



JENNIFER NOONAJ

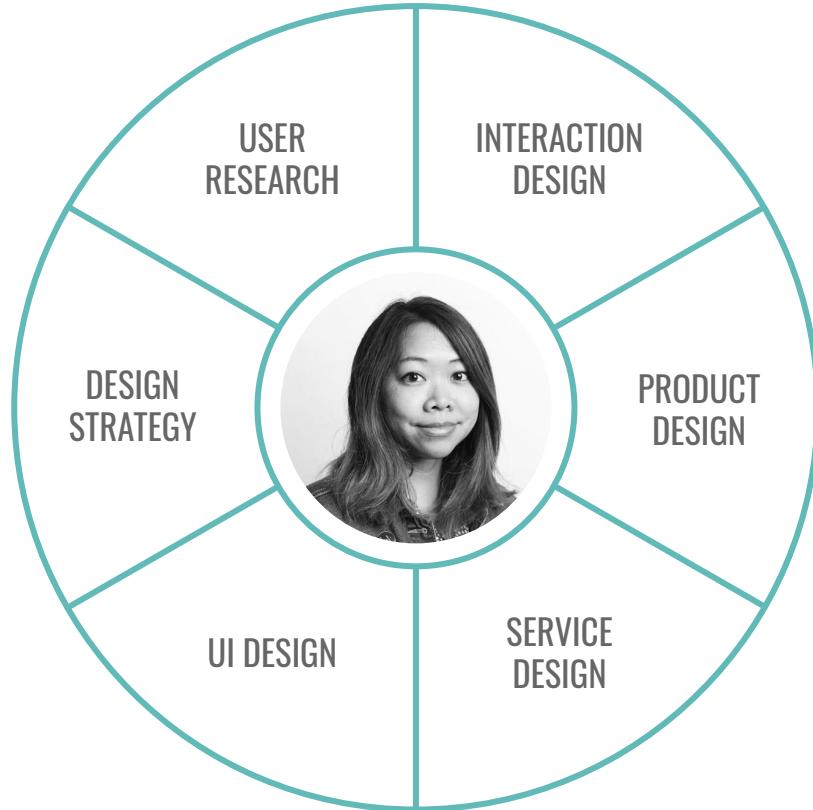
UX DESIGN PORTFOLIO

SELECTED SAMPLES

hi@actuallyjenn.com

SKILLS

I leverage design thinking in my work to help shape the development of products and services based on user needs. I have over nine years of experience designing user workflows, delivering delightful services, and crafting thoughtful interactions.



EXPERIENCE



Sample of the clients and companies I have worked with and for:



U.S. DIGITAL SERVICE



NATIONAL
INSTRUMENTS



SPEAKING

I love giving back to the design community. I do this in a variety of ways, like mentoring junior designers or sharing design best practices and templates for reuse. One of my favorite ways is storytelling and I've been fortunate to be a part of many conferences and workshops so far.



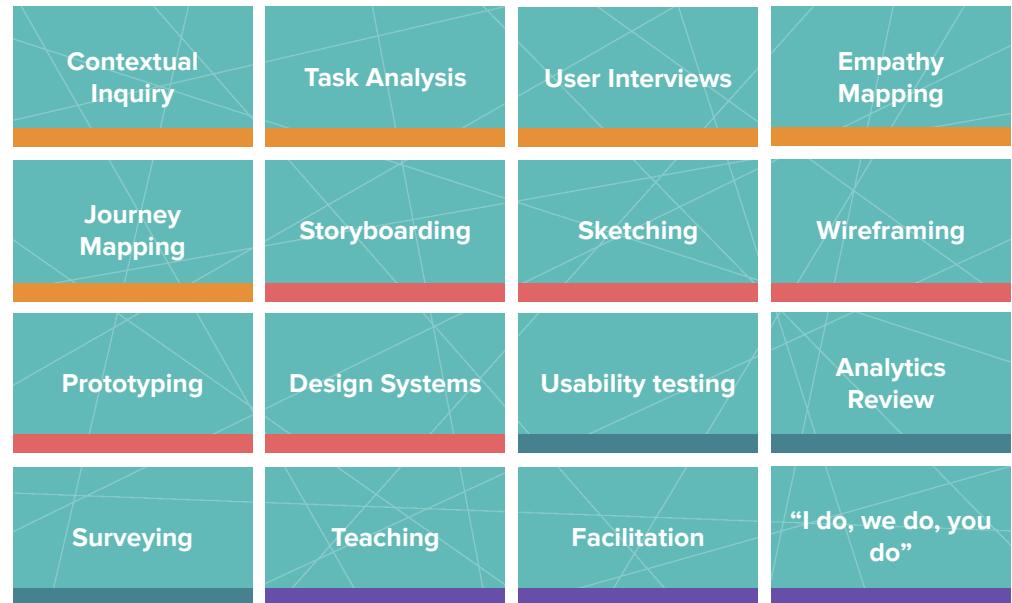
Watch me at the Digital Citizen Summit in Washington, DC on August 15, 2019 about UX principles I use when designing for government

Watch me at Fusion Conference in Charlotte, NC talking about my journey into civic tech

METHODS

I employ a variety of design methods to drive outcomes for the user, product, and organization. These methods are flexible and I choose my approach based on situational needs, adapting my design process to changing circumstances.

INSPIRATION | IDEATION | IMPLEMENTATION | LEADERSHIP



CASE STUDIES

I have worked with a multitude of clients and for a variety of companies. This is a selection of my most recent and relevant user experience design projects.

01



U.S. DIGITAL SERVICE

Government services. UX Design Lead - Partnered with various agencies to transform digital services across the government.

02

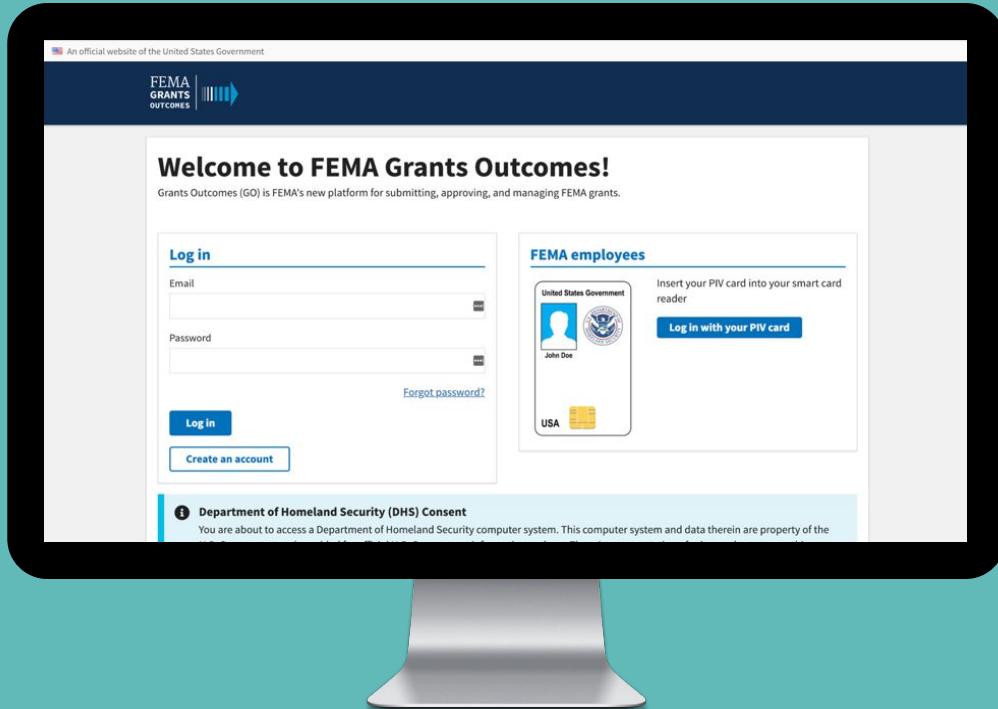


Virtual instrumentation. Senior Product Designer - Designed user experiences for creating UIs to measure and record test data.

03

charles SCHWAB

Financial services. Service Designer - Improved the database request process for an Infrastructure as a Service initiative.



UNITED STATES DIGITAL SERVICE

Date: 2018 - Now

Platform: Web, Mobile

Role: UX Design Lead

CHALLENGE

Getting access to government services is hard. It takes a long time to find the information you need for the specific service and, once you do, the information can be confusing.

PROJECTS

- Federal Emergency Management Agency (FEMA)
- Fish and Wildlife Service (FWS)
- Department of Energy (DOE)

GRANTS MANAGEMENT

UX LEAD

Product Design // Design Operations // Capacity Building

BACKGROUND

The Federal Emergency Management Agency (FEMA) helps people before, during, and after disasters. The agency provides funding, in the form of grants, to people preparing for or recovering from a disaster. FEMA awards and manages about 40 different types of grants using 10 different grant systems. In 2015, the agency started an [initiative](#) to consolidate their 10 existing grant systems into one. The existing systems were hard to maintain, didn't communicate with each other, and made it difficult for users to apply for and manage their grants.

When I joined the team, the project had been focused on gathering system and functional requirements with no development work started. Our USDS engagement consisted of a team lead, an engineer, a strategic analyst, and two designers.

UNDERSTAND

The team had two goals: to help FEMA deliver functionality quickly and build up the agency's skills and expertise for managing and supporting a user-centered, agile software development process. Within the first nine months, we designed, tested, built, and launched a small subset of features, helping fire departments across the US get equipment and hire and train firefighters. My role during this phase of work was to create design deliverables and coach the team on user-centered design best practices.

DESIGN

Initially, the team didn't have any buy-in for design activities so I worked on high-level wireframes based off of the system and functional requirements gathered first. We made the case for usability testing, conducted a set of them, and showed how they yielded disastrous results. It was at that point that our stakeholders came around to a different way of doing things and we were able to conduct user research for the first time on the project.

GRANTS MANAGEMENT // RESEARCH + DESIGN



Firefighters were in DC for an event so we spoke to them about their grant experience.

Alameda County Fire Department (ACFD)															
<p>Suburban, Northern California</p> <p>Population: 400,000</p> <p>Combination department, 300 active firefighters</p>															
<p>Organization information</p> <p>Fire department characteristics</p> <p>Community description</p> <p>Grant request information</p> <p>Background</p> <p>Equipment description <input checked="" type="radio"/></p> <p>Activity narrative <input checked="" type="radio"/> ✓</p> <p>Cost / benefit narrative <input type="radio"/></p> <p>Statement of effect <input type="radio"/></p> <p>Additional funding request <input type="radio"/></p> <p>Budget</p> <p>Assurances and certifications</p> <p>Section 5</p>	<h3>Equipment description</h3> <p>Add score</p> <ul style="list-style-type: none"> Does the applicant explain why they are unable to fund the project without federal assistance, and provide a clear description of how the critical functions of their organization will be affected? Does the applicant describe their efforts to secure funding from other sources, provide details on their operating budget, and/or discuss how similar projects are funded? <p>Recommendation</p> <div style="border: 1px solid #ccc; padding: 2px; width: fit-content;"> <input checked="" type="radio"/> Strongly agree <input type="radio"/> Agree <input type="radio"/> Neutral <input type="radio"/> Disagree <input type="radio"/> Strongly disagree </div> <p>Justification</p> <p>Answer</p> <p>Save score</p> <h3>Equipment summary</h3> <table border="1"> <thead> <tr> <th>Activity</th> <th>Number of entries</th> <th>Total cost</th> <th>Additional funding</th> </tr> </thead> <tbody> <tr> <td>Equipment</td> <td>5</td> <td>\$1,867,530</td> <td>\$367,530</td> </tr> </tbody> </table> <p>Grant-writing fee \$0</p> <h3>Equipment 1</h3> <table border="1"> <thead> <tr> <th>Equipment type</th> <th>Portable Radios (Input to P-25 Compliant, limited to number of AFG approved seated positions)</th> </tr> </thead> <tbody> <tr> <td>Detailed description</td> <td>Portable Radios (Input to P-25 Compliant, limit=25 compliant digital dual band portable radios,(ated to number of AFG approved seated positions)</td> </tr> </tbody> </table> <p>Number of units: 235</p> <p>Cost per unit: \$5,778</p> <p>The equipment will: Replace obsolete or damaged equipment that</p>			Activity	Number of entries	Total cost	Additional funding	Equipment	5	\$1,867,530	\$367,530	Equipment type	Portable Radios (Input to P-25 Compliant, limited to number of AFG approved seated positions)	Detailed description	Portable Radios (Input to P-25 Compliant, limit=25 compliant digital dual band portable radios,(ated to number of AFG approved seated positions)
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From the research, we created and iterated on designs for usability testing.

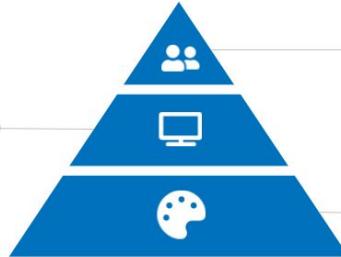
GRANTS MANAGEMENT // IMPLEMENTATION

As the team worked towards the first release, I established and formalized processes and best practices based on some the activities that were happening on the project. This included creating a design system and templates for user research and design. It was this bottom-up approach coupled with working with leadership that allowed the team to get buy-in for more design work.

Design maturity

Interface design

- Appreciates design's input for layout, interactions, and user flows
- User research is usability / validation of a specific section or flow
- Systems / business first

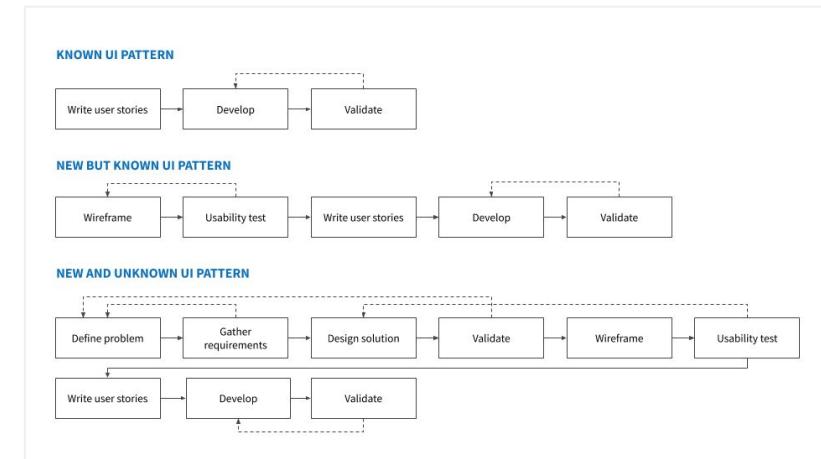


User-centric

- Design is seen as a way to solve problems
- Support for user research
- Users first - start with the user's mental model and built to that

“Make it pretty”

- Design is only visual - colors, images, fonts
- “The user interface should look like...”
- Systems first



DOWNLOADABLE TEMPLATES

[Participant Agreement and Consent Form](#)

[User Research Plan and Notes](#)

[Design Plan](#)

[Usability Plan and Notes](#)

GRANTS MANAGEMENT // COMPONENTS

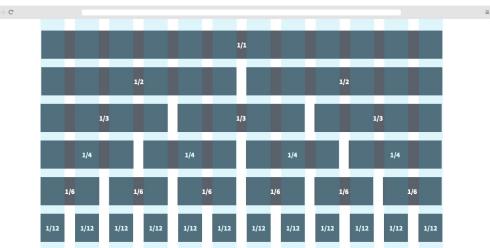
Grid

FEMA GRANTS OUTCOMES

MEASUREMENTS

Device	Baseline	Content Area	Header
Desktop	1440px	1340px	10px
Tablet	768px	668px	10px
Mobile	320px	290px	10px

DESKTOP (12 COLUMNS)



TABLET (6 COLUMNS)



MOBILE (4 COLUMNS)



Form controls

FEMA GRANTS OUTCOMES

TEXT INPUT

Label:

Label:

Label:

Text input focus:

Label:

Height error message: Success
Disabled

DROPODOWN

Label:

Label:

Label:

Label:

CHECKBOX

Label: Selected
 Unselected
 Focus + Selected
 Focus + Unselected
 Disabled

RADIO

Radio group: Selected
 Unselected
 Focus + Selected
 Focus + Unselected
 Disabled

FORM TEMPLATES

Name:
 Title:

Colors

PRIMARY

Color-primary #007bff ✓ AA	Color-gray-dark #33334d ✓ AAA
Color-primary-darker #00667c ✓ AA	Color-gray-lighter #e0f2f1 ✓ AAA
Color-primary-darkest #112233 ✓ AA	Color-white #fff7 ✓ AAA
Color-base #112233 ✓ AA	Color-gray-lightest #f9f9f9 ✓ AAA

SECONDARY

Color-primary-alt #007bff ✓ AA	Color-secondary #4d79a6 ✓ AA
Color-primary-alt-light #00667c ✓ AA	Color-secondary-lightest #f9f9f9 ✓ AAA
Color-primary-alt-dark #005566 ✓ AA	Color-secondary-light #e0f2f1 ✓ AA
Color-primary-all-dark #004455 ✓ AA	Color-secondary-dark #4d79a6 ✓ AA
Color-primary-all-light #005566 ✓ AA	Color-secondary-darkest #9b9b9b ✓ AA

TERTIARY

Color-gold #ffcc00 ✓ AA	Color-green #28a745 ✓ AA
Color-gold-lightest #ffcc00 ✓ AA	Color-green-lightest #77bb4a ✓ AAA
Color-gold-lighter #ffcc00 ✓ AA	Color-green-light #77bb4a ✓ AAA
Color-gold-light #ffcc00 ✓ AA	Color-green-medium #77bb4a ✓ AAA
Color-gold-dark #ffcc00 ✓ AA	Color-green-dark #33664d ✓ AAA

BACKGROUND

Color-gray-lightest #f9f9f9 ✓ AAA	Color-gray-light #e0f2f1 ✓ AAA
Color-gray-lighter #e0f2f1 ✓ AAA	Color-gray-medium #77bb4a ✓ AAA
Color-gray #77bb4a ✓ AAA	Color-gray-dark #33664d ✓ AAA
Color-gray-dark #33664d ✓ AAA	Color-gray-warm-dark #4d79a6 ✓ AAA
Color-gray-darkest #28a745 ✓ AAA	Color-gray-warm-light #77bb4a ✓ AAA
Color-gray-darkest #112233 ✓ AAA	Color-gray-cool-light #77bb4a ✓ AAA

SPECIAL STATE

Color-bl-default #007bff ✓ AAA	Color-focus #007bff ✓ AAA
Color-bl-hover #007bff ✓ AAA	Color-focus-hover #007bff ✓ AAA
Color-bl-active #007bff ✓ AAA	Color-focus-active #007bff ✓ AAA
Color-bl-focus #007bff ✓ AAA	Color-focus-focus #007bff ✓ AAA
Color-bl-disabled #007bff ✓ AAA	Color-focus-disabled #007bff ✓ AAA
Color-bl-pressed #007bff ✓ AAA	Color-focus-pressed #007bff ✓ AAA

Elements

FEMA GRANTS OUTCOMES

BUTTONS

Primary	Action	Hover	Active	Press	Disabled
<input type="button" value="Action"/>					

SECONDARY

Action	Action	Action	Action	Action
<input type="button" value="Action"/>				

TERtiary

Action	Action	Action	Action
<input type="button" value="Action"/>	<input type="button" value="Action"/>	<input type="button" value="Action"/>	<input type="button" value="Action"/>

ALERTS

Standard

- Success status** Lorem ipsum dolor sit amet, consectetur adipiscing elit.
- Warning status** Lorem ipsum dolor sit amet, consectetur adipiscing elit.
- Error status** Lorem ipsum dolor sit amet, consectetur adipiscing elit.
- Informative status** Lorem ipsum dolor sit amet, consectetur adipiscing elit.

Additional information if needed. This could explain a regulation or tell the user where to find more information. If this content is more than 3 lines, use a read more link to expand the content block.

SEARCH

Search

MODAL

Title goes here
 Description goes here.
 Example link

Something important to call out:

- Bullet item
- Bullet item
- Bullet item

 If you have important copy that needs to stand out, use bold.

Call to action

REVIEW PANEL

Collapsed accordion

Congress shall make no law respecting an establishment of religion, or prohibiting the free exercise thereof; or abridging the freedom of speech, or of the press; or the right of the people peaceably to assemble, and to petition the Government for a redress of grievances.

Bordered accordion

Congress shall make no law respecting an establishment of religion, or prohibiting the free exercise thereof; or abridging the freedom of speech, or of the press; or the right of the people peaceably to assemble, and to petition the Government for a redress of grievances.

Accordion

Bordered accordion

Congress shall make no law respecting an establishment of religion, or prohibiting the free exercise thereof; or abridging the freedom of speech, or of the press; or the right of the people peaceably to assemble, and to petition the Government for a redress of grievances.

EMBEDDABLE

Reveals the path to the current page

[Home](#) / [Level 1](#) / [Level 2](#) / [Level 3](#) / [Archive page](#)

LIST PAGINATION

For navigating multiple pages, typically in a content list or search results

I created a design system to make sure that everything we created was consistent and met accessibility standards.

GRANTS MANAGEMENT // PAGE LAYOUTS

The image displays a grid of 12 wireframe prototypes illustrating various page layouts for a grants management system. Each prototype includes a header with the 'FEMA GRANTS OUTCOMES' logo and a 'Section title' placeholder. A 'User Name' dropdown is present in the top right of most headers.

Row 1:

- Left Column:** A table-based layout showing three rows of items. Each row contains a 'Hose (Attack/Supply)' item with columns for Description, Quantity (15), Unit Price (\$700.00), Total (\$10,500.00), and Budget Class (Equipment). Buttons for 'Edit', 'More details', and a 'Show your review panel' button are included.
- Middle Column:** A form-based layout titled 'Form title <h1>'. It includes a text field labeled 'Answer', a large text field labeled 'Answer', a dropdown labeled '- Select -', and a 'Save and close' button.
- Right Column:** A table-based layout titled 'Page title'. It shows a single row of items with columns for Item (Portable radios, Helmets, Headlamps, Ladderfeet), Description (Motorola, 10-band, Orange, XL, Ultrabright, Model 3276, Rubber, super-grip), Budget class (Equipment), Quantity requested (5, 10, 10, 4), Item price (\$500.00, \$150.00, \$75.00, \$50.00), and Total (\$2,500.00, \$1,500.00, \$75.00, \$2).

Row 2:

- Left Column:** A table-based layout titled 'Page title' showing a single row of items with columns for Heading (Heading, Heading, Heading, Heading, Heading, Heading, Heading, Heading) and Answer (Answer line 1, Answer line 2, Answer line 3, Answer, Answer, Answer, Answer, Answer).
- Middle Column:** A table-based layout titled 'Outline Heading' showing a tree structure under 'Parent Item - Active State' with levels for Subsection, Subsection, Subsection, and Subsection.
- Right Column:** A table-based layout titled 'Page title' showing a single row of items with columns for Subsection title (Heading, Heading, Heading, Heading) and Answer (Answer, Answer, Answer, Answer).

Row 3:

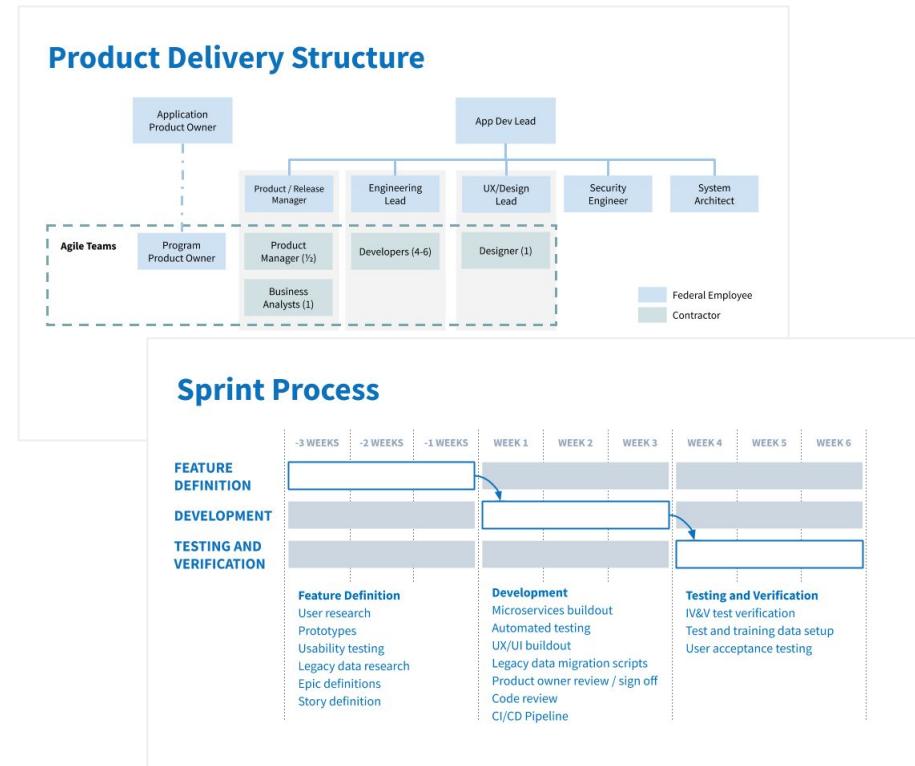
- Left Column:** A table-based layout titled 'Page title' showing a single row of items with columns for Heading (Heading, Heading, Heading, Heading, Heading, Heading, Heading, Heading) and Answer (Answer, Answer, Answer, Answer, Answer, Answer, Answer, Answer).
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- Right Column:** A table-based layout titled 'Page title' showing a single row of items with columns for Subsection title (Heading, Heading, Heading, Heading) and Answer (Answer, Answer, Answer, Answer).

GRANTS MANAGEMENT // STRATEGY

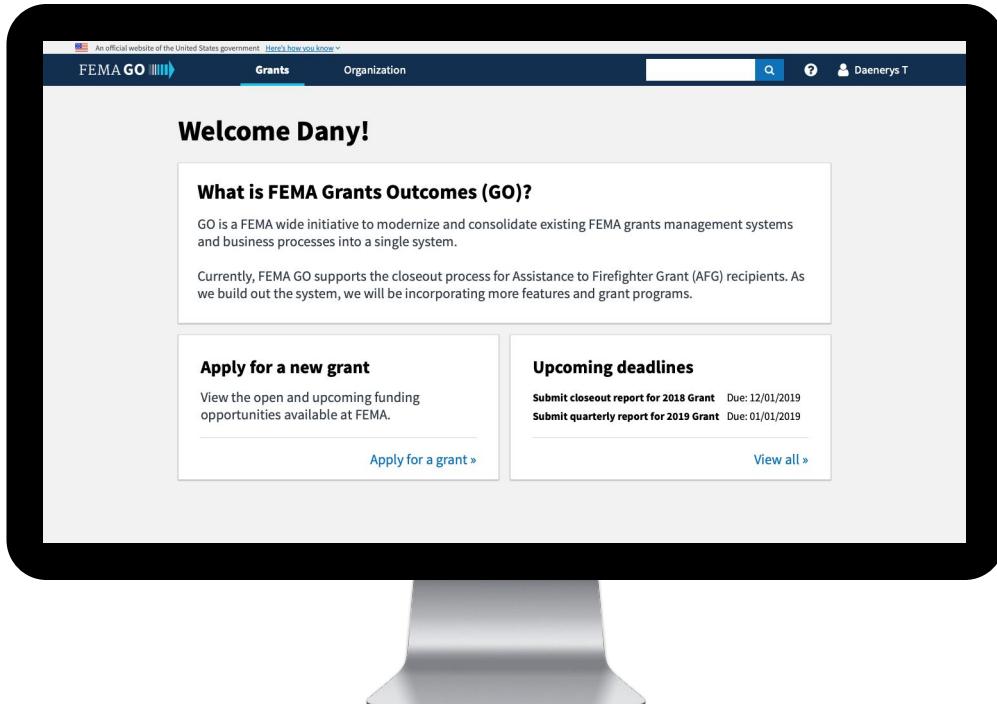
Eventually my role shifted from day-to-day design work to working with leadership to create a user-centric culture on the program. There were three initiatives the team worked on:

- Facilitate alignment across FEMA to clarify the program's mission, purpose, and focus
- Understand user needs to build the right thing and simplify the process for users to apply for, manage, and receive grants
- Increase product delivery quality and speed through better processes and improved methods throughout the project

As part of this work, I facilitated interviews with leadership and key stakeholders, documented and proposed process and organizational structure improvements, and continued to mentor and coach individuals on the team.



GRANTS MANAGEMENT // OUTCOMES



The program is now regularly releasing functionality to users. Firefighters and state officials are able to apply for grants to help them fund initiatives to train staff and mitigate disasters. The program is also in the process of hiring a design lead, which will actually be the first of its kind in FEMA. During one of the last usability sessions I conducted, one of the participants said:

“This whole thing has restored my faith in the government. This is such a good program, and it’s an example that government is doing something right.”

SINGLE WINDOW PROJECT

SYSTEM INTEGRATION LEAD

Stakeholder Management // Bureaucracy Hacking // Capacity Building

BACKGROUND

In 2014, there was an [executive order](#) signed to streamline the import and export process for products into the US. It establishes a “single window” where industry and the international trade community can electronically submit their data to various government agencies for imports and exports.

The system, Automated Commercial Environment or ACE, allows agencies to obtain data quicker, process cargo faster, and identify unsafe, dangerous or prohibited shipments. Customs and Border Protection (CBP) maintains ACE and has been working with 18 core agencies to integrate with their system and share trade data. Fish and Wildlife Service (FWS) is the last agency to fully integrate with the system and has had issues doing so. USDS was asked to help facilitate the integration between the FWS and CBP systems.

UNDERSTAND

When I joined the project, I spent the first two weeks getting to know every stakeholder—their understanding of the project, goals and motivations, and frustrations and pain points so far. What I found through that research was that there were both a lack of resources and expertise on the project that prevented work from getting done. FWS also already had their own trade declaration system, called eDecs, for trade filers to declare wildlife imports and exports.

DESIGN

I quickly realized that there needed to be some initial alignment between all of the stakeholders at the two agencies before the team could move forward. I facilitated a workshop to level-set project expectations and create momentum on this project that had been stalled. We got into a cadence of working sessions where I worked with the team to identify the product owner. Once the product owner was identified, we worked together to define the system requirements and develop user stories.

SINGLE WINDOW // OUTCOMES

The team is currently working on integration testing and towards an initial production release in April. More information about this project can be found at <https://www.cbp.gov/trade/automated>.

FWS Form 3-177 and Implementation Guide Field Mapping

#	Form 3-177 Field	Record Identifier	Data Element	Entry or Line?
1	Date of Import/Export	PG13	Arrival Date	Entry
2	Import/Export License Number	PG14	LPCO Type 1 = FWL	Entry
3	Indicate One: Import	PG14	LPCO Number	Entry
4	Port of Clearance	10	ACE Business rule	Entry
5	Purpose Code	PG01	Intended Use Code, see Appendix 1: FWS Purpose Code to CBP Intended Use Code Mapping	Entry
6	Customs Document Number(s)	10	Enter File Code	Entry
7	Name of Carrier	10		
8	Air Waybill or Bill of Lading Number - Master	20		
	Air Waybill or Bill of Lading Number - House	23		

U.S. Customs & Border Protection
U.S. Department of Homeland Security

Search Results | Entry Details | Intensive/Document Required | Referrals | Redelivery

Details for Entry

Pending

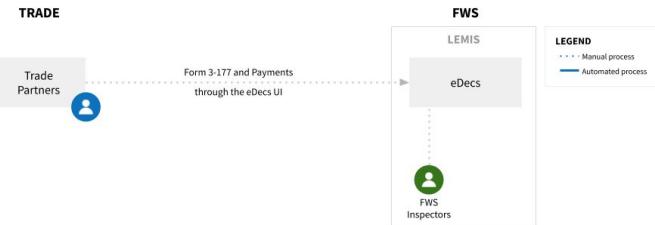
Entry Details | Parties | Bill Details | PGA Data | Business Rule Hits | **PGA Reviews** | Referrals | Intensive/Document Required

Version #	By	Program	Line #	PGA Line #	Review	Reasons
1		FWS	L1.51	1	UNDER REVIEW	

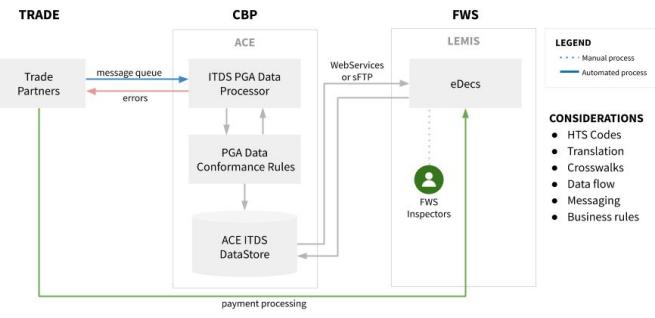
ITDS Entry Version: 1
Review: UNDER REVIEW
Entry Line Number: L1.51
PGA Line Numbers: PGA Line #1

Create Date: 10-09-2019 06:35:55
Reviewer Agency: FWS
Program Code: FWS
Reviewer Info:
Reviewer Comments:
Public Comments:

Current FWS Process



Future Single Window Process



NORTH AMERICAN ENERGY RESILIENCE MODEL (NAERM)

SPRINT LEAD

Research // Interviews // Recommendations

BACKGROUND

USDS has many engagement models when working with our agency partners. For our work with the Department of Energy, we conducted a discovery sprint. The purpose of a discovery sprint is to quickly explore a pressing agency challenge, partnering agency personnel with a small cross-functional team of USDS engineers, designers, and subject matter experts. By the end of the sprint, the team should have a clear understanding of the problem, recommendations for how to achieve agency goals, a suggested path forward, and potentially a team capable of assisting that effort.

The USDS team worked with the Office of Electricity on NAERM - a resilience model that aims to end-to-end map the North American energy grid for energy planning and situational awareness.

UNDERSTAND

Over the course of two weeks, the team interviewed about 40 individuals involved with the project to get a sense of the problems they were facing. The three top items we learned were:

- There are so many influences that impact our energy grid but everything is largely done independently with little coordination.
- Project team members were spread across the organization, in different offices that had differing priorities.
- There was a lot of energy expertise on the project, but limited expertise in building or developing digital products.

OUTCOMES

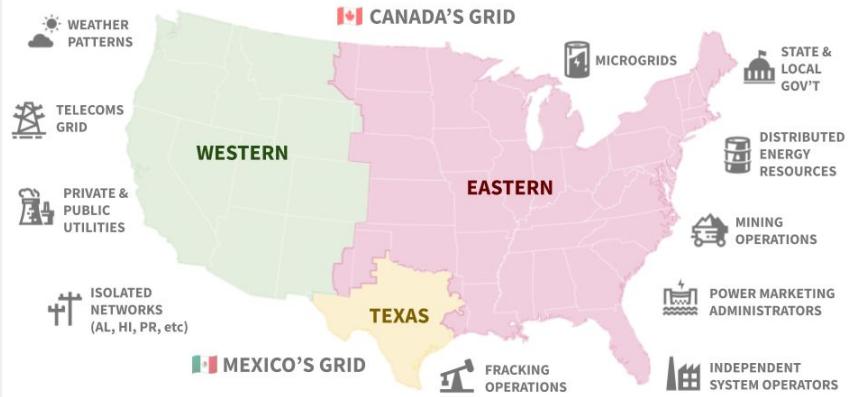
The team presented their findings and recommendations to project leadership. The NAERM team has used the result of the sprint to help prioritize their work and get the needed resources for the team.

NAERM // FINDINGS

NAERM ORG STRUCTURE



THE US POWER GRID

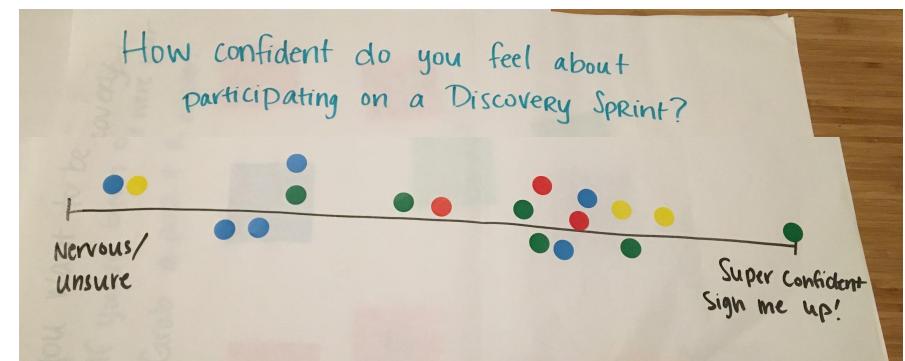
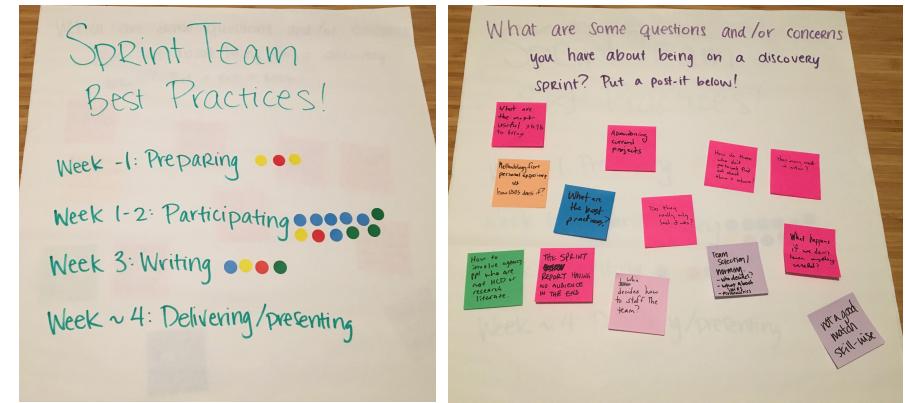


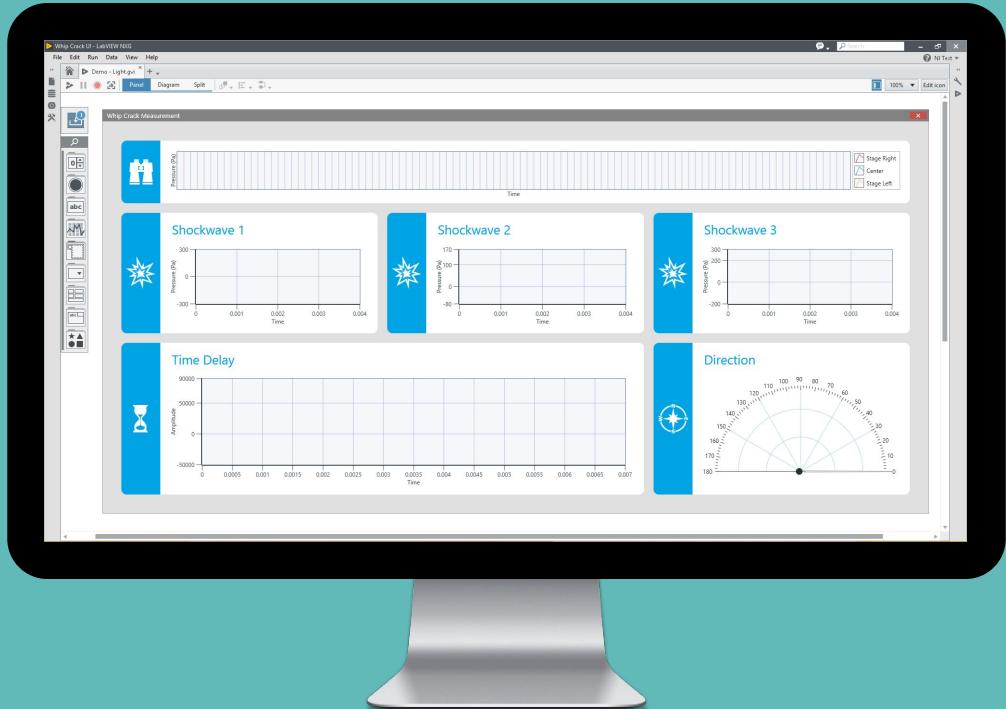
NAERM // SPRINT BEST PRACTICES

After the discovery sprint, I did a session sharing out best practices and lessons learned for anyone who was interested in being on one in the future. I opened the session with three questions to help me understand what information would be most useful for the audience:

- How confident do you feel about being on a discovery sprint?
- What are some questions and / or concerns you have about being on a discovery sprint?
- Why do you want to be on a discovery sprint? If you've been on one, what were your goal(s)?

I wanted the session to be participatory so I encouraged the audience to ask questions at any time and to jump in with their own experiences. I started the session with background details about discovery sprints and then covered how to prepare for the sprint, how to participate in the sprint, and then how to write the sprint report and delivering and presenting to the agency.





Date: 2015 - 2018

Platform: Desktop

Role: Senior Product Designer

CHALLENGE

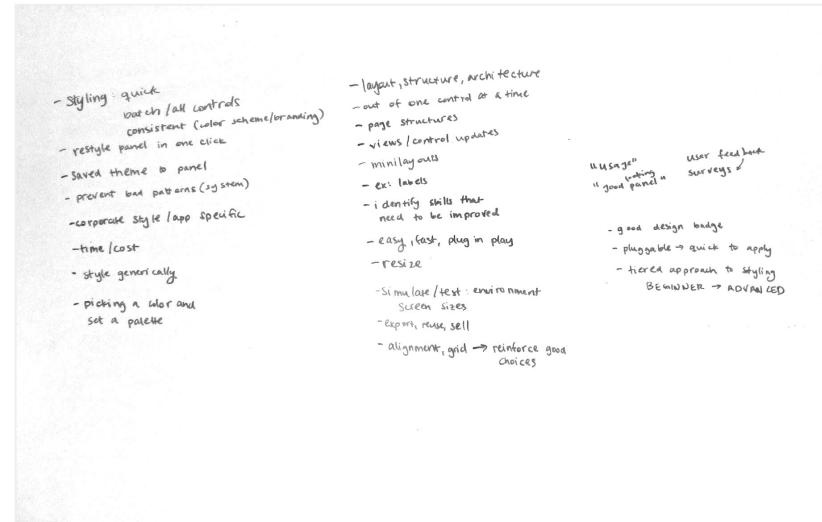
Scientists and engineers want to create UIs to measure data and display their results from their hardware devices with minimal effort.

WHAT I DID

- User observation
- Stakeholder interviews
- Competitive research
- User journey maps
- Low-fidelity wireframes
- High-fidelity wireframes
- Prototypes
- Usability testing

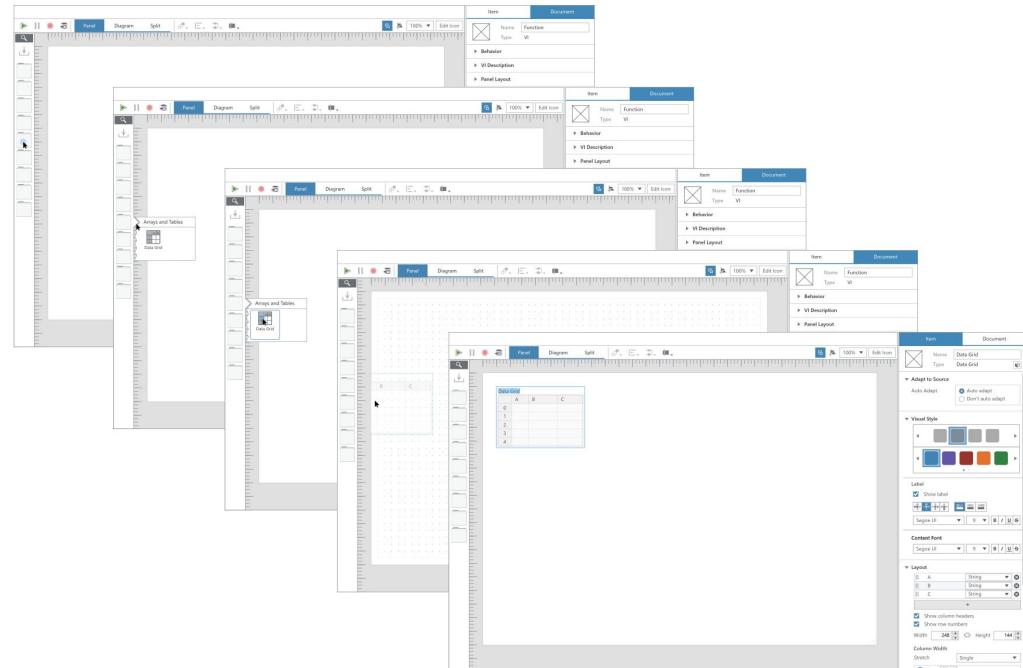
UNDERSTAND

LabVIEW NXG is a system-design platform that is based off of the original LabVIEW software, first created in the late '80s. Users can quickly drag-and-drop components to create UIs to test and measure data. Since we were launching this new product, the team spent a good amount of time on user research upfront to really understand our user's goals. We were able to take our research results and story map features and functionality to develop a longer term product roadmap.

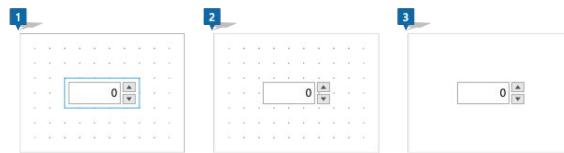


DESIGN

Since our users wanted to spend minimal time and effort creating UIs, I focused on ensuring that we had easy to drop controls that required little to no configuration as well as building in layout tools into the editor.



GRID PLACEMENT CONTROLS



1 Selected Control with Grid Shown

The control and its padding fits to the grid. There is 4px padding around each control. The bounding box fits to the edge of the control padding.

2 Unselected Control with Grid Shown

The control is offset from the grid by 4px since the control padding fits to the grid.

3 Unselected Control with Grid Hidden

The control is shown on the front panel in normal view, without the grid shown.

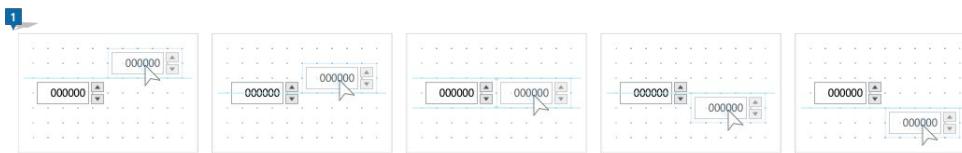
ALIGNMENT CONTROLS

1

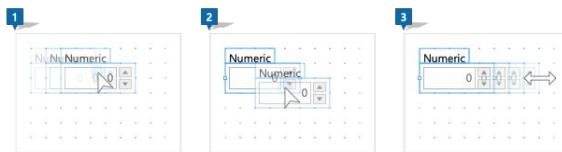
Alignment Overlays

Each control has alignment overlays generated based on mouse tolerance to nearby controls. As the user moves a control on the canvas, it snaps to existing controls and alignment overlays should display.

The controls should be able to snap to the grid and also to any alignment areas for each control.



MANIPULATION CONTROLS



1 Default Behavior

By default, the control moves in 16px increments to align with the grid. A control can be moved in 1px increments by hitting the arrow keys. SHIFT + arrow keys moves the control in 16px grid increments. When a control is moved using the arrow keys on the keyboard it cannot be inserted into a container or sublayout.

2 Placing and Moving

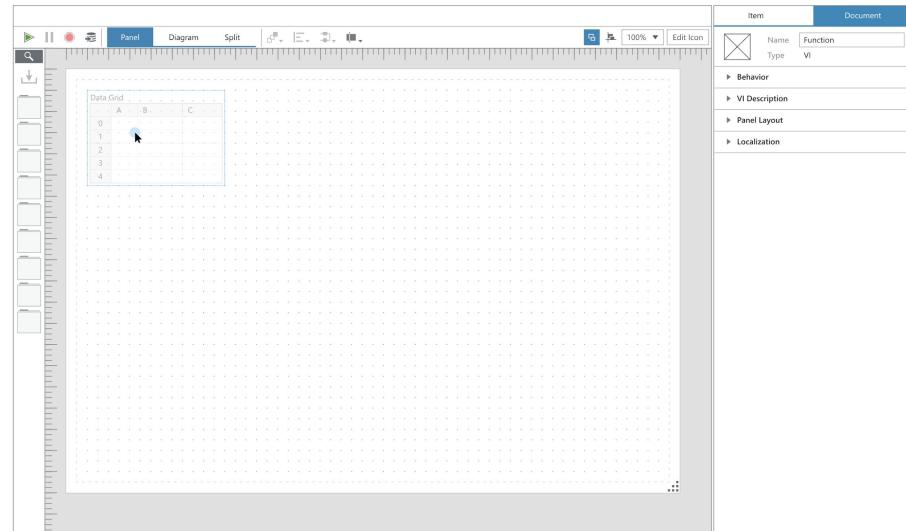
Placing a control and moving a control should function the same way so the user can see the control that is being placed. The control, on both actions, will be semi-transparent and is the actual, default size of the control. The area where the control appears indicates the area on the canvas that the control will place in if the user releases it.

3 Sizing

When the user clicks on the control to size it, the sizing handles appear. As the user sizes a control, the control snaps to align to the grid. This means that controls grow or shrink in increments of 16px when being directly manipulated. To size the controls so it is an off-grid size, the user can specify the size via the right rail or toggle to turn off snapping to the grid.

OUTCOME

I would work with our product manager to bucket designs into the product releases, which were on a six month cycle. For the first LabVIEW NXG release in May 2017, the product feedback we received for the UI creation functionality was positive: users stated that they were able to create UIs quicker based on the built-in features our team had designed.



Infrastructure as a Service Offerings

The Schwab team will be implementing a new virtual server provisioning environment that automates server delivery to offer quicker and more complete server resources.

- Enables full stack provisioning in an efficient and secured manner
- Increases agility and consistency in server provisioning
- Simplifies the infrastructure model for applications
- Reduces complexity and quantity of non-standard (manual) changes in the environment
- Ensures traceability of servers and applications provisioned through our selected vendor software

Our Offerings

The Schwab Infrastructure as a Service offerings provide fully functional, scalable virtual servers to support the development, validate, and deployment of your applications. Development servers will only be available from our data center in Phoenix for the first phase of the project. Production servers will be available in our two data centers in Phoenix and Chandler. The team is working on delivering these offerings by the end of the year. When launched, they can be accessed through Request Center.

- Windows Server 2012 Standard
- Red Hat Enterprise Linux 6.6
- Red Hat Enterprise Linux 7.1

Questions?

Contact the IaaS team at cloudcore@schwab.com.

charles SCHWAB

Date: 2014 - 2015

Platform: Desktop, Web, Mobile

Role: Service Designer

CHALLENGE

Internal Schwab clients need to request infrastructure for their projects but did not use the current process and would go through other channels to get resources.

WHAT I DID

- User interviews
- Design sprint
- User journey maps
- Service blueprint
- Prototypes
- Usability testing
- Training materials

UNDERSTAND

I conducted contextual inquiries with our existing users to understand the current state of the process. Customers were going outside of Schwab to purchase infrastructure (databases, servers, storage, etc). Many of our existing customers did not like the current process because there was no transparency, every request was ad hoc, and nothing was standardized.

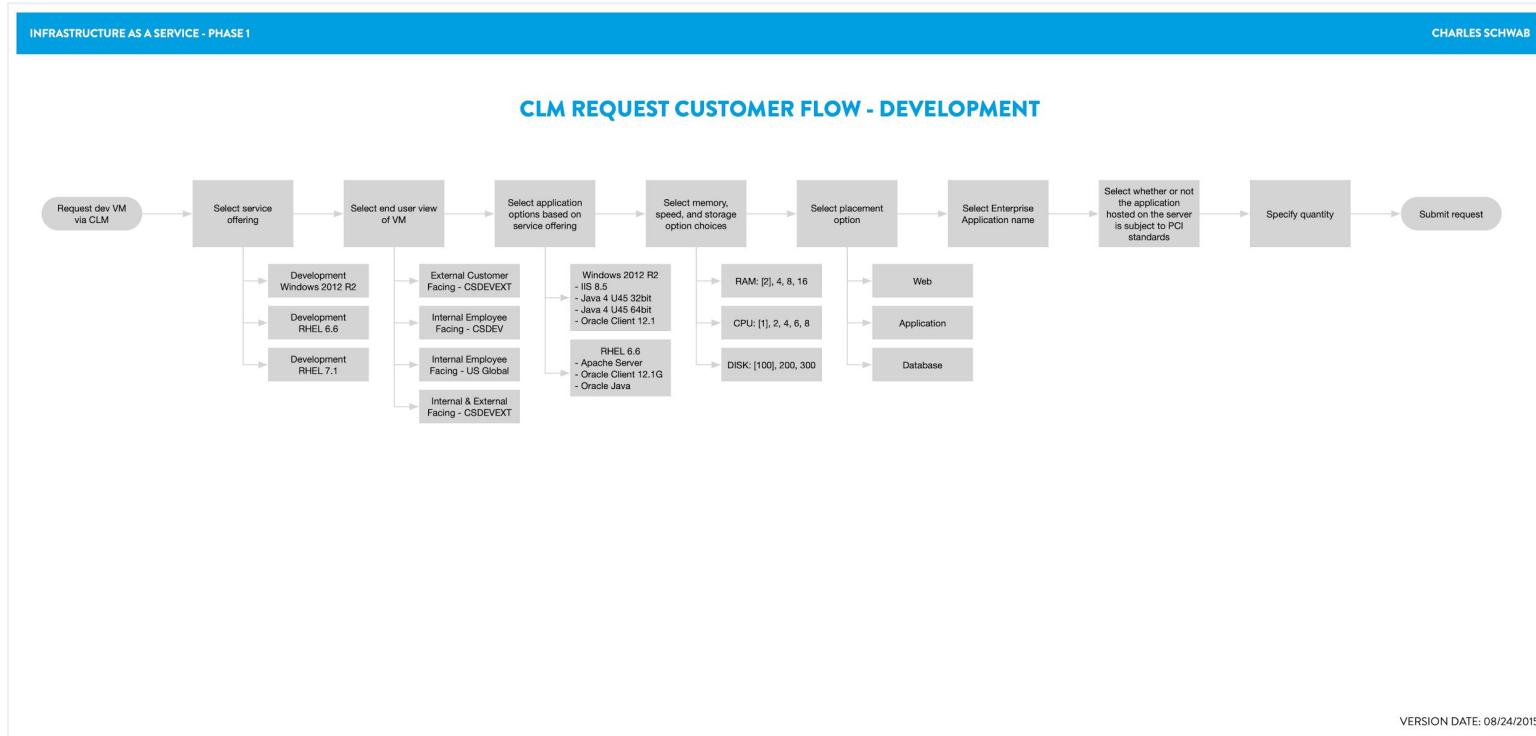


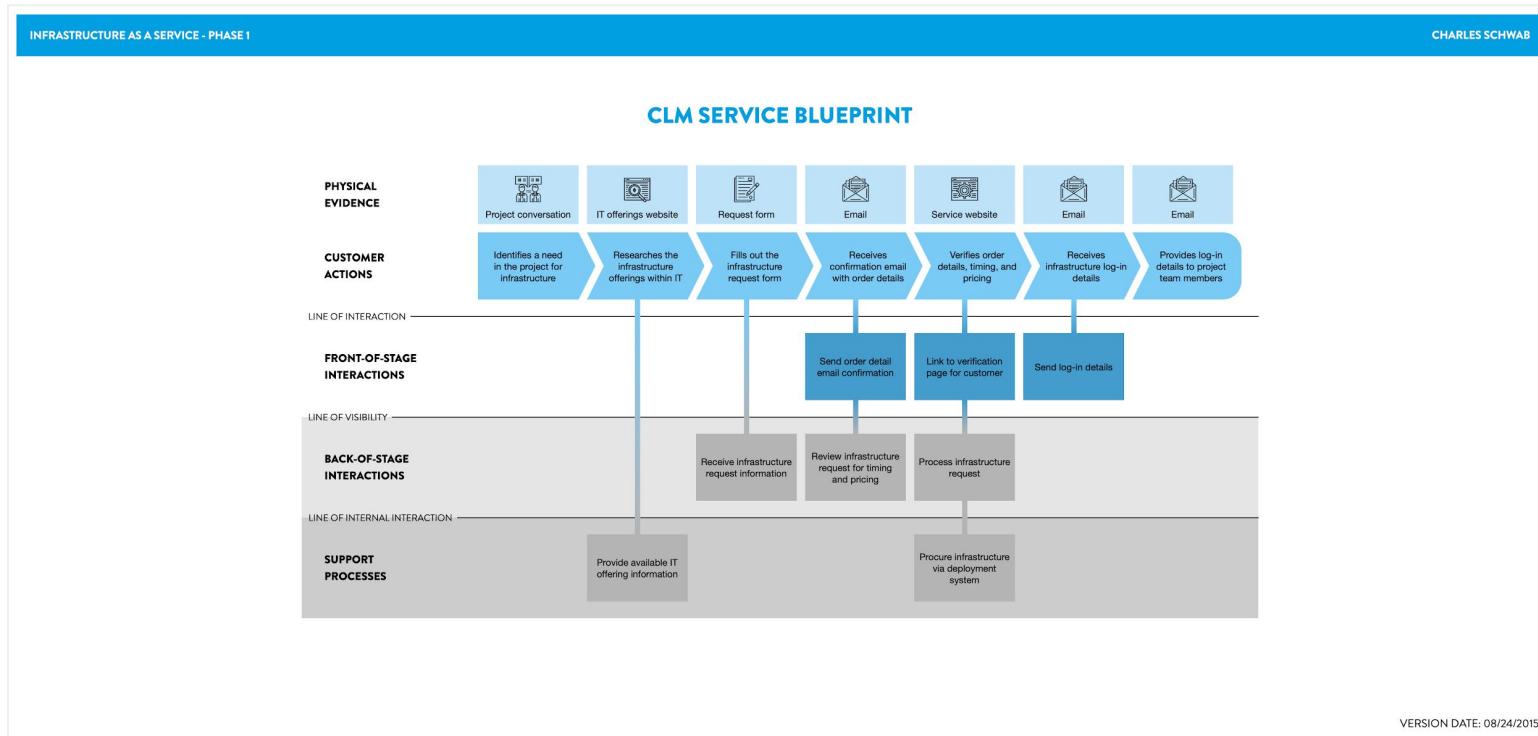
IDEATE + DESIGN

The research helped to create a current state service blueprint which showed a lot of gaps and areas for improvements. Customers I spoke to also revealed that they wanted ordering infrastructure to be as simple as ordering something on Amazon. Based on these insights, I facilitated a week long workshop where the team got together and brainstormed service solutions.

SERVICE SPRINT!

MONDAY Frame	TUESDAY Identify	WEDNESDAY Create	THURSDAY Prototype	FRIDAY Test
<ul style="list-style-type: none">Understand the service strategyRecruit and coordinate participants for testing	<ul style="list-style-type: none">Ideate on service solution	<ul style="list-style-type: none">Converge on the service blueprint	<ul style="list-style-type: none">Create necessary prototype artifacts (screens, service scripts, etc)Prep for testing	<ul style="list-style-type: none">Conduct field tests with participants using the prototypeLook for patternsDocument resultsRepeat prototype and test as needed





Service Blueprint for the Request Process

PROTOTYPE

Once the service blueprint was drafted, I worked with IT to understand the technologies that could support the service. The team spun up a request system to support the process we created and I ran through the service with some of our existing clients.

The screenshot shows the Charles Schwab My Cloud Services interface. At the top, there's a navigation bar with 'My Cloud Services' and tabs for 'Catalog' and 'My Resources'. Below this is a search bar labeled 'Search Offerings' and a 'Catalog' section header. Under 'All Offerings 4', there are three main items listed: 'RHEL 6.6', 'RHEL 6.6 w Apps', and 'Windows 2012 R...'. Each item has a small icon, a name, a 'No Cost' badge, and a 'BASELINE CONFIGURATION' section. The 'RHEL 6.6' configuration includes 1 Server (1 CPU, 2 GB Memory, None Extra Disks), running OS C-RHEL6-2015w25_VG_P. The 'RHEL 6.6 w Apps' configuration includes 1 Server (1 CPU, 2 GB Memory, None Extra Disks), running OS Redhat Enterprise Linu x 6.6. The 'Windows 2012 R...' configuration includes 1 Server (1 CPU, 2 GB Memory, None Extra Disks), running OS Windows 2012 R2 Standard. On the left side, there's a 'FILTER' sidebar with checkboxes for 6.6, Cloud Services, Linux, R2, RHEL, and Windows. A 'Clear Filters' button is also present.

OUTCOME

After making adjustments to the process and service blueprint based on the testing of the service, I created training materials and collateral to help roll the service out. The process that originally took about 2-weeks was now done in a matter of days and the team reported that all infrastructure requests are now being processed by them.



Thank you for contacting Schwab Oracle support. To help complete your request in a timely manner, please use the guidelines below when requesting support.

Emergency, production issue?	Non-emergency incident?	Need work done?	General Oracle question?	Want to join in the Schwab Oracle fun?
Call ITO at 877-977-5789.	Go to Jumphost: Remediate Under Applications, select Incident Management and then select New Incident. Fill out the form and click Submit. ce.oracle.db2.support under TIS for the Assigned Group.	Request Schwab Oracle Support below through RequestCenter. We currently have three different type of requests we support to get database work done.	Send an email to dist list Critical.Engineering.Oracle.Database . This is the only valid contact email for Schwab Oracle support.	Join our Schwab Oracle User Group which can be found at Jumphost: 50409 .

Using RequestCenter to Request Schwab Oracle Support

Support Request  Select this option to request support for database maintenance services on existing systems. All requests for database work on new systems, and/or very large work efforts, should be processed with a Project Service Request (PSR). If you already have a PSR, please have Project Manager open a Work Request against it. Open a Request for Support >	Access Request  Select this service to request access, or to make changes or delete existing access to Access Manager administered Oracle, SQL or DB2 LUW databases. This is currently limited to a small number of databases. For databases not administered by Access Management, please use the Support request form . Open a Request for Access >	Consultation Request  Select this service if you require a general consultative with the Oracle / DB2 team. The consultation is for nc emergency, architecture reviews and design or database engineering inquiries. Open a Request for Consultation >
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[View your open RC requests and their associated SSRs in one place >](#)



THANK YOU



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