

» IBM Datacap

-**brief overview:** dashboard

Tina Adams: UX Co-Lead, Visual Design Lead

Rita Claar: UX Co-Lead

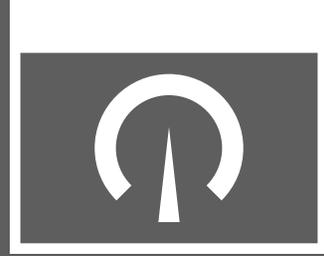


Where real improvement can be achieved by making major changes, the interface designer must balance the legitimate use of familiar paradigms, which ease the learning process, against the enhanced usability that can be attained by abandoning them.

~Jef Raskin



IBM ECM
Design Studio



Create a **useful at-a-glance dashboard** that is also **immediately actionable** for the user.

Currently our users do not have a dashboard.

A good dashboard provides a **large amount of data, visually, at-a-glance**, to allow the user to **make quicker and more informed decisions** and actions.

Dashboards break out data into 4 main forms:

- analytical
- strategic
- operational
- informational

We plan to address all main areas **giving the user what they need within 15 seconds**.

The user is desiring a higher level abstraction of data to allow them to:

- manage all aspects of the capture system **at a glance**
- **be notified** of impending problems
- resolve problems **proactively**
- visually **view overall system health**
- **highlight problems and exceptions** on the system proactively
- **define threshold values** on key metrics that can be used to provide proactive notifications
- **show only what is relevant**, in a logical sequence, allowing those with a need to know to deep dive into the data



Jennifer

Jennifer is an LOB Manager at a large insurance company.

monitors:

- task completion
- accuracy,
- team performance.

Jennifer's team works in 3 shifts due to the high volume of data input needed,

She needs to quickly know where processes and teams have challenges in order to immediately remediate problems.

she needs

A dashboard that monitors the processes I am responsible for, and alerts me when something in the process goes wrong.

process monitoring

- how long my current processes are taking
- total number of batches by state for each process
- see oldest batch by state for each process
- see a volume activity graph by day on a 24-hour, 7-day , and 12-month cycle
- alerted when a process cross a pre-set time threshold
- monitor the accuracy of automated classification

performance monitoring

- monitors my team's performance based on thresholds, and alerts me with potential issues
- typical task time monitoring
- see statistics for each person



Jennifer

Jennifer is an LOB Manager at a large insurance company.

monitors:

- task completion
- accuracy,
- team performance.

Jennifer received alerts in her inbox that 2 of her areas are either underperforming or have fallen under her threshold.

1. She will need to discern if it is an Operator or a system issue and resolve it quickly.
2. She will also need to see if there is a trend in underperformance and address the issue after she looks at all the variables.

system issue example: Team Member Bob's productivity has suddenly dropped. When Jennifer investigates, she sees that Bob's source, a scanner in a different location, was offline for several hours because of a power outage, so Bob was unable to process any new information during that time.



Jennifer

Jennifer is an LOB Manager at a large insurance company.

monitors:

- task completion
- accuracy,
- team performance.



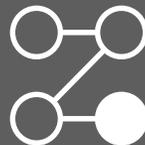
- 1 logs in to the system & checks her dashboard
- 2 at-a-glance she can detect anomalies
- 3 deep dives into data
- 4 identifies the problem
- 5 remediates the issue

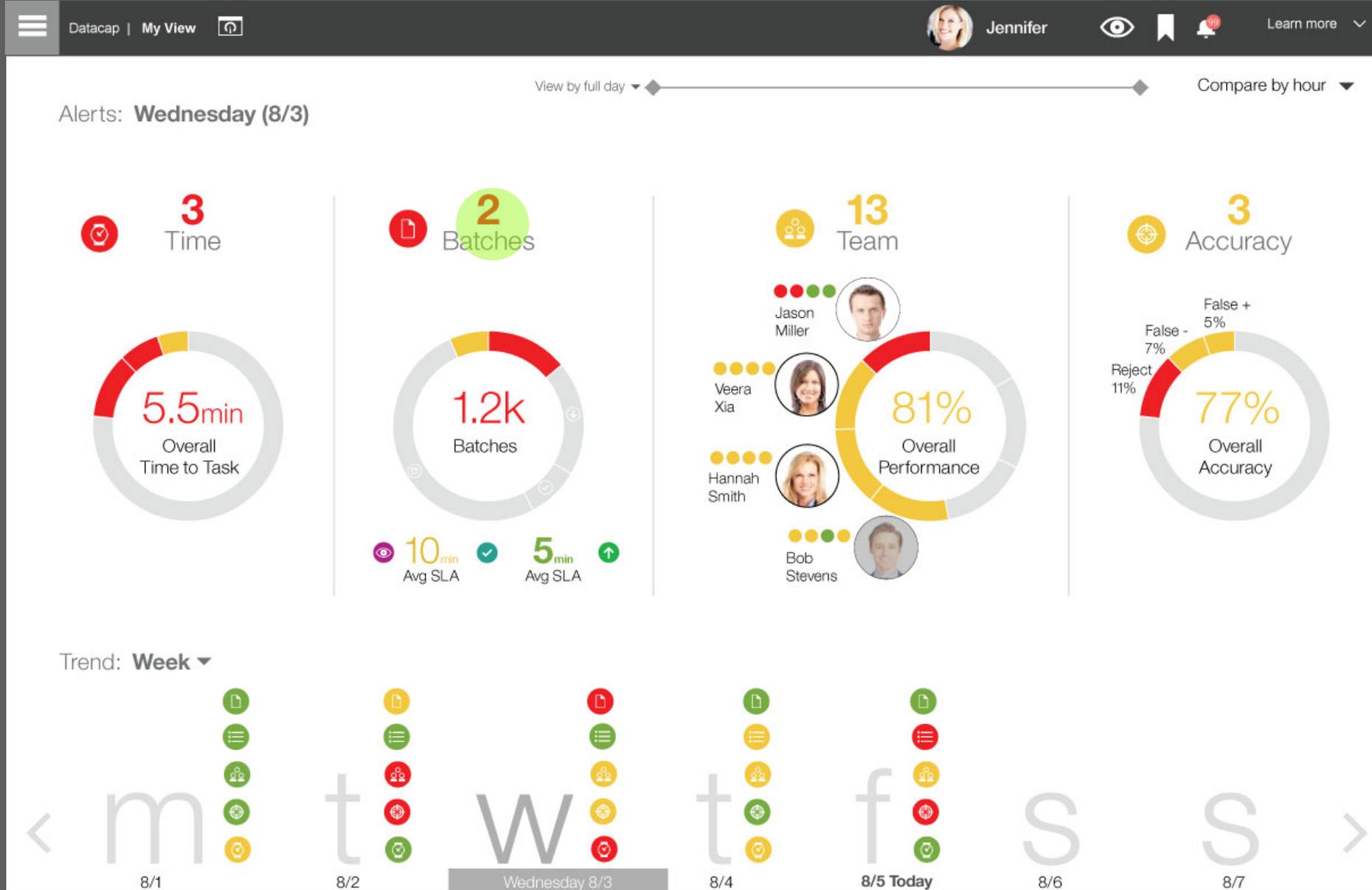


Jennifer

Jennifer is an LOB Manager at a large insurance company.

Let's take a look at this workflow in the UI, and how we presented Jennifer with her solution in **2 clicks**, in **under 15 seconds**.





Jennifer logs in and is presented with an aggregate of all the problem areas within the time frame she has set.

Jennifer sees that Time and Batches have critical issues, and that Team and Accuracy art in the warning zone.

main view: troubleshooting

Jennifer sees the critical fail 12 am on Upload.

Jennifer sees that there is a Note on the critical fail and she clicks it to see more info.

Jennifer sees:

- issue
- location
- operator (her team member)
- issue details

She sees that it has been resolved and she doesn't need to take action, and can report that the anomaly has been fixed.



main view: resolution

Jennifer does see that this device has been flagged (orange circle) in the past as having issues and can request the Dublin team to remove it from her sources in the future.

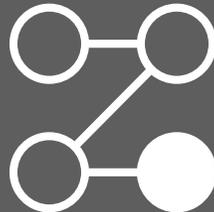




Jennifer

Jennifer is an LOB Manager at a large insurance company.

Let's take a look at Jennifer's other actions.





Jennifer

Jennifer is an LOB Manager at a large insurance company.

monitors:

- task completion
- accuracy,
- team performance.

Jennifer needs to evaluate her team on performance across the board, in order to write her yearly reviews and designate her top performer for a promotion.

1. She needs a high level, holistic view of the team.
2. She will also need to see individual performance to see if there is a trend.

team issue example: Team Member Bob's productivity has suddenly dropped. When Jennifer investigates, she sees that Bob has had multiple source issues that have unfavorably affected his overall performance metrics.



Jennifer

Jennifer is an LOB Manager at a large insurance company.

monitors:

- task completion
- accuracy,
- team performance.



- 1 logs in to the system & checks her dashboard
- 2 she clicks on her Team section
- 3 evaluates Team performance
- 4 evaluates individual performance
- 5 identifies candidate

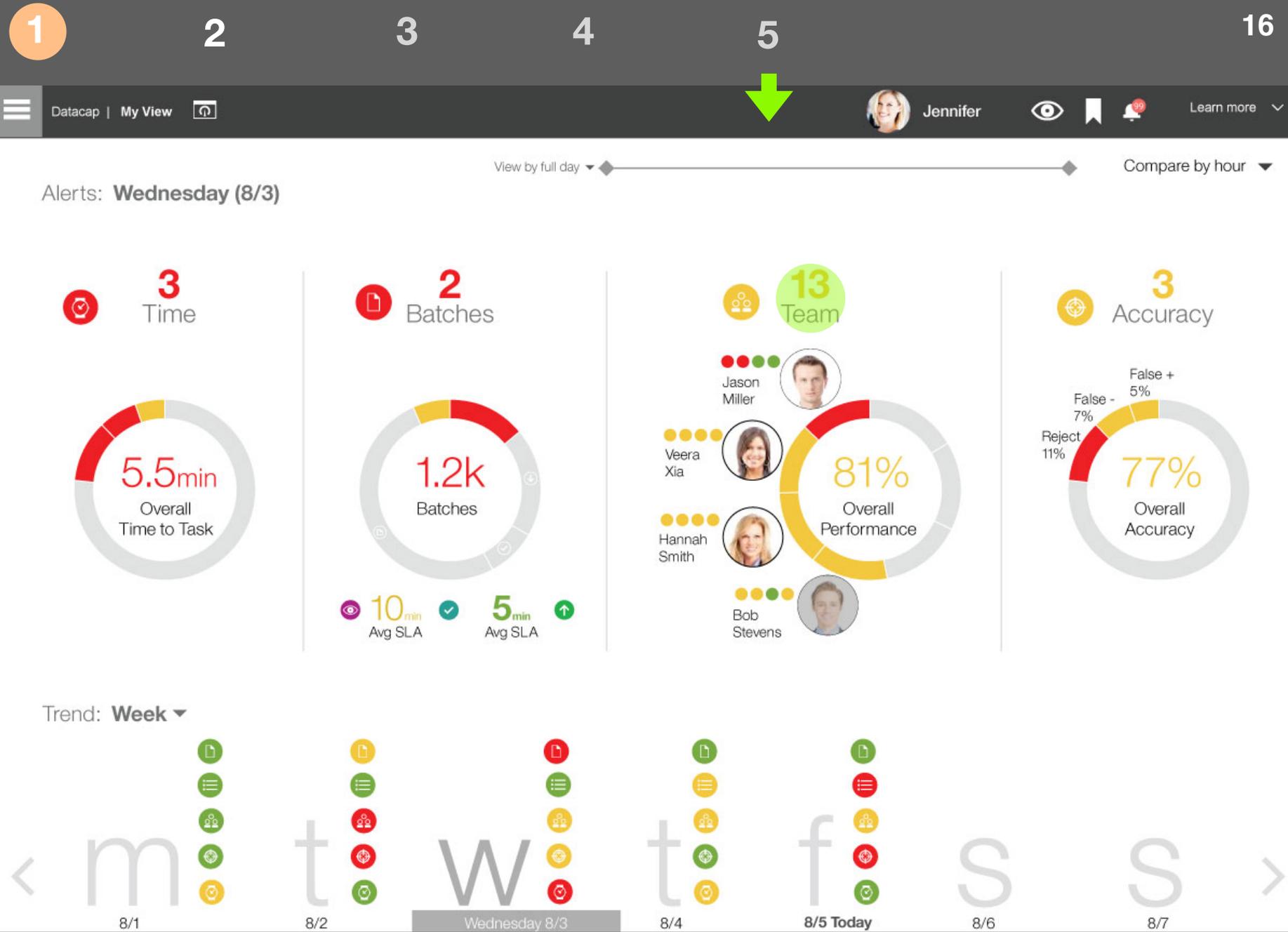


Jennifer

Jennifer is an LOB Manager at a large insurance company.

Let's take a look at this workflow in the UI, and how we presented Jennifer with her solution in **2 clicks**, in **under 15 seconds**.





Jennifer logs in and is presented with an aggregate of all the problem areas within the time frame she has set.

Jennifer can immediately see team and individual performance metrics for the time frame she has selected (24 hours).

She sees that 3 of the 4 members had an average shift, but Jason Miller had the most disparate performance.

She also sees that Bob is not logged in, as his shift has ended.

She clicks the **Team** section.

main view: evaluating

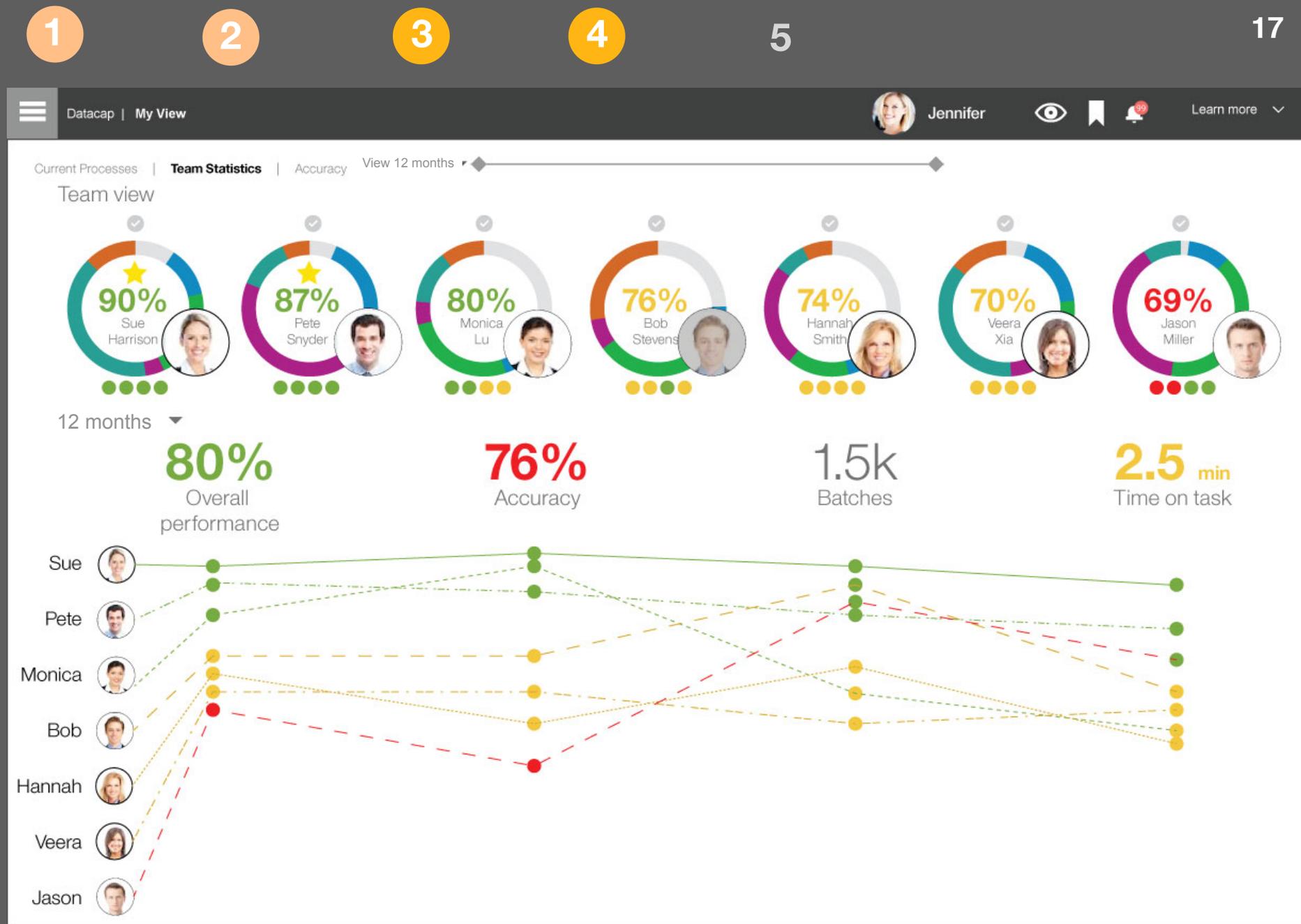
Jennifer can now see all of her reports and she adjusts the scale to 12 months.

Her team is arranged from overall top performers on the left and lower performers on the right. →

She can see their compared performance, based on 4 metrics;

- overall
- accuracy
- batches processed
- time on task

Jason immediately is designated as a lower Accuracy score compared to his Batch volume. She can address this with Jason directly.



main view: identifying

Jennifer clicks on her top performer, Sue to deep-dive into her metrics.

Jennifer can see Sue's yearly performance metrics on the left, and can view each Task facet if she wants metrics for each facet. Since Jennifer set her own thresholds, she knows that Sue really is a top performer.

Jennifer can feel confident that Sue will be the one who gets the promotion.



main view: identifying

1

2

3

4

5

Datacap | My View Jennifer    Learn more 

Current Processes | **Team Statistics** | Accuracy View by full day  Compare by hour 

Team view

Operator	Performance
Sue Harrison	90%
Pete Snyder	87%
Monica Lu	80%
Bob Stevens	76%
Hannah Smith	74%
Veera Xia	70%
Jason Miller	69%



Sue Harrison
Operator
Shift: 9-5

6 months 

95%  Overall performance	1.5k Batches	1.2 min Time on task
97%  Accuracy	9,995 Documents (avg 37/batch)	45,482 Pages (avg 3.5/doc)
33%  Volume	96% correct 2% false positive 1% false negative 1% rejects 1% incorrectly by Operator	97% correct <1% false negative <1% rejects <1% false positive <1% incorrectly by Operator

Jennifer can also click Sue's picture and be taken to Sue's dedicated page.

users need **relevant visual analytics surfaced only when needed**, to **detect issues in under 15 seconds**.



and the journey continues,
turning **analytics** into **immediate actions**.

