

PLATFORM - CURRENT STATE

Full heuristic evaluation results: Overall Usability Score: **63** (out of 100)

- Lack of navigation icon differentiation
- Poor visual cues for user validation of current place in system - no hover state/ roll-over trigger to indicate interactivity
- Page identification (headers) not present
- Lack of available help resources - Online FAQ, glossary, how-to's, user's guide
- Inconsistent terminology (FILES vs RECORDS, DIRECTORIES vs FOLDERS, etc.)
- Users must adapt to unconventional and confusing interactivity - gestures, interactive element and graphics stray from current and accepted UI design trends.
- Lack of consistency with appropriate warnings, alerts, execution success cues and user validation processes.
- Login success verification confusing and alienating.
- Lack of a site map.
- Overall interactive process is unclear - unsure of procedure dependencies and the order of interactive actions to accomplish task from start to finish.
- UNDO and REDO functionality is not present and should be standard.
- Platform currently provides no support information (phone numbers, email addresses, chat support, help links, etc.)



- Data visualization is not integrated. Platform relies on Microsoft Power BI for charting. Platform can work well alongside Stored IQ.
- There are no interactive elements to launch POWER BI - User's wouldn't know that charting and graphs are available.
- Scan status detail is lacking. User's unclear about scan length of time estimation, notification of completion, how to view results.
- Data review procedures are unclear, as are the overall processes of how data review is organized, assigned and monitored/tracked.
- Interface forces users to ask questions about the use of the platform.

PLATFORM - WHAT NEEDS TO CHANGE

- Redesign of user interface - create an original graphic personality that has a modern, inviting and visually engaging layout and style.
- Develop new UI within a standard (best practices) **responsive** interface shell (bootstrap) and define content container standards - Header, Footer, Body.
- Encapsulate the interactivity in **DASHBOARD-BASED USER INTERFACE**. Dashboard will be customizable per administrative user, with the ability to change, add, delete and view real-time information through the use of widgets. A widget bar will be available from a pull-up interactive bar and display all available widgets that can be easily dragged and dropped on to the Dashboard area. Widgets will be a combination of data scan ROT analysis results (currently driven by Power BI), scan progress, and information charts/graphs as well as data review campaign results such as reviewer progress, reviewed file counts, etc.
- Strategically reorganize the experience - optimize processes and functionality to guide a user naturally. Implement a common-sense approach to navigation, common interactive elements (drop-downs, radio buttons, data entry fields, etc.) and identifiable, custom iconography.
- When graphic personality is approved, document and create ACTT style guide to ensure all future design work and updates are shelved to continuity in all user interface elements, promoting consistency in color use and CSS values.
- When graphic personality is approved, create, document and deploy a proprietary Design System that will parallel the style guide and include instructions on proper use, as well as verbiage to instill the importance of adhering to these tools.
- Devise an integrated help system that in itself is easy to locate, use and remove from view until needed again by a user.
- Implement "LIGHT/ DARK" mode toggle switch.
- Addition of Data Review Administration section of the platform for administrators. This section will allow administrators to assign, track and report on Data Review "Campaigns."

PLATFORM - UX DESIGN FLOW

- REQUIREMENTS/INTENT**
 - Objective: Understand business and organizational objectives for better alignment, planning, manage resources and defining success metrics.
 - Actions:
 - Briefings, overviews
 - Stakeholder interviews
 - Outcome:
 - Vision and objectives
 - Success metrics
 - Project scope
 - Resource Plan
 - Timelines
- CURRENT STATE**
 - Objective: Map the current state of platform and identify context, product technology and users to identify strengths, weaknesses and areas of intervention.
 - Actions:
 - Existing user and client reviews/feedback
 - Competitor analysis
 - Outcome:
 - Competitor review
 - Existing user flows
 - Content structure
- FUTURE STATE**
 - Objective: Define the future state in terms of context, target user group, technology and user flows to create product roadmap.
 - Actions:
 - Ideation/Conceptualization
 - User journey mapping
 - Elimination and selection
 - Outcome:
 - Concept direction
 - Target user group
 - Desired user outcomes
- DESIGN**
 - Objective: Conceptualize and design various artifacts to realize and demonstrate Future State.
 - Actions:
 - IA/Content structure workshop
 - Platform storyboard/journey mapping
 - Layout and content design
 - Prototyping
 - Outcome:
 - Information architecture
 - User persona creation
 - Content structure
 - Task flows
 - Wireframes
 - Interactions
- TESTING**
 - Objective: Test and validate design artifacts for risk mitigation, deeper insights, better efficiency and redesign if needed
 - Actions:
 - User testing
 - Usability testing
 - Heuristics analysis
 - Outcome:
 - Findings and insights
 - Areas of intervention
 - Recommendations

SUCCESS MEASUREMENT

- Pre-Launch Testing: First test-ready beta iteration presented to a 1st-round test group of 6 to 10.
- Test results from round 1 test group analyzed. User input and results used to make necessary revision based on those results.
- Revised platform tested by 6 to 10 2-Round test group
- Success of user-experience based on the HEART method:

- H** **Happiness:** Focus on subjective aspects of the platform - satisfaction, graphic design, platform appeal and perceived usability.
- E** **Engagement:** Focus on the frequency, intensity and overall level of involvement with the platform
- A** **Adoption:** Focus on the initial uptake and continued use of the platform.
- R** **Retention:** Focus on the initial uptake and continued use of the platform over time.
- T** **Task Success:** Focus on how efficiently, effectively and successfully users accomplish key tasks using the platform.

PLATFORM DEVELOPMENT DRIVERS

What is driving this product's development?

ROT (Redundant, Obsolete and Trivial data) has become a significant and growing concern. Statistics garnered from Global Fortune 500 corporations have reported that more than 30% of their content (in volume) is ROT. Studies have revealed that a large percentage of worldwide companies underestimate the amount of ROT they have. ROT accumulation and inaction can lead to problems, such as:

- Increased storage costs... the loaded cost of storage can be several thousand/TB per year (overhead, backups, infrastructure, DR, etc.) not protected by the EU GDPR Privacy.
- May lead to high operating and maintenance expenses (resources, license renewals, maintenance, etc.) when stored in obsolete systems, and it may interfere with IT's application decommissioning strategies.
- Could represent legal risks and can lead to unwanted legal eDiscovery costs, which can be significant.
- Has the potential to represent regulatory compliance risks. For example, information protected by the EU GDPR Privacy Regulation.



DRIVING CLIENTS



THE TECHNICAL: WHAT THE PRODUCT DOES and HOW IT DOES IT

- Connect to various content sources within the infrastructure (File Shares, SharePoint, ECM systems, etc.).
- Index the metadata and the content.
- Apply analytics on that index: metadata patterns, named entities, classifications, semantic fields, etc.
- Identify ROT candidates within that content, using policy configuration settings.
- Enable authorized users to perform on that content the actions prescribed in the policies.
- Generate a legally defensible audit trail about these activities.



BARRIERS

What could prevent the product's complete success

ACTT currently leverages the data visualization tool POWER BI - this software takes data that has been scanned with ACTT and generates information graphics consisting of graphs, charts and header counts of pertinent information. ACTT does not have a data visualization utility coded into the platform. This devalues the application, and sets it below the perceived value of its competition. It is recommended that ACTT be developed to include its own data visualization system, that can be easily activated to provide customized information graphics based on scanned data that has been dispositioned with ROT categorization, as well as data review campaign statistics including reviewer file counts marked for deletion, marked for archive and marked for retention. It could also be activated to provide information graphics showing actual data review statistics, including length of review time per owner, data review WIP reports (Work In Progress) and completion results.

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CURRENT UI DESIGN (WORK IN PROGRESS)

