Functional Concepts Presentation
PSEWeb - Redesign

Presented by Lisa Mullinaux, User Experience Solutions Architect EMC² | Microsoft Practice

Prepared for:

PUGET SOUND ENERGY

PSEWeb Co-Sponsors

AGENDA

State of PSEWeb

Objectives

Ground Rules

Patterns

- 4 core Patterns
  - Best practices
  - Examples
- Innovative Patterns
  - Unique solutions
  - Business Intelligence
  - Collaboration
  - Accessibility

Recommendations

Next steps

STATE OF PSEWEB

- PSEWeb has undergone steady and organic growth
- New content, new owners, new users
- Started as a passion and an incubator of core applications, created to fulfill the needs of the business.
- IT team has been forced to spend greater proportions of their time managing and maintaining, leaving very little time for innovating and developing new capabilities.

STATE OF PSEWEB: FINDINGS

Evolving shift in corporate culture

- Users should be able to make effective use of its content, in a timely manner

Users desire secure access anywhere, anytime

- access to data from any device/workstation/computer

General perception and lack of trust in data accuracy

- Validation of useful content communicated before, during and after the user experience; value clearly defined and illustrated

Lack of governance & standards

- Standards for home page elements; “mandatory” navigation vs optional vs personalized

Need for ways to collaborate

- Communication/knowledge sharing/collaboration

Users don’t know what they are missing

- Timely, interesting and useful content; customizable content

WHAT DOES "PORTAL" MEAN?

PORTAL as a concept

- Provide a single point of access to key tools
- Customize information to specific goals/needs
- Manage multiple log-ins and passwords

PORTAL as a technology

- Simplify integration
- Provide tools to enable those concepts
- Offer dev environment, integration standards

IMPACTS, RISKS & CONFLICTS

Present time business goals, processes and timelines

Limited resources (content authors, web administrators)

Concurrent initiatives

- SAP Roadmap
- Corporate records management
- ESS
- WCMS

Limited input from users

- Scope of this project limited to 4 of 54 departments
- Key individuals in the 4 sponsor groups not yet interviewed
  - Corporate Communications: Teri M, Dorothy B
  - Customer Service: CSRs, receptionists
  - IT: Ornulf K, Ruud S.

Lack of official Governance Plan

Assessment of “Level Of Effort” vs “Value Add”

PSEWEB IS…

- TRUSTED
- PRODUCTIVE
- USEFUL
- USABLE
- PERVASIVE
- ESSENTIAL
- COLLABORATIVE
- COHERENT
- STRATEGIC

PSEWeb is a TRUSTED source of information and business tools

PSEWeb delivers tangible and visible benefits

PSEWeb directly supports your needs

PSEWeb is easy to USE and quick to learn

PSEWeb supports every role and location

PSE is not able to function effectively without PSEWeb

PSEWeb supports working together effectively, sharing knowledge

Clear and consistent direction, purpose and design supports PSEWeb

PSEWeb is a STRATEGIC platform and environment for the company

OBJECTIVES

- Patterns
  - Best Practices
  - Examples
  - Level of Effort
- Desired Outcome
  - General understanding of patterns
  - Likes and Dislikes

LEVEL OF EFFORT < *legend*

Out of the Box

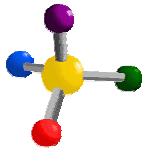
< 1 day

- Chrome themes
- Master page "as is"
- Standard web part pages

Low

1-5 days

- Custom master page
- Custom CSS



Moderate

1-6 weeks

- Custom site definitions
- Custom page templates

~1 week per site definition

~2-3 days per template

Complex

- Extremely customized
- Server controls, web parts, work flows

PSE.com:

- 3 months+
- 3 architects/developers (FT)

Assumption: web team has had training and familiarity with SharePoint 2007, and is proficient with Asp.net master pages

A FEW GROUND RULES

These are ideas and concepts to begin thinking of how it could work

- Let's not get wrapped up in technology/budgetary/manpower solutions

See each example as a template – don't be distracted by the content, industry or services

As you look at each example, consider it from the perspective of:

- You, the PSEWeb business sponsor
- You, the consumer

CORE PATTERN: NAVIGATION

NAVIGATION < *core pattern*

Taxonomical navigation *is organized in a hierarchical manner*

Ontological navigation *is organized in a contextual manner*

BEST PRACTICES:

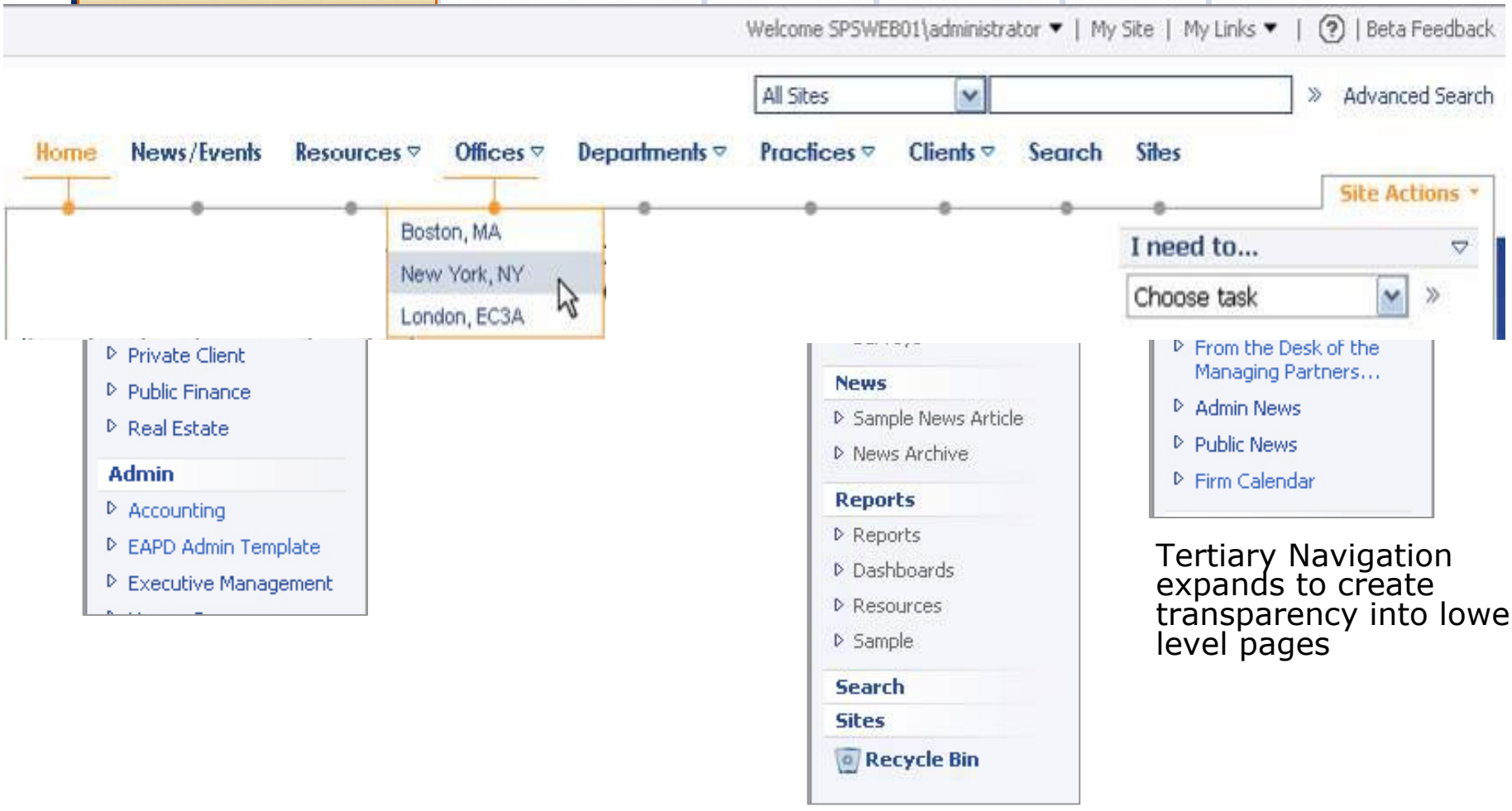
- *Incorporate a hybrid of the two types of navigation, to accommodate the diverse ways to find information, based on users' needs and habits.*
- *reinforce a successful user experience with a navigation that is consistent, transparent and contextual.*
- *maximize use of other navigational elements such as footer, breadcrumbs, embedded, utility and persistent links.*

NAVIGATION < *example*

Multiple layers of navigation

Helps the user to narrow the choices

Tends to be a drill down user path

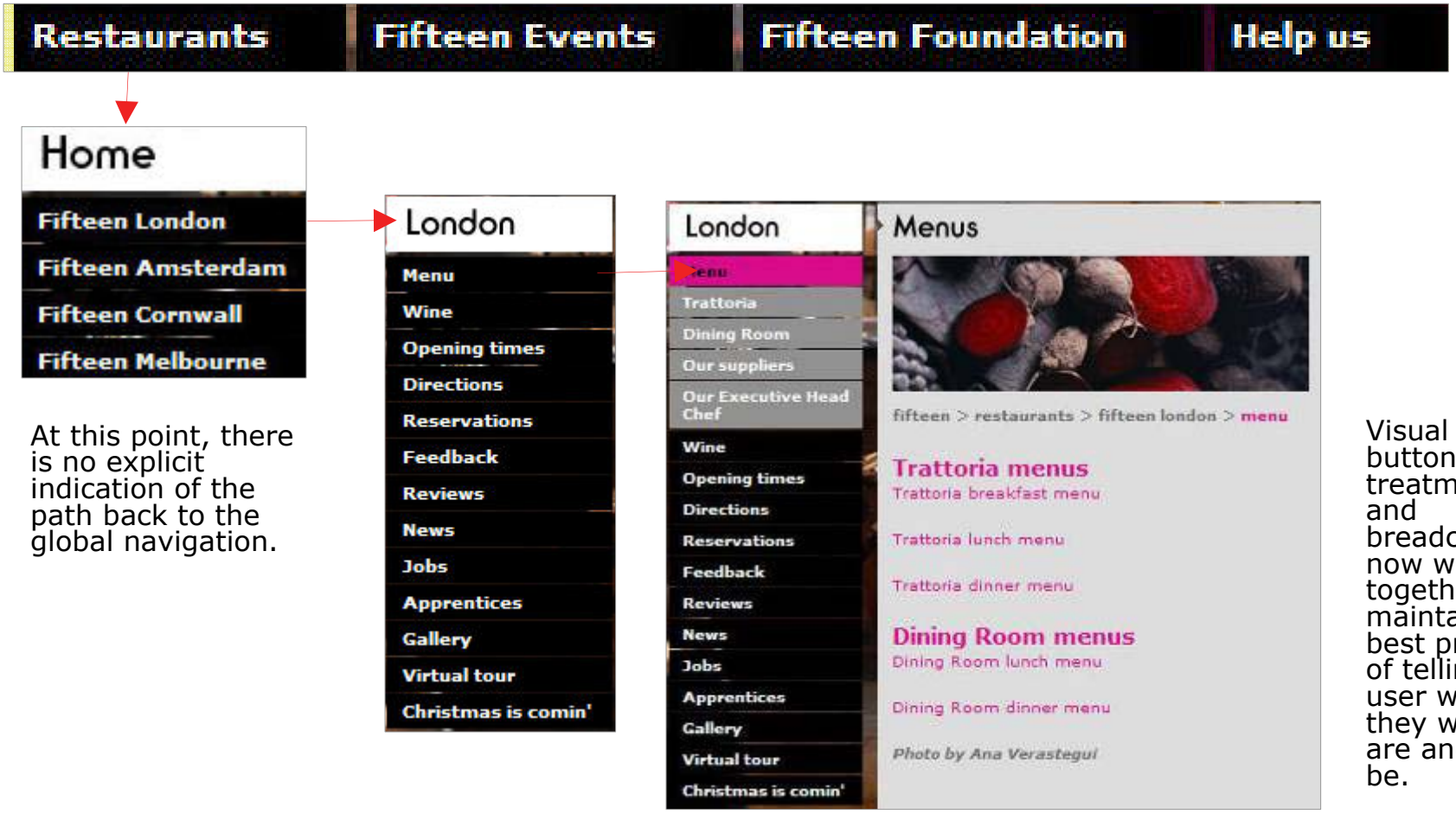


Tertiary Navigation expands to create transparency into lower level pages

NAVIGATION < *examples*

While best practice recommends a transparent navigation to be able to show the user where they were, are and can be, an unwieldy practice can result in a bad experience.

This example illustrates maintaining a successful user experience while "breaking" some rules concerning secondary navigation in context to the global AND local navigation



At this point, there is no explicit indication of the path back to the global navigation.

Visual design, button treatment and breadcrumbs now work together to maintain the best practice of telling the user where they were, are and can be.

NAVIGATION < *examples*

Visual design, font treatments (size, emphasis and style) also add to a useful navigation.

NAVIGATION < *examples*

Global navigation

Secondary navigation
+ breadcrumb

Tertiary navigation
+ breadcrumb

Footer navigation

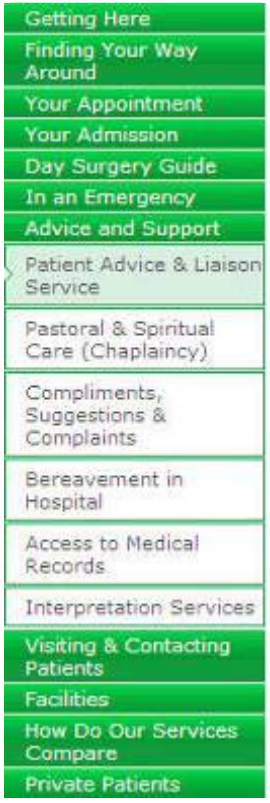
Incorporating navigation that makes use of best practices allows for a user experience that is neither horizontally or vertically constrained.

NAVIGATION < *examples*

Global navigation

Breadcrumb

Secondary navigation

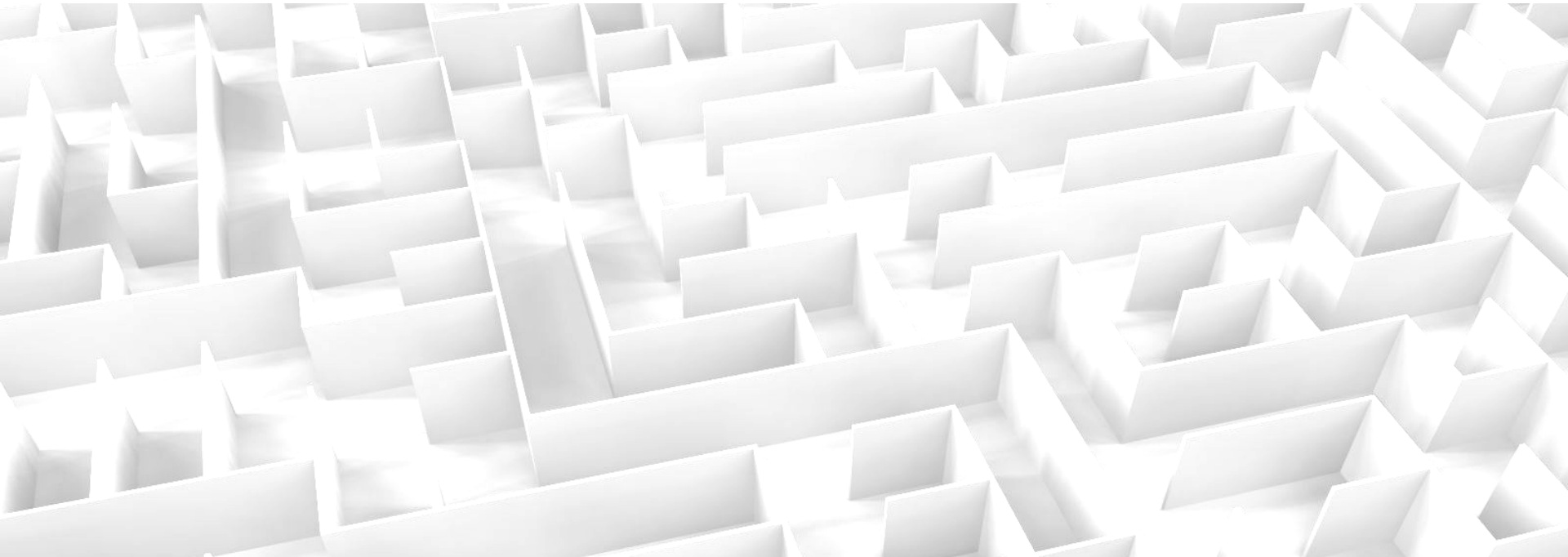


Utility/persistent navigation

Tertiary navigation

Footer navigation
+ utility navigation

CORE PATTERN: HOME PAGE



HOME PAGE < *core pattern*

The intranet homepage should be the primary way for employees to access tools/ information required to carry out their daily job tasks.

HOME PAGE < *content*

- Common page elements
  - Employee look up/Search
  - Emergency alerts
  - Critical announcements
- Links into the site
  - Direct access deeper into site
  - "Full" version of brief content on home page
    - NOT a mirror of global navigation
- "Quick links"
  - To content the USER want to access
    - NOT for business units to push their own content out

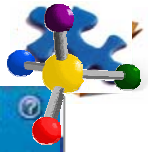
HOME PAGE < *content*

- Communications, Activities, News
  - Lead-in to corporate communications announcing activities and stories that are most important to PSE.
    - Corporate initiatives
    - External news in context to organization
- "How To's"
  - How to personalize
  - How to use
- "Local" News
  - Employees' achievements [shows equal value to corporate news]
  - Community involvement

HOME PAGE < *best practices*

- Audience specific - meaningful to
  - New visitor
  - Regular visitor
  - Infrequent visitor
- Primarily navigation-oriented
- Establish and reinforce the global navigation, corporate branding
- Communicate the usefulness and need
  - Allow user to find 'high use' items quickly
  - Minimize ‘distraction' of less relevant information.
  - Identify/address users’ perceived roadblocks
    - Limited “extra” time
    - General lack of awareness of the new functionality

HOME PAGE < *examples*



MYJANUS Welcome Chris! - Logout | My Links | My Site | My Department

GO FARTHER JANUS

My Janus SEARCH

JNS Stock: 28.98 ▲ 1.33
11:07 AM Eastern (20 min. delay)

INSIDE JANUS | I NEED TO... | JANUS LIFE

People Finder | Outlook | Report Illegal or Unethical Behavior | Help

Inside Janus

THE COMPANY
- About Janus
- Brand Toolkit
- Company Publications
- Company Locations
- Company Policies
- JNS Market Performance

DEPARTMENTS
- Corporate Finance
- Corporate Services
- Fund Services
- Human Resources
- Information Technology
- International
- Investment Accounting
- JGA
- JIIAM
- Legal & Compliance
- Marketing
- Portfolio Management
- Sales
- Trade Operations

SUBSIDIARIES
- INTECH
- Perkins Wolf

COMPANY NEWS

Market update

The market reacted negatively to jobs data released on Friday, September 7. The Dow fell almost 250 points or 1.9% and other U.S. indices had similar declines. European markets, which were open when the data came out, were down about 2% on average. Asia already had ended its week. Find out what happened

Read More Company News

JANUS IN THE NEWS

Rocky Mountain News

09/04/2007 "Six Questions for Ron Sachs, New Manager of Janus Twenty Fund"

Read More

Press Releases | Search Archive

JANUS LIFE NEWS

Wellness Expo Sign up now for free health screening! September 17 & 18

Chair massages, acupuncture, tips from personal coaches, along with health screenings for you, your spouse/domestic partner & children over 18. Receive a $50 AmEx gift card for completing a health risk assessment (employees only). Watch your home mailbox for more info or click here for details!

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ANNOUNCEMENTS
- TODAY! Small talk can lead to big things
- REGISTER NOW! Discover Janus "Next Gen PMs" September 24 (part 2)
- Janus Bowling League

Read All Announcements

MARKET SUMMARY

▼ NYSE Comp	9934.17	-36.73
▼ Dow 30	13766.54	-49.02
▼ Nasdaq Comp	2654.29	-12.19
▼ Russell 2000	809.76	-7.64
▲ CRB Index	333.32	+3.75
▼ Dollar Index	78.58	-0.72

WORLD TIME

Denver	02:53 PM MDT	9/20/07
New York	04:53 PM EDT	9/20/07
London	09:53 PM BST	9/20/07
Frankfurt	10:53 PM CEST	9/20/07
Hong Kong	04:53 AM CST	9/21/07

CLIENT CORNER

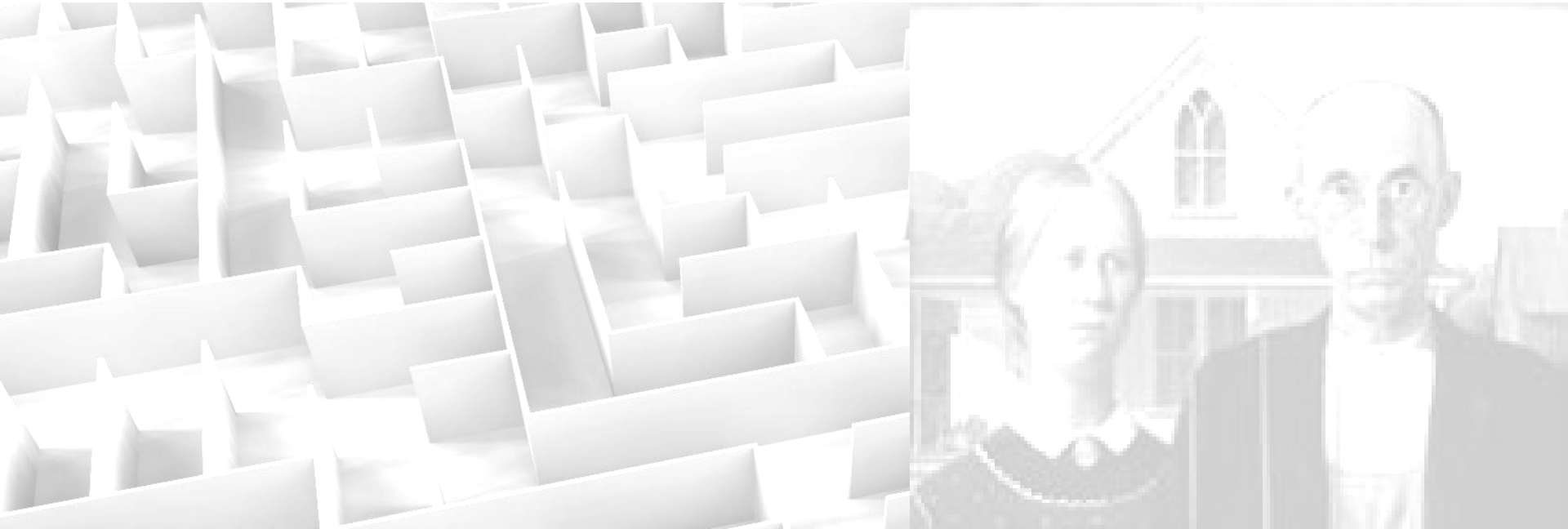
Aliquam lectus, adi piscing etes ac. feugiat lacus. Ut di velit nec est. Tue posuere, sit amet malesuad blandit, sapien sapien auctor arcu, sed pulvinar felis mi sollicitudin tortor. Maeces volutpat, nisl et dignissim phretra, urna lectus ultrices est, vel pretium pede turpis. Read More

Merrill

View All Site Content
Document Center
Document Center S
SharePoint Trainin
Reports
Search
Site Directory
Recycle Bin

My Links | Advanced Search | Site Actions

CORE PATTERN: MY HOME PAGE



MY HOME PAGE < best practices

USEFUL

- Designated content/modules
  - Mandatory [global navigation, corporate messaging, emergency alerts]
  - Audience specific [managers, support, represented, dashboard/ scorecards]
  - Optional
    - "Full" version of story/article on home page
    - Workflow starting points
  - Personalized
    - "Quick links"
    - Direct access deeper into site
    - Fast access to frequently used documents

MY HOME PAGE < best practices

USABLE

- Simple to set up
- Easy to edit
- Fits in different page layouts
- Contextual to individual employees’ job roles

Building “MY Home Page” is like playing with…

MY HOME PAGE < best practices

Plan for multiple page layouts; consider unique needs of specific user groups

- Remote access
- Multiple screens and applications open at the same time
- Varying proportionate real estate needs, based on modules

MY HOME PAGE < best practices

Ensure user-friendly implementation and layout:

- Offer fast access to high use items by placing “quick links” and workflow links above the fold.
- Highlight benefits of time spent well now, in learning and setting up
- Give tangible evidence of the increased value as a result of creating their own home page.

MY HOME PAGE < best practices

Users need to configure their own personalized environment for it to be used in the context it is meant.

It must have significant benefit:

- Time savings
- Efficiency
- High trafficked area

MY HOME PAGE < best practices

In previewing

- Messaging of its benefits
- Tutorials
- Instant help

Setting up

- Quick/less time than feared
- Access to help (tutorials, phone calls)

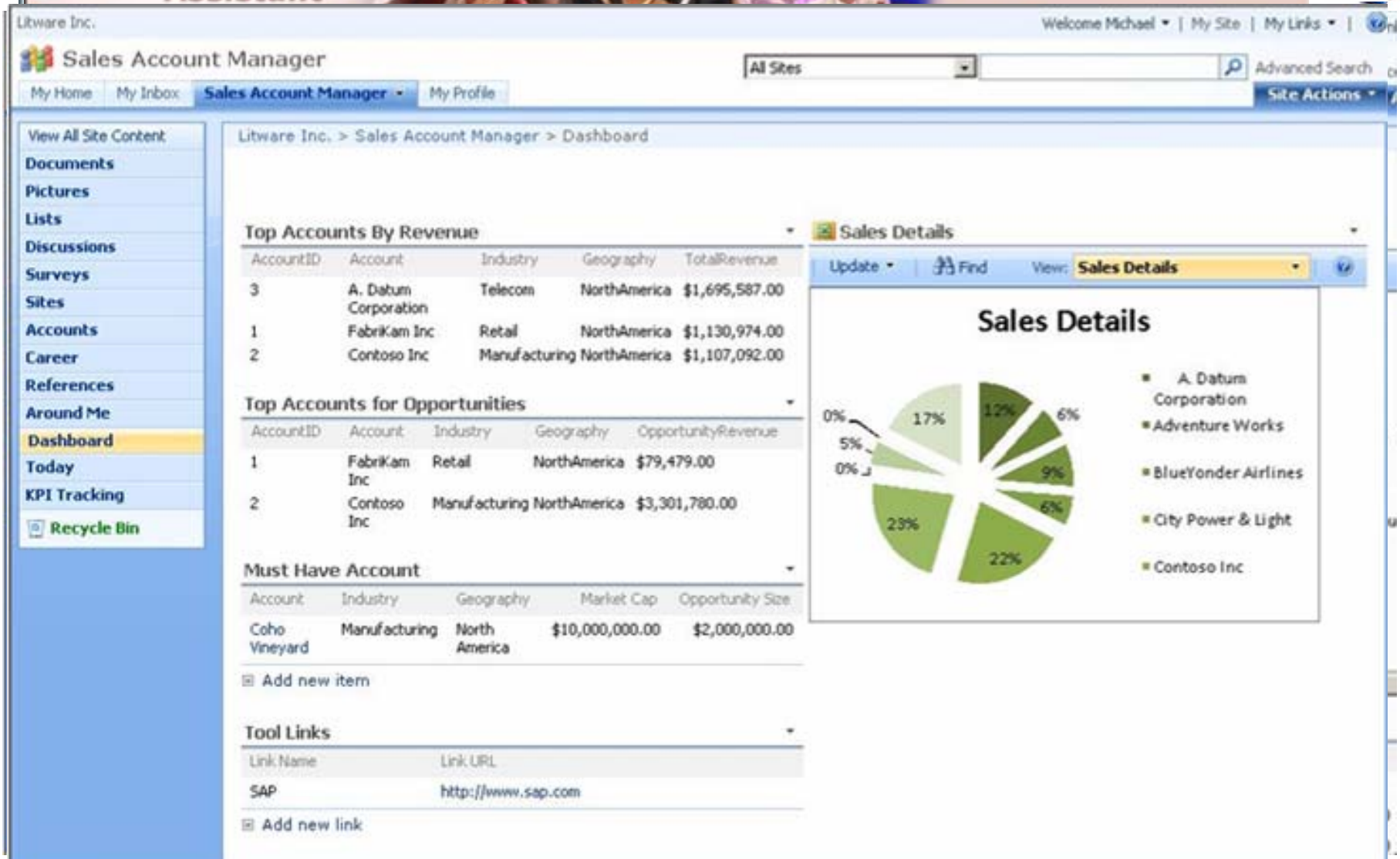
In action

- Easy to adjust, edit, add
- Content is useful and offers a better experience than their current work-arounds

MY HOME PAGE < best practices

How to personalize is very subjective to the user's role within the company, their interests, comfort level, external influences.

MY HOME PAGE < examples



CORE PATTERN: SEARCH

SEARCH < best practices

Top issues within a corporate intranet Search functionality:

- Cumbersome tools that don’t fulfill user expectations
- Obsolete tools that only a few people understand
- Integrating new content, acquisitions
- New employee frustration

SEARCH < best practice

Placement

- Persistent | Contextual | Consistent | Contextual help

User expectation management

- Messaging: Search range | Search scope
- Easy to select sub-sections - communicates exclusivity of one another

Querying

- Simple: easy to enter
- Complex: examples
- Effective use of search builders

Results

- Messaging: Results range | scope | Relevance | Did you mean… | "Others found this useful" (vote capability) | One result per document

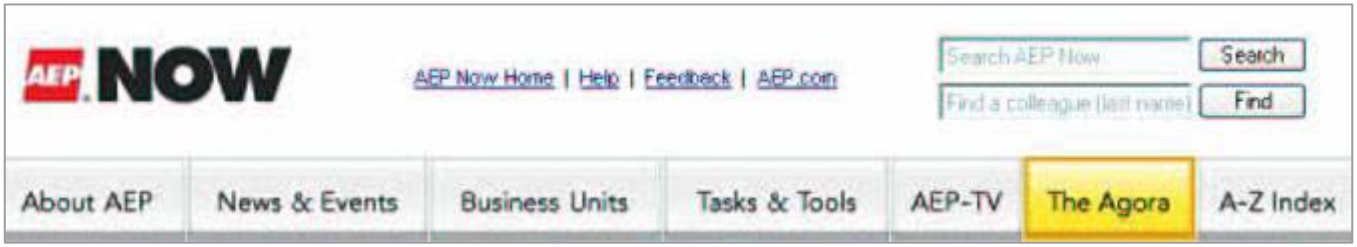
Advanced | Refined Search

- Messaging: Ways to narrow and expand search

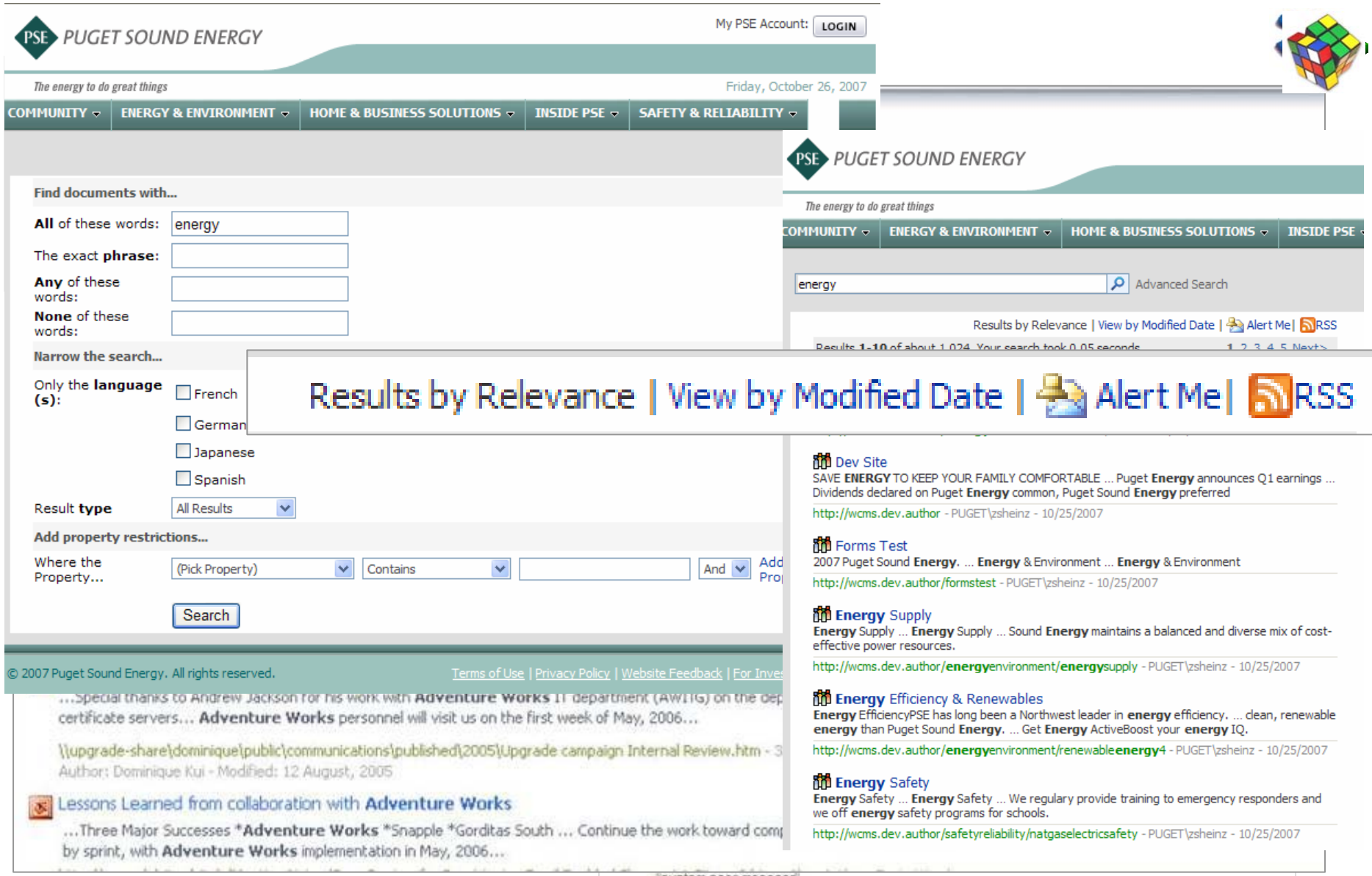
Finishing Search

- Save | Email search query/results
- Alert me when new results appear

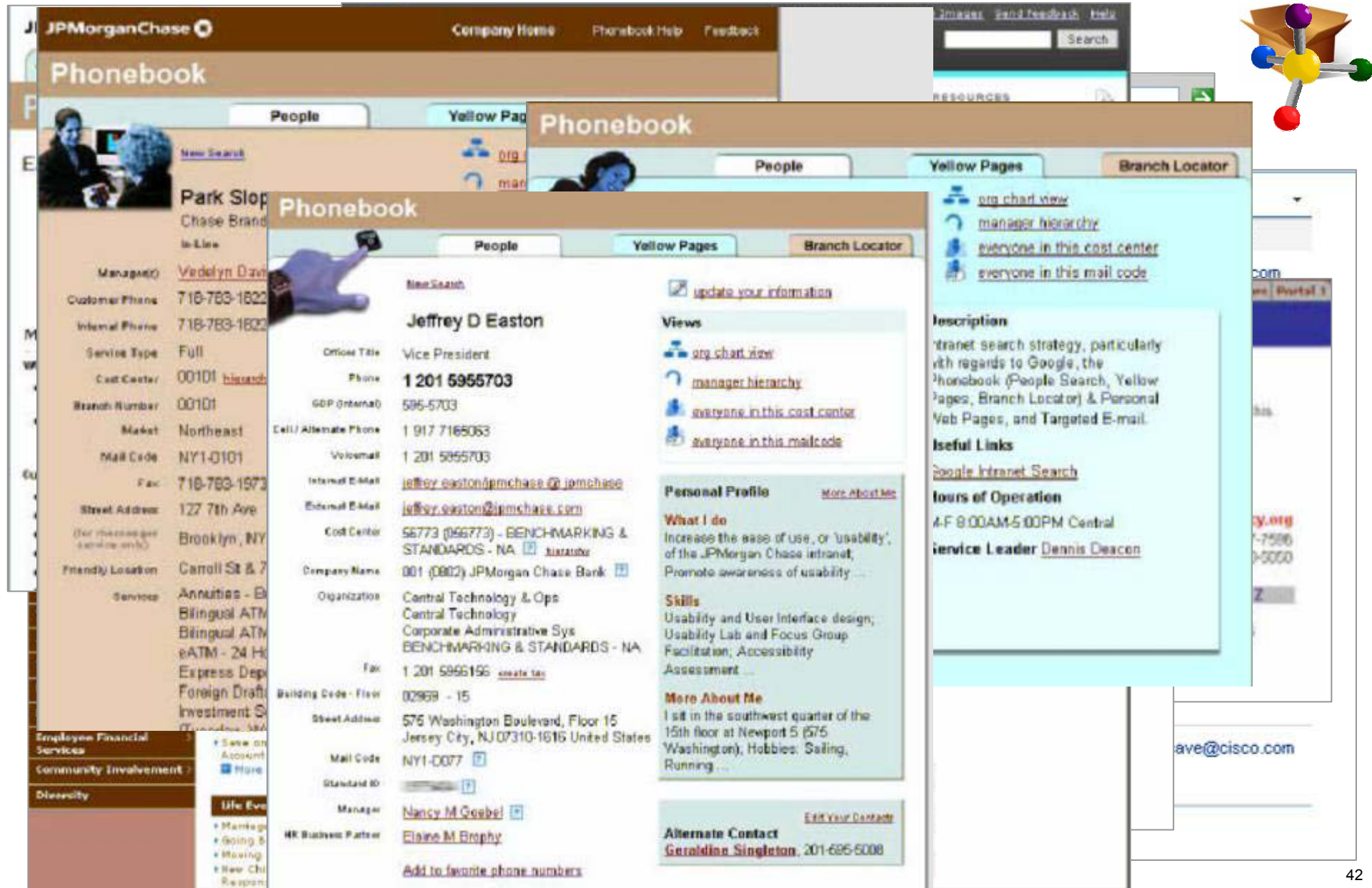
SEARCH < examples



SEARCH < examples

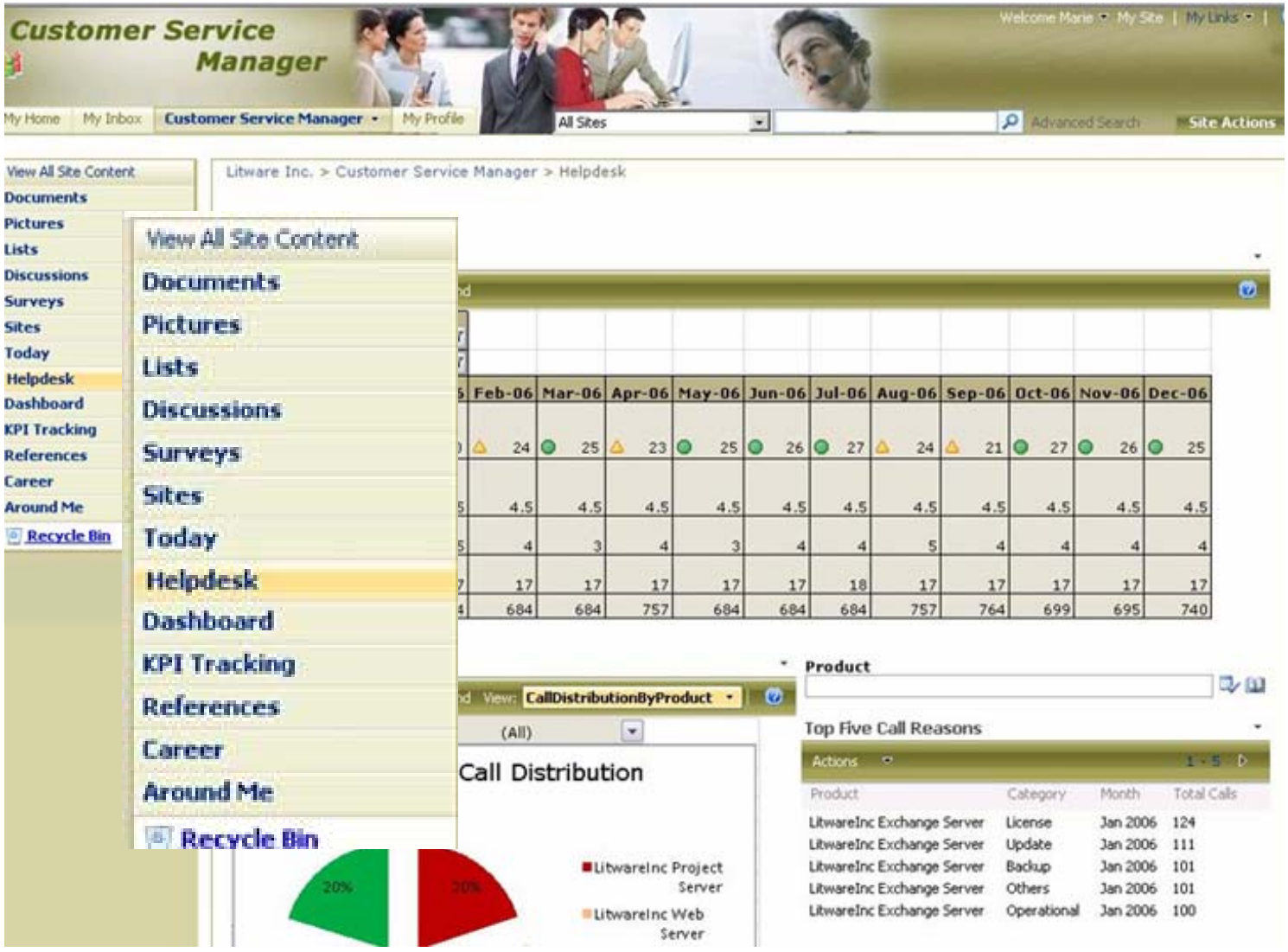


SEARCH < examples

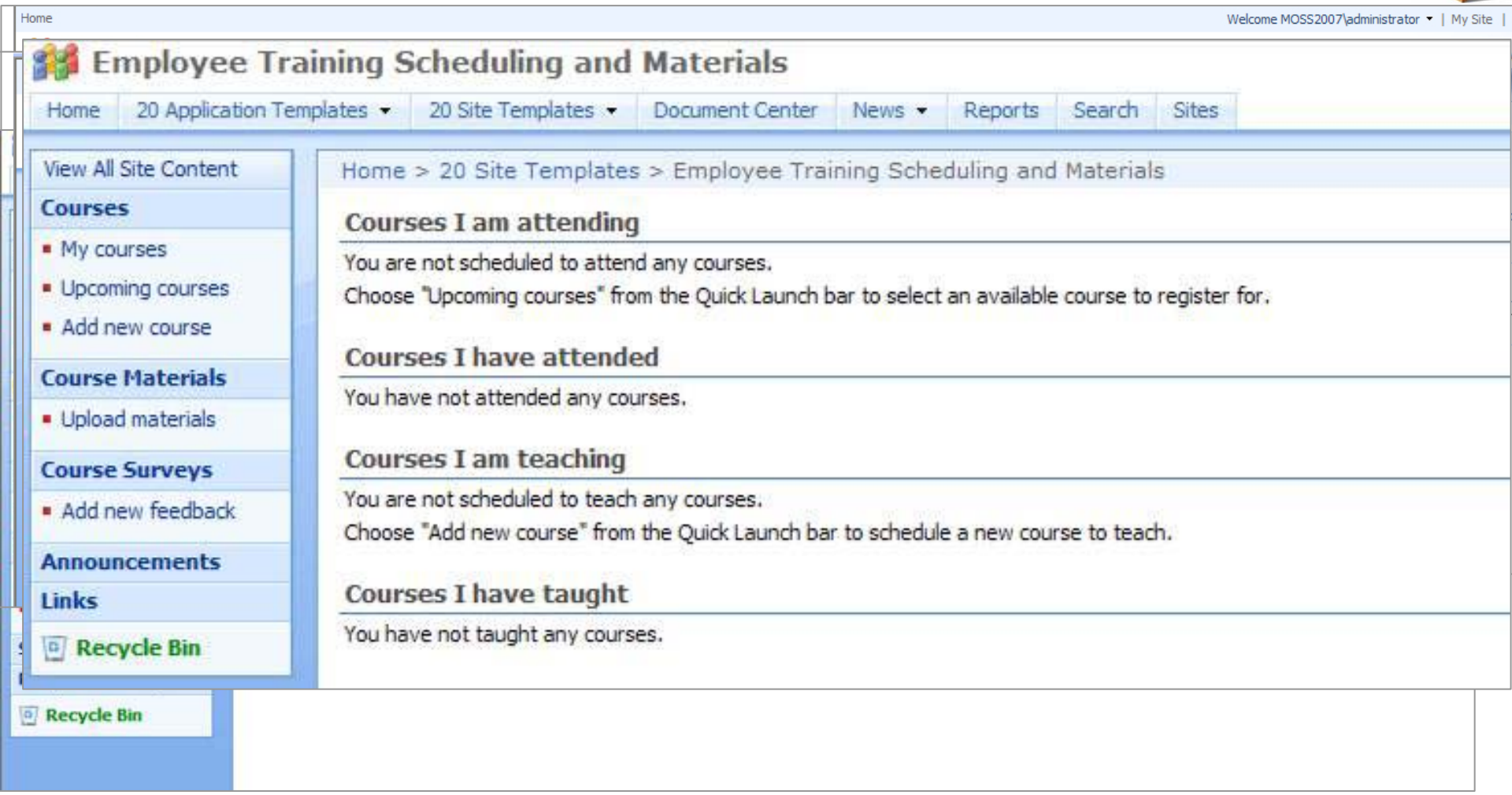


CUSTOMER SERVICE &

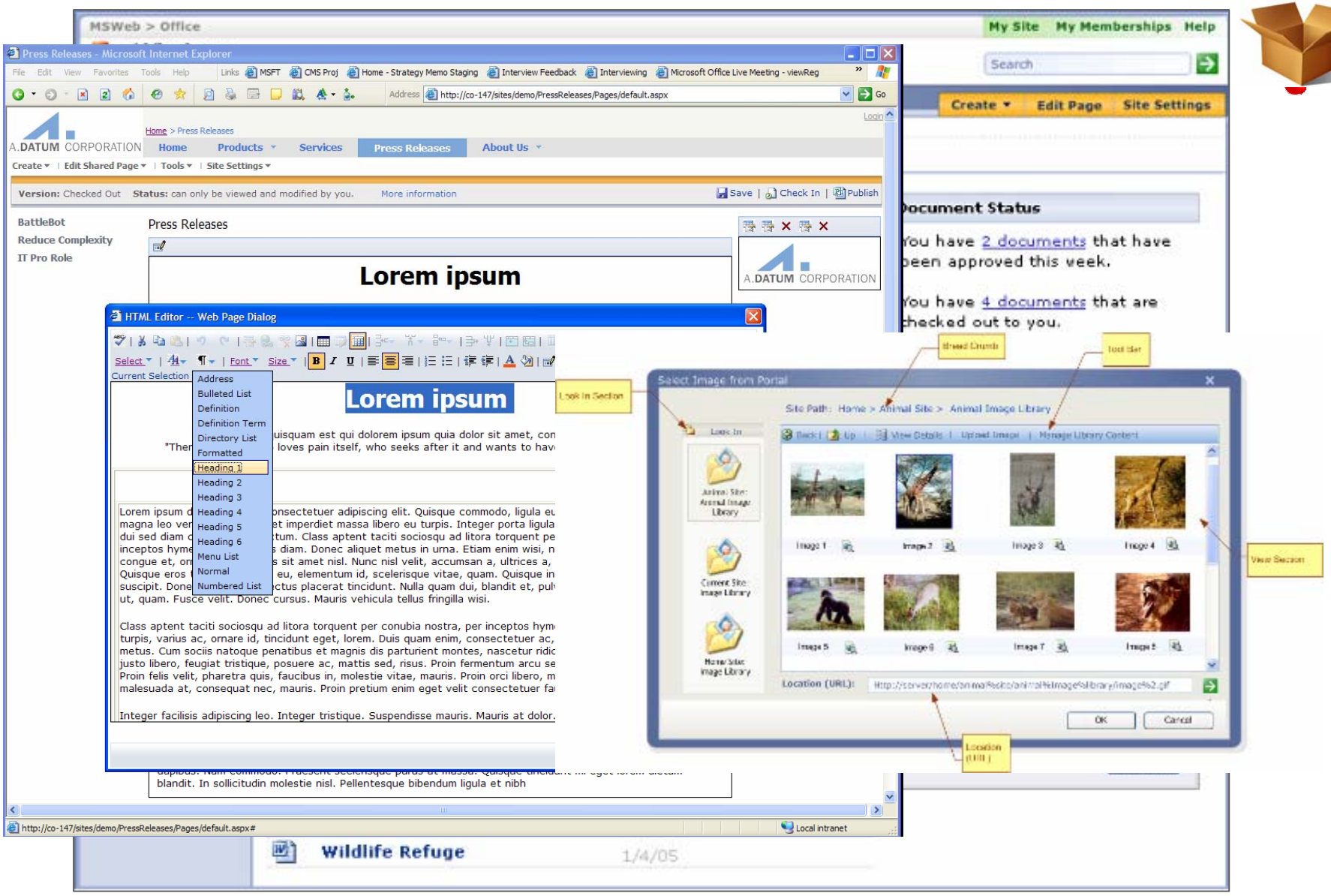
CUSTOMER SERVICE & QUICK REFERENCE MANUAL



CUSTOMER SERVICE & QUICK REFERENCE MANUAL



CUSTOMER SERVICE & QUICK REFERENCE MANUAL



INNOVATIVE CONCEPTS

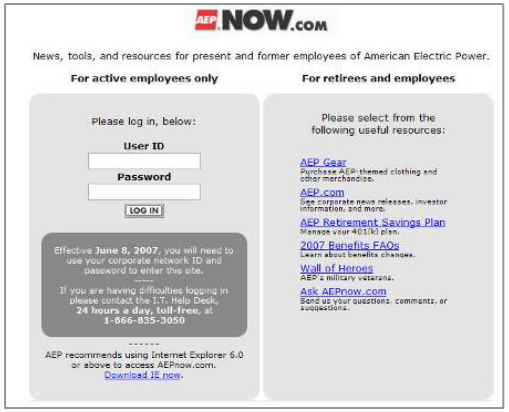
UNIQUE SOLUTIONS

Tag clouds are an example of how Web 2.0 has improved navigation user experience:

- Rational user experience design, using font size, emphasis and style to show what links others have used
- Efficient use of real estate – it eliminates a "per line" navigation, and instead allows words to wrap

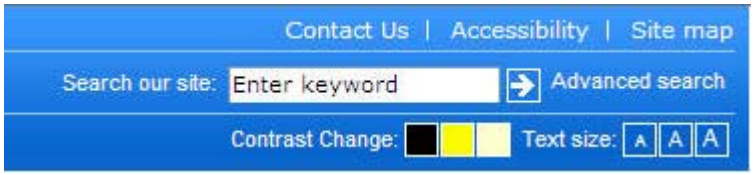
Intranet access via the web

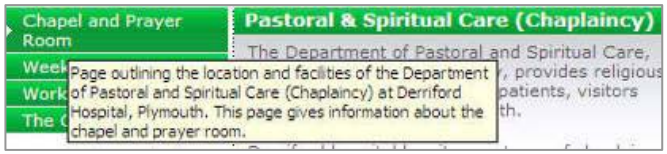
- American Energy has created "an abridged intranet version is also available on the Internet, and features news and benefits-related information.



Accessibility

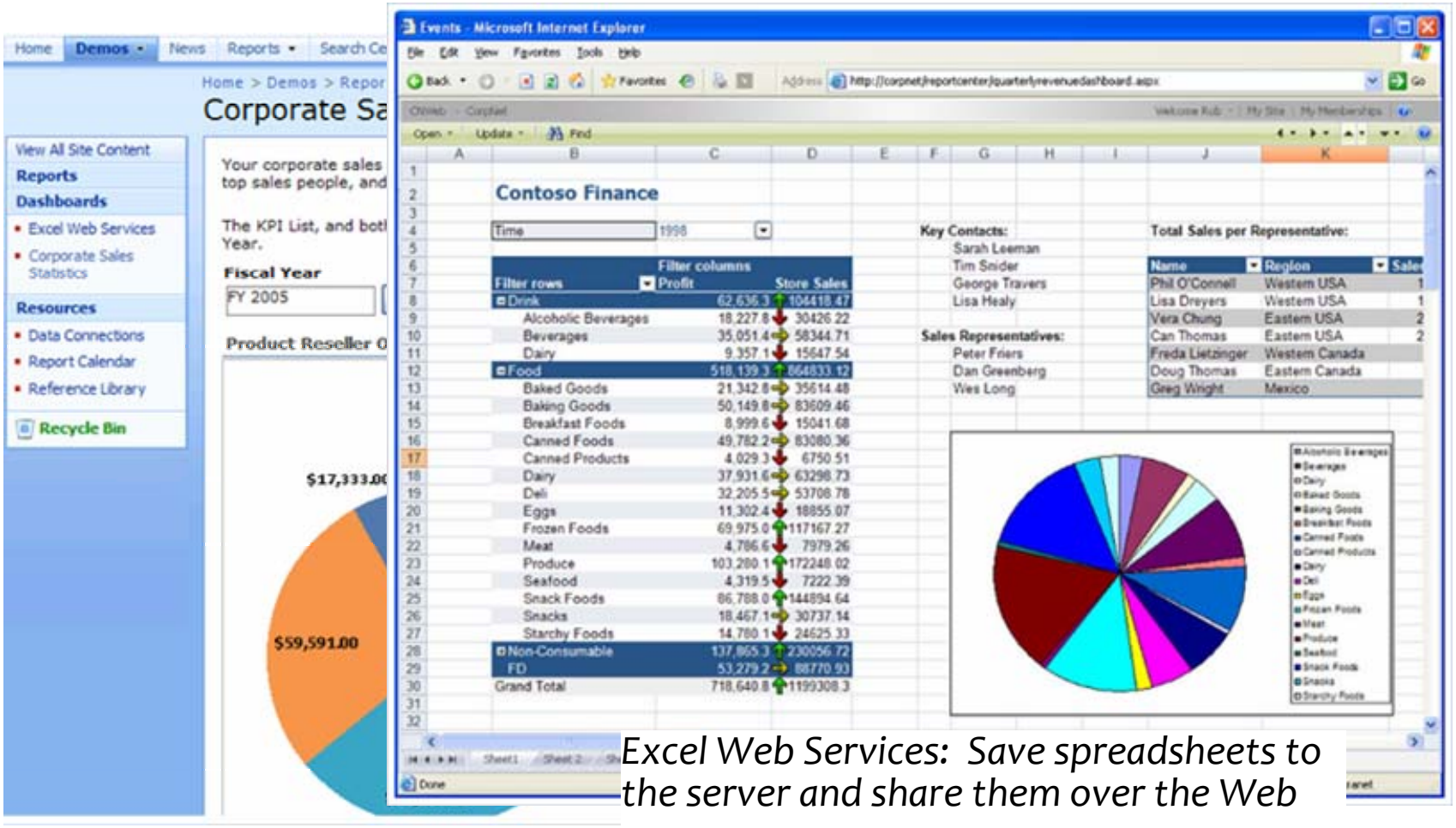
- Allow users to change font size (nearsighted/ farsighted users), background color change (color blindness)
- Take advantage of short and long descriptions to maximize the benefit of the alt tag





BUSINESS INTELLIGENCE

A Key Performance Indicator (KPI) is a visual cue that communicates the amount of progress made toward a goal.



Excel Web Services: Save spreadsheets to the server and share them over the Web

COLLABORATION

Blogs, Wikis and discussion threads allow groups to communicate, share, collaborate without software or platform limitations.

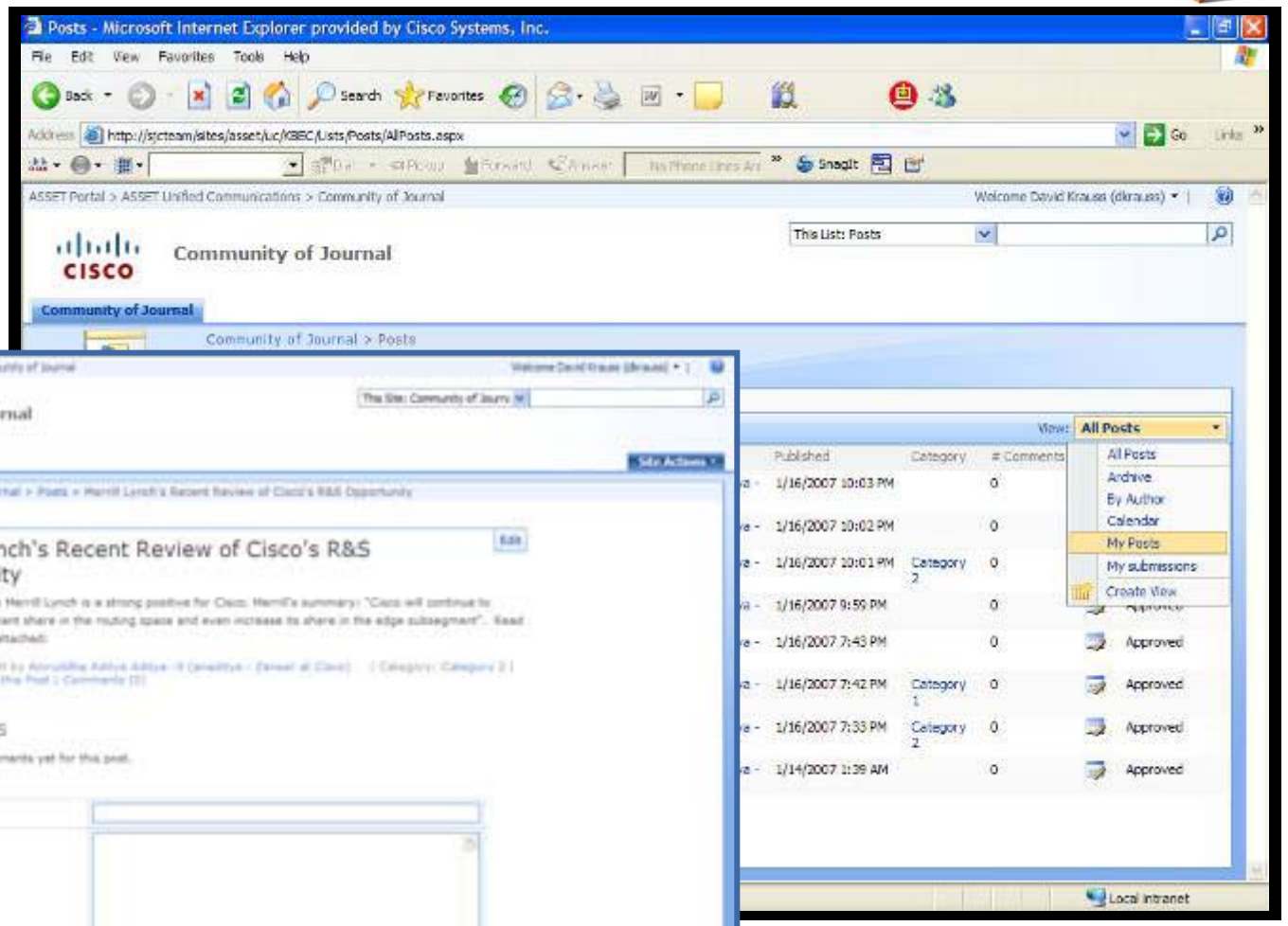
Core Competencies of organizations that embrace Web 2.0:

- Control over unique, hard-to-recreate data sources that get richer as more people use them
- Trusting users as co-developers
- Harnessing collective intelligence
- Leveraging the long tail through customer self-service

CREATE A BLOG

Blog Features:

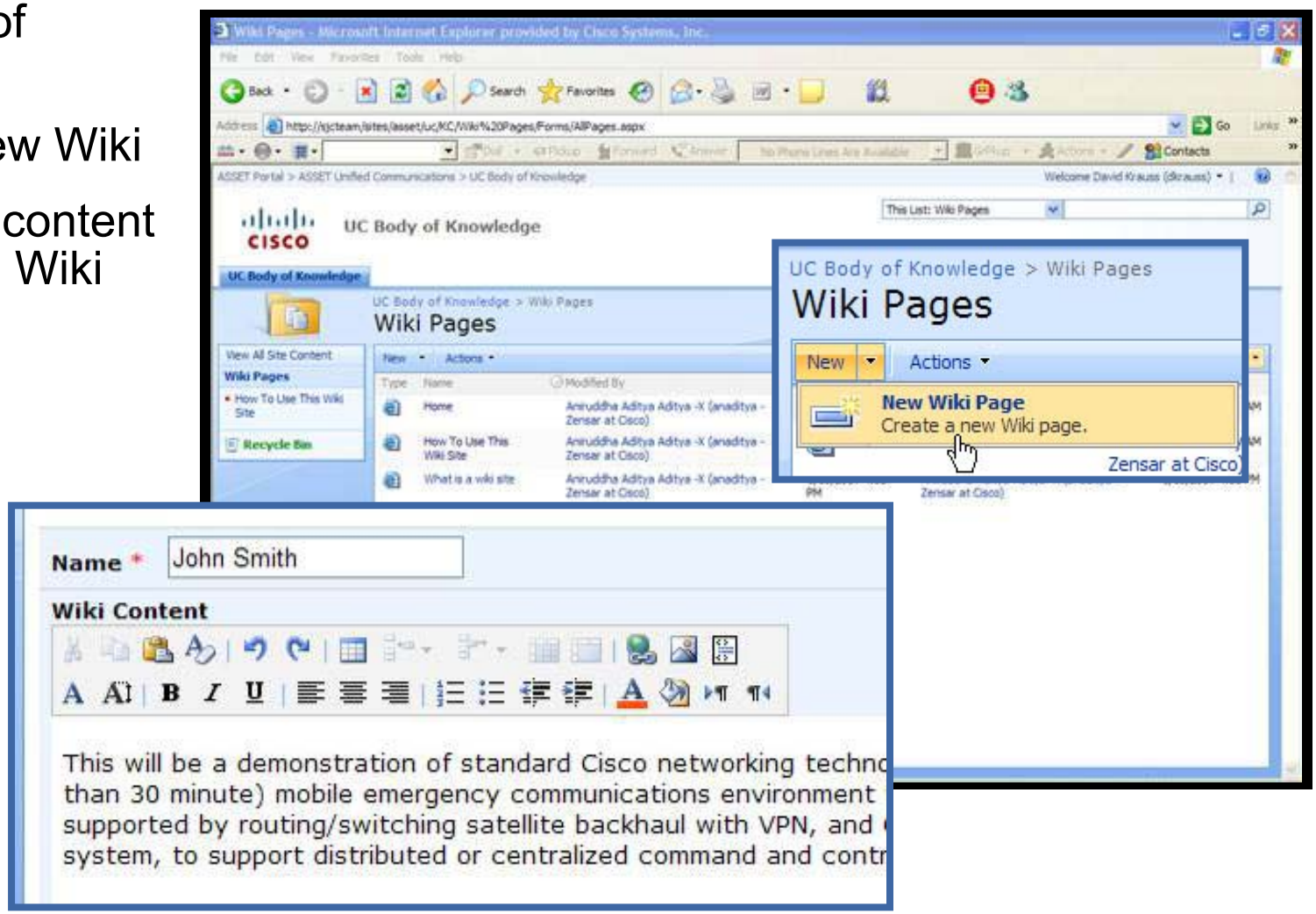
- Start a Community
- Manage the community posts
- Reply to a post



CREATE A WIKI

Wiki Features:

- View a list of pages
- Create a new Wiki
- Add or edit content directly to a Wiki page



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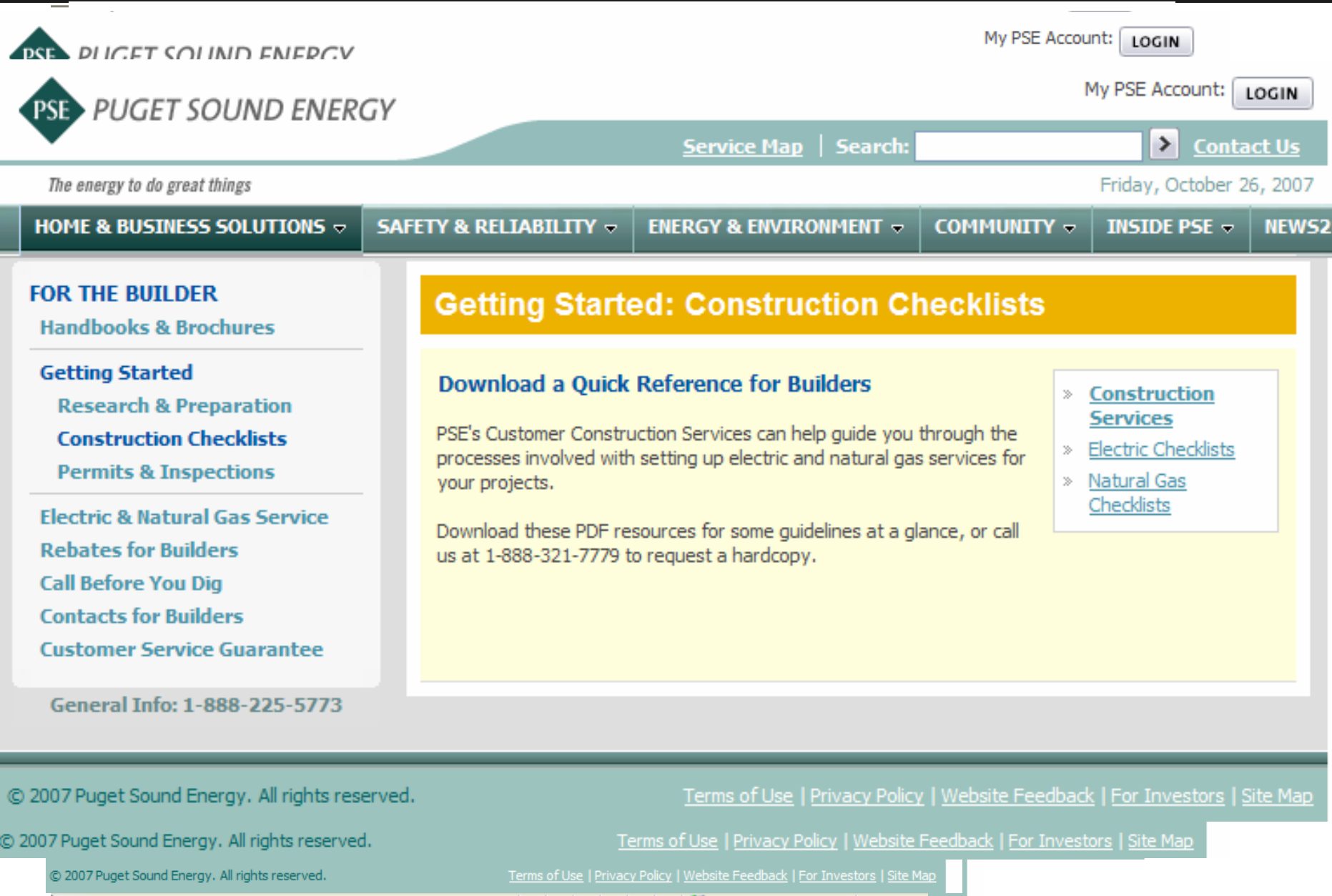
PUGET SOUND ENERGY
My PSE Account: LOGIN
PUGET SOUND ENERGY
My PSE Account: LOGIN
Service Map | Search: Contact Us
The energy to do great things
Friday, October 26, 2007
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RECAP of FINDINGS

Workforce turnover

Navigation | Home Page | Accessibility | Tribal Knowledge > Preservation

Access to tools/data away from work station

Extranet/ “limited” intranet

Challenge to Data Accuracy | Value Resource

Navigation | Home Page

Contextual and accurate search results (people, data)

Search | Advanced Search

Time stamp | NEW! | Updated

Lack of governance & standards

Navigation | Standards | Guidelines | Templates

Collaboration

Community | Communication | My Home Page

User’s Don’t Know What They Don’t Know

My Home Page | Mandatory information modules | Navigation | Standards

NEXT STEPS

- Preference of the Sponsors

- Flows/user scenarios
- Site Map/Navigation
- Wire Frames
- SDD

EMC²
where information lives®