

IBM December

Update Left Nav for Cosmos (+ Eventually NOVA)
Iteration 4
Version 1

November 10, 2016

FFPO

OM's are pulling for bringing the left nav back because of Box's new UI, so I started work on how we could improve our current left nav from the pro's and cons of both the left nav and subway map options we have.

Overall I tried to make it simpler and easier for the user to understand how each tab worked, if it is re-editable or not, and point them in the right direction of action.

*I have not made many edits to other parts of the page, but I understand changes will need to be made if this is the path we choose.

IBM Cloud eDiscovery

MattersCustodiansTemplatesReportsTasks

ilgadmin

Data Request Name Goes Here Bel...

Matter Name

Last Saved 10/09/2016, 10:21 am

Refine Request

Definition phase

DefineIdentifyPreserveRelease

DefinitionIdentificationPreservationReleaseCompletion

ActionsDeleteSave DraftIdentify

Select Criteria

Define Text FilterCustodians

Date Created (Based on UTC time zone)

If no date is specified (start, end, or both), then the request spans across all possible dates.

Start Date:

End Date:

Data Type (required)

You must select at least one type.

All Data Types

Archives: Mail archives, ZIP, TAR

Images: JPG, GIF, PNG

Miscellaneous: Other data

Programming: Java, C++, Python, CSS

Images: JPG, GIF, PNG

Miscellaneous: Other data

Multimedia: Animation, sound, music

Presentation: PowerPoint

OpenOfficeMiscellaneous: Other data

0.0 Issues with Subway Map Nav a

1 The 3 layers of tabs (+subway map) is confusing. it is unclear which one is clickable, how they are different and no real distinguishing factor on what the user is supposed to do on this page.

2

IBM Cloud eDiscovery

MattersCustodiansTemplatesReportsTasks

ilgadmin

Data Request Name Goes Here Bel...

Matter Name

Last Saved 10/09/2016, 10:21 am

Expand Details

Save & Close

Refine Request

Identification phase

Defined

Identify

Preserve

Released

Defined

identification

Preservation

Release

Completion

Preserve

Viewing Version:

Blah Blah Blah (Current)

Identified Data

Total items: 38 /36.67 MB estimate

Enter custodian name

Viewing by: Count

Custodian	Data Composition
<input checked="" type="checkbox"/> Custodian 11	
<input checked="" type="checkbox"/> Custodian 55	
<input checked="" type="checkbox"/> Custodian 6	
<input checked="" type="checkbox"/> Custodian 4	
<input checked="" type="checkbox"/> Custodian 14	

Data Types

☒ Archives

☒ Images

☒ Miscellaneous

☒ Multimedia

☒ Presentation

☒ Programming

☒ Spreadsheets

☒ Word Processing

☒ Search Exceptions

☒

0.0 Issues with Subway Map Nav b

1 The 3 layers of tabs (+subway map) is confusing. it is unclear which one is clickable, how they are different and no real distinguishing factor on what actions the user is supposed to do on this page.

New Data Set

Define

Identify

Preserve

Release

Save Draft

Preview

Delete

Publish

Initial Hold Notice for L-128

Expand Details

Last Saved: 00:00

Define

3

Actions

Delete

Export

Identify

2

Clear

Select Criteria

Define Text Filter

Custodians

Date Created (Based on UTC time zone)

If no date is specified (start, end, or both), then the request spans across all possible dates.

Start Date:

2

End Date:

2

Data Type (required)

You must select at least one type.

☐ All Data Types

☐ Archives: Mail archives, ZIP, TAR

☐ Images: JPG, GIF, PNG

☐ Miscellaneous: Other data

☐ Programming: Java, C++, Python, CSS

☐ Images: JPG, GIF, PNG

☐ Miscellaneous: Other data

☐ Multimedia: Animation, sound, music

☐ Presentation: PowerPoint

☐ OpenOfficeMiscellaneous: Other data

1.0 Option 2 - Define with Left Nav

1

Left nav is broken up into: “Define”, “Identify”, “Preserve”, and “Release”

2

“Identify” button is blocked out until information is filled in on page where you are allowed to move to next page.

*NOTE: If we end up using the left nav option, we need to figure out a better way to prioritize the action (ex: Identify) button

3

*NOTE: The tabs in main section could also revert back to accordian style like in build. Just from personal experience in the build, I often forget about what’s in the other tabs when displayed like this. Accordians seems to be better in this regard, would love some user testing.

New Data Set

Define

Identify

Preserve

Release

Save Draft

Preview

Delete

Publish

Initial Hold Notice for L-128

Expand Details

Last Saved: 00:00

×

Define

Actions ▾

Delete

Export

Identify

Select Criteria

Define Text Filter

Custodians

Clear

Date Created (Based on UTC time zone)

If no date is specified (start, end, or both), then the request spans across all possible dates.

Start Date:

11/13/2016

2

End Date:

11/23/2016

2

Data Type (required)

You must select at least one type.

☐ All Data Types

☒ Archives: Mail archives, ZIP, TAR

☐ Images: JPG, GIF, PNG

☐ Miscellaneous: Other data

☐ Programming: Java, C++, Python, CSS

☐ Images: JPG, GIF, PNG

☐ Miscellaneous: Other data

☐ Multimedia: Animation, sound, music

☐ Presentation: PowerPoint

☐ OpenOfficeMiscellaneous: Other data

1.1 Define with Left Nav - Done

1 After information is filled in, “Identify” button is filled blue and is now active.



Define



Identify



Preserve



Release



Save Draft



Preview

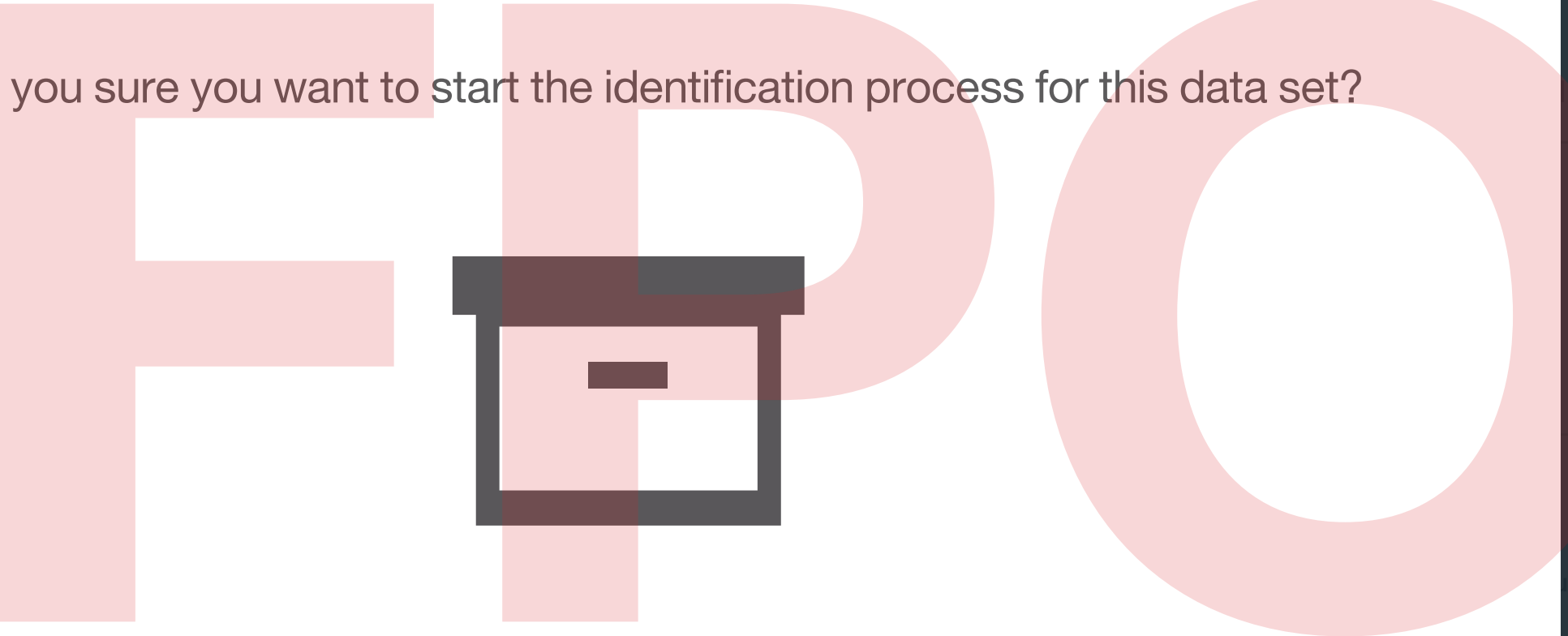


Delete

Publish

Start Identifying

Are you sure you want to start the identification process for this data set?



You are about to identify a data set containing 0 custodians.
The system will automatically generate a list of custodians based on the owners and collaborators of the files returned in the search.

Cancel

Identify

1.3 Confirm Define Stage

1

“Start Identifying” modal pops up to let user know they are about to start Identification process.

**NOTE: Does this mean that once they click “Identify” they can no longer edit their “Define” page? Aren’t there pages during the process where once you confirm you can’t re-edit them?*



1.4 Hover state for tab that can't be re-edited

1 User is able to hover over “lock” icon if they are unsure what it means.

*NOTE: Is Define a tab that should be locked?

Define

tooltip

1

Preserve

Release

Save Draft

Preview

Delete

Publish

Identify

Preserve

Viewing Version: Test Data Set (Current) ▼

Identified Data

No Exceptions

Total items: 38 /36.67 MB estimate

Enter custodian name

Viewing by: Count ▼

☐ Custodian

Data Composition

▼

☐ Custodian 11

☐ Custodian 55

☐ Custodian 6

☐ Custodian 4

☐ Custodian 14

Data Types

☐ Archives

☐ Images

☐ Miscellaneous

☐ Multimedia

☐ Presentation

☐ Programming

☐ Spreadsheets

☐ Word Processing

☐ Search Exceptions

☐

New Data Set

1

Define

Identify

Preserve

Release

Save Draft

Preview

Delete

Publish

Initial Hold Notice for L-128

Expand Details

Last Saved: 00:00

×

Identify

2

Preserve

Viewing Version:

Test Data Set (Current)

Identified Data

No Exceptions

Total items: 38 /36.67 MB estimate

Enter custodian name

Viewing by: Count

Created On:

Start Date: 06/17/2016 09:00 UTC

End Date: 06/18/2016 02:00 UTC

Custodian

Custodian 11

Custodian 55

Custodian 6

Custodian 4

Custodian 14

Data Composition

Data Types

Archives

Images

Miscellaneous

Multimedia

Presentation

Programming

Spreadsheets

Word Processing

Search Exceptions

1.5 Identify Nav

1

User can see that tabs that are finalized and can't be edited will have the "lock" icon next to it on the left nav.

2

Once user fills out information on "Identify" tab, they click on "Preserve" button to move on to the next step.

*NOTE: Is Identify a tab that should be locked?



Define

Identify

Preserve

Release

Save Draft

Preview

Delete

Publish

Preserve

Actions ▼

Export

Release

Release All

1

Viewing Version:



Test Data Set (Current) ▼

Identified Data

No Exceptions

Total items: 38 /36.67 MB estimate

Viewing by: Count ▼

Created On:
Start Date: 06/17/2016 09:00 UTC
End Date: 06/18/2016 02:00 UTC

<input type="checkbox"/> Custodian	Data Composition
<input type="checkbox"/> <u>Custodian 11</u>	<div></div>
<input type="checkbox"/> <u>Custodian 55</u>	<div></div>
<input type="checkbox"/> <u>Custodian 6</u>	<div></div>
<input type="checkbox"/> <u>Custodian 4</u>	<div></div>
<input type="checkbox"/> <u>Custodian 14</u>	<div></div>

Data Types

- ☐ Archives
- ☐ Images
- ☐ Miscellaneous
- ☐ Multimedia
- ☐ Presentation
- ☐ Programming
- ☐ Spreadsheets
- ☐ Word Processing
- ☐ Search Exceptions
- ☐

1 Once user finishes filling out info on “Preserve” tab, they can click on the “Release All” button to move on to the next tab.

*NOTE: Is Preserve a tab that should be locked?

Actions

End Date: 06/18/2016 02:00 UTC

Viewing by: Count ▼

☐ ☒ System Files

*NOTE: Is Release a tab that should be locked?