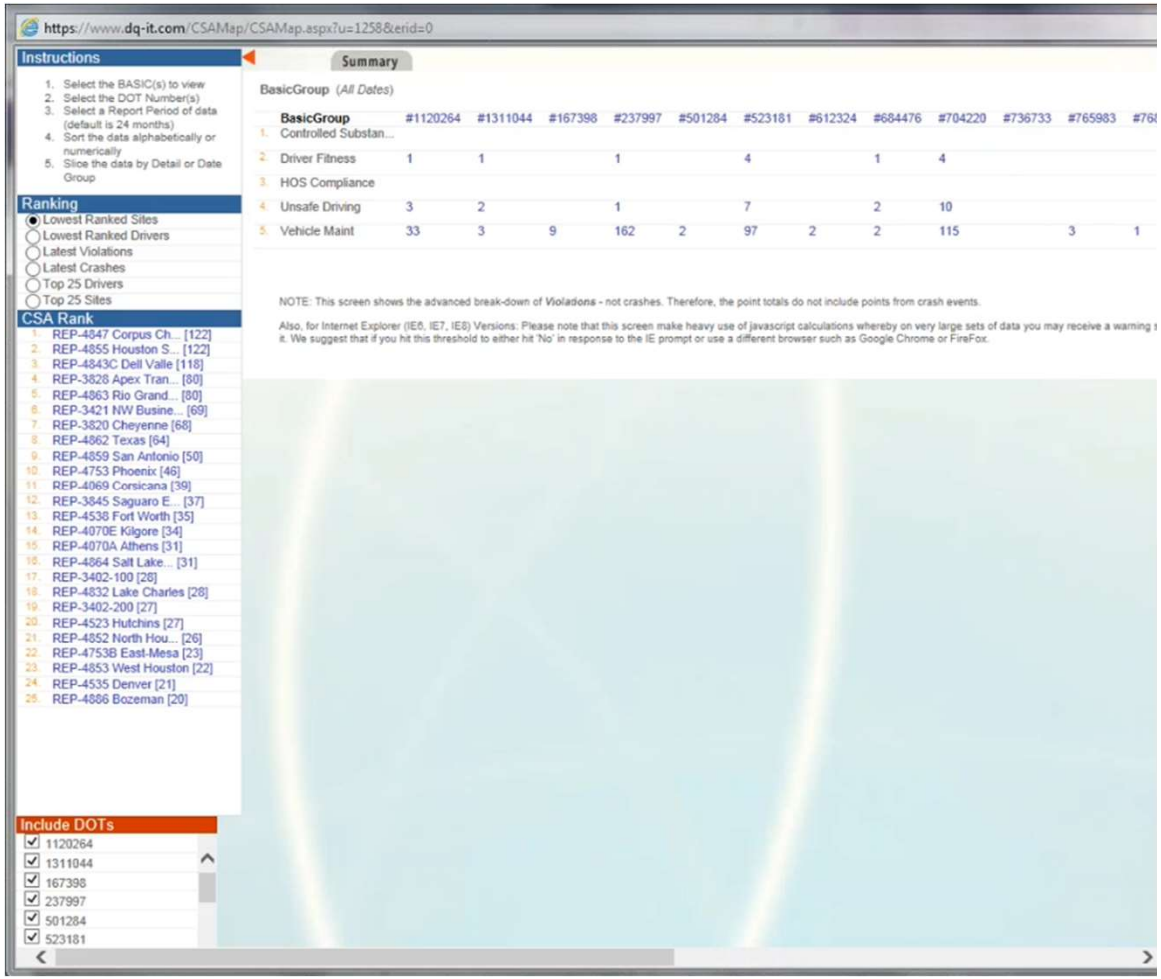
CSA Scores

- 2 participants indicate that numbers on this screen should be clickable
  - 1 repeatedly tried to click number
- Helpful information but does not change that frequently
- Cannot view by area so winds up going to “CSA Hit List” and using pen and paper



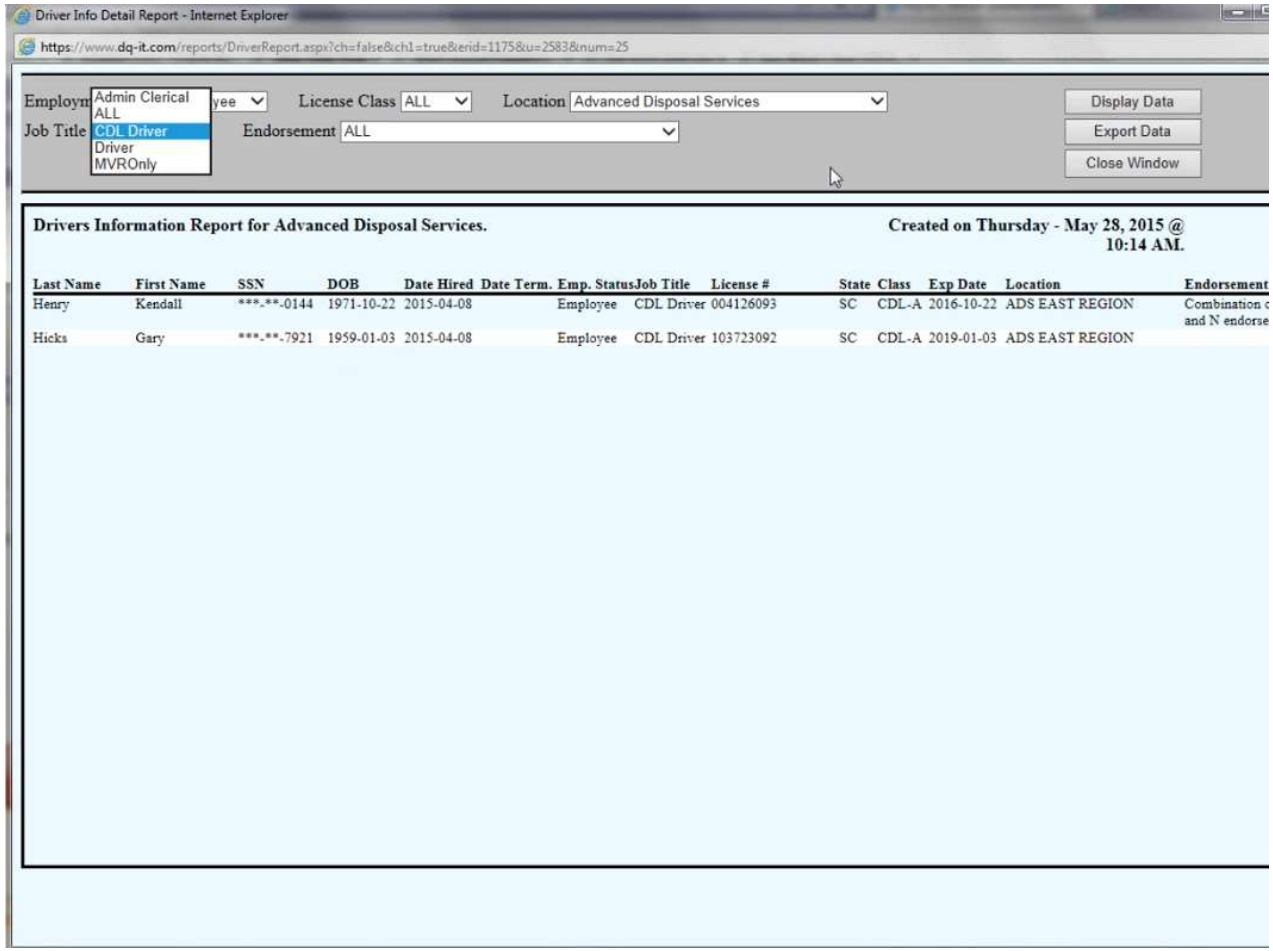
CSA Advanced

- Participant has trouble with pop-up window going behind the browser (2x) and struggles to find window
- Two participants showed this screen, 1 user indicated high relevance to “CSA Rank” another low relevance since it’s not something that’s tracked by the company



Driver Info Detail Report

- Participant indicated she can't use the employee filter because 2 are categorized as a "CDL Driver" the rest are under "Driver" so "Driver" is unusable as a reliable filter



“I try to keep tight control on SMART...I have had trouble with the filters, so I don’t have confidence in them.”

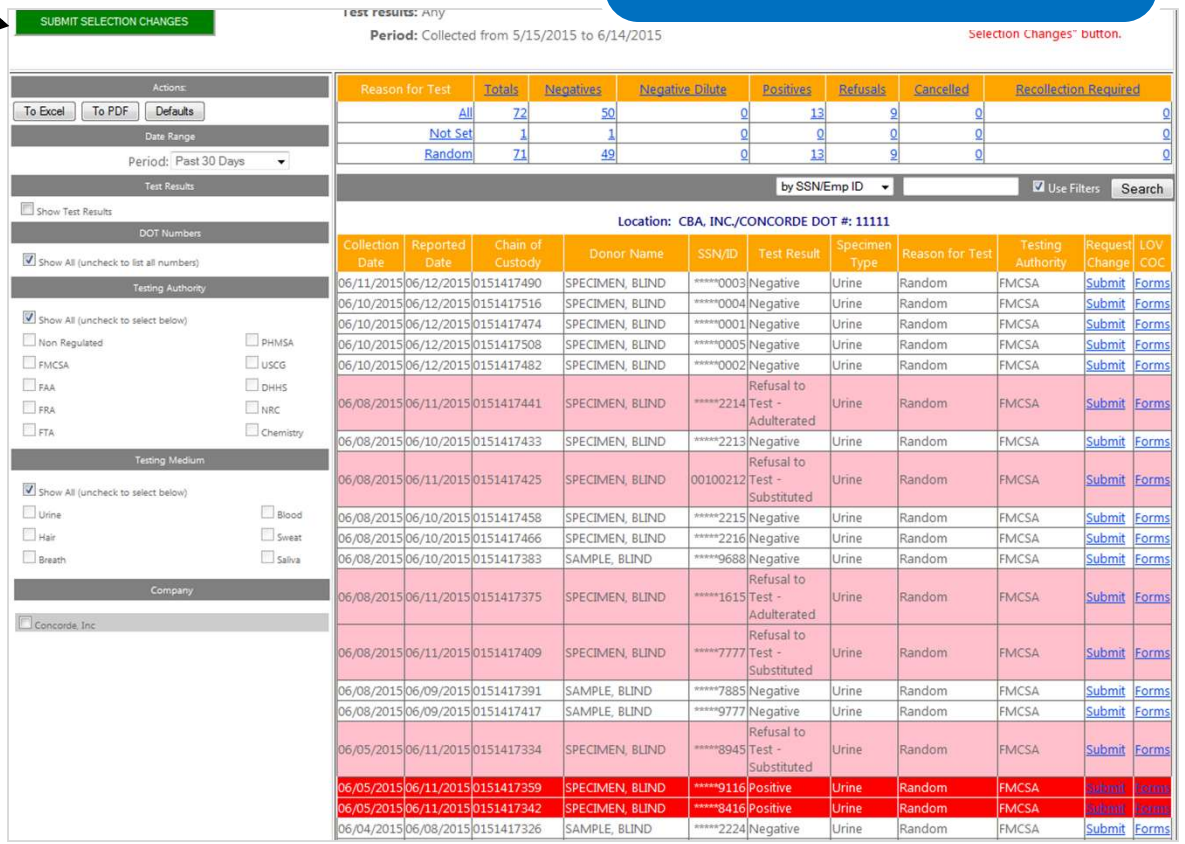
- SMART user

Findings by Product

SMART

- Participant indicated problem finding submit button after editing filters
- Participant mentioned not being able to paste SSN#
- One participant uses separate spreadsheet since *"SMART is a little slow to do analysis and doesn't correct common mistakes"*
- Exception management

"The main thing I look for is if a specific individual has taken a test"



Reason for Test	Totals	Negatives	Negative Dilute	Positives	Refusals	Cancelled	Recollection Required
All	72	50	0	13	9	0	0
Not Set	1	1	0	0	0	0	0
Random	71	49	0	13	9	0	0

Collection Date	Reported Date	Chain of Custody	Donor Name	SSN/ID	Test Result	Specimen Type	Reason for Test	Testing Authority	Request Change	LOV COC
06/11/2015	06/12/2015	0151417490	SPECIMEN, BLIND	*****0003	Negative	Urine	Random	FMCSA	Submit	Forms
06/10/2015	06/12/2015	0151417516	SPECIMEN, BLIND	*****0004	Negative	Urine	Random	FMCSA	Submit	Forms
06/10/2015	06/12/2015	0151417474	SPECIMEN, BLIND	*****0001	Negative	Urine	Random	FMCSA	Submit	Forms
06/10/2015	06/12/2015	0151417508	SPECIMEN, BLIND	*****0005	Negative	Urine	Random	FMCSA	Submit	Forms
06/10/2015	06/12/2015	0151417482	SPECIMEN, BLIND	*****0002	Negative	Urine	Random	FMCSA	Submit	Forms
06/08/2015	06/11/2015	0151417441	SPECIMEN, BLIND	*****2214	Refusal to Test - Adulterated	Urine	Random	FMCSA	Submit	Forms
06/08/2015	06/10/2015	0151417433	SPECIMEN, BLIND	*****2213	Negative	Urine	Random	FMCSA	Submit	Forms
06/08/2015	06/11/2015	0151417425	SPECIMEN, BLIND	00100212	Refusal to Test - Substituted	Urine	Random	FMCSA	Submit	Forms
06/08/2015	06/10/2015	0151417458	SPECIMEN, BLIND	*****2215	Negative	Urine	Random	FMCSA	Submit	Forms
06/08/2015	06/10/2015	0151417466	SPECIMEN, BLIND	*****2216	Negative	Urine	Random	FMCSA	Submit	Forms
06/08/2015	06/10/2015	0151417383	SAMPLE, BLIND	*****9688	Negative	Urine	Random	FMCSA	Submit	Forms
06/08/2015	06/11/2015	0151417375	SPECIMEN, BLIND	*****1615	Refusal to Test - Adulterated	Urine	Random	FMCSA	Submit	Forms
06/08/2015	06/11/2015	0151417409	SPECIMEN, BLIND	*****7777	Refusal to Test - Substituted	Urine	Random	FMCSA	Submit	Forms
06/08/2015	06/09/2015	0151417391	SAMPLE, BLIND	*****7885	Negative	Urine	Random	FMCSA	Submit	Forms
06/08/2015	06/09/2015	0151417417	SAMPLE, BLIND	*****9777	Negative	Urine	Random	FMCSA	Submit	Forms
06/05/2015	06/11/2015	0151417334	SPECIMEN, BLIND	*****8945	Refusal to Test - Substituted	Urine	Random	FMCSA	Submit	Forms
06/05/2015	06/11/2015	0151417359	SPECIMEN, BLIND	*****9116	Positive	Urine	Random	FMCSA	Submit	Forms
06/05/2015	06/11/2015	0151417342	SPECIMEN, BLIND	*****8416	Positive	Urine	Random	FMCSA	Submit	Forms
06/04/2015	06/08/2015	0151417326	SAMPLE, BLIND	*****2224	Negative	Urine	Random	FMCSA	Submit	Forms

e-city interactive

User Groups

User Groups?

- Not the same as system user types e.g. “administrator” or “guest” users
- Do not indicate level of access to features or other security or authentication levels
- Groups are based on user behaviors; common tasks and feature needs

Contributor User Group

- **Contributor**→ Uploads documents, manages personnel files, orders MVRs, on boards new employees
- E.g. Administrative Assistant
- Most active users are the local, day to day users *(confirmed)*
- Might provide reports to supervisors who don't login
- Proficient at previously learned common tasks, but has minimal need for exploration or troubleshooting trends
- Might benefit from "CRM" functionality such as driver communication notes; *i.e. Gave Joe form on x date…"*
- Support with direct access to personnel records, recently viewed ("Jump List") items, and current "to do" type actions to take

Manager User Group

- **Manager** → Mid-range data need; Escalation and exception management so that they can follow-up with Contributors
- E.g. Area Safety Manager, Site Manager
- Second most active user-group
- Occasionally monitors CSA Reports for his/her area of responsibility

- Escalation-based review of driver files (expired, accident) to ensure responses to CSA violations
- Might benefit from in app notification of changes in CSA score
- Support with actionable information for escalated issues. E.g. direct view of “CSA Hit-List” type data points

Executive User Group

- **Executive** → Focused on CSA compliance data, trends, and troubleshooting. Interested in groupings by region, area, maybe site
- E.g. Regional Director
- Lowest frequency user with more sophisticated data needs and higher product purchase decision making authority

- Monitor Area Managers, identify poor performing areas. Investigate CSA data to identify trends and understand potential solutions
- Supported by quick access to KPIs with the ability to drill-down

"What are our top CSA violations? This area seems to keep having issues with vehicle lights being out. That's easy to solve…"

Content Priority by User Group

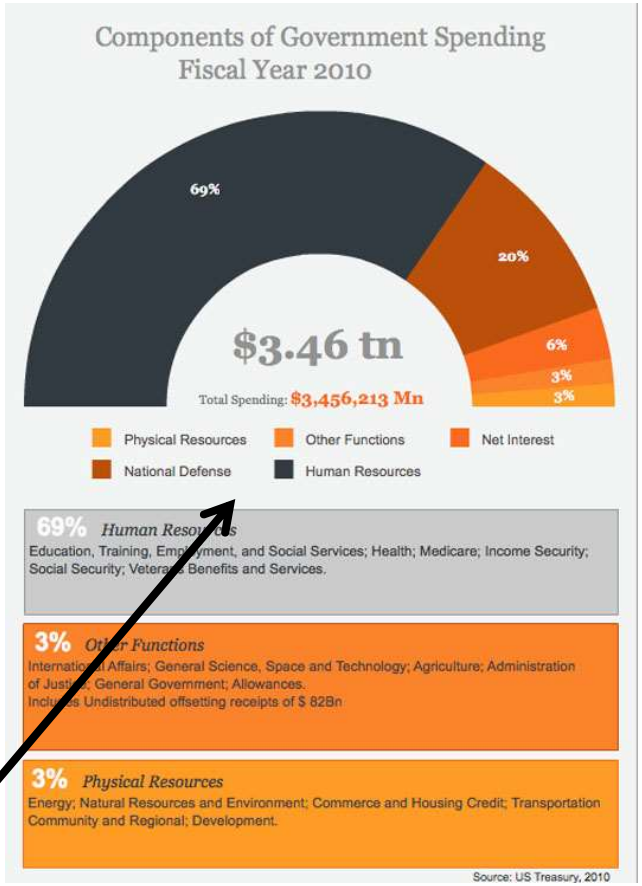
Priority	Contributor	Manager	Executive
High	• Find an Employee • Upload Files • View Documents • Order Single MVRs	• Missing File Reports • Action Items • Find an Employee • View Documents • CSA Hit List	• CSA Hit List • CSA Scores • CSA Rank • CSA Advanced
Med	• Batch MVRs • Missing File Reports • Action Items	• Upload Files • CSA Scores • CSA Reports • Order Single MVRs	• Find an Employee • Missing File Reports • Action Items
Low	• CSA Hit List • CSA Scores • CSA Reports	• Batch MVRs • Order • CSA Advanced	• Batch MVRs • Upload Files • Order Single MVRs

* Example content, not complete or 100% accurate

Recommendations

Overall User Experience

- **Workflows not Screens** - Focus on **high priority task-based workflows** first before defining individual screens. E.g. "*A local user, Mary, needs to order an MVR for an individual driver. What steps does she need to take?*"
- **Global Improvements** – Improving **usability**, **layout consistency**, and **interaction design** throughout the applications will raise the real and perceived value of Concorde software products
- **Enhanced Reports** -- Enhancing with **data visualization for key performance metrics** per user group will help users more quickly understand what's going on, and be an immediately recognized differentiator in sales



High perceived value!

e·city·interactive

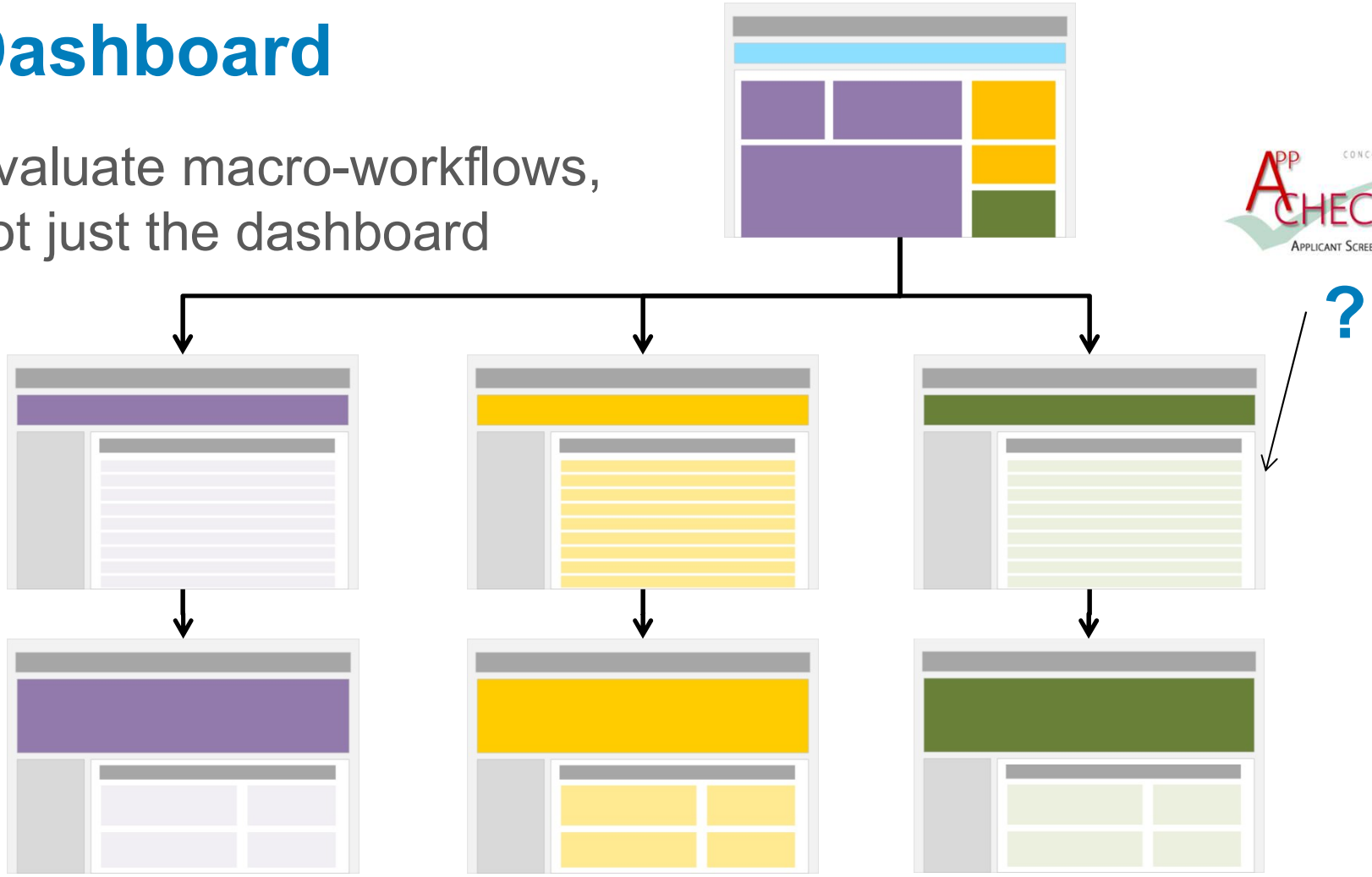
Concorde Product Suite

- **Driver Qualification & Compliance** – One product suite, multiple integrated add-on products. DQ-it, SMART, RANDOMS and potentially AppCheck are all thematically connected under driver qualification and compliance. The system should feel like one integrated experience.
- **Doing That One Thing Very, Very Well** –*…and making sure they realize it.* Cross-sell will be improved far more by more effectively showing customers the value of their current product and with seamless integration than by a dashboard showing the existence of other products.
- **Dashboard with grayed-out buttons or links to other products will have little to no impact on cross-sell.**
  - Most local and area users have minimal influence on vendor selection
  - Highest current value of Concorde is customer service responsiveness and core functionality
  - Grayed out, unusable options reduce system clarity, reducing product value

e·city·interactive

Dashboard

Evaluate macro-workflows,
not just the dashboard



Content Groupings

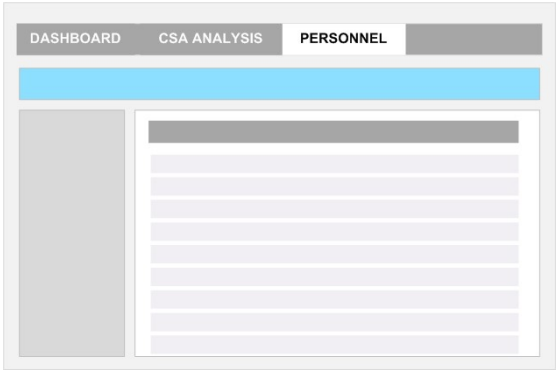
- Single cohesive site map for an integrated experience; show or hide based on product purchase
- Use task-based names, not product names (branding once in product section)

Example content grouping. Not a navigational scheme or actual menu.

Dashboard

- Supporting primary tasks for each user group indicates the need for groups to have different “start page” views
- Start with role level by default, but allow the default setting to be updated by user i.e. *“Make this my start page”*

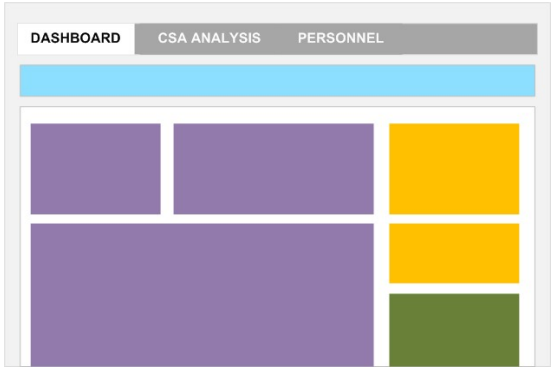
Contributor View



Start on “Personnel” screen

- Items coming due
- Recently viewed items
- Ease of employee lookup

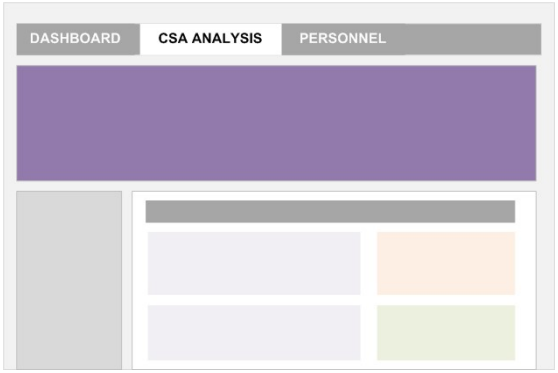
Manager View



Start on “Dashboard” screen

- Items past due
- Drug testing statistics
- CSA Score Highlight

Executive View

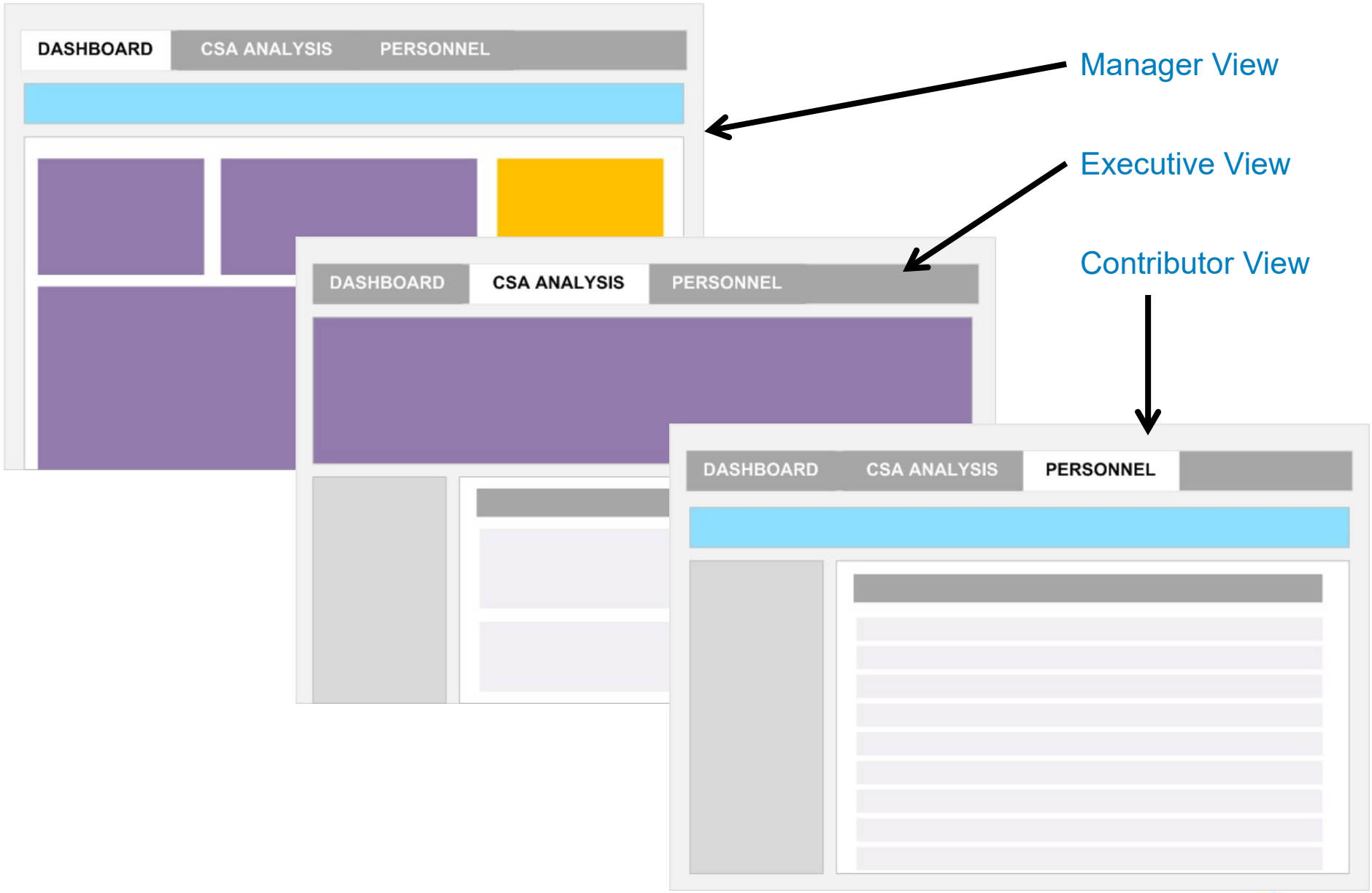


Start on “CSA Analysis” screen

- CSA Score Data Visualization
- CSA Rank
- Trends by Region

e·city·interactive

Recommendations



Wrap Up

Activities & Events

Deliverable	Date
User Interviews Discussion Guide	5/22
User Interview Sessions	5/28 & 5/29
User Testing Study Screener Survey	6/8
User Testing Recruitment Begins	6/16
Summary Report	6/17 (Onsite)
Round 1 Wireframes	6/24 (Got2Mtg)
Round 2 Wireframe Revisions	7/1
User Testing Discussion Guide	7/1
User Testing Sessions	7/7 – 7/9
Testing Summary w Round 3 Wireframes	7/16 (Onsite)
Dashboard Designs	7/24
System Architecture Diagram	7/27 (Onsite)

Next Up…

- Concept Design: Wireframes
- User Testing
- System Architecture

Thank You.