Resource Tracking and Documentation

Sample designs for a system that tracks resources and creates documents.

Document Creator Design

PROJECT SUMMARY

These designs are a part of a significantly larger ongoing project spanning over 3 years to update a current client's system. The major function of the system is to record and keep track of resources. These designs represent one moving part of a complete overhaul of the current system based on previously recorded user feedback via user interviews and observations of current system use.
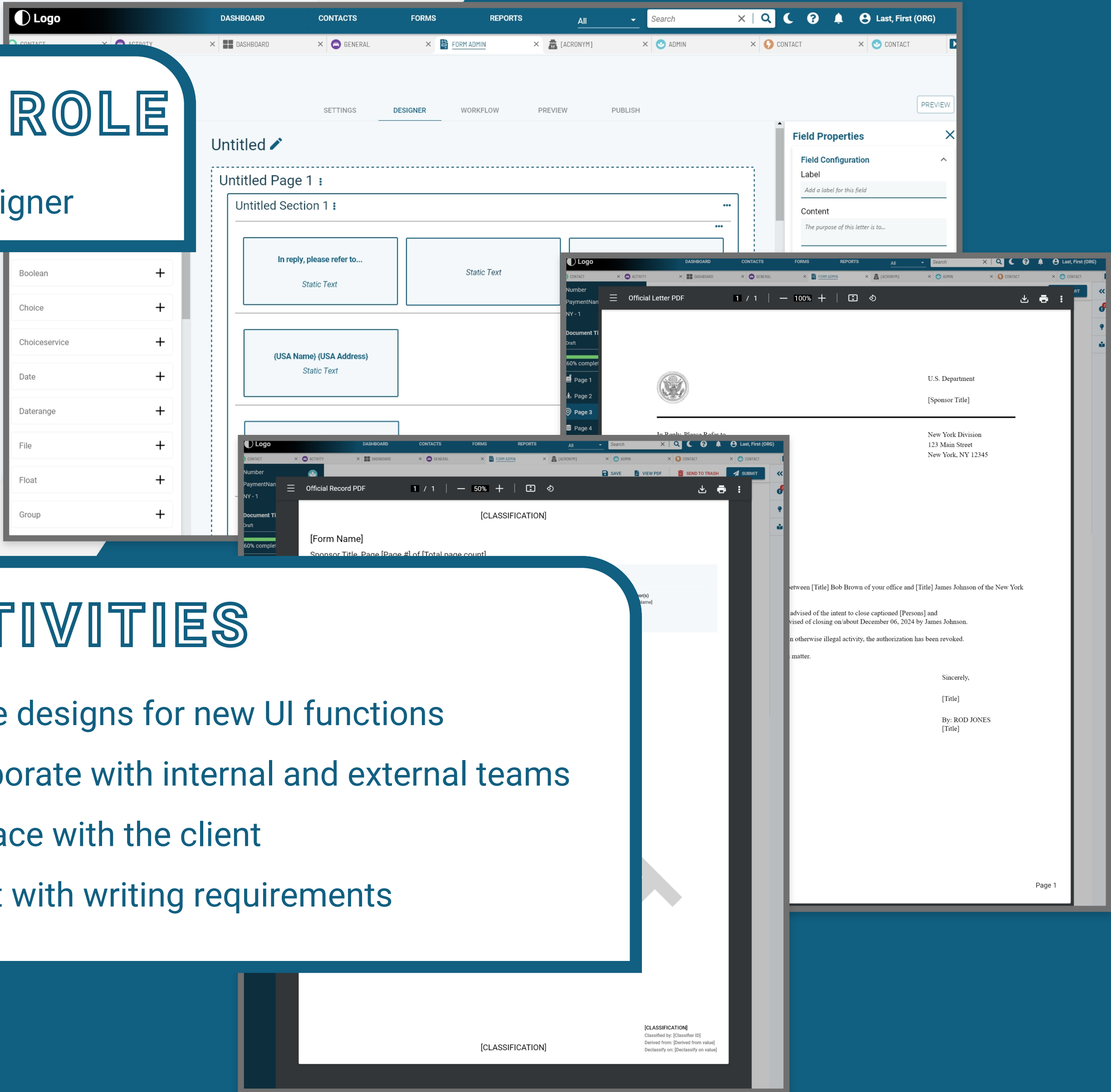
The first design displays how an admin could create the logic, layout, and function of a document. The other two provide an idea of how a document might look after admin configuration, a user fills in fields, and the document is rendered as a PDF. These designs in particular show two different types of documents rendered as PDFs.

MY ROLE

UX Designer

ACTIVITIES

• Create designs for new UI functions

• Collaborate with internal and external teams

• Interface with the client

• Assist with writing requirements

CONTACT   ACTIVITY   DASHBOARD   GENERAL   FORM ADMIN   [ACRONYM]   ADMIN   CONTACT   CONTACT

Admin > Forms > Test

Edit Form

Test
Status: Draft

SETTINGS   DESIGNER   WORKFLOW   PREVIEW   PUBLISH

PREVIEW

EXISTING ATTRIBUTES | NEW ATTRIBUTES | FORM ELEMENTS

Search

Address ➕

Approval ➕

Boolean ➕

Choice ➕

Choiceservice ➕

Date ➕

Daterange ➕

File ➕

Float ➕

Group ➕

Untitled ✏️

Untitled Page 1 ⋮

Untitled Section 1 ⋮

In reply, please refer to...	Static Text	Static Text
Static Text		

{USA Name} {USA Address}

Static Text

{Date}

Static Text

Dear {USA Name}

Field Properties ✕

Field Configuration ⌃

Label

Add a label for this field

Content

The purpose of this letter is to...

Style

○ Heading

○ Subheading

○ ✓ Success

○ ⓘ Info

○ ⚠ Warning

○ ⊘ Error

◉ Default

⬤ Hide

⬤ Hide on review

⬤ Hide on export

Business Rules ⌃

ADD BUSINESS RULE

3

[CLASSIFICATION]

[Form Name]

Sponsor Title, Page [Page #] of [Total page count]

Serial Number [Serial number - blank if not serialized]	**Serialization Date** [Date - blank if not serialized]		
Contact [Contact Name]	**Office** [Office Location]	**Author** [Display Name]	**Co-Author(s)** [Display Name]
Drafted Date [Date]	**Group** [Group]		

[Page Name]

[Section Name]

[Label]	(U)	[Value]
[Label]	(U)	[Value]
[Label]	(U)	[Value]
[Label]	(U)	[Value]
[Label]	(U)	[Value]
[Label]	(U)	[Value]
[Label]	(U)	[Value]
[Label]	(U)	[Value]
[Label]	(U)	[Value]
[Label]	(U)	[Value]
[Label]	(U)	[Value]

[CLASSIFICATION]

Classified by: [Classifier ID]
Derived from: [Derived from value]
Declassify on: [Declassify on value]

[Client Organization]

[Client Title]

In Reply, Please Refer to
[Information]

New York Division
123 Main Street
New York, NY 12345

November 11, 2024

John Smith
[Title]
Northern District of New York
100 Center Street
New York, NY 12345

Re: Rocky

Dear Daniel Smith:

The purpose of this letter is to confirm contact between [Title] Bob Brown of your office and [Title] James Johnson of the New York Division regarding the captioned [Persons].

On December 05, 2024, [Title] Bob Brown was advised of the intent to close captioned [Persons] and the reasons for closing. [Title] Rocky will be advised of closing on/about December 06, 2024 by James Johnson.

If the [Title] had been authorized to participate in otherwise illegal activity, the authorization has been revoked.

Thank you very much for your assistance in this matter.

Sincerely,

[Title]

By: ROD JONES
[Title]

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