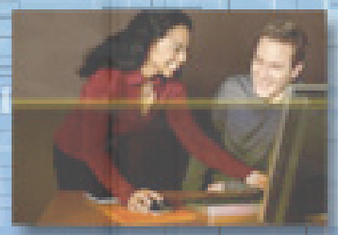
IA Summit 2005 : Montreal



Designing the Enterprise Experience

How IA advances UCD in complex environments

Intro: Issues and Goal

Sample Scenarios:

- *"How can CRM analysts effectively use performance indicators within a dashboard interface, while keeping track of sales leads?"*
- *"What is the best way to synchronize the multi-step dependencies of a process wizard with objects defined in an entirely different application that has its own web-based console?"*

platform and suite level integration

tech stacks, release cycles, stakeholders

tab architecture, dynamic menus

complex challenge → UCD process → loose/iterative

focus / clarity / structure / order

Our Goal Today: *>> gain richer insight into enterprise problems*
>> learn how IA artifacts can usher UCD process along

E-business: A Primer

- **E-business**: *fusion of process, architecture, and organizations to deliver business value*
- Not just websites or e-commerce!
- A cultural and technological transformation
- Delivering user experience value, flows of information, services to people
- ERP + CRM = automated business systems and processes

"The complex fusion of business processes, enterprise applications, and organizational structures to create a high performance business model...without which e-commerce cannot happen."

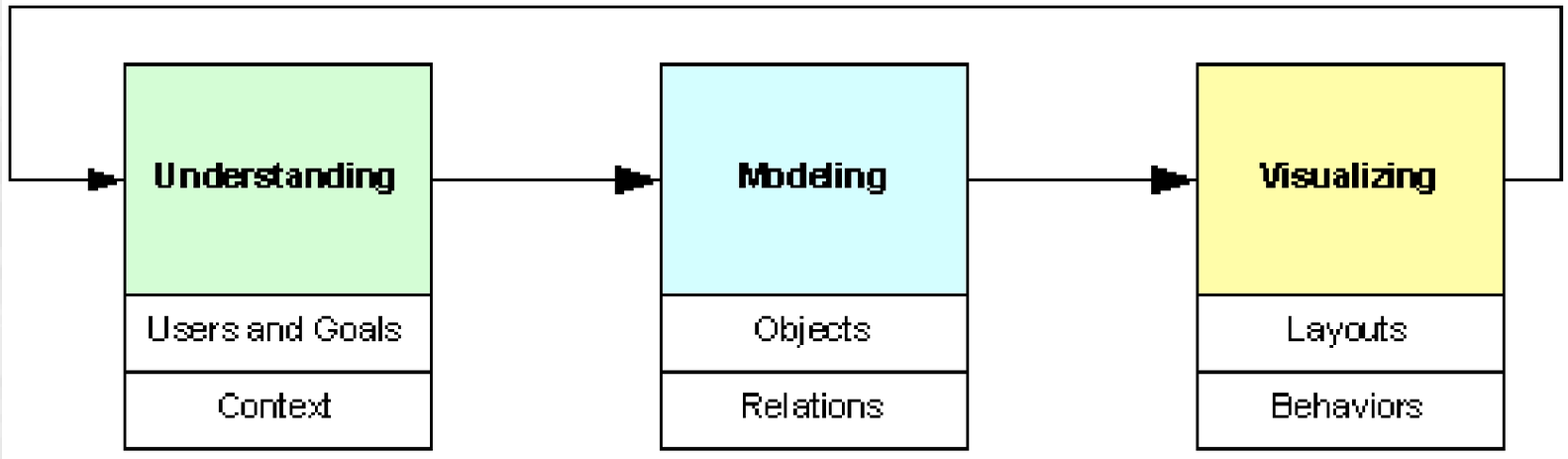
Kalakota and Robinson, 1999
E-Business 2.0: A Roadmap

Complexity: Inevitable

- *mission-critical apps, run a whole business*
- *transactional in nature, data flows*
- *multiple user types/roles/privileges/prefs*
- *dense functionality, hi-frequency usage*
- *state persistence, data caching, query governor limits*
- *integration of function and interface across domains and applications for suite level implementation*

UCD + IA: General Overview

- **UCD**: *one process, many flavors, iterative*



- **IA**: *systematic, structured, disciplined, organized*

- Focus on enterprise systems, dense UIs, complex interactions, “mission critical” operations for entire companies

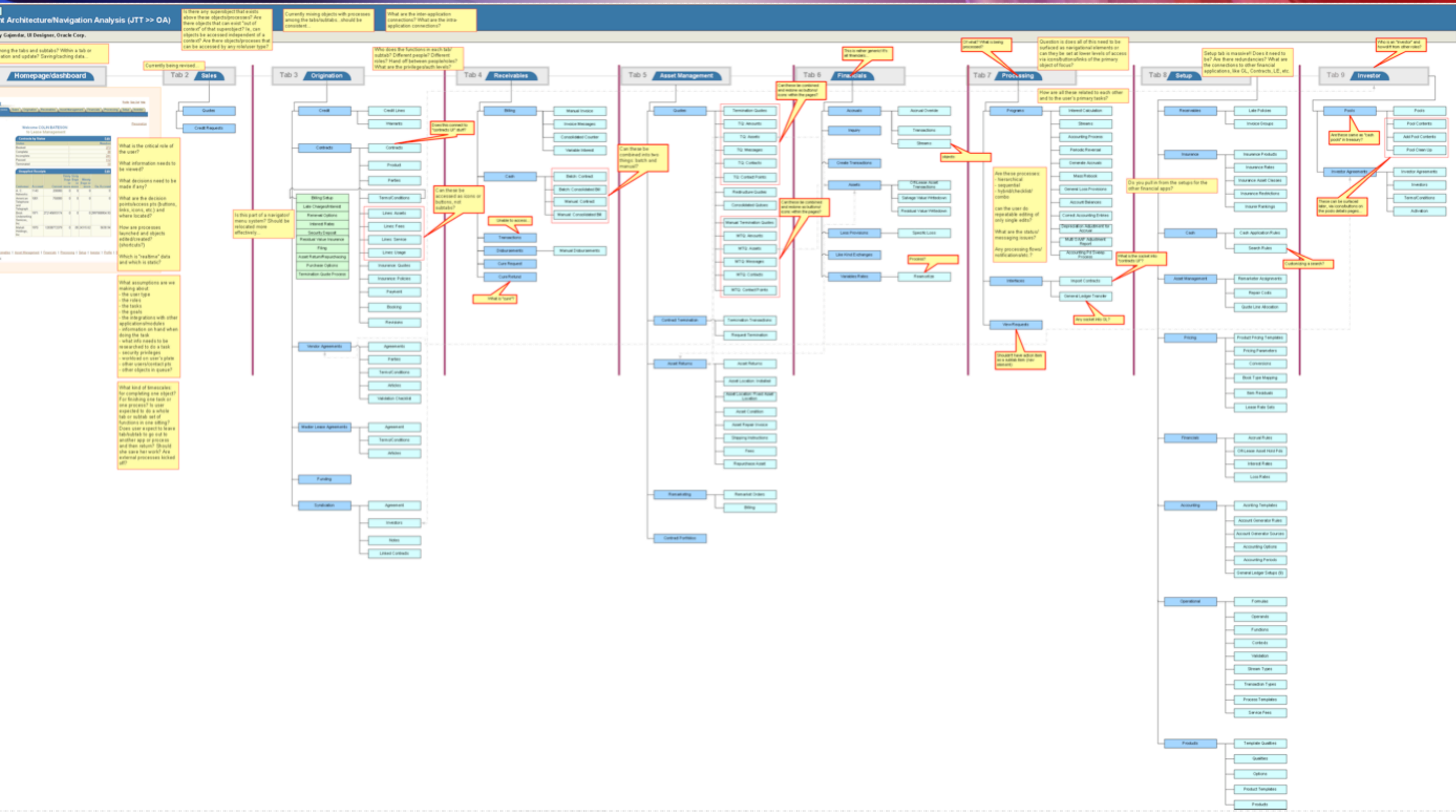
IA: Artifacts and Problem Types

- To provide guidance and structure for "modeling the application", IA artifacts become highly useful. Specific deliverables in this phase include the following:
  - *object models*, *taskflows*, *wireframes*, *key questions model*
- Type 1: application architecture revamp
- Type 2: dense layout of functionality
- Type 3: new function in product
- Type 4: dashboard of objects, info, actions
- Even more types...just a quick sample

Type 1: Architecture Revamp (techstack migration)

- Example: Financials (accounting, lease, loans, etc.)
- Method/artifact:
  - Object model/Entity relationship diagram
  - Architecture diagram
- Value: this creates a cognitive map of how the user perceives the relationships of objects in the system.

Type 1: Architecture Revamp (techstack migration)



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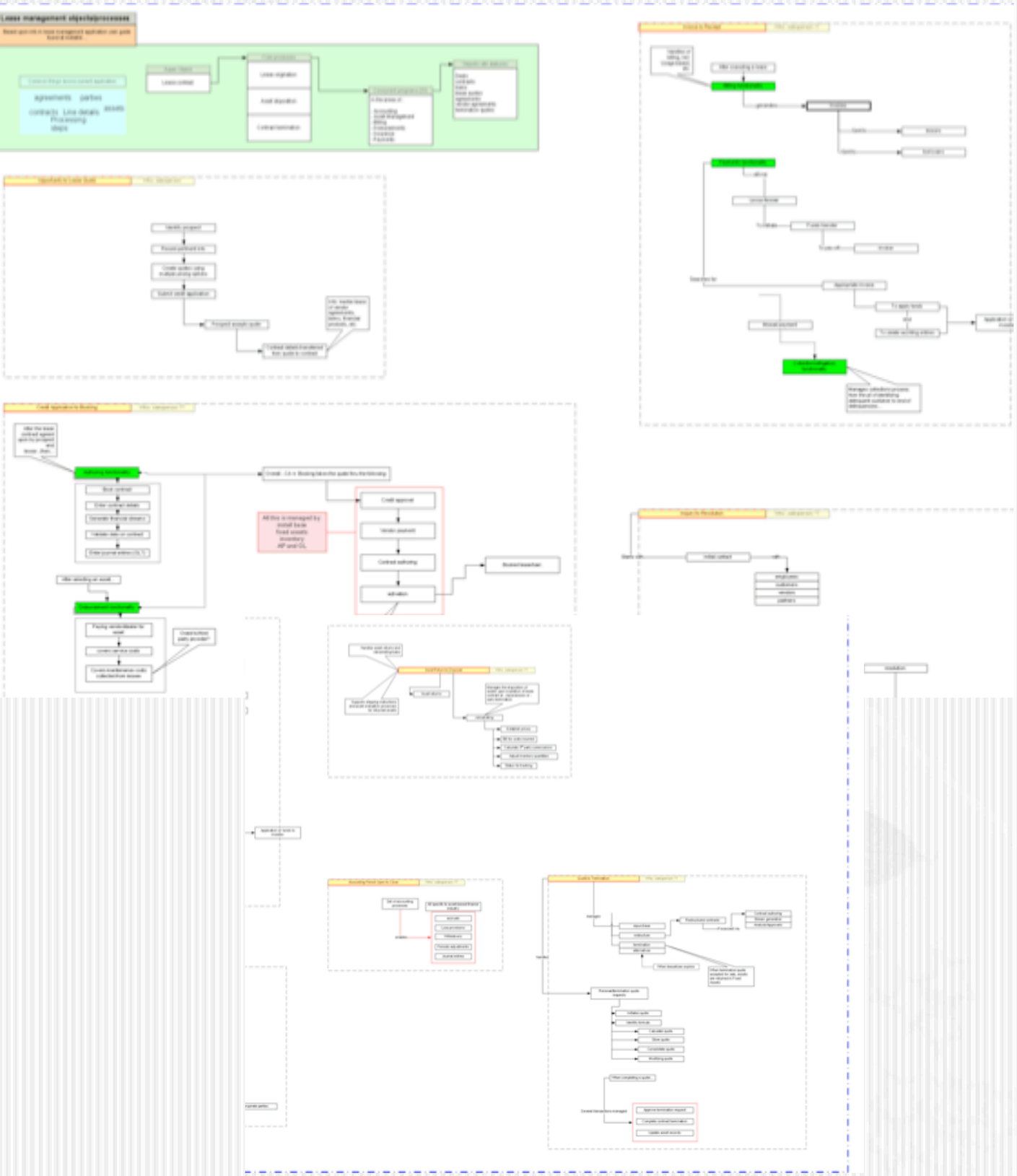
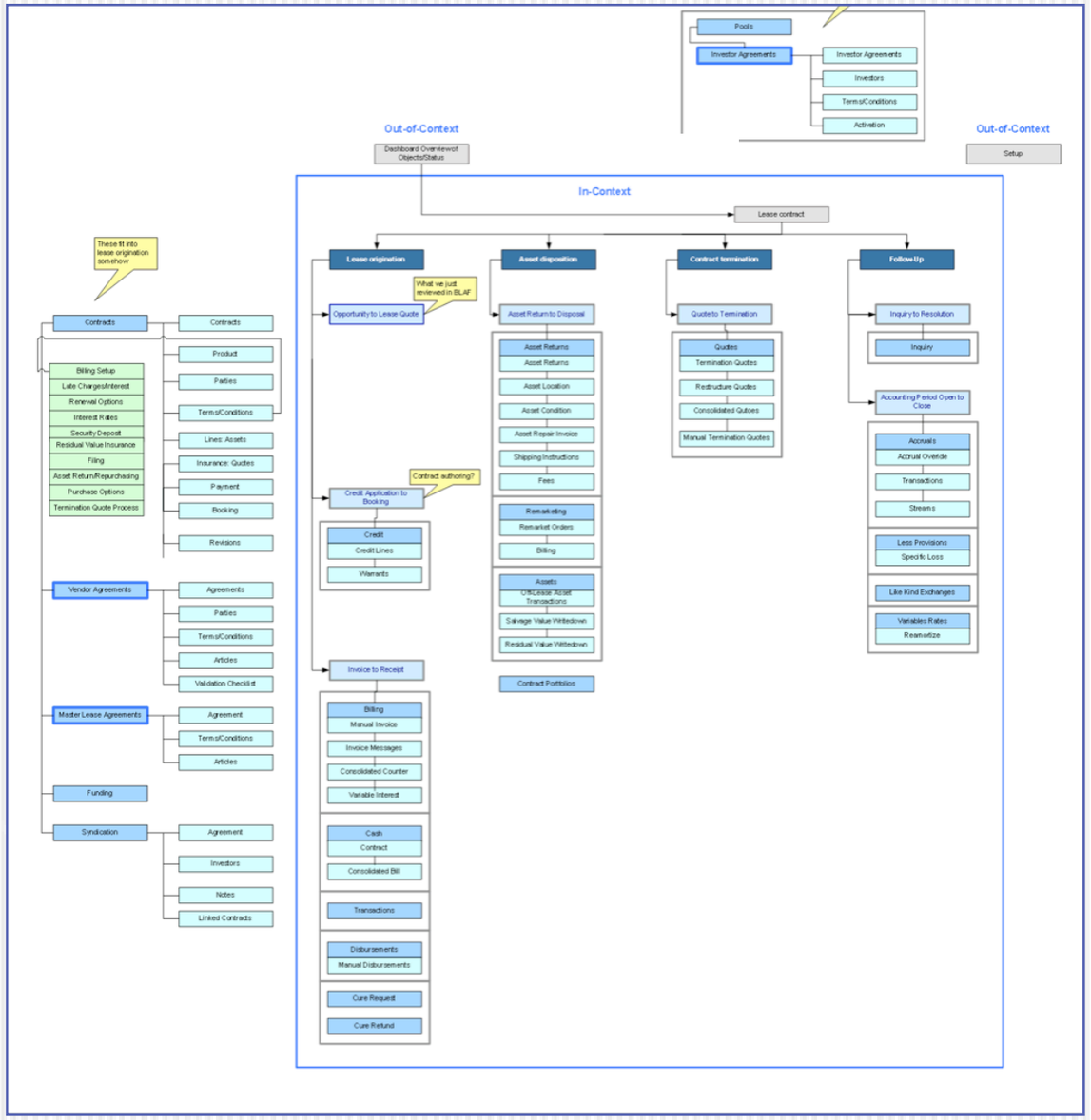
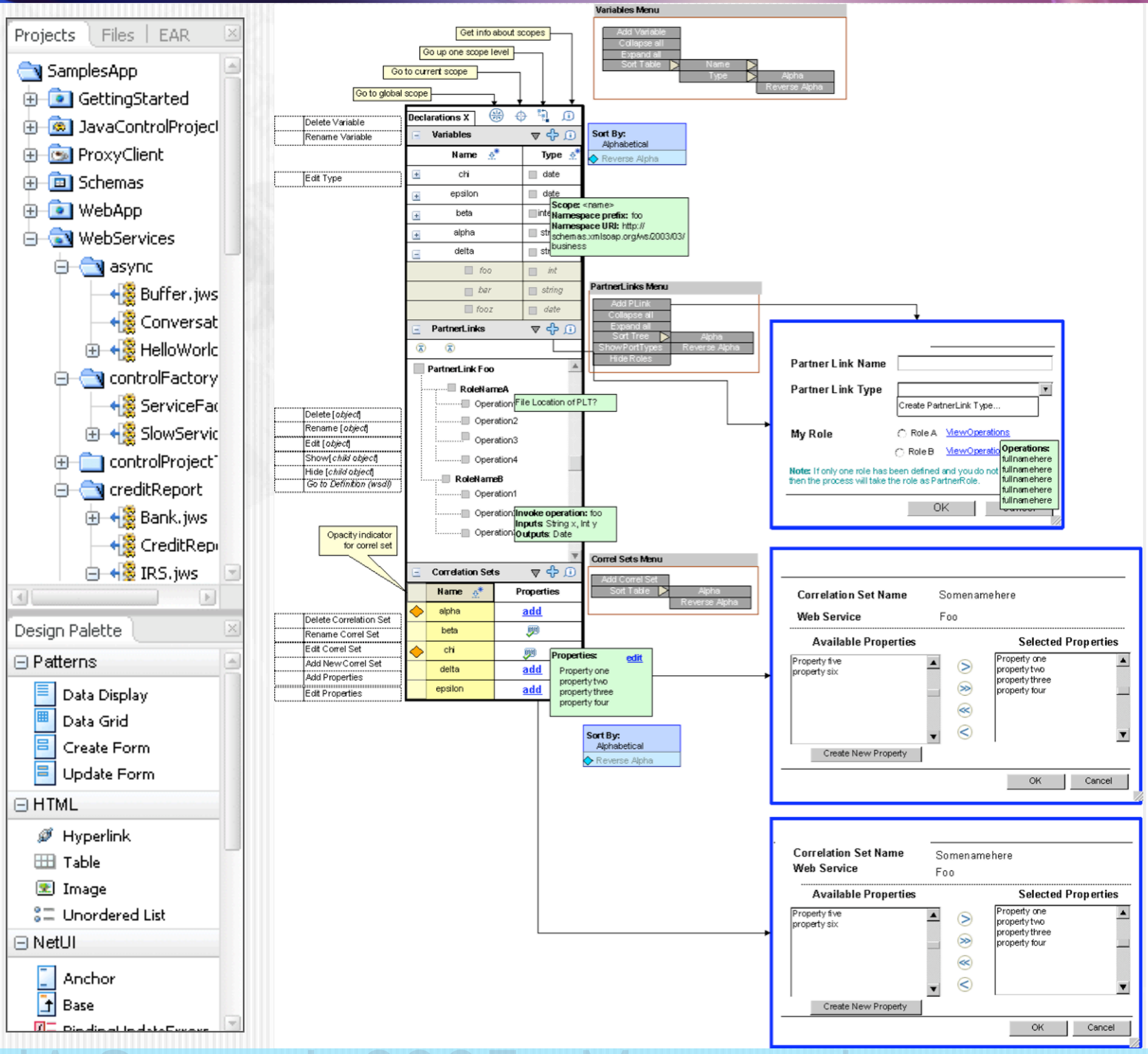




Type 2: Dense Functionality (developer tools)

- Example: Java/XML-based developer tool
- Method/artifact: wireframes in MS Visio
- Value: this offers a skeletal look at the functionality--in terms of structure, organization, exposure, and “bare bones” details, sans stylizing. Purpose is to see where the actions are, for buy-in.

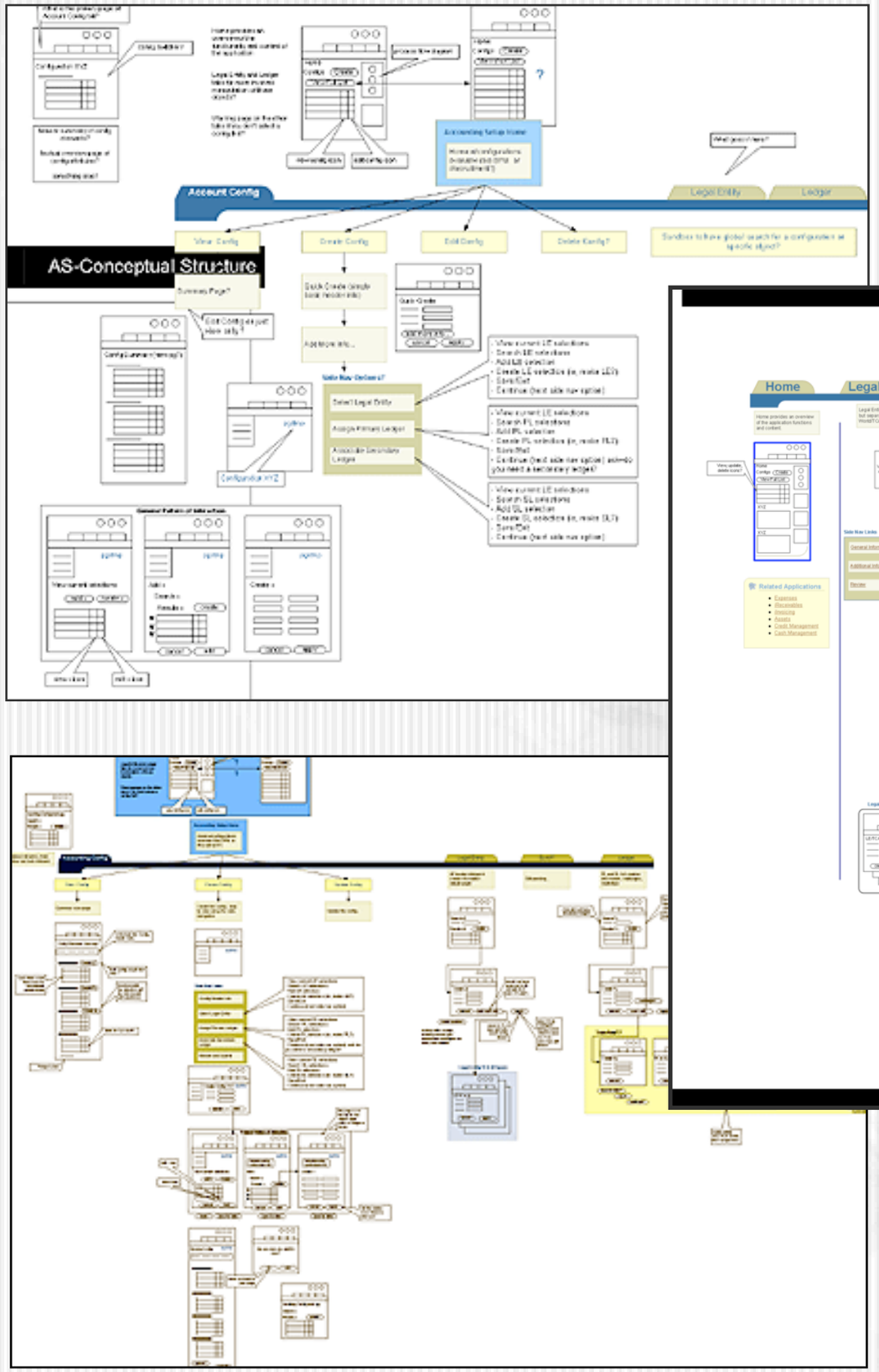
Type 2: Dense Functionality (developer tools)

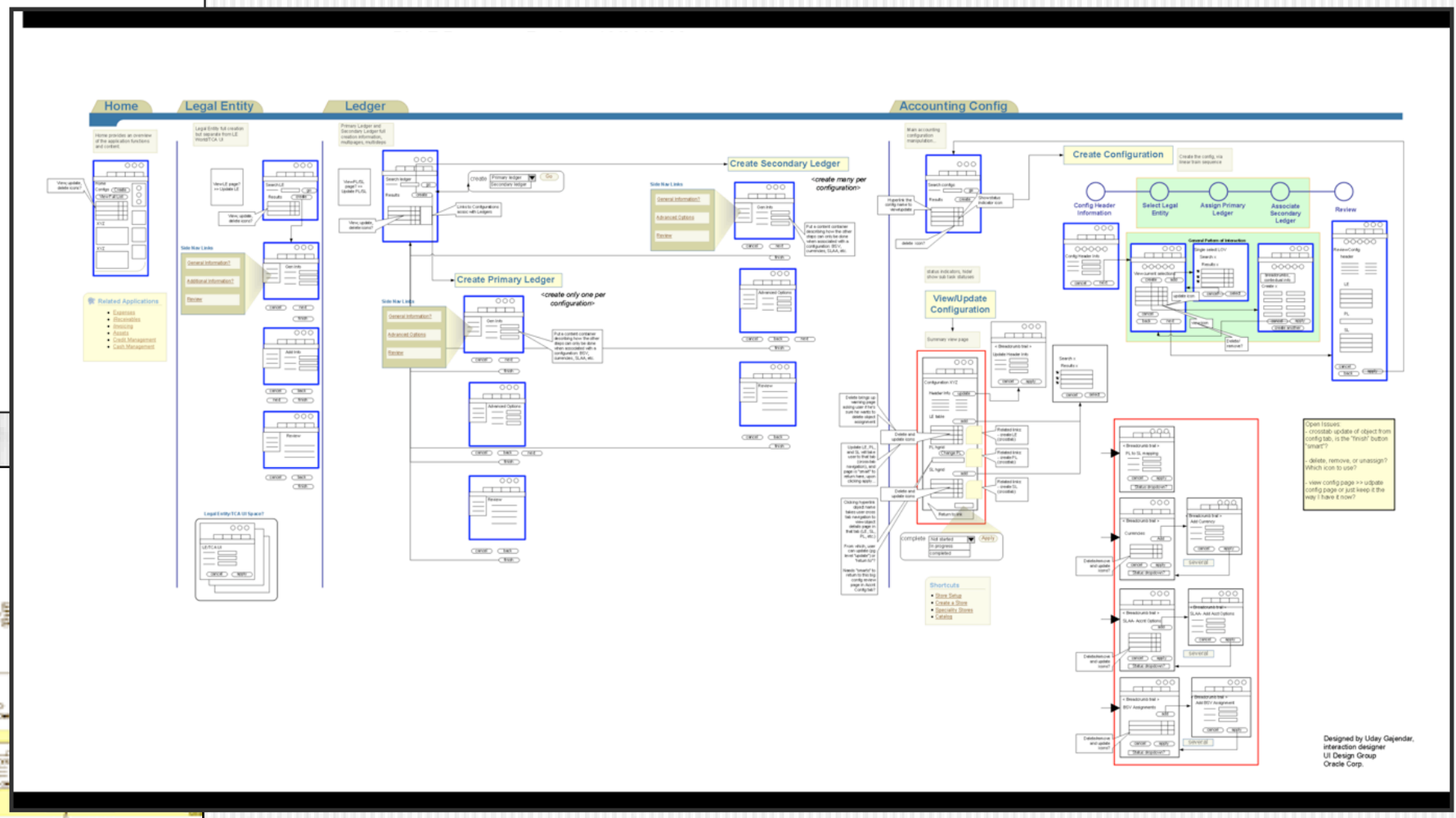


Type 3: Taskflow Redesign (inserting new functionality)

- Example: Financials (accounting, ledger, etc.)
- Method/artifact: Taskflow diagram
- Value: this is a diagram which reveals the steps a user must take in order to accomplish goals identified in various usability activities beforehand (card sort, group task analysis, etc.)

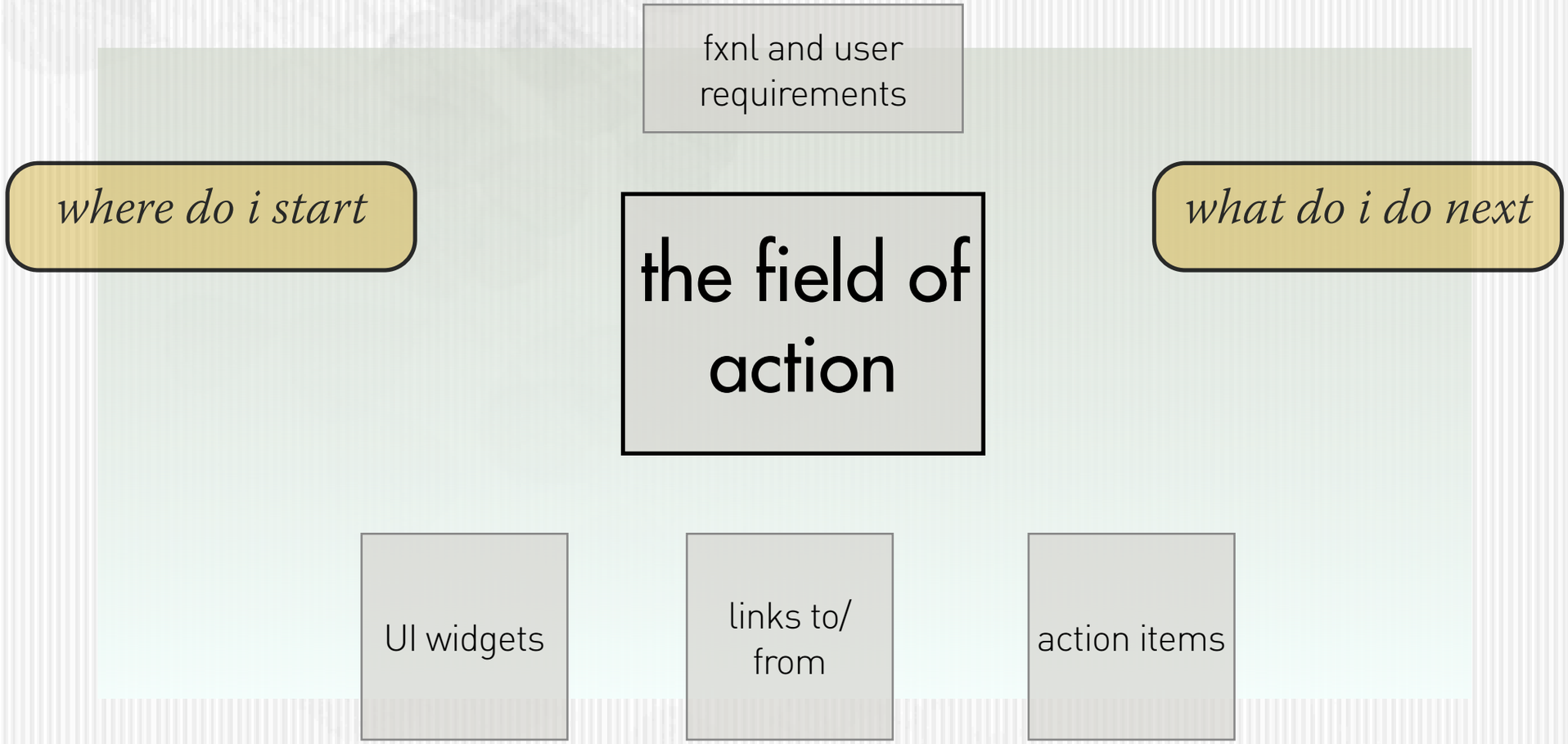
Type 3: Taskflow Redesign (inserting new functionality)





Type 4: Layouts/Widgets/Controls (chartjunk chaos)

- Example: call center, sys admin UI, prefs manager
- Method/artifact: Key questions, wireframes
- Value: this is a diagram which exposes the underlying reasons that the application exists. It strips away all complexity of the system, leaving the designer with the core goals the user is trying to meet.



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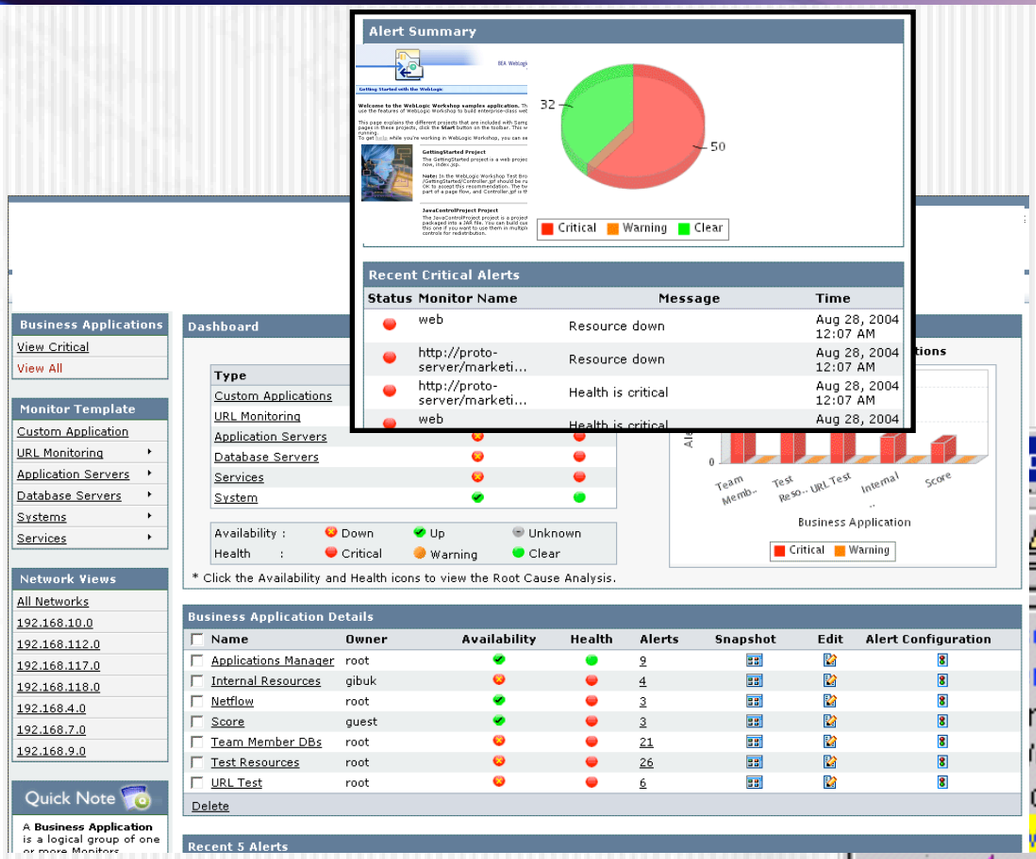

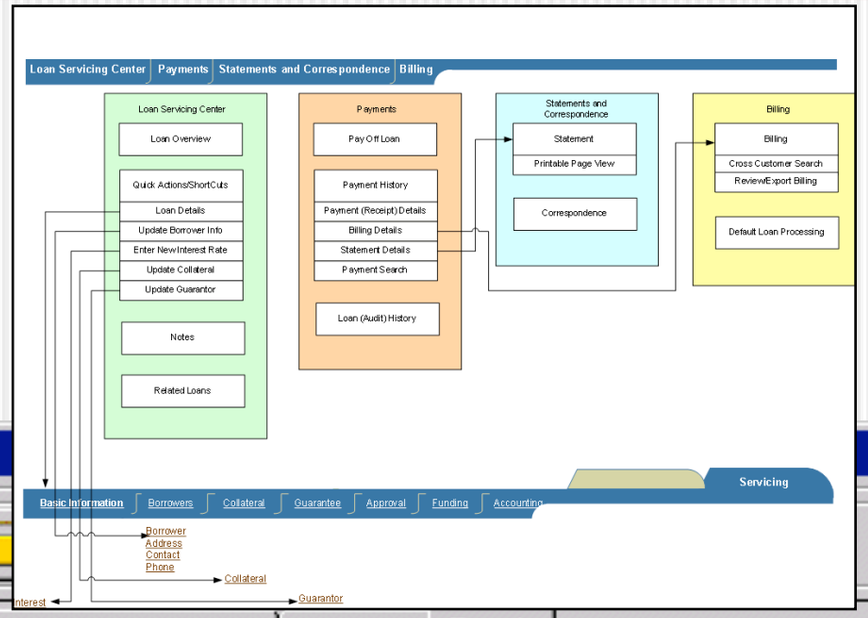

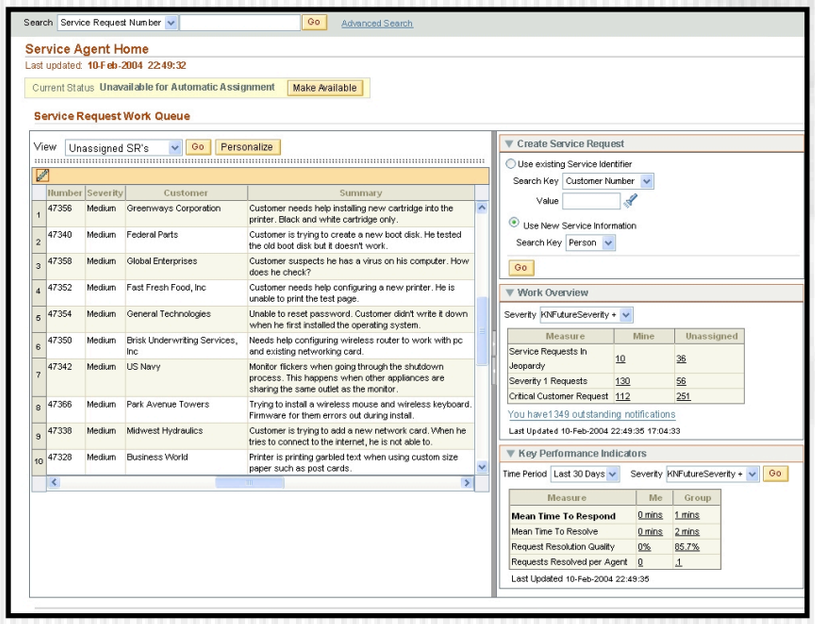

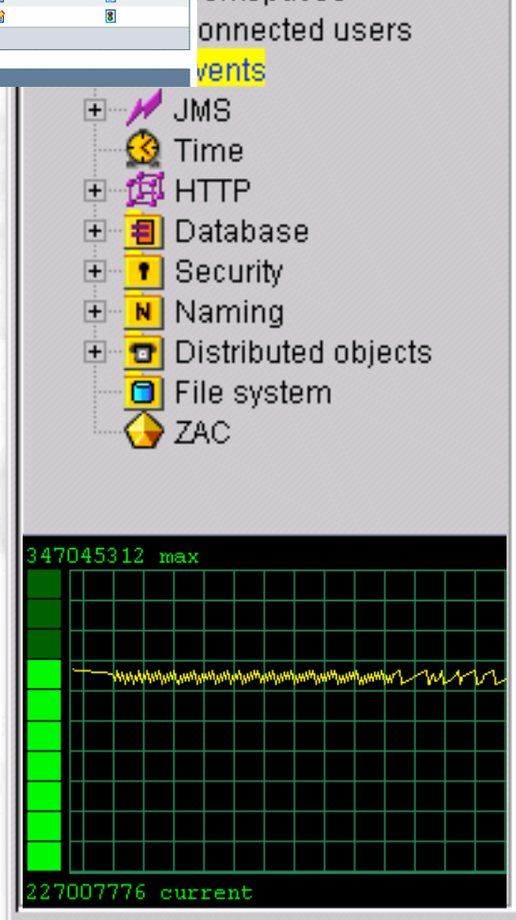

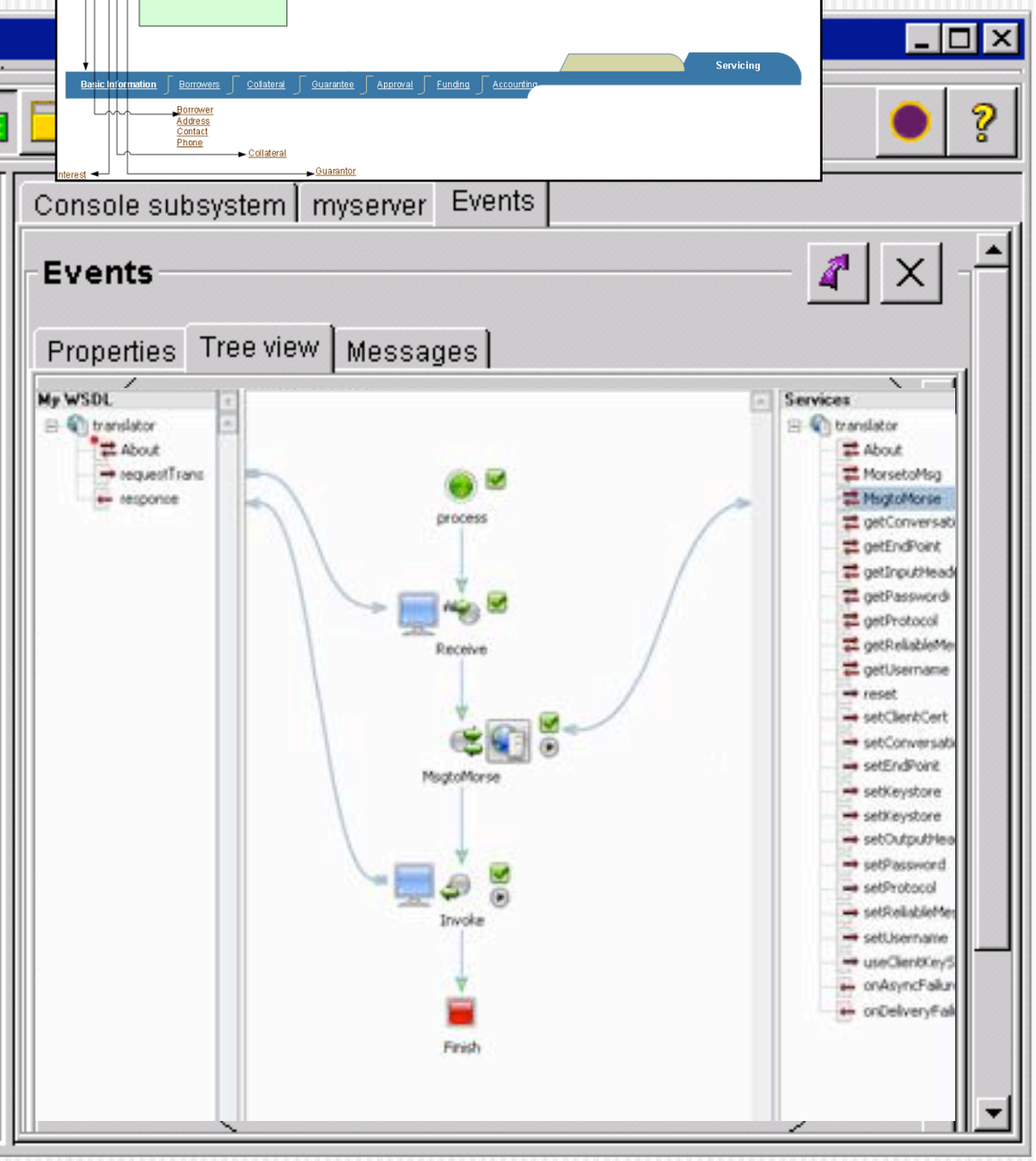

Final Thoughts...Restating the Value

- Power of artifacts found in dependencies and connections -→ true art of the IA / UX professional
- Artifacts serve as a "platform for conversation"
- Ideas to be improved upon, hybridized, morphed, shared...

To be continued...?
(tutorials, workshops, further resources)

Thank you ... Questions?

udanium@yahoo.com

www.udanium.com