

# UX Design

## Directory Service

Michael Martel  
v1.1 / 2018-07-17

Digital Collaboration Division, Chief Information Officer Branch  
Treasury Board of Canada Secretariat / Government of Canada

Division de la collaboration numérique, Direction du dirigeant principal de l'information  
Secrétariat du Conseil du Trésor du Canada / Gouvernement du Canada

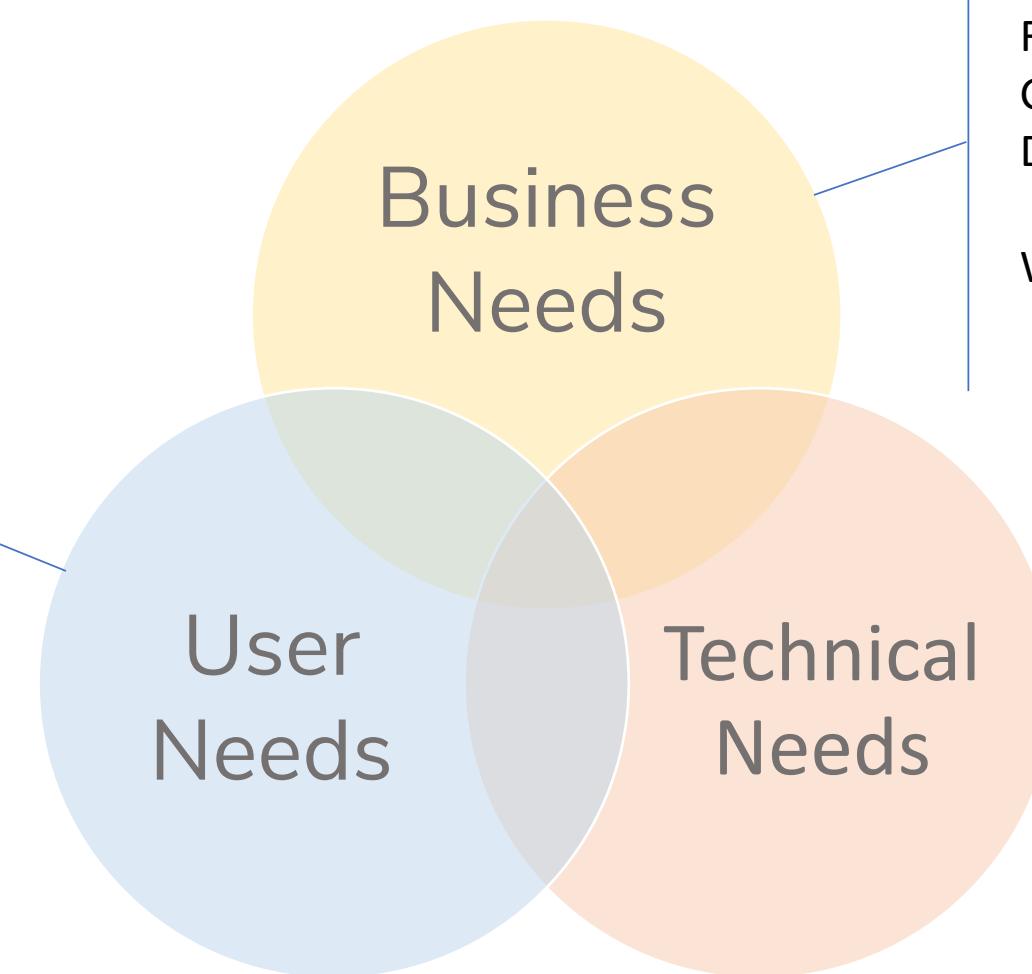
## Collected research for Org-chart collaboration with NRC

Assists in clarifying the intent of the org chart within Directory Service so NRC Dev & UX can proceed with the development work

# Document revisions

Version #	Comments	Author	Date
1.0	Document creation	Michael Martel	2018-07-16
1.1	Added Deliverable questions	Michael Martel	2018-07-20

# Needs



Allow users to observe where they fit in their team's hierarchy

Allow users to manipulate their place in their team's hierarchy

Allows user to see Profiles of other users by interacting with the org chart

WCAG 3.0 Compliant

Revised & refreshed version of GEDS (Government Electronic Directory Service)

WCAG 3.0 Compliant

Uses the Aurora Design System for final deliverable

<https://github.com/gctools-outilsgc/design-system>

# 1. Current Directory Service

This shows the current state of GEDS which is live and in use.

It contains a basic profile card.

The screenshot displays the Government Electronic Directory Services (GEDS) website. The header features the Government of Canada logo, a red maple leaf, and the word "Canada". The main navigation bar includes links for "Search/Browse", "Quick Links", and "Resources". Below the navigation, a breadcrumb trail shows the user's path: Home > Department Listing > Browse Organization > Person Information. The main content area on the right shows a profile card for a person. The card includes a yellow and orange stylized human icon, a telephone number (613-790-3802), and an address (140 O'Connor St, Ottawa, Ontario K1A 0R5, Canada). A "Show Map" button is also present. On the left, a sidebar titled "Search/Browse" lists various search options like General Search, Advanced Search, and Department Listing. Other sections include "Quick Links" for Honourable Ministers, Deputy Ministers, Honourable Senators, and MP Offices; "Resources" for FAQ, Help, Contact Us, and Site Map; and a section for "Organizations" which lists the Treasury Board of Canada Secretariat, Chief Information Officer Branch, Service Sector, and Service and GC 2.0 Policy and Community Enablement Division. At the bottom right, a note indicates the date was modified on 2015-07-03.

## 2. Research

When looking for ways that GoC handles the display of orgcharts, the TBS “My Profile self-service application” was one of the UX team’s earliest references.

The My Profile site allows the user to edit their basic Profile and also observe where they reside in the TBS hierarchy

The image shows two screenshots of the TBS InfoSite. The left screenshot displays the 'Employee profile' page for Michael Martel, showing his basic information such as title, sector, directorate, unit, employee type, address, office number, email address, phone numbers, fax, and supervisor. The right screenshot shows the 'My Profile self-service application' search results for 'Employee profile'. It includes a search bar, a 'Find an employee' section, a 'Browse employee profiles' section, and a 'Position within the TBS hierarchy' section. Red arrows highlight the search bar on the right and the 'Position within the TBS hierarchy' section on the left.

**Employee profile**

- Michael Martel
- Title: User Experience Designer/Visual Designer
- Sector: Chief Information Officer Branch
- Directorate: Office of the Chief Technology Officer (CTO)
- Unit: Digital Collaboration
- Employee type: Casual
- Address: 6, 140 O'Connor
- Office number: 0621
- Email address: Michael.Martel@tbs-sct.gc.ca
- Primary phone number: 613-897-2361
- Secondary phone number: Not available
- Fax: Not available
- Supervisor: Lemieux, Geneviève

**Request changes to your profile    Update your contact information    Manage your direct reports**

**Position within the TBS hierarchy**

**My Profile self-service application**

Search or browse for TBS employee profiles, and edit your own profile as needed. This information will be used to update the TBS phone book and GDirectory.

**Find an employee**

\* By name or phone number  
By first name, last name, department/branch or unit  
Enter an employee's full or partial name or phone number  Find

**Browse employee profiles**

\* By reporting structure  
By organizational structure

**Browse by reporting structure**

- Wallace, Peter - Secretary of the Treasury Board of Canada
  - Bard, Louise - Assist. Secretary, Strategic Comms. & Ministerial Affairs
  - Benay, Alex - Chief Information Officer of the Government of Canada
  - Benbaruk, Dora - Executive Director and Senior General Counsel
  - Ducros, Françoise - Assistant Secretary, Social & Cultural Sector
  - Forgeron, Jean-Guy - Assistant Secretary, Regulatory Affairs Sector
  - Fournet, Tamya - Executive Assistant to the Secretary
  - Gagnon, Doreen - Director General, Human Resources
  - Huppé, Roch - Comptroller General of Canada
  - Jolin, Catherine - Executive Director and Chief of Staff to the Secretary
  - Lafontaine, Renée - Assist. Secr., Corp. Services Sector & CFO
  - Latinde, Natalee - Director General
  - O'Gorman, Erin - Assistant Secretary, Government Operations Sector
  - Pagan, Irina - Assistant Secretary, Expenditure Management Sector
  - Pearce, Jane - Assistant Secretary, Economic Sector

**Position within the TBS hierarchy**

- Wallace, Peter - Secretary of the Treasury Board of Canada
  - Bard, Louise - Assist. Secretary, Strategic Comms. & Ministerial Affairs
  - Benay, Alex - Chief Information Officer of the Government of Canada
  - Boutin, Caroline - Chief of Staff and Senior Advisor
  - Brouillard, Marc - Chief Technology Officer
    - Allison, Christopher - Director, Digital Collaboration
      - Andrecheck, Philippe - Chief of Strategy, Research and Development
      - Lemieux, Geneviève - Chief, User Experience and Design
        - Martel, Michael - User Experience Designer
        - Robitaille, Bryan - Senior Advisor
      - Armstrong, Karen
    - Bashir, Imraan - Senior Director
    - Boucher, Ashley - Administrative Coordinator
    - Gomes, Denise - Senior Director, IT Planning & Priorities
    - Hubbard, Sheila - Senior Advisor to the Chief Technology Officer of the GC
    - Rinthom, Rick - Transition Advisor
    - Rumball, Janet - Acting Senior Director, CIOB Projects
    - Smith, Gina - Executive Director
    - von Finckenstein, Vernon
    - Wilson, Erika - Issues Manager
  - Neal, Olivia - Executive Director, Digital Change
  - Benbaruk, Dora - Executive Director and Senior General Counsel
  - Bilodeau, Francis - Assistant Secretary, Digital Policy and Services
  - Ducros, Françoise - Assistant Secretary, Social & Cultural Sector
  - Forgeron, Jean-Guy - Assistant Secretary, Regulatory Affairs Sector
  - Gagnon, Doreen - Director General, Human Resources

profile?activeDirectoryId=64bc0c74-3600-4f11-9e0d-000000000000

## 2. Research and Design

Initially the Directory Service began with focusing on the need to have a basic version of an interactive, editable Profile card.

From their Profile the user could potentially access the org chart.

This slide shows the earliest mock up of a Basic Profile (View Mode) and how an org chart could be displayed once the user selects the View (orgchart) icon.

The image shows a digital interface for a 'GC Profile'. At the top, there's a logo, the text 'GC Profile', and a 'FR' button. Below this is a form field for 'First Name, Last Name' with placeholder text 'Job Title, Lorem Ipsum Dolor Sit Amet, Placerat et Primis Sagittis Lectus'. To the right is an 'Edit' button. On the left is a user icon with an 'Update' button below it. In the center are contact details: 'Work' (613-790-0000), 'Mobile' (613-770-0000), an address ('140 O'Connor St, Ottawa, Ontario K1A 0R5 Canada'), and an email ('Lorem.Ipsum@PrimisSagittis-Lectus.gc.ca'). A 'View' button with a person icon is positioned next to the contact details. A dotted line encloses a dropdown menu titled 'Supervisor' which lists 'Allison, Christopher'. Below this is a section titled 'Position within the TBS hierarchy' which displays a hierarchical tree of names and titles, starting with 'Wallace, Peter - Secretary of the Treasury Board of Canada' and ending with 'Boucher, Ashley - Administrative Coordinator'.

## 2. Research and Design

The initial idea of using the Org chart style from My-Profile received lukewarm reviews.

A second round of mockups began. A new treatment for the Org chart was proposed.

The updated mockup showed the org chart displayed on screen and not hidden. A mini-profile card was proposed as the main vehicle in the org chart view.

**GC Profile** FR

 Update

**Nick Pietrantonio**  
Job Title, Lorem Ipsum Dolor Sit Amet, Placerat et Primis Sagittis Lectus  
Department Semper ad Scelerisque Amet

 140 O'Connor St  
Ottawa, Ontario  
K1A 0R5  
Canada

 **Work**  
613-790-0000

 **Mobile**  
613-770-0000

 [Lorem.Ipsum@PrimisSagittis-Lectus.gc.ca](mailto:Lorem.Ipsum@PrimisSagittis-Lectus.gc.ca)

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**Organization Chart**

 Nick Pietrantonio  
Job Title One Hundred Characters  
Department Semper ad Scelerisque Amet Primis Sagittis

## 2. Research and Design

Once the new Profile card itself was in development, NRC supplied some additional research that was meant to help expedite the design process for the org chart component.

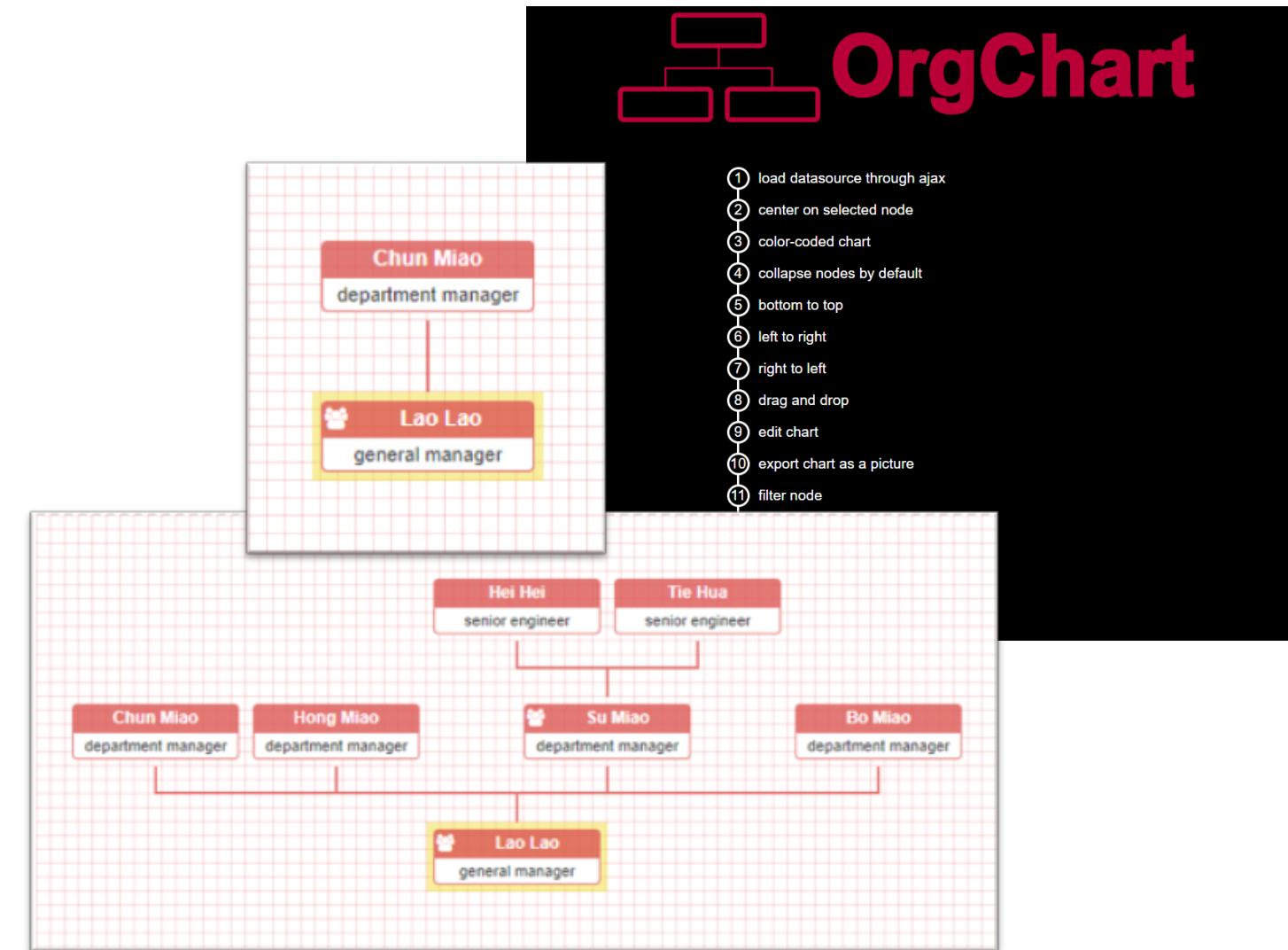
It was quickly decided that an open source Org Chart component could be grafted into the new Profile card in development.

This may continue to be a time-saver.

<https://rawgit.com/dabeng/OrgChart/master/demo/index.html>

&

<https://github.com/dabeng/OrgChart>



### 3. Final Design for the PoC

With the deadline drawing near, final mockups were designed which would show how the open source org chart could be grafted into the new Profile proof of concept.

The UX and Dev team also chose to experiment with the requirement which would allow a user to navigate through an org chart they were a part of.

Additionally, by selecting a member within the org chart, the displayed Profile card would refresh and the user could now view the Profile card of the team member selected.

**GC Profile**

Employee Name Here Semper ad Scelerisque Amet Placerat Primis  
En Job Title Here Semper ad Scelerisque Amet Placerat et  
Fr Titre de poste ici emper ad Scelerisque Amet Placerat et  
(Enter Name) Users search identify select supervisor

**Organization Chart**

```

graph TD
    LaoLao[Lao Lao  
general manager] --> BoMiao[Bo Miao  
department manager]
    LaoLao --> SuMiao[Su Miao  
department manager]
    BoMiao --> LiXin[Li Xin  
senior engineer]
    SuMiao --> PangPang[Pang Pang  
senior engineer]
    LiXin --> ToTo[To To  
engineer]
    LiXin --> FeiFei[Fei Fei  
engineer]
    LiXin --> XuanXuan[Xuan Xuan  
engineer]
  
```

## 4. Proof of Concept with live Org chart component

The Org chart is show here in the final and current version of the Directory Service (Profile) Proof of Concept.

Notable: In edit mode of the Profile card, teams and roles are edited in the Profile card and reflected instantly in the org chart

<https://profile.gccollab.ca/profile/37>

The screenshot shows the GCProfile application interface. At the top, there is a header with the GCProfile logo, a search bar, a user profile for Michael Martel, and language selection buttons for FR and EN. Below the header, on the left, is a detailed user profile for Gen Lemieux (TBS). Her profile includes a photo, her name, title (Chief, User Experience and Design), department (Treasury Board Secretariat), supervisor (Chris Allison), and contact information (Work phone number 613-790-3802, Mobile, Email genevieve.lemieux@tbs-sct.gc.ca). On the right, there is a hierarchical organizational chart. At the top level is Chris Allison (Digital Collaboration Di...). She has three direct reports: Gen Lemieux (TBS) (User Experience and D...), Michael Martel (Digital Collaboration Di...), and Kevin Changnon (User Experience and D...). Gen Lemieux has one direct report, Krista Lecuyer (User Experience and D...). The entire org chart is displayed on a light gray background with black outlines for the boxes and lines for the hierarchy.

## 4. Proof of Concept with live Org chart component

The Org chart is show here in the final and current version of the Directory Service (Profile) proof of concept.

Notable: In edit mode of the Profile card, teams and roles are edited in the Profile card and reflected instantly in the org chart

<https://profile.gccollab.ca/profile/37>

The screenshot displays the Directory Service (Profile) interface. On the left, a user profile for Michael Martel is shown, including a photo, a 'Change' button, and a 'Save' button. Below the photo are fields for 'Michael Martel' (en: User Experience Designer, fr: Concepteur de l'expérience de l'utilisateur). Under 'Supervisor', 'Gen Lemieux (TBS)' is listed, with a red circle highlighting it. The 'Team' field shows 'Digital Collaboration Division'. Address details are provided: 140 O'Connor St., Ottawa, Ontario, K1A 3A1, Canada. On the right, an organization chart shows Gen Lemieux (TBS) as the supervisor for Krista Lecuyer, Michael Martel, and Kevin Changnon, who are all part of the 'User Experience and D...' team. Michael Martel is highlighted with a yellow box, and the 'Digital Collaboration Division' team is also highlighted with a yellow box. Red arrows point from the highlighted supervisor and team names in the profile back to their respective entries in the org chart.

## 5. MVP Research

The Proof of Concept was accepted. The Dev and UX team began research on more intuitive metaphors, layouts and profile integration solutions for the org chart that will be a fundamental part of the Directory Service MVP. Conclusions from comprehensive affinity diagramming workshops for Profile as a Service illustrated a need for an Org chart. This helps support the requirement for org chart integration at the Directory Service level.

Blue Card/Issue	Solution/Idea
I trust when people have a photo	<ul style="list-style-type: none"> <li>- Make photo mandatory, but offer generic pictures to choose from if they don't want to upload one</li> <li>- Ability to input government ID picture by default</li> </ul>
I will use GC Collab if my manager does this same	<ul style="list-style-type: none"> <li>- If the tools prove valuable, people will use them</li> <li>✖ Org chart and clear presence of managers</li> <li>- For managers: the ability to search for potential candidates based on self-identified info</li> </ul>
I use GEDS to see profile	<ul style="list-style-type: none"> <li>- Find contact information</li> <li>- Auto sync info into profile</li> </ul>

The screenshot shows the GEDS website interface. At the top, there's a navigation bar with links for 'Search/Browse', 'Quick Links', 'Resources', and 'Person Information'. The main content area features a large red maple leaf graphic. Below it, there's a sidebar with links for 'General Search', 'Advanced Search', 'Department Listing', 'Browse Organization', 'Honourable Ministers', 'Deputy Ministers', 'Honourable Senators', and 'MP Offices'. The main content area displays a list of staff members under the heading 'Supervisor: Alison Christopher'. Each staff member entry includes a small profile icon, their name, title, and a brief description of their role. The list includes names like Wallace, Peter; Denyer, Alex; and Routhier, Bryan. At the bottom right of the page, there's a note indicating the date was modified on 2015-07-03.

# 5. MVP Research

The Proof of Concept was accepted. The Dev and UX team began research on more intuitive metaphors, layouts and profile integration solutions for the org chart that will be a fundamental part of the Directory Service MVP.

**Sales and Marketing Attainment**

This screenshot displays a hierarchical organizational chart for the Sales and Marketing department. At the top is James Altoni, VP of Marketing. He oversees three main divisions: Sales, Planning, and Product. The Sales division includes Daniel Taylor (Sales Mgr) and Ashima Singhal (Sales Mgr E). The Planning division includes Oliver Lee (Planning Dir). The Product division includes Raina Cabatana (Product Dir). Each division has a budget status indicator (e.g., 151-100%, 90-101%, 80-90%, 0 to 80%) and employee counts.

**Office 365 - Delve**

This screenshot shows the Delve interface for Bonnie Kearney, Sr. VP of Sales and Marketing. It includes a profile picture, a bio, and links to boards and activities.

**Organization**

This screenshot shows a modern organizational chart interface. It features a central profile for Anna Reid (CEO), followed by Marshall Penrose (Global Director of Sales and Marketing) and Felipe Escobedo (Head of US Sales). Below them is a 'Staff (4)' section with four additional profiles. The interface includes a sidebar for 'Working on' tasks and a 'Praise' section.

**Plumsail Org Chart**

This screenshot shows a clean, modern organizational chart interface. It features a central profile for David Navarro (Vice-president of Plumsail LLC), followed by Xue Li (Financial director) and Adam Allman (Analyst). Below them is a 'Marketing Department' section with profiles for Derek Clark, Jessica Adams, Anil Mittal, and Brenda Coel. The interface includes a sidebar for 'Organization' tasks and a 'Praise' section.

UX Design : Project name - [#3219]

# 5. MVP Research

The Proof of Concept was accepted. The Dev and UX team began research on more intuitive metaphors, layouts and profile integration solutions for the org chart that will be a fundamental part of the Directory Service MVP.

The image displays three different approaches to organizational chart design:

- Visio Web Access:** A simple hierarchical tree diagram showing relationships between users. The top node is "Jane Doe Smith, SharePoint Director". Below her are "John Doe, Manager Director" and two other users.
- User Profile Page:** A dark-themed page for "Dan Wilson" showing his profile picture and title ("SR PROGRAM MANAGER LEAD, FAST PM - Norway"). It includes sections for "Manager" (John Wood), "Peers" (with a list of 31 people), and "Directs" (with a list of 27 people). There are also links for "We both work with" (27 people) and "Working with" (31 people).
- Organization Browser:** A Windows Internet Explorer window showing a grid-based organization chart. The top row includes "Dan Jump, CEO" and "Adam Barr, General Manager of Professional Service". Below them is a grid of 15 user profiles, each with a photo, name, and title. The grid is organized into columns labeled "Sales", "Operations", "Engineering", "Marketing", and "Product Management".

## 5. MVP Task flow and early designs

The Dev and UX team have established about 20 task flows for the Directory Service MVP. This included addressing where the org chart should integrate with the other Directory features, such as My Teams, and Manage Teams.

Based on similar work done by Microsoft, it appears that a tab structure is a recurring best practice for integrating an org chart within a Profile and/or Directory Service application.

The image consists of two side-by-side screenshots. The left screenshot shows a wireframe or design mockup of a user profile page. At the top is a circular placeholder for a user's photo, followed by several horizontal grey bars representing profile information. Below this is a large, semi-transparent overlay showing a simplified organization chart with nodes represented by circles and connecting lines. The right screenshot shows a more polished version of the same interface. It features a user profile card for 'Cameron Evans' (Senior Researcher at Contoso) with options to 'Send email' and 'Start chat'. A tab menu below the card includes 'Contact', 'About', 'Organization' (which is selected and highlighted in blue), and 'Recent files'. The main area displays the organization chart with Cameron Evans as the central node, connected to other users like Hedi Peete, Arjuna Mishra, and Finlay Murphy, who are listed under the heading 'Reporting to Cameron Evans (3)'. Other users like Leona Skretting, Courtney Rees, and Joao Mello are listed under 'Related to this person'. The overall design is clean and modern, using a light grey palette with blue highlights for active tabs.

# Suggestions for NRC

- Usability testing of current org chart  
<https://profile.gccollab.ca/profile/37>
- Additional research to guide best Org Chart practices and metaphors
- Complete task flow analysis, resulting wire frames and low fidelity/high fidelity prototype
- UI must include Aurora Design System:  
<https://github.com/gctools-outilsgc/design-system>



# References

**1** Open source sample interactive org-charts

<https://rawgit.com/dabeng/OrgChart/master/demo/index.html>

<https://github.com/dabeng/OrgChart>

**2** Current Org Chart in use by Profile/Directory service (Proof of Concept)

<https://profile.gccollab.ca/profile/37>

**3** Microsoft Delve (Discontinued):

<https://searchcontentmanagement.techtarget.com/definition/Microsoft-Delve>

<https://support.office.com/en-us/article/connect-and-collaborate-in-office-delve-46f92806-b52c-4187-b60e-b3bf8d25f73e?ui=en-US&rs=en-US&ad=US>

**4** Sharepoint Org Charts

<https://medium.com/plumsail/sharepoint-org-chart-for-modern-pages-1ebf82b4d5fd>

Thank you  
Merci