

OTF Usability Lab

# GlobaLeaks Design Research Report

## *GlobaLeaks, Simply Secure & Ura Design*

October 2019 - May 2020



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# 1. Overview

## 1.1. About GlobaLeaks

GlobaLeaks is a browser-based platform that enables whistleblowers to securely submit documents to companies, newspapers, government bodies, and other organizations. It also enables these organizations to host a secure platform for handling, viewing, responding to, and administering whistleblower-submitted documents. It has grown steadily and successfully since 2012 and is currently used by over 600 organizations.

## 1.2. About this report

This is a joint project between Simply Secure and Ura Design. While Simply Secure focused on design research and UX recommendations, Ura Design took on the high-fidelity interface design and the GlobaLeaks brand guideline going forward. The report, written by Simply Secure, focuses on the research findings and UX recommendations, and also includes some first design iterations.

GlobaLeaks is necessarily a highly customizable and versatile scaffold, allowing for different feature sets, whistleblower questionnaires, UI choices, language choices, and language support. The optimal way to configure GlobaLeaks depends heavily on context. The goal of this redesign is to enable people from a variety of backgrounds to install, configure, and use GlobaLeaks without the help of trainers.

In October 2019, Simply Secure and Ura Design convened a team to help GlobaLeaks further improve its usability by tackling the following problem areas:

1. Since GlobaLeaks' user base is so diverse, a one-size-fits-all "boilerplate" approach didn't make sense. Both the whistleblower and administration interfaces needed to be configurable to accommodate different groups around the world: from human rights organizations to investigative journalism and media organizations, from corporations to local and national governments. There was a need to balance customizability with appropriate default options that help all users get their GlobaLeaks installation running with minimum friction and misunderstanding.
2. The user journeys and workflows for different roles within the platform needed to be further developed. Before, the whistleblower interface was fairly well-thought-out, while the administration interfaces were less so. It was just as important for the recipients as the administrators to be able to effectively manage and respond to documents uploaded by whistleblowers.
3. Localization & accessibility: The global nature of GlobaLeaks means that the boilerplate needs to be culturally and linguistically agnostic and customizable to a variety of contexts. We needed to encourage customization while improving the defaults. Additionally, the colors of the GlobaLeaks brand didn't pass AA standards.

### **1.3. Research Overview**

#### **a. Privacy & Confidentiality**

Our confidentiality policies contributed to research participants' ability to trust us and provide us with the information we needed for this project to be successful.

Our risk assessment at the beginning of the project identified whistleblower identities as well as submission contents as the most sensitive data points. This presented a challenge for our user research practices, as we didn't want to view the users' actual interface which might reveal confidential information received from whistleblowers. In order to address this challenge, we created a demo installation and a rough interface wireframe that we used during our user research interviews. Since few things can be customized (customization occurs mostly on the whistleblowing side), we were able to imitate their platform by setting up an instance in their language. This, however, meant that research participants had to compare our interface wireframe with their own installation, which added to the complexity of our interviews.

In addition to that, we also created a new email account and an extra calendar hosted by Simply Secure for invitations and correspondence that was deleted at the close of this project. Before the interviews, each participant received a Participants Bill of Rights and a Consent Form. The entire project (data collection and processing) was GDPR-compliant.

There are three roles for any GlobaLeaks installation: the Whistleblower, the Recipient, and the Administrator (Admin). As part of our threat modelling, we identified specific challenges for each role and asked questions concerning associated risks which are listed as below:

#### **For Admins / Recipients:**

- Is it a risk if:
  - Their own participation becomes known.
  - They find out about others who participated.
  - Their words used in a report can be attributed to them.

#### **For Whistleblowers:**

- Is it a risk if:
  - Their own participation becomes known.
  - They find out about others who participated.
  - Their words used in a report can be attributable to them.

#### **b. Research Objectives**

Our research objectives were:

- To understand how the platform is currently used from the perspectives of Admins, Recipients, and Whistleblowers.

- To identify pain points and user needs for Admins and Recipients during the onboarding process.
- To provide GlobaLeaks team with design recommendations in order to make the platform aligned with users' needs.

### **c. Research Methodology**

#### **Usable Security Review**

A usable security review (or heuristic review) is a structured evaluation of an interface based on a list of desired qualities, with the goal of pointing out where the interface matches these qualities and where it doesn't.

For GlobaLeaks's design review, we used Simply Secure's 10 Heuristics for Responsible Interface Design that we have developed in-house. We did the review concurrently with conducting user interviews and beginning an interface redesign.

Conducting a detailed review allowed us to address design issues that fit into the limited schedule of user interviews. Our usable security review was conducted on a **default, demo** installation of GlobaLeaks. GlobaLeaks is customizable, so not all possible cases were covered. However, we have tried to take common customization cases into account.

#### **User Interviews**

We conducted five user interviews with recipients and admins to understand their needs and learn how the platform is used across different installations.

The interviews were 60 minutes long and semi-structured. Each interview had at least two people present from Simply Secure and Ura Design. Ideal interviewees would be:

- Someone who had used the platform
- Someone who had set up the platform
- People who would potentially use the platform
- People who tried to use it and it didn't work

Due to security concerns, we did not reach out to whistleblowers. However, since the whistleblowing platforms are directed at the general public – anyone can blow the whistle on a government or a company – we conducted two additional interviews about the whistleblower interface that were not originally scoped. Findings from these two interviews helped us understand that whistleblowers played an important role in initiating the conversation between the Recipient and the Administrator.

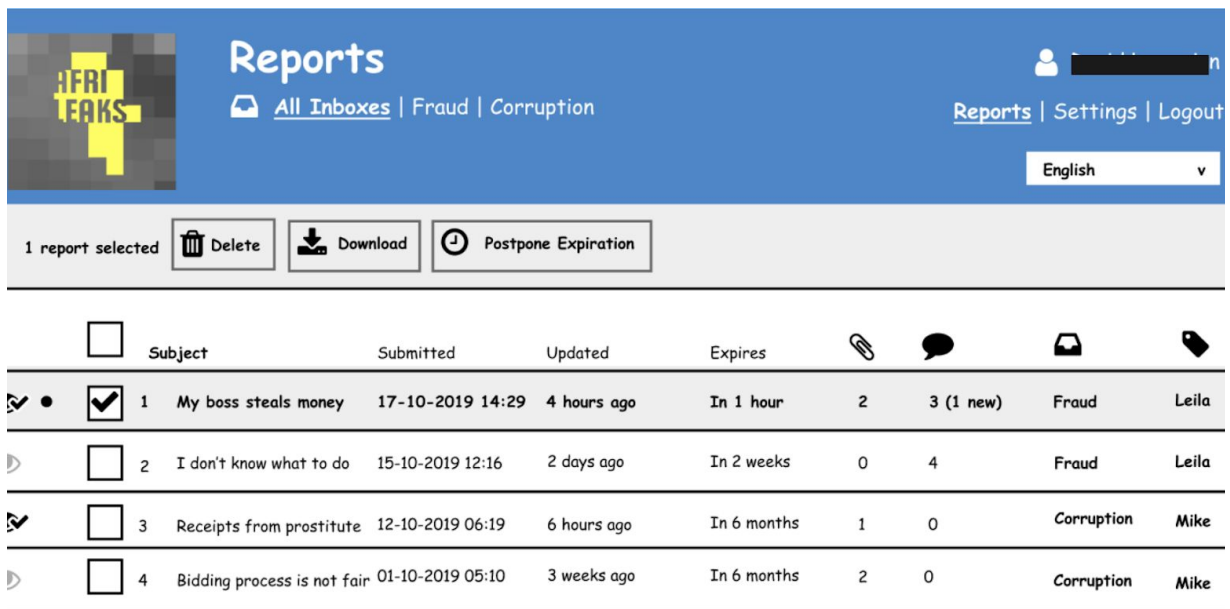
Our interview guide topics included:

- Introduction of Simply Secure and URA Design
- Background of the interviewee

- Type of organization and role
- Frequency of using GlobalLeaks
- Feedback and perception of GlobalLeaks
- Product walkthrough
  - Admin Interface (if applicable)
    - Focused on areas the person actually used, usually Questionnaires
    - Participant shared their screen
  - Recipient Interface
    - Participant did not share their screen; we looked at a demo installation while they looked at their screens

(See the detailed Interview Guide in Appendix)

- Low-fidelity designs used during our interviews:



*A rough mockup of an Admin/Recipient submission screen*



✓ Your report has been sent.

Your secret code:

6283 2016 2673 9562



Use this code to check for messages from us.

❗ If you lose this code, you will not be able to see our messages.

*A rough mockup of the Whistleblower's post-submission screen*

## 2. Research Findings

### 2.1. Usable Security Review (Heuristic Review)

In the first phase, we conducted a usable security review of the existing whistleblower and administrative UIs, focusing on different flows for different roles.

We used our 10 Heuristics for Responsible Design for our evaluation. These heuristics are based on a number of other digital interface heuristics, including Jakob Nielsen's 10 Usability Heuristics and And Also Too's heuristics for consentful technology. Our heuristics cover basic usability concepts like orientation, error handling, and tool-wide consistency, as well as taking into account an ethical framework that respects people's rights, time, attention, and knowledge.

Generally, a heuristic review doesn't include design suggestions. However, since we also provided design work on the portal, we included initial design suggestions (more details below). These suggestions provided us with a foundation for our design reasoning.

**What does this heuristic review not cover?**

- This review does not cover touchscreen use. Most people report using GlobaLeaks on a desktop or notebook computer, presumably using a mouse or trackpad.
- This review does not cover mobile use, for the same reason.
- Perhaps most importantly, this review is not a replacement for user interviews. We chose not to give more weight to common vs. rare use cases; therefore we didn't tune the heuristic review towards particular user goals. For this reason, it's important to combine this heuristic review with the results of user interviews, as well as with what we knew from experience about user behavior (bug reports, pull requests, etc.) Areas and workflows that people use more often should be a high priority to optimize, whereas some of the things pointed out below may actually not be as important.

In regard to the customization experience, we paid particular attention to communication between the whistleblower and the receiving organization.

### **2.1.2 Key findings**

Whistleblower Interface:

- Some phrases, terms, and concepts such as 'receipt', 'blow the whistle', and 'filed the submission' may not be meaningful to or understandable by users.
- It's not clear to users what the submission process is like and what to do next after submitting a report.
- Asking for donations on this page may imply that the user needs to donate in order for the portal to work. Therefore, it is not an appropriate place to solicit donations.
- Additionally, the lack of information related to GlobaLeaks and Hermes Center for Transparency and Digital Human Rights (the organization behind GlobaLeaks) may lead to some trust issues among users.

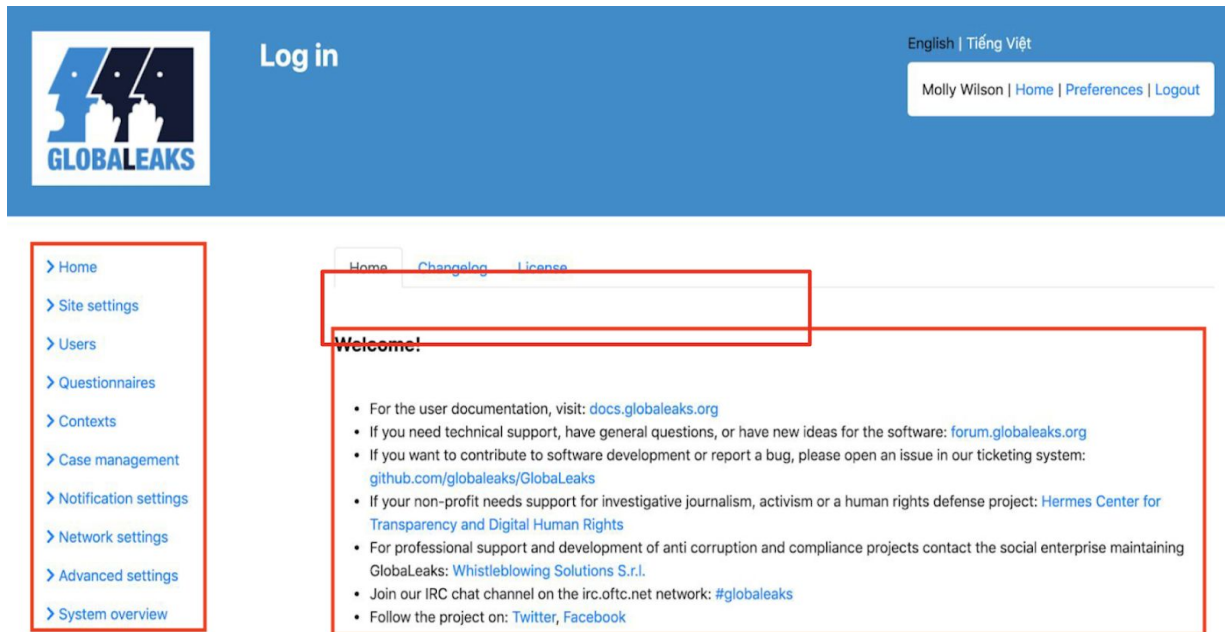
Recipient Interface:

- The platform does not indicate the account status effectively, i.e. if users are logged in or not.
- Overwhelming information and hyperlinks greet the user upon every login. This bombardment of information distracts the user from doing the most common task - looking at submissions.
- Users could not determine whether a submission was moved to a "trash bin" and could be restored, or whether it was deleted securely and permanently.

Admin interface:

- The default text boxes are confusing to users. This was exacerbated by a lack of previews when changing settings.
- Lack of wayfinding. It is not clear why some settings are grouped together and which pages are active on the sidebar menu.
- In many places, buttons and labels are not clearly distinguishable from each other.





*Screenshot of Admin Home / Landing page*

*(See the detailed review in Appendix)*

## 2.2. User Research

As a part of phase one - User research, we wanted to listen and observe how users interacted with the interface, what features they use, and how they use them. However, due to the sensitive nature of most GlobaLeaks submissions, screen-sharing was impossible. As a result, we conducted research interviews with a demo version of the interface that we developed to closely resemble the actual website.

Not being able to view the participants' screens for privacy concerns led to major challenges in understanding their problems, confusion, and intentions. Discussing the website abstractly was not ideal; however, it was the only method available given the current, global restrictions on travel.

Our research focused on issues that arise when setting up and administering a GlobaLeaks instance. We, therefore, aimed to talk to either the person who was/is responsible for initial setup, or a person who handles incoming communication from whistleblowers.

Before doing user research, we always assess potential risks to participants and take appropriate security and privacy measures. We did not anticipate any risks from participating since organizations using GlobaLeaks are public about that fact. However, the content of the interviews was sensitive and we aimed to publicly release our research report, so we have obscured the names of participants and anonymized any quotations or recommendations.

We shared interview notes on an online whiteboard platform. In response to themes from

interviews, we were able to identify the main areas for design impact.

### **Interview demographic:**

In phase 1, we conducted remote interviews with organizations that currently had a GlobaLeaks instance. We aimed for geographic and linguistic diversity, as well as at least two organizations from each field of journalism, government, corporate, and nonprofit.

Among those interviewed, three were from Europe, two were from Africa, one was from the US, and one was from Asia. Four out of the five participants had the role of Admin/Recipient, and one was Admin only. One held a corporate job and four worked in the non-governmental, non-profit sector.

### **2.2.2. Key Findings**

Most people we interviewed have used the platform extensively and found it incredibly helpful. It is a reconfirmation that GlobalLeaks is a very useful platform and is highly important. The main theme that we found throughout the research was: ***The power of defaults.***

People don't usually change their default settings. Even when things are customizable, there is a big mental barrier to overcome in order to customize. For this reason, we aimed to encourage customization actively but also provide a default that is sufficient for those who don't adjust settings.

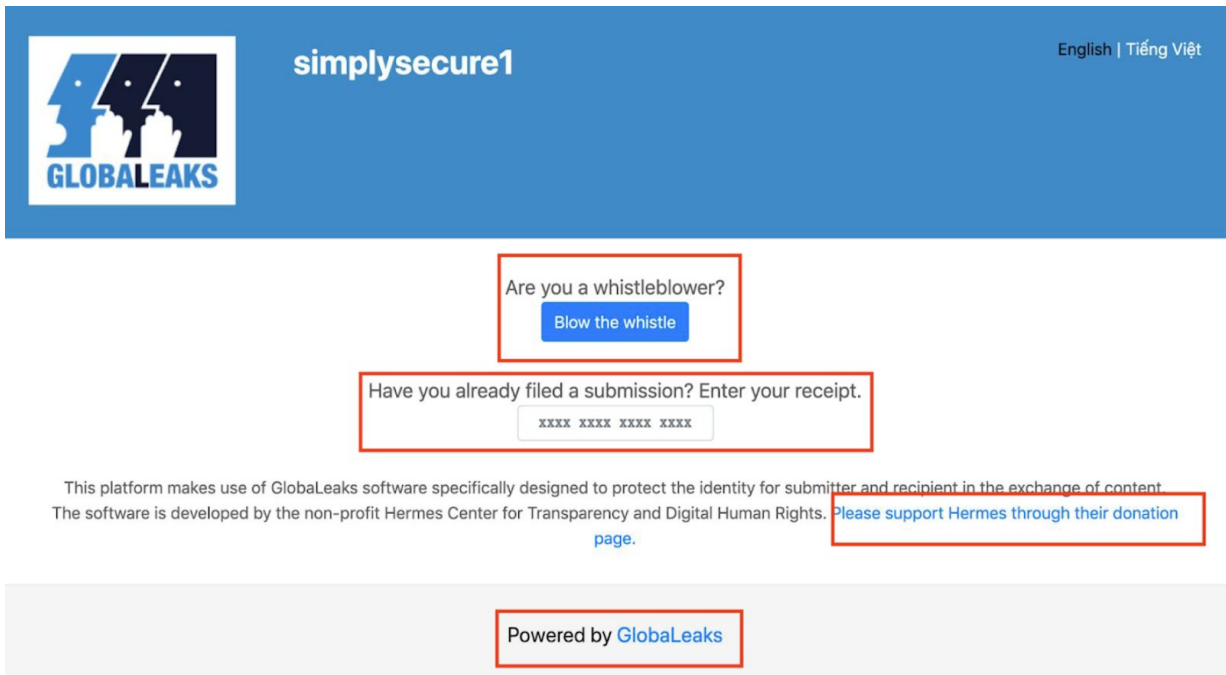
Through the lens of customization and default, we addressed the **4 themes: Trust, Customization, Streamlining, Setup, and Support.**

1. Trust (Whistleblowers): How can we help admins create a trustworthy experience for potential whistleblowers?
2. Customization: How can we enable and clarify customization options?
3. Streamlining: How can we prioritize the most-used features?
4. Setup and Support: How can we help people who don't have access to direct support from the GlobaLeaks team?

#### **a. Trust**

##### **Trust is about people first, tech second**

GlobaLeaks is an open-source submission framework of which source code is more transparent and secure than closed-source technology. Open-source technology itself is trustworthy, but potential whistleblowers need to know who they are sending a report to, and what is likely to happen afterwards. The whistleblower is unlikely to know about Hermes/GlobaLeaks, so referring to Hermes/GlobaLeaks alone doesn't help.



Screenshot of the Whistleblower landing page

*"Who will be reading my report?"*

*"This line [this platform makes use of the GlobaLeaks software] is not convincing or trustworthy. There is no weight."*

*"The organizations that use this platform - what are their functions? Are they solving the problem or are they delivering the news/giving information? Are they taking sides/or having any affiliations?"*

In addition, asking for donations while soliciting reports makes it seem like reporting has a "cost". The credit card image at the end of the process validates that, distracting from the trustworthiness of the platform.

## Your submission was successful.

Thank you! Your submission was successful. We will try to get back to you as soon as possible.

Remember your receipt for this submission.

2089 4834 1236 3413


Use the 16 digit receipt to log in. It will allow you to view any messages we sent you, and also to add extra info.

View your submission

Hint: How to hide your receipt

A useful way to hide your receipt is to write it down like a credit card number, i.e. by also including an expiration date.

Example:



Powered by [GlobaLeaks](#)

*Screenshot of the credit card image on the demo platform*

Preliminary design recommendation:

- Separate anything financial and/or transaction-like from the process of reporting.

### A simple but high-stakes interaction

The Whistleblower flow is a very simple interaction, yet particularly high-stakes. Even though the process of submitting a report is relatively simple, every single element contributing to the overall experience of the Whistleblower matters and should be prioritized. The potential “whistleblowers” we interviewed appreciated the clean, bare-bones default design and lack of distractions on the screen. The existing text and space could be used more effectively for orientation. For example, the header currently doesn’t give any information beyond “blow the whistle” throughout the whole process.

*“If I enter the [receipt] number wrong, will it lock me out?”*

*“How much longer is this going to take?”*

Preliminary design recommendations for the default interface:

- Provide a step-by-step list of what is likely to happen once a report is submitted.
- Provide as much information about the recipients as possible.
- Offer explicit confirmation at every step. Emphasize that a report has been submitted.
- Emphasize that the code is necessary to check for messages.

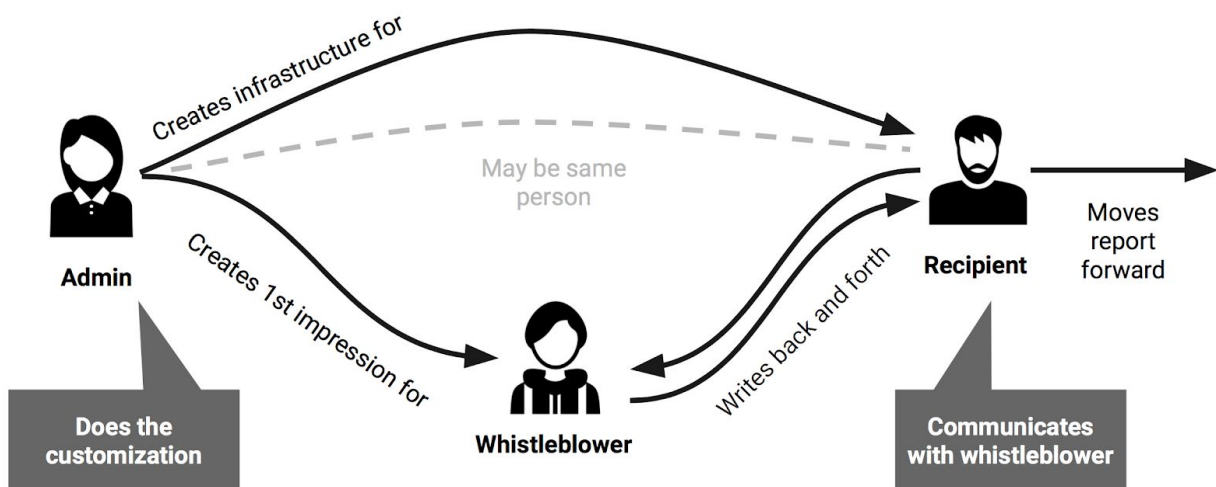
- Offer the opportunity to turn the “credit card” off. Consider a “phone number” code.
- Incorporate visual elements to build up trust in users, and reduce donation requests.

There is no single solution that will work for everyone. The credit card visual will be perceived differently depending on the whistleblower’s cultural background and knowledge. For example, the Vietnamese potential whistleblower didn’t seem to mind the credit card while the American potential whistleblower thought the payment was required.

## b. Customization

### Customization is the key to communication.

We created a diagram to illustrate the relationship between the stakeholder involved in a GlobaLeaks installation. There are usually three roles: the Admin, the Whistleblower, the Recipient. Sometimes the Recipient and the Admin are the same people. Four out of five interviewees are actually both Admin and Recipient.



*The relationship between the main stakeholders of a typical GlobaLeaks installation.*

The Admin creates the infrastructure for Recipients of the same organization, and/or the Admin creates the infrastructure and then signs out and signs back in as a Recipient.

The Admin also creates the first impression for Whistleblower. The Recipient and the Whistleblower then write back and forth to each other. If this process goes smoothly, the report will move forward.

The Admin designs the infrastructure for communication while the Recipient communicates with the Whistleblower. This means that the Recipient if they are a different person from the Admin, knows a lot more about the Whistleblower’s needs and challenges than the Admin. However, the Recipient can’t edit the questionnaire and the texts.

Once the Admin has done the setup, they might not be around anymore and be involved. While the Recipient has a better understanding of what might be needed and/or what isn't working, they are not capable of making any changes because that's not their role.

### **Customization is not easy, albeit indefinite.**

Customization, even with the Admin permissions, is not easy. Almost every area of the Whistleblower experience is customizable - the customizability is extensive. Most of the customization capabilities are not utilized and the lack of customization might cause the Whistleblower to not submit the report in the first place. It might also cause Whistleblowers to stop communicating.

The person who has the most contact with the whistleblower has neither the power to make changes nor the technical knowledge required, as the Admin panel is highly technical and intimidating.

*"30% of people who use [GlobaLeaks] to report don't get back to us to bring additional documents we require."*

*"[The first step is to] reply on the platform. If [the] source doesn't reply after a couple of weeks, we give up."*

### **Customization is high-stakes and mysterious.**

The process of editing a public Whistleblower interface is a high-stakes modification and should be done without any accidental mistakes.

*"We had another person who we hired to do this before but they really struggled using the platform."*

*"[It] took a little bit to try to understand 'Advanced Setting'."*

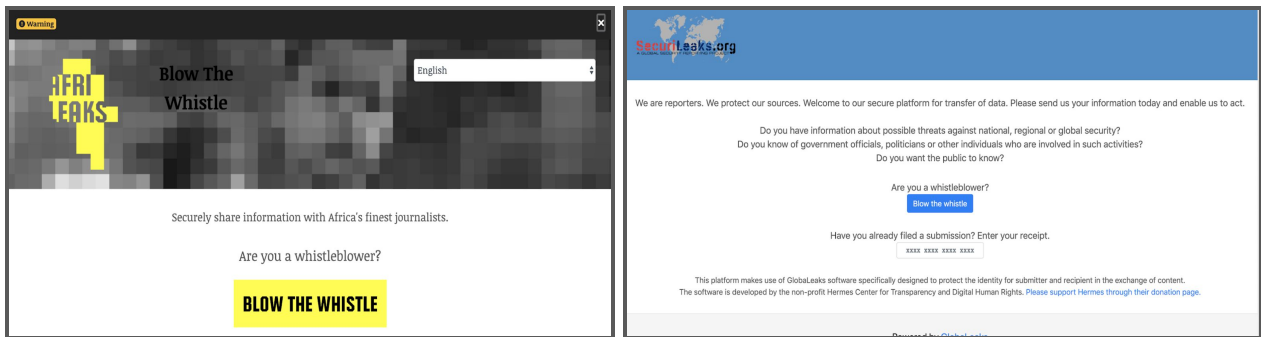
*"There are a lot of configurations and settings and sometimes I can't find them."*

*"If I change this, how does it look to the public?"*

When considering changes, there are no previews, suggestions, or ways to ask for help. The Admins don't know what they are changing and they would rather change nothing than make a mistake.

Some areas definitely receive more customization than others. We reviewed how other organizations have customized their landing page. It appeared that many organizations customize their logo, questionnaires, colors (occasionally), and titles. On the other hand, the descriptive texts and infrastructure are rarely touched.

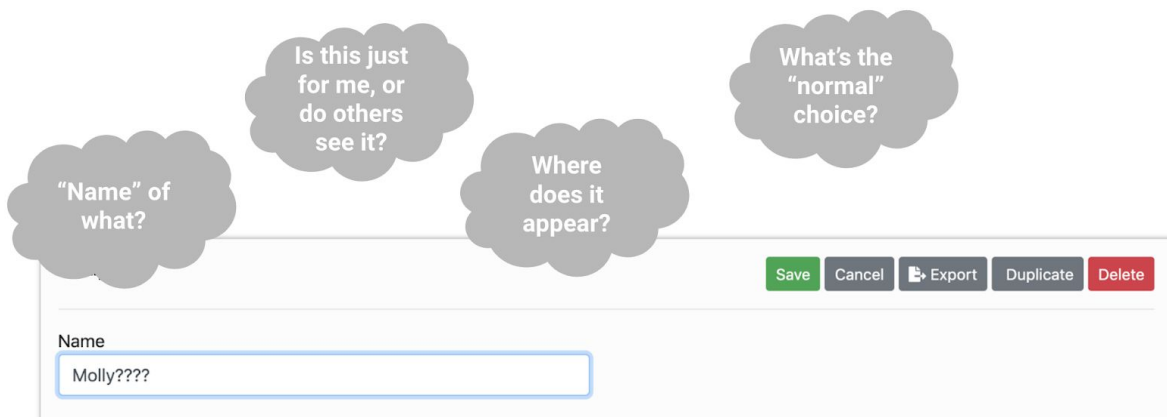
The language, 'Blow the Whistle', is an industry stand as almost all call-to-action buttons for submitting a report in English use this expression.



*TheAfriLeaks and SecuriLeaks websites contain buttons with the expression, "Blow the Whistle".*

We also noticed a few barriers to customization:

- The input field could be improved to help people better understand where their data is going. Smart defaults or help text can alleviate user concerns.



- Finding the setting you want to customize is not easy: it seems confusing why certain settings are in certain places

The screenshot displays the 'Admin Advanced Setting' interface. It features several configuration sections, each with a text input field and a dropdown menu. A prominent red error message, 'Why is this "advanced" not "site"?', is repeated across multiple fields. The sections include:

- Landing page:** Dropdown set to 'home'.
- Default questionnaire:** Dropdown set to 'Default'.
- Title of the submission page:** Text input containing 'Blow the whistle'.
- Text shown on top of the interface for selecting contexts:** Text input containing 'Select the context of your submission:'.
- Show contexts in alphabetical order:** A checked checkbox.
- Type of context selector:** Dropdown set to 'list'.
- Title of the receipt page:** Text input containing 'Your submission was successful.'

The red error message 'Why is this "advanced" not "site"?' appears in the 'Landing page', 'Default questionnaire', 'Title of the submission page', and 'Title of the receipt page' fields. Additionally, a similar message 'Why is this "advanced" not "contexts"?' appears in the 'Text shown on top of the interface for selecting contexts' field.

Screenshot of Admin Advanced Setting

*"I can't find where to change this 'you're not using Tor' message."*

*"[A new admin] struggled a lot. Even after two months, she wasn't able to understand it fully."*

*"I can't tell whether I just turned this thing off or not."*

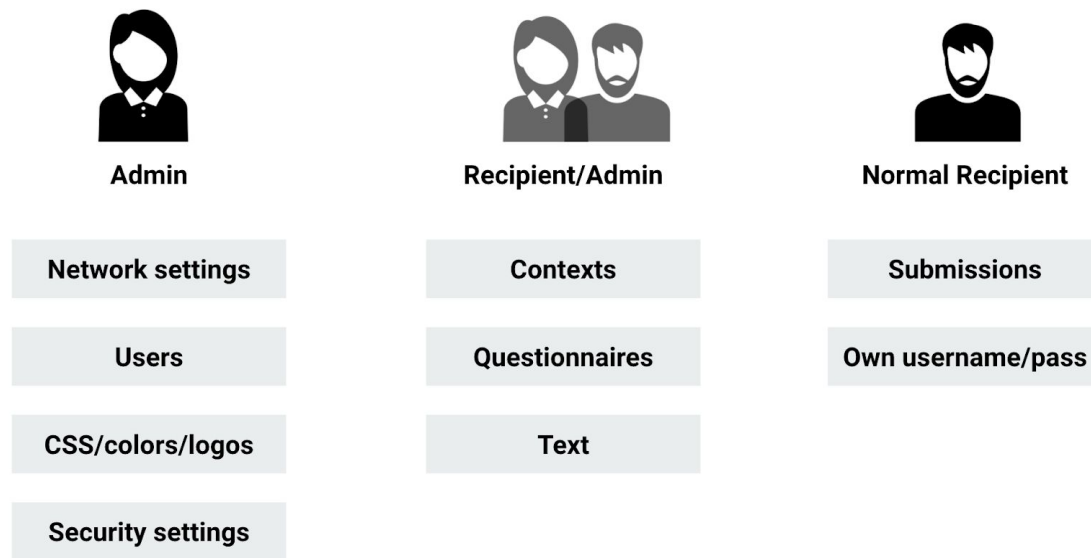
## The roles

These are the common roles that we found:

1. The Admin/Admin: Their roles are purely technical and they are interested in editing Network Settings, Username, Password, CSS colors, logo). They usually don't have much contact with the Whistleblower.
2. The Recipient: they can see submission, edit their password, and change notification settings.
3. The Recipient/Admin: They administer an installation. They should be able to edit/add Context, Questionnaire, and customize texts. They are less technical and probably aren't interested in Network Settings than the Admin. They are the users who are not being served by the current design.

The admin panel has both **technical** and **customization** functions. The Recipient/Admin are usually only concerned with the customization functions and are fearful of interfering with the technical functions and causing damage to the system.





*The three main roles and their most-used features*

Preliminary design recommendations:

- Organize the information architecture
- For Recipients/Admins, make switching the role easier, for example, by using a dropdown menu

Admin interface:

- Show hints and explanations for text boxes
- Separate technical and customization functions in the admin interface
- Group all settings that apply to a similar feature
- Create a customization guide for documentation
- Move some settings to more specific pages, e.g. “Advanced” in each setting, rather than one “Advanced” area that applies across contexts.

### c. Streamlining

Streamlining and prioritizing the most used features are important. We want to make sure the features people actually use and want to see stand out visually.

**The Recipient landing page is packed with too much information.**

There are 3 different types of links that include:

- Useful reference and instructions for how to use GlobaLeaks
- GlobaLeaks “Family tree” – who we are, how to support us, how we can support you
- Communities



Blow the whistle

English | Tiếng Việt

Molly Wilson | Home | Logout

- > Home
- > Submissions
- > User preferences

#### Welcome!

- For the user documentation, visit: [docs.globaleaks.org](https://docs.globaleaks.org)
- If you need technical support, have general questions, or have new ideas for the software: [forum.globaleaks.org](https://forum.globaleaks.org)
- If you want to contribute to software development or report a bug, please open an issue in our ticketing system: [github.com/globaleaks/GlobeLeaks](https://github.com/globaleaks/GlobeLeaks)
- If your non-profit needs support for investigative journalism, activism or a human rights defense project: [Hermes Center for Transparency and Digital Human Rights](https://hermescenter.org)
- For professional support and development of anti corruption and compliance projects contact the social enterprise maintaining GLOBELeaks: [Whistleblowing Solutions S.r.l.](https://whistleblowing-solutions.com)
- Join our IRC chat channel on the [irc.oftc.net](https://irc.oftc.net) network: [#globaleaks](https://irc.oftc.net)
- Follow the project on: [Twitter](https://twitter.com/globaleaks), [Facebook](https://facebook.com/globaleaks)

### Screenshot of the Recipient Landing page

By separating the links and increasing the white space, we can reduce user strain. Changing the weight or emphasis of text helps the user navigate and find what they're looking for.

- The information overload on the screen is less of a concern for admins.

### Many recipient columns are unused

	Label	Status	Submission date	Last update	Expiration date					Preview	Score
#3		Closed	07-11-2019 15:13	07-11-2019 15:13	06-02-2020 01:00	✓	0	0	0		-
#2		New	06-11-2019 11:32	06-11-2019 11:32	05-02-2020 01:00	✓	0	0	0		-
#1		Opened	17-10-2019 14:29	17-10-2019 14:29	16-01-2020 01:00	✓	1	0	0		-

### Screenshot of the Recipient Submission page

There are many used columns on the Recipient interface:

- 0 / 4 recipients knew what "score" was
- 1 / 4 recipients used "submission status"
- 2 / 4 recipients used "label"
- Most recipients had figured the icons out, but they all said it had been difficult at first.

*"I figured these icons out through trial and error."*

*"I leave the submission 'open' even when I'm done with a report."*

*"This 'opened/closed' took me a while to understand."*

Preliminary design recommendations:

- Give emphasis to the features people use the most
- Improve information architecture by relying on familiar design patterns, such as survey questionnaire builders, or Email Inbox for Recipient's submissions page.

When setting up a Recipient interface:

- Reduce the clutter, allow people to opt into features
- Use text labels to provide a clear explanation for each icon
- Show frequently-used actions and information on the landing page

When setting up an Admin Interface:

- Show frequently-used actions and information on the landing page
- Group similar settings near each other
- In particular, rethink and rearrange Site Settings & Advanced Settings

#### **d. Setup and Support**

**The "hotline" is key to successful GlobaLeaks usage.**

- Many people first heard of GlobaLeaks through a personal connection with the GlobaLeaks team.
- They often set up GlobaLeaks with the help of the lead developer. Together, they came up with "hacks" like using contexts instead of multitenancy.
- They likely could not have used GlobaLeaks without personal support, and sometimes they aren't able to confidently change their own installation.

*"When I have a problem, I ask [GlobaLeaks lead developer]."*

*"I'm not sure how it works. [GlobaLeaks lead developer] showed me how to do it."*

#### **Many features remain a mystery**

- The documentation explains how to operate various features, but not their purpose
- One of the least-understood features was "contexts." Nobody we talked to would have been able to figure out how to use contexts without help.

*"I have no idea what this does. I never used it."*

*"I figured this out through trial and error."*

*"It would be great if this were in the documentation."*

Preliminary design recommendations:

- Improving the setup experience, customization documentation is a priority
- Some documentation can occur in the interface, such as:
  - Default text
  - "Guidance" text explaining what a feature does – since people don't use the interface daily, they would likely appreciate a reminder.
  - Explain the big-picture "why" of current features is a higher priority than adding new features
- In the documentation, give examples of features in action, rather than explaining the interface.
  - Example: "Contexts can be used for..." instead of "Here's how to upload a logo for a context"

### 3. UX/UI Design & Testing

Based on the preliminary design recommendations from phase one, in phase two, we drafted wireframes for the interfaces of Admin, Recipient, and Whistleblower. We focused on the communication between whistleblower and organization, on the process of managing whistleblower communications, and on the process of customizing a GlobaLeaks instance.

We then tested rough prototypes with 2-3 users from human rights and journalistic organizations.

#### 3.1. Design priorities

With our research findings, we identified specific design priorities for phase 2:

Whistleblower interface:

- Focus on language changes. Eg. "report" instead of "submit"
- Develop an alternative design for the 'Credit card'
- Improve the defaults in a way that enhances the trustworthiness of GlobaLeaks

Recipient interface:

- Redesign the landing page
- Develop an onboarding wizard
- Improve site navigation and information architecture
- Have a clear separation between the advanced settings and the customization settings
- Redesign the submission page, clarify columns and icons, experience with inbox pattern

Admin interface:

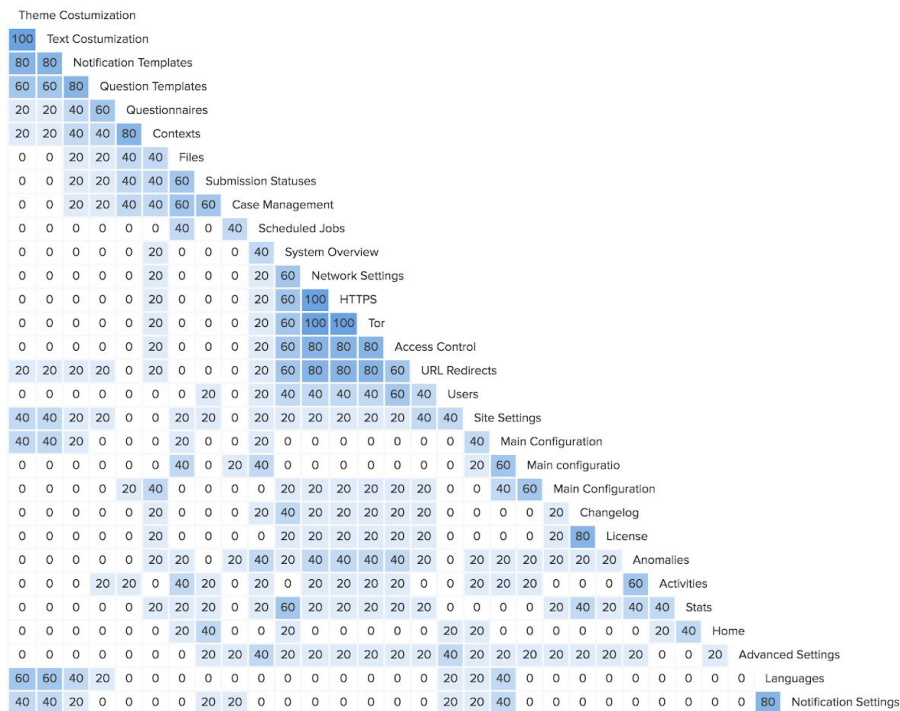
- Redesign the landing page
- Develop an onboarding wizard
- Group settings that make sense together
- Improve documentation in the interface

Additionally, we also focused on developing a new design solution that would allow users to switch roles between Admin and Recipient. We went through three rounds of iterations to test how the 'merged' Admin and Recipient interface would behave and function.

## 3.2. Wireframe Mock-ups

### 3.2.1. Admin Interface

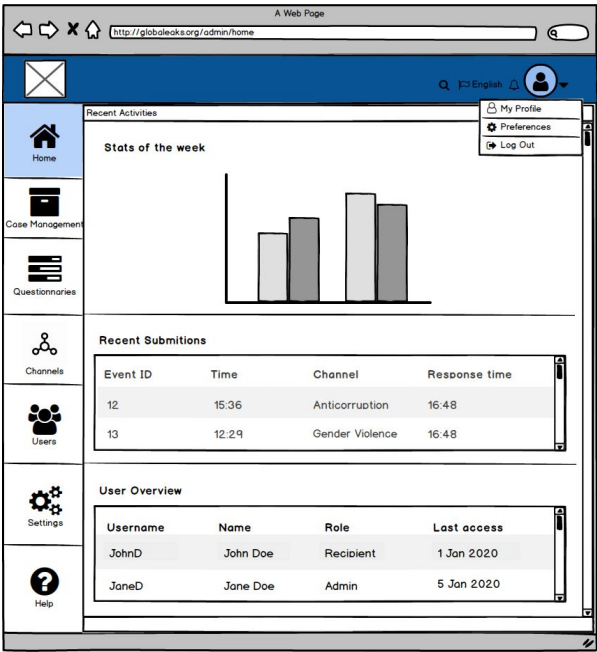
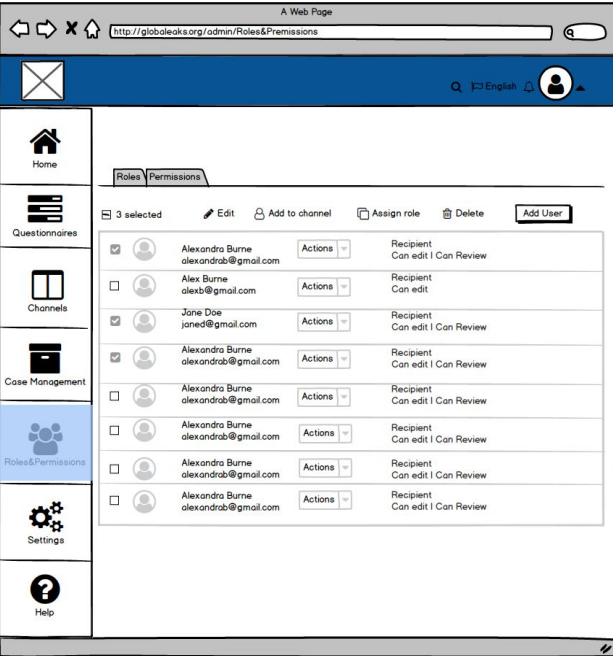
In order to improve the information architecture and design a new menu for the Admin interface, we did a card sorting exercise with 27 cards each representing a setting in the Admin Panel. The result shows a total of 35 categories with a median of 7 categories among 5 different participants.



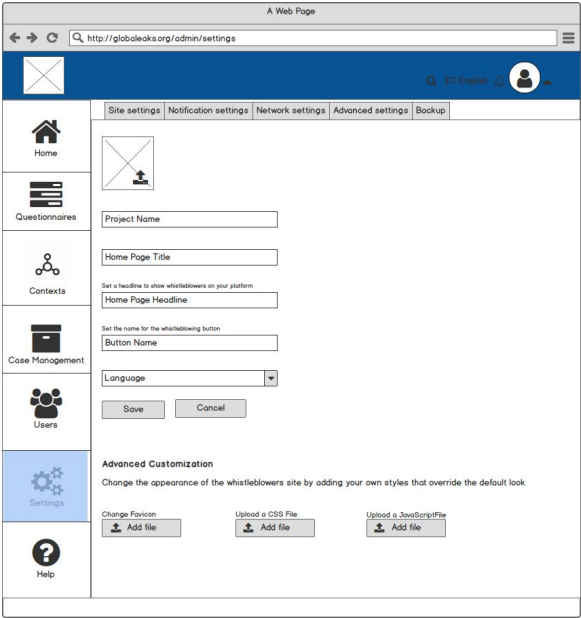
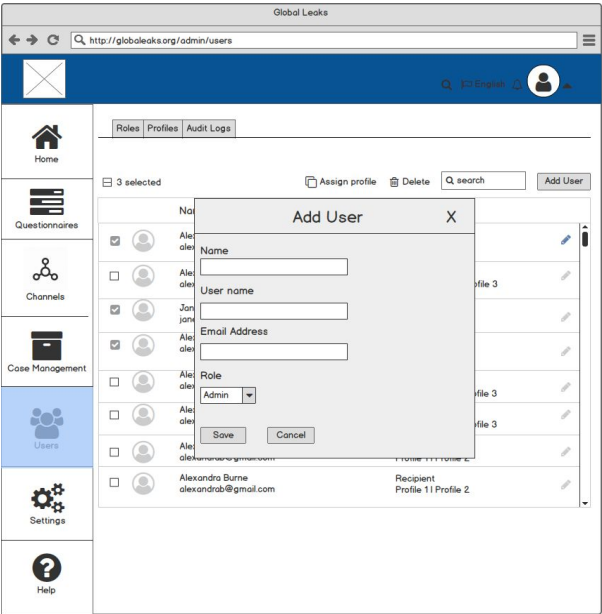
This exercise enabled us to identify which groups of settings would make the most sense together. As a result, we simplified the sidebar menu and categorized into 7 groups: Home, Case Management, Questionnaires, Channels, Users, Settings, Help. We also reorganized the sub-menus and merged some menus with similar functionalities. For example "Notification

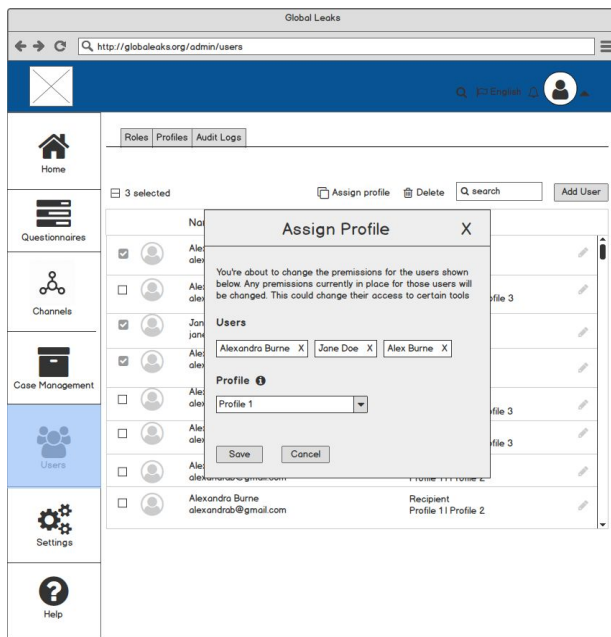
Settings”, “Network Settings”, “Advanced Settings” and “System Overview” are now grouped in a single menu named “Settings”.

## Low-fidelity mock-ups: Iteration Round 1

Screen name	Changes in this mock-up include:
 <p><i>Home: Landing page / Dashboard</i></p>	<ul style="list-style-type: none"> <li>• The bar graph that shows the statistic of the week</li> <li>• Settings are categorized into 7 groups on the sidebar menu: Home, Case Management, Questionnaires, Channels, Users, Settings, Help.</li> <li>• Updates on recent submissions</li> <li>• Audit log / User overview to keep track of recent activities</li> <li>• Added Search function.</li> </ul>
 <p><i>Roles and Permissions</i></p>	<p>The new design solution that allows the user to switch roles between Admin and Recipient:</p> <ul style="list-style-type: none"> <li>• Two new features introduced are Assign Role and Add User</li> </ul>

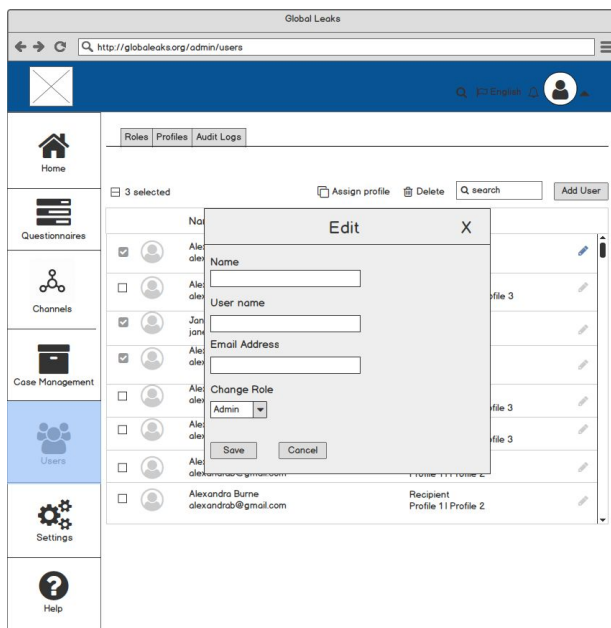
Low-fidelity mock-ups: Iteration Round 2

Screen name	Changes in this mock-up include:
<div></div> <p><i>Settings</i></p>	<ul style="list-style-type: none"><li>• Text boxes with clear hint and explanation</li><li>• Settings are grouped into five categories: Site settings, Notification settings, Network settings, Advanced Settings, Back up</li><li>• Clear advanced customization area that makes it easier to change the defaults.</li><li>• Added search function.</li></ul>
<div></div> <p><i>Users &gt; Add User</i></p>	<ul style="list-style-type: none"><li>• When adding users, Admin will have the ability to assign their roles.</li></ul>



*User > Assign Profile*

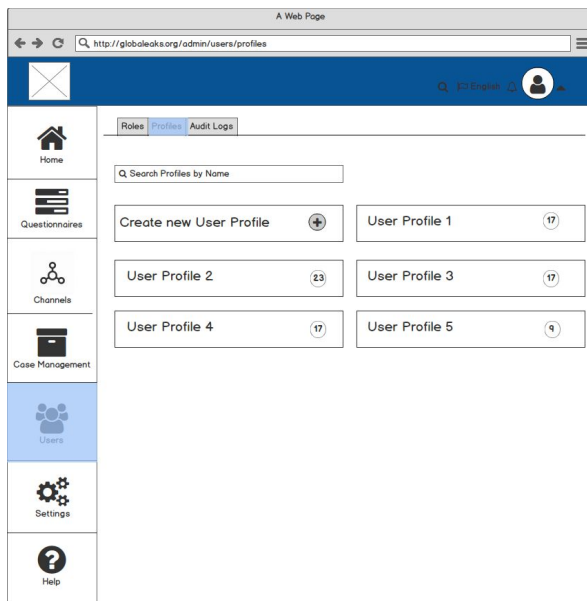
- When Admin creates a Profile, they will be able to group multiple permissions together under a Profile.
- This will allow them to later assign these profiles to multiple users instead of assigning permissions to each individual user.



*Users > Edit User*

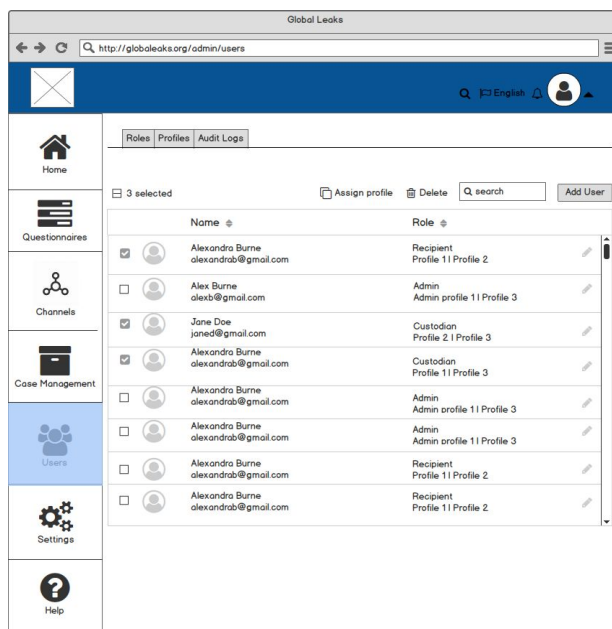
- Admins can use the Edit button to update each user information, and Action to assign permissions to them according to their role.





*Users > Profiles*

- Admin can create different Profiles, each with a different set of permissions before assigning them to users.



*Users*

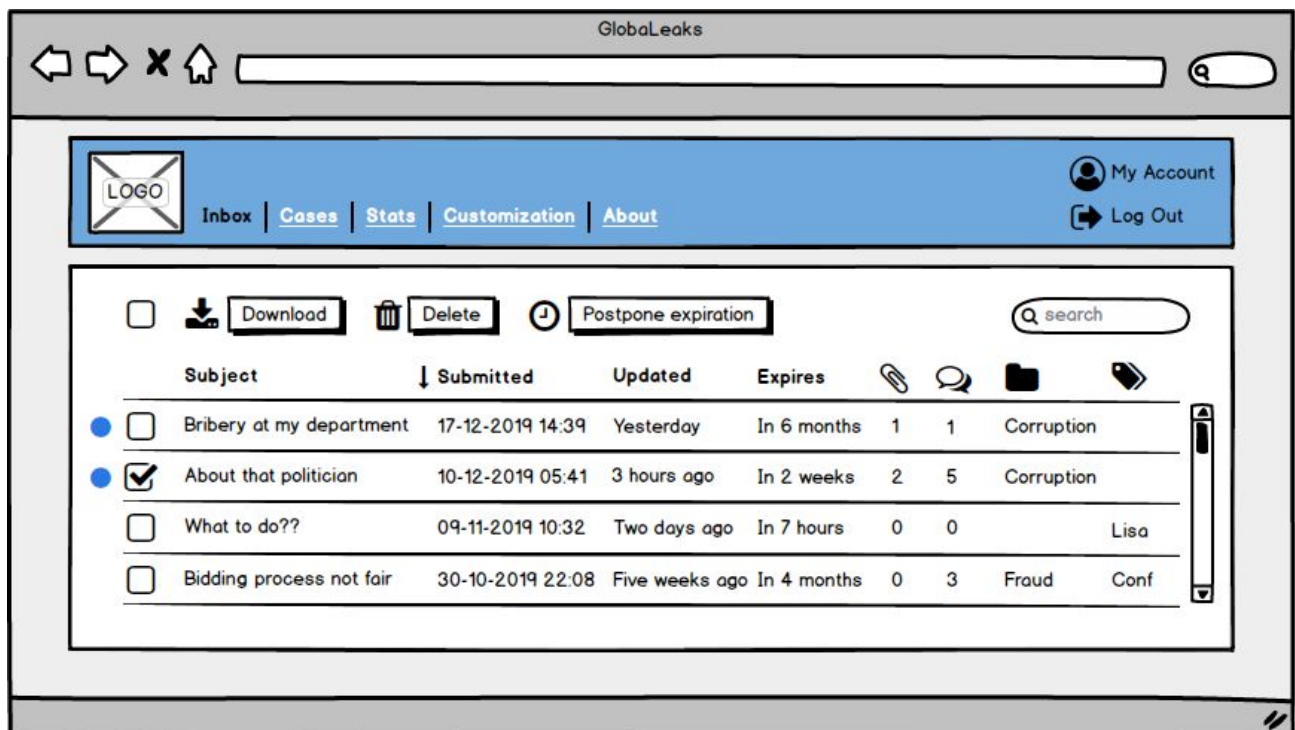
- New design for Users page.
- Remove the Edit button, Add to Channel and Actions from the top panel
- Move the Edit icon to accompany each user
- Enable multiple users selection

### 3.2.2. Recipient Interface



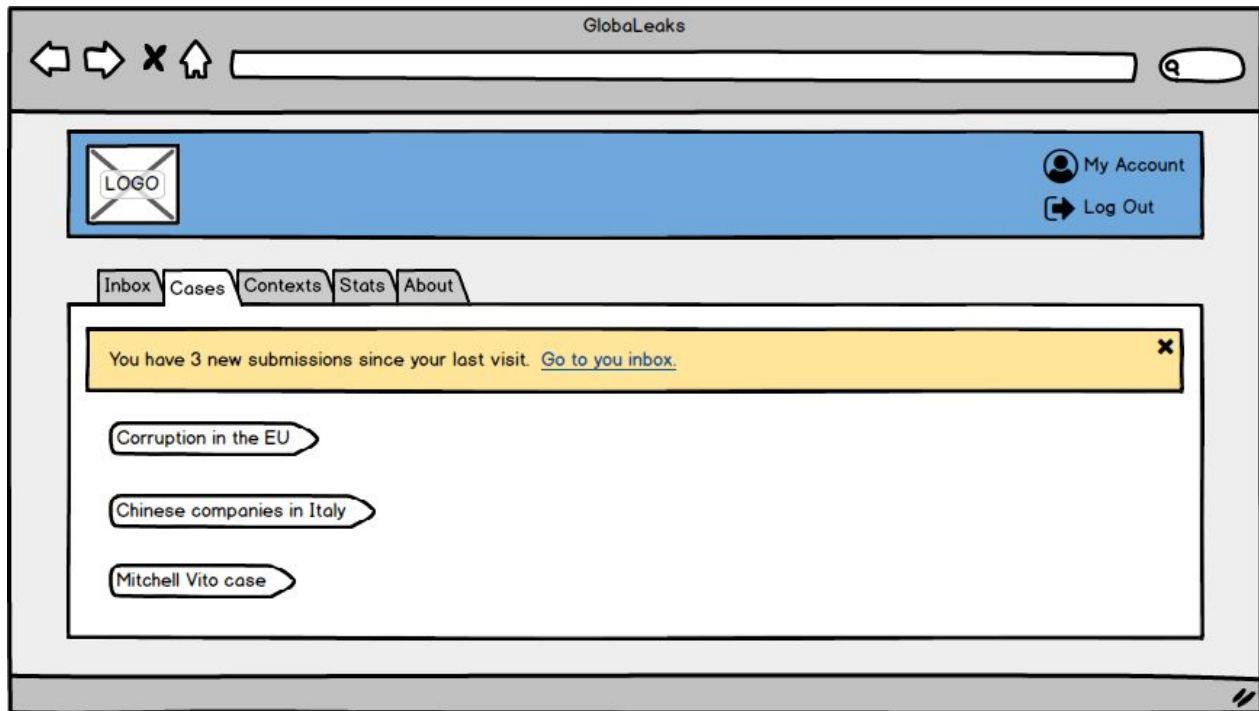
Home / Dashboard

- Statistics are featured.
- Notification that updates users on the current status of submissions and provides an action link that allows users to go straight to the Submission page.



Experiencing with inbox pattern for the Submission page

- New Submission page resembles an inbox with the exact date and time of submission, subject title, expiration date, number of comments, folders, and tags.
- Postpone Expiration feature allows the Recipient to adjust the submission expiration date in case more data are needed from the Whistleblowers or they need more time to work on the case.



Cases

- Tags enable users to filter and find submissions more efficiently.

### 3.2.3. Whistleblower Interface

We leveraged concise language and clear visuals to communicate trustworthiness and increase the transparency of the submission process. We wanted the mock-ups for the Whistleblower interface to be simple, clean, and easy to navigate. Additionally, the use of language should also be friendly, easy to understand and be customized depending on different geographical and cultural contexts.

Screen name	Contents / Changes
-------------	--------------------



Landing page 1

This design provides an example of how default text on the Landing page can be customized.


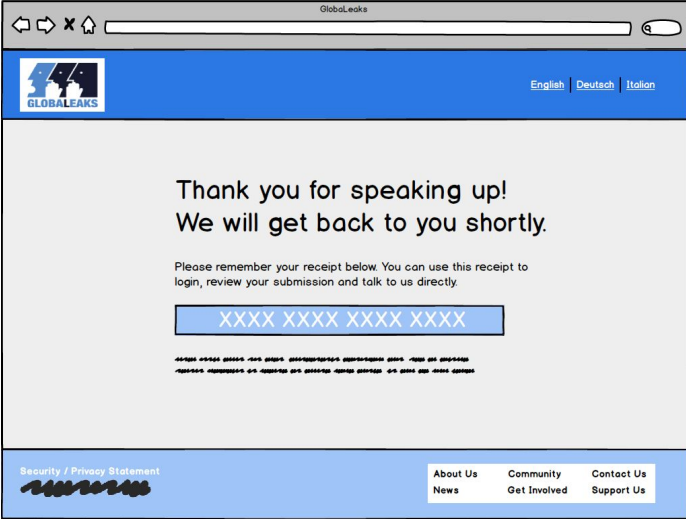
It also covers a scenario that has not been addressed before: when the Whistleblower loses their receipt.



Landing page 2

The customization of language (from 'blow the whistle' to 'tell us more') can be used to encourage users to take actions however it should be done with consideration to cultural differences.

This screen provides an option to learn more about GlobaLeaks before submitting a report.

 <p><i>Receipt screen for returning users</i></p>	<p>This screen provides an option to seek support in case users have trouble logging in.</p>
 <p><i>Post-submission screen</i></p>	<p>This screen shows:</p> <ul style="list-style-type: none"> <li>• Appreciation for Whistleblower trust in using the GlobaLeaks platform as they speak up.</li> <li>• Transparency as it provides Whistleblower with an understanding of the process.</li> <li>• A reminder of the importance of the receipt.</li> </ul>

### 3.3. Usability Testing

We were able to conduct usability tests using the low-fidelity mockups from both rounds of the iteration process. We recruited three participants who were currently using the platform and managing their own GlobaLeaks installations. Among them, one was an Admin/Admin, two were both Admin and Recipient.

Overall our mockups received positive feedback from participants. Some of the feedback provided insights that directly contribute to our second round of mock-ups design for the Admin interface.

#### Our objectives for the usability testing were:

- To test preliminary concepts, such as role switch, and evaluate their promise

- To assess some specific features of the Admin and Recipient interfaces: what works and what doesn't
- To identify new design issues and address them during the implementation process

**Our selected features to test include:**

Admin interface:

- Breadcrumb navigation
- Site setting, including Customization
- Questionnaires
- Grouping and finding settings
- Guidance text & good defaults
- Landing page

Recipient interface:

- Log-in and submission page
- Landing page
- Usability of icons & columns on the submission page
- User Preferences / PGP Key / Password

**Usability testing key findings:**

Admin interface:

- The participants liked the new Homepage and found the breadcrumb navigation to be helpful. The icons made it easier to identify which section each Setting goes to. However, it wasn't clear how that would look like on a mobile screen.
- The layout of the User / Profile was straightforward and clean.

Recipient interface:

- The inbox visual for the submission page was perceived as an improvement.
- The statistics on the dashboard were appreciated and helpful.
- The information architecture made a lot of sense and helped users navigate more efficiently.

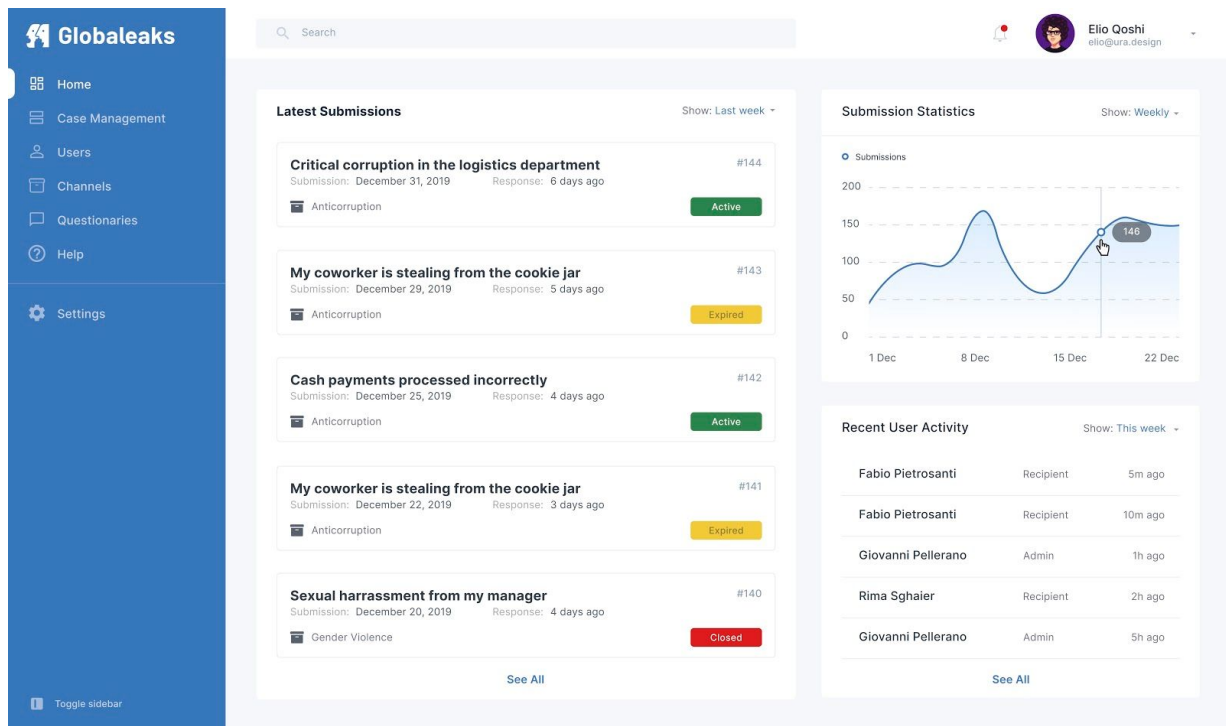
## **4. High-fidelity UI & Style Guide Design**

In this phase, we further developed the design prototypes from phase three into higher fidelity mockups and continued iterating these mockups based on usability testing sessions throughout this process, until we arrived at a stage where we are able to provide production-ready interactive prototypes for the Admin, Recipient and Whistleblower interfaces.

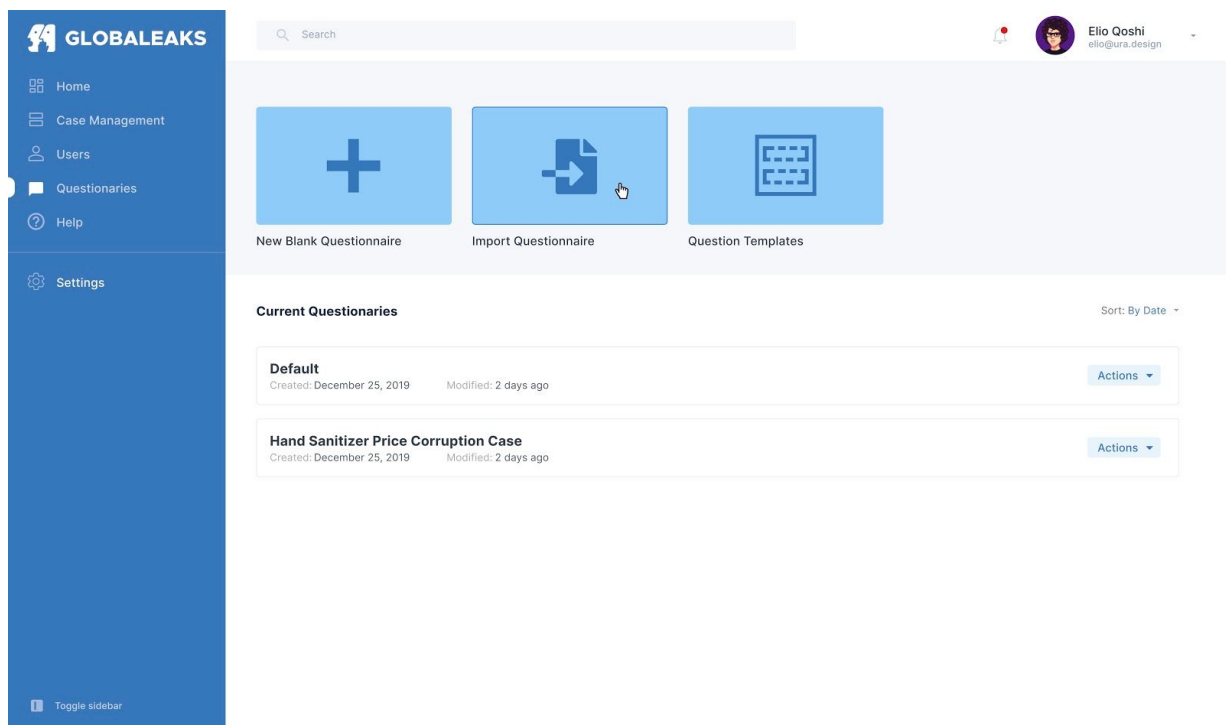
In parallel, we also developed a master style guide for out-of-the-box GlobaLeaks installations on a foundational level. Due to the nature of the project (deployments vary based on the

provider), we built a web-based style guide on a foundational and principle level, rather than a step-by-step design system.


#### 4.1. High-fidelity: Admin interface



Home



Questionnaires

Globeleaks

Home

Case Management

Users

Questionaries

Help

Settings

Toggle sidebar

Search

General

General Settings, Language

Customize

Submission Form, Theming

Notifications

SMTP Setup

Channels

Users, roles and permissions

Network

HTTPS, Tor, Access Control, URL Redirects

Backup

Backups overview and scheduling

Advanced

Administration, Access & Permissions, Privacy & Security, Custom Strings

Report Submission Form

Tagline

Secure Report Platform

In a few words, explain what this site is about.

Submission Button

Submit a Tip

Call to Action

Do you have sensitive information you need to share?

This call to action will be displayed on the submission form, inviting the user to submit a tip.

Presentation

GlobalLeaks is open source whistleblowing software.

(optional) Add a presentation of this GlobalLeaks instance for viewers.

Submission Status Title

Submission Status

Select Context Help Text

Select the context of your submission

Text shown on top in the Context selection interface.

Context Order

☒ Alphabetical order

☐ Reverse alphabetical order

Type of Context Selector

☒ List

☐ Card

☐ Search

Receipt Page Title

Your submission was successful.

Text shown after a submission has been sent.

Attachment Size Limit (MB)

30

Size Limit (in Megabytes) for Attachments in submissions

Theming

Custom CSS

Upload

Custom JavaScript

Upload

Custom Files

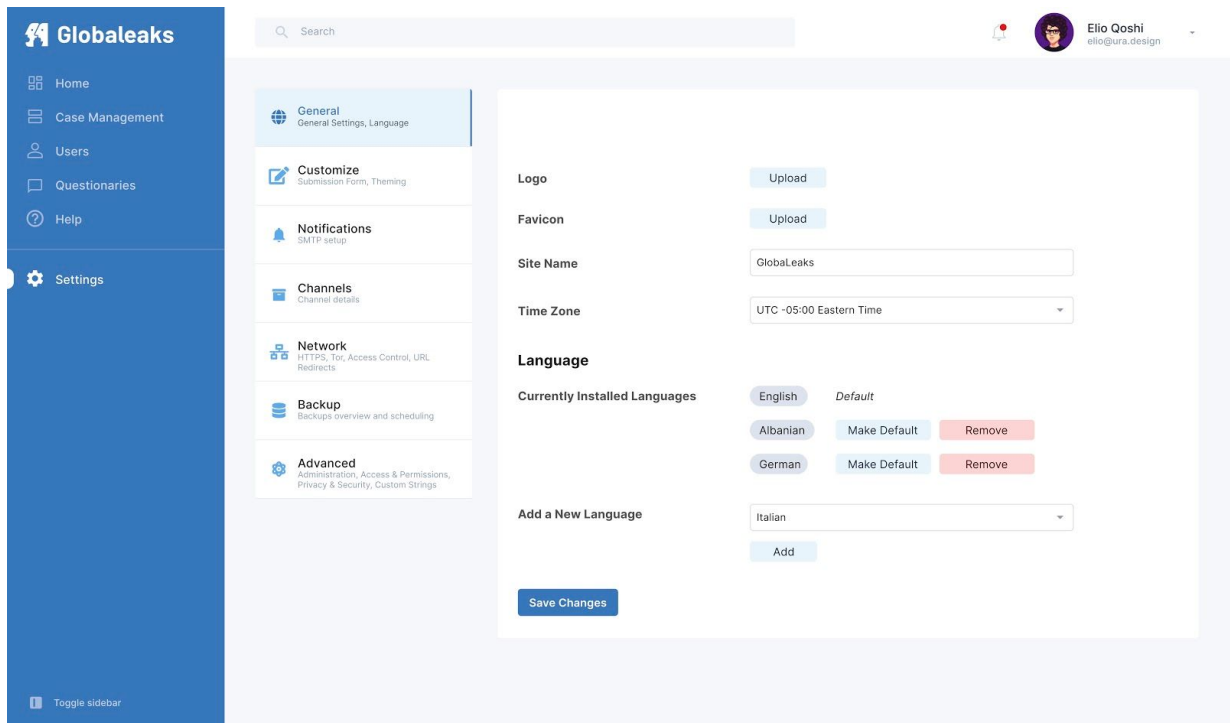
Upload

Save Changes

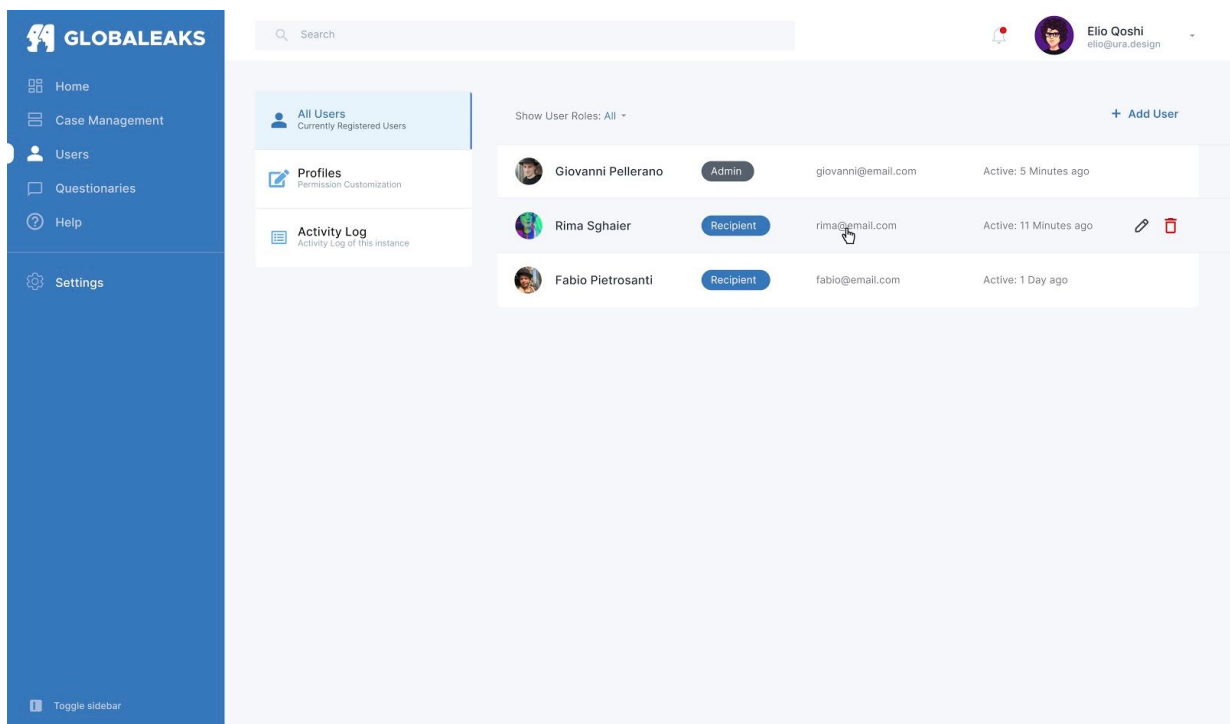
## Customization

32





## Settings (General)



## Users

### 4.2. High-fidelity: Recipient interface

Recipient Dashboard

- Home
- Reports
- Preferences

Toggle sidebar

Search

You have 3 new submissions since your last visit. Go to [your inbox](#).

### Welcome back, Elio!

Here's your summary for the week 43rd, 2020.

- News** Whistleblowers in the UK are now granted protection by the new amendment of the Public Interest Disclosure Act 1998 ("PIDA").
- Stats** The submission rate of ABC organization is increased by 5.25%.
- Updates** We have opened our new support channel for professional support and development of corruption and anti-compliance project at Whistleblowing Solution

### Submission Statistics

Show: Weekly

Date	Submissions
1 Dec	50
8 Dec	150
15 Dec	100
22 Dec	146

### Latest Submission

Title	Submission Date	Response Date	Status
Critical corruption in the logistics department	December 31, 2019	6 days ago	Active
My coworker is stealing from the cookie jar	December 29, 2019	5 days ago	Expired
Cash payments processed incorrectly	December 25, 2019	4 days ago	Active

Home

Recipient Dashboard

- Home
- Reports
- Preferences

You have 3 new submissions since your last visit. Go to [your inbox](#).

### Welcome back, Elio!

Here's your summary of week 43rd, 2020.

- News** Whistleblowers in the UK are now granted protection by the new amendment of the Public Interest Disclosure Act 1998 ("PIDA").
- Stats** The submission rate of ABC organization is increased by 5.25%.
- Update** We have opened our new support channel for professional support and development of corruption and anti-compliance project at Whistleblowing Solution

### Submission Statistics

Show: Weekly

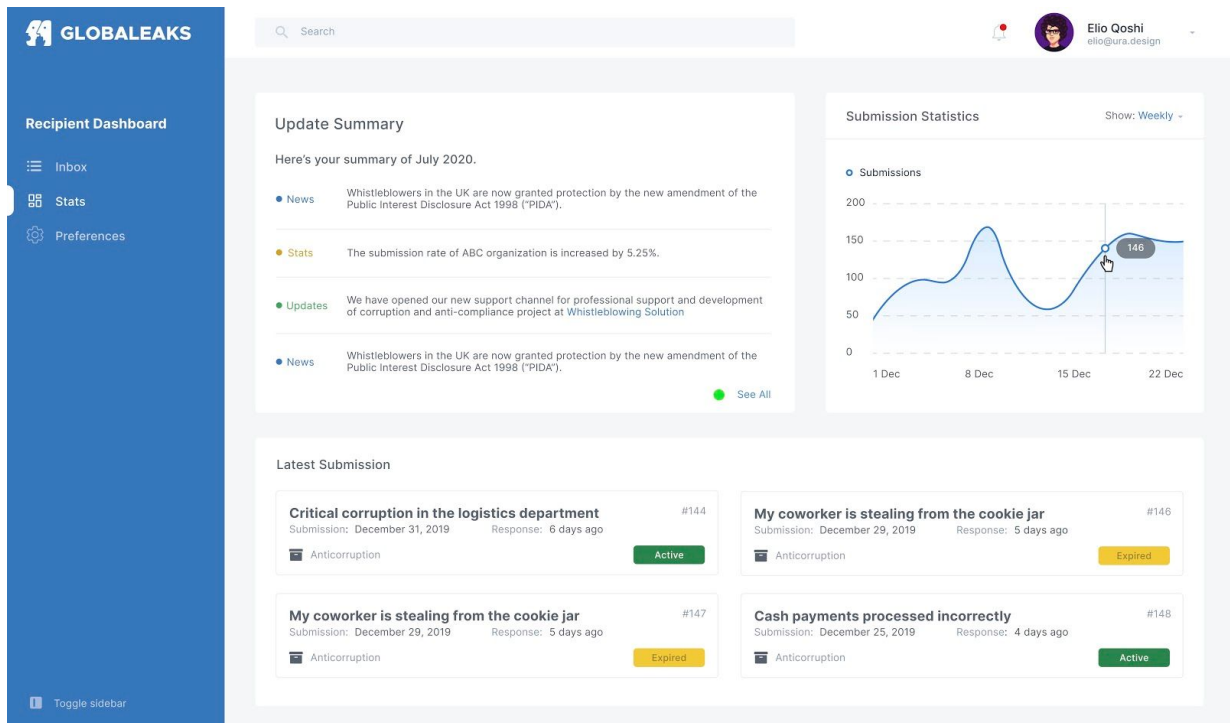
Date	Submissions
1 Dec	50
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22 Dec	146

### Latest Submission

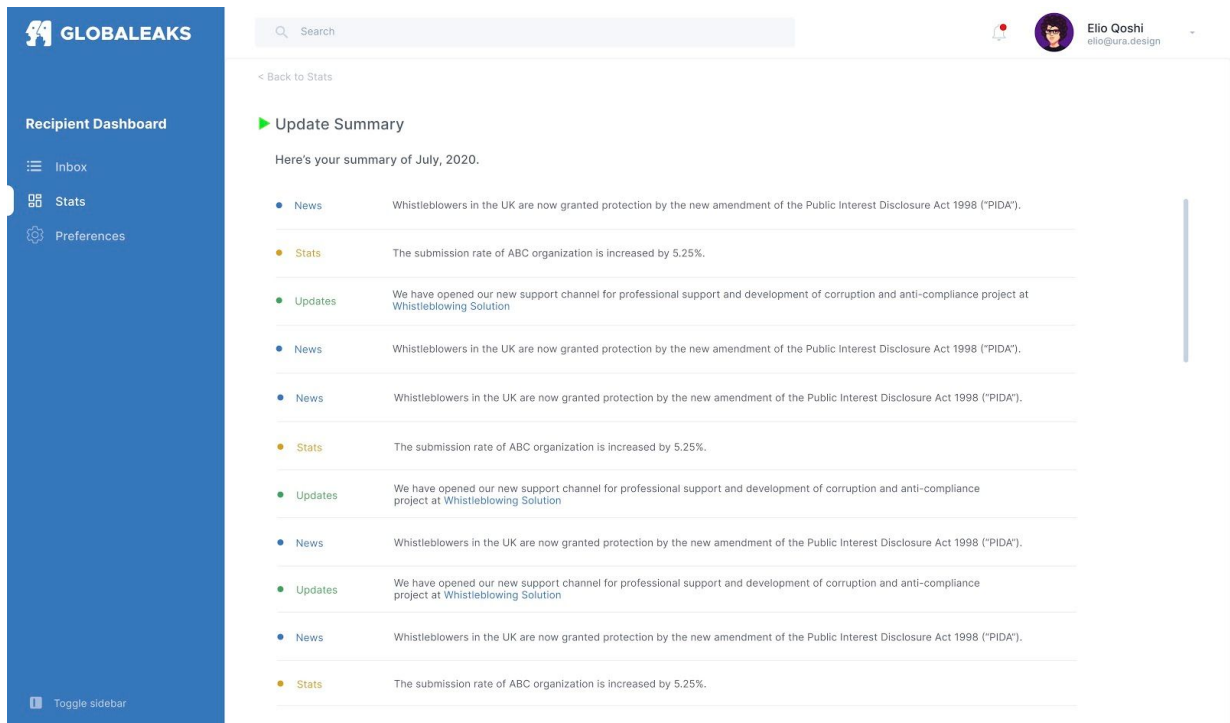
Title	Submission Date	Response Date	Status
Critical corruption in the logistics department	December 31, 2019	6 days ago	Active
My coworker is stealing from the cookie jar	December 29, 2019	5 days ago	Expired

[See All](#)

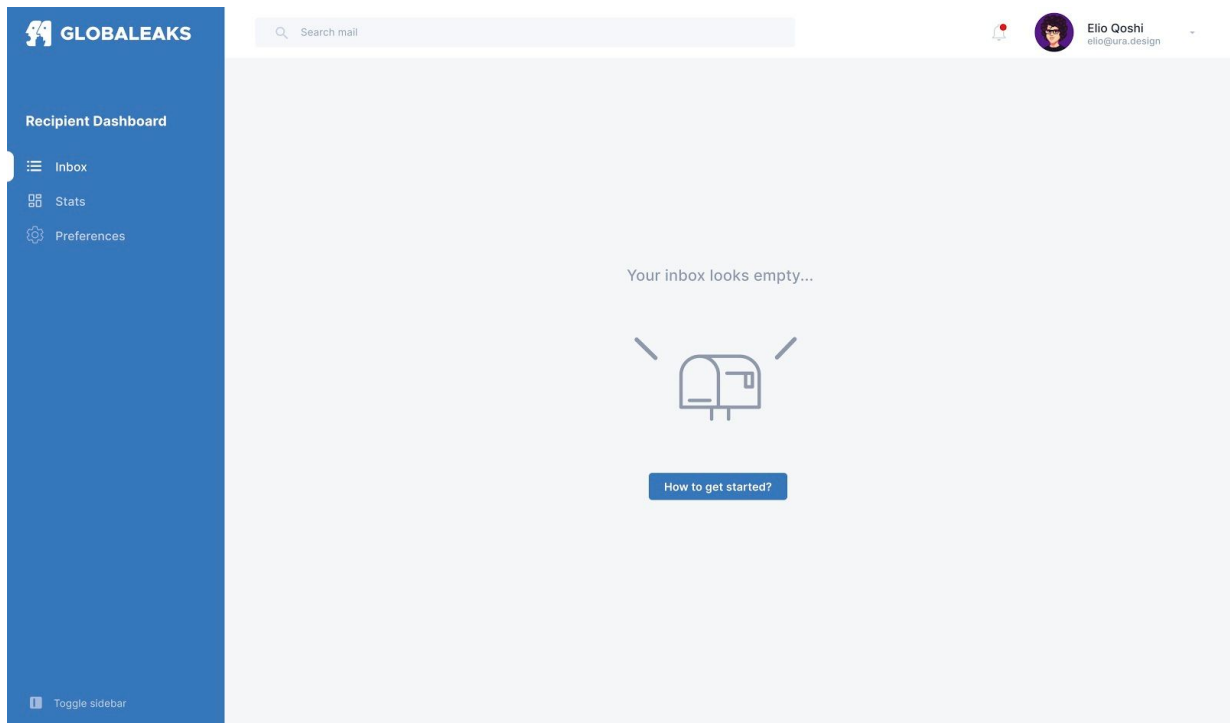
Dashboard / Landing page



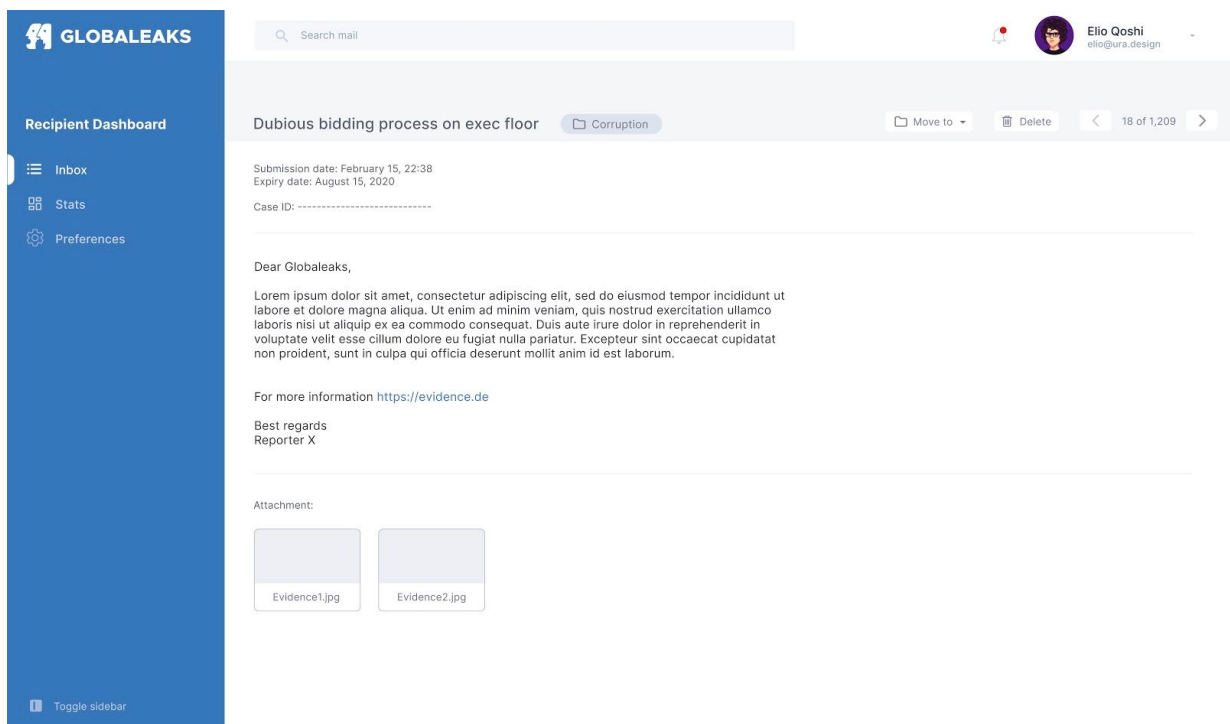
## Statistics Summary



## Update Summary



*Inbox (On-boarding)*



*Inbox (Case)*

GLOBALEAKS

Inbox

Stats

Preferences

Toggle sidebar

Search mail

Elio Qoshi

elio@ura.design

You have 3 new submissions since your last visit. Go to [your inbox](#).

X

☐

Select all reports

Latest submission date

Move to

Delete

1-20 of 159

☐

Bribery at my department

2

April 22, 17:35

yesterday

In 6 months

Corruption

Lisa

☐

Bribery at my department

1

April 10, 11:20

submission date

April 15, 20:30

In 6 months

Corruption

☐

Bribery at my department

April 2, 15:00

yesterday

In 5 months

Lisa

☐

Bribery at my department

1

March 20, 11:20

March 22, 11:05

In 4.5 months

Corruption

Lisa

☐

Bribery at my department

1

March 19, 09:15

yesterday

In 4 months

Corruption

Lisa

☐

Bribery at my department

March 18, 15:00

yesterday

In 5 months

Lisa

☐

Bribery at my department

1

March 15, 11:20

March 22, 11:05

In 4.5 months

Corruption

Lisa

☐

Bribery at my department

1

March 11, 09:15

March 25, 10:55

In 4 months

Corruption

Lisa

☐

Bribery at my department

March 1, 15:00

yesterday

In 5 months

Lisa

☐

Bribery at my department

1

February 2, 11:20

February 22, 11:05

In 4.5 months

Corruption

Lisa

☐

Bribery at my department

1

February 1, 09:15

February 25, 10:55

In 4 months

Corruption

Lisa

## Inbox (Submission Date)

GLOBALEAKS

Recipient Dashboard

Inbox

Stats

Preferences

Toggle sidebar

Search mail

Elio Qoshi

elio@ura.design

You have 3 new submissions since your last visit. Go to [your inbox](#).

X

Select all reports

Latest submission date

Move to

Delete

< 1-20 of 159 >

Bribery at my department

2

April 22, 17:35

yesterday

In 6 months

Corruption

Lisa

Bribery at my department

1

April 10, 11:20

April 15, 20:30

In 6 months

Corruption

expiry date

Bribery at my department

April 2, 15:00

yesterday

In 5 months

Lisa

Bribery at my department

1

March 20, 11:20

March 22, 11:05

In 4.5 months

Corruption

Lisa

Bribery at my department

1

March 19, 09:15

yesterday

In 4 months

Corruption

Lisa

Bribery at my department

March 18, 15:00

yesterday

In 5 months

Lisa

Bribery at my department

1

March 15, 11:20

March 22, 11:05

In 4.5 months

Corruption

Lisa

Bribery at my department

1

March 11, 09:15

March 25, 10:55

In 4 months

Corruption

Lisa

Bribery at my department

March 1, 15:00

yesterday

In 5 months

Lisa

Bribery at my department

1

February 2, 11:20

February 22, 11:05

In 4.5 months

Corruption

Lisa

Bribery at my department

1

February 1, 09:15

February 25, 10:55

In 4 months

Corruption

Lisa

## Inbox (Expiry Date)

The screenshot shows the 'Recipient Dashboard' for 'GLOBALEAKS'. The left sidebar contains links for 'Inbox', 'Stats', and 'Preferences' (which is active). The main content area is titled 'Preferences settings' and includes fields for 'Username' (Recipient), 'Role' (Recipient), 'Public Name' (Elio), and 'Email Address' (Elio@ura.design). There are checkboxes for 'Enable Email notification' and 'Enable two-factor authentication', both of which are checked. A section for 'Set up email encryption by providing PGP public key' includes a text input field with the placeholder 'Copy and paste PGP Public key here' and a button labeled 'Account Key Recovery'. A 'Save Changes' button is located at the bottom left of the settings area. The top right corner shows a user profile for 'Elio Qoshi' with the email 'elio@ura.design'.

### *Preferences Settings*

## 4.3. Style Guide Design

The style guide design includes:

- New GlobaLeaks logo: introducing the accent color Orange to complement the main blue color as in many cases, the different shades of blue were not enough to build the right composition.
- New brand color that is more accessible and is WCAG AA compliant.

For more details, see the full GlobaLeaks Brand Guideline in the Appendix.

## 5. Appendix

### 1. Usable Security Review

### 2. Interview Guide

### 3. GlobaLeaks Brand Guideline