

HOTB Software Solutions

California RFI Process Documentation

Knowledge is Power



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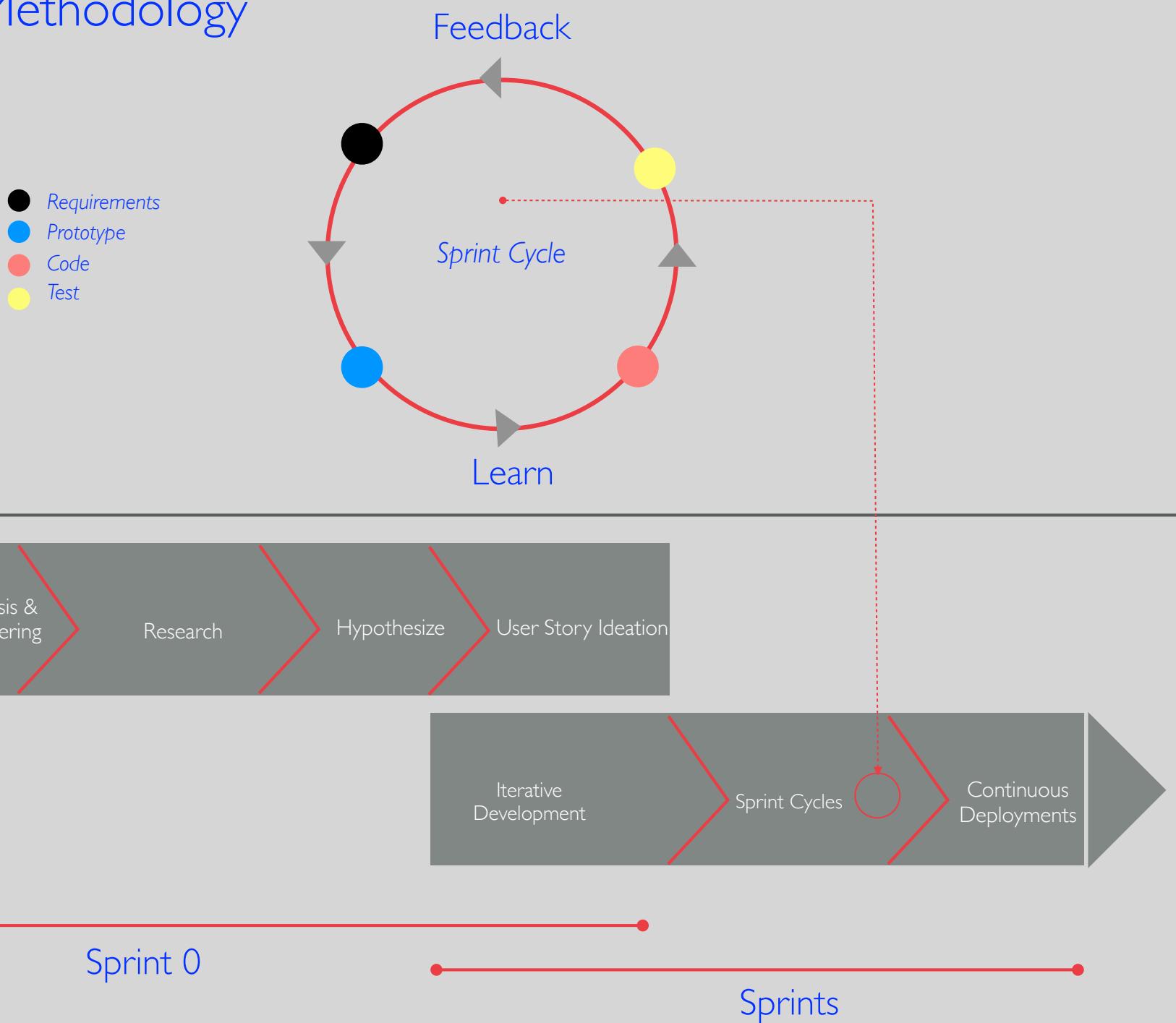
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Thesis

Build a working prototype that will allow State Agencies/Departments to capture, archive, and manage organization knowledge from its employees and programs. To accomplish that effectively, the working prototype should provide 3 experience pillars centered around; knowledge creation, knowledge sharing, and knowledge development. For Knowledge creation, users should have the ability to easily create ‘knowledge articles’ (KA’s). These can be original records (e.g., specific work instructions or content) and/or packages of content, including documents, user configurable forms, tables, and workflows). In addition, have the ability to provide multiple levels and formats of information in KAs (e.g., bullet points for senior technical levels, scripted specific details for junior/non-technical staff). Allow for role-based security access, to allow control of access and level of information by login. For knowledge sharing, the working prototype should: Allow for the promotion of process and information across systems and channels, as required, have the ability to create user-defined rules for creation (e.g., mandatory fields) and lifecycle management (e.g., who, how, when revised and updated) and finally, trigger escalation processes (e.g., automated emails texts to approvers, reminders) for lifecycle activities. For knowledge development, the working prototype should: Have the ability to update and improve KAs and access the value of usage as input to predicting new records or record types. Lastly the application must show innovation by learning from existing records (e.g., types, content, usage) and prompting to create new KAs.

Agile Dev. Methodology



HOTB Team



Jason Connolly
Project Lead



Mark Witte
Product Manager



Raghu Jonnala
Front End Web Developer



Noel Eom
Backend Web Developer



Tracy DePietro
Interaction Designer
User Researcher
Usability Tester



Mike Firoved
Technical Architect



Ken Baker
Visual Design



Luis F. Escobar-Driver
Backend Web Developer



Eric Dobyns
DevOps Engineer

Accountability & Team Communication

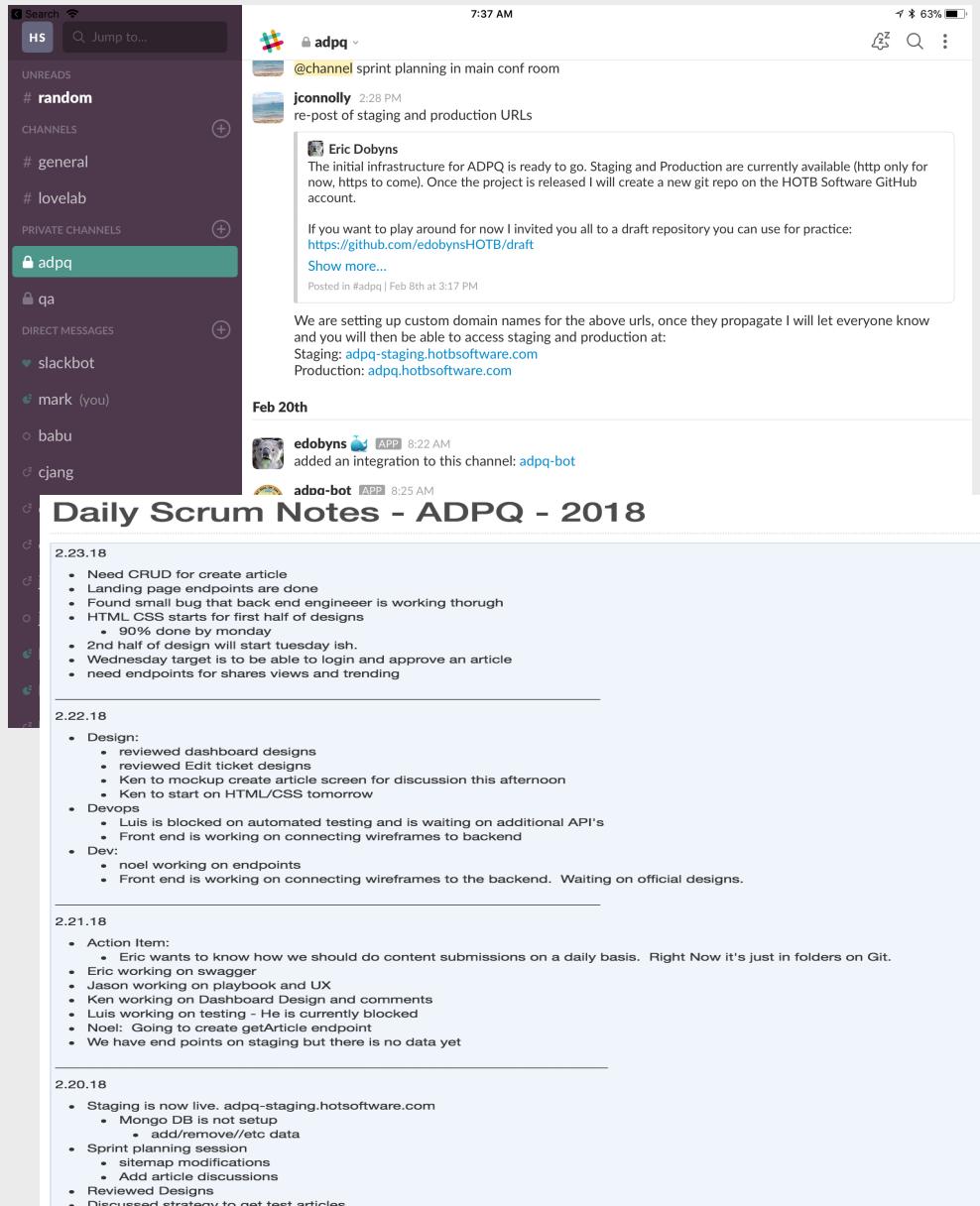
	Under consideration	In design	Design Review	Ready to develop	In development	Dev Complete	QA	Ready to ship	Shipped	Will not implement	
✓ Dan Castellan	PA-27 On-Design-HTML5-PhoneRegistration 3 Requirements 0 Requirements PA-25 On-Design-Mobile-AddLocation 2 Requirements 0 Requirements PA-24 On-Design-Mobile-Email Registration 2 Requirements 0 Requirements PA-23 On-Design-Mobile-PhoneRegistration 3 Requirements 0 Requirements										
✓ Eric Dobyns	PA-22 On-Design-Mobile-Create 3 Requirements 0 Requirements		PA-36 Setup Build Server 10 Requirements 0 Requirements PA-137 DevOps - Setup Build Server 9 Requirements 0 Requirements	PA-57 Documentation - Data Models 5 Requirements 0 Requirements	PA-155 Documentation - Initial Swagger Setup 0 Requirements 0 Requirements PA-156 Documentation - API Endpoints 5 Requirements 0 Requirements PA-150 DevOps - Setup Production Environment 7 Requirements 0 Requirements PA-151 DevOps - Setup Staging Environment 0 Requirements 0 Requirements PA-152 DevOps - Setup GitHub 5 Requirements 0 Requirements						
✓ Felix Tran											
✓ Jason Connolly	PA-167 Create Seed Data 3 Requirements 0 Requirements PA-141 Technical Writeup 2 Requirements 0 Requirements			PA-165 UXResearch - UI 4 Requirements 0 Requirements PA-45 Technical Writeup 0 Requirements 0 Requirements PA-140 Complete the Playbook writeup 2 Requirements 0 Requirements PA-133 Conduct Initial Interviews 3 Requirements 0 Requirements	PA-144 Design - Landing Page - Wireframes 6 Requirements 0 Requirements						
✓ Ken Baker	PA-166 Design - Style Guide 2 Requirements 0 Requirements PA-147 Design - High Fidelity Designs 4 Requirements 0 Requirements PA-148 Design - Mockups 4 Requirements 0 Requirements	PA-148 Design - HTML/CSS Conventions - 1/2 Half of Design Requirements 6 Requirements 0 Requirements	PA-174 Design - Wireframes - Create Article Screen 0 Requirements 0 Requirements PA-173 Design - Wireframes - Create/Edit Timer Screen 1 Requirements 0 Requirements PA-172 Design - Wireframes - Dashboard 5 Requirements 0 Requirements PA-149 Design - Multiple Versions of Article Table View - wireframes 2 Requirements 0 Requirements						PA-168 Design - Dashboard - Wireframes 2 Requirements 0 Requirements		
✓ Luis F. Escobar-Driver	PA-175 Accessibility Testing 0 Requirements 0 Requirements PA-143 Performance Testing 4 Requirements 0 Requirements				PA-152 QA - Regression Template 5 Requirements 0 Requirements PA-144 QA - Automated Tests 4 Requirements 0 Requirements	PA-153 QA - Initial Setup 0 Requirements 0 Requirements					
✓ Luis Garcia					PA-150 On-OS-Phone Registration 5 Requirements 0 Requirements	PA-15 On-OS-EmailRegistration 4 Requirements 0 Requirements PA-12 On-OS-Add Location 7 Requirements 0 Requirements PA-11 iOS - Onboarding - Create 4 Requirements 0 Requirements PA-10 iOS-Initialization 2 Requirements 0 Requirements					
✓ Mark Witte	PA-139 Complete Readme Deck 0 Requirements 0 Requirements				PA-134 Experience Pillar Document 0 Requirements 0 Requirements PA-49 Complete Readme Deck 0 Requirements 0 Requirements	PA-48 Complete the Playbook writeup 0 Requirements 0 Requirements PA-47 User Pillar Document 0 Requirements 0 Requirements					

Aha!, our agile development platform was used for running development, velocity and progress tracking, to-do's, and burn down.

Accountability & Team Communication cont'd

Ready to develop	In development	Dev Complete	QA
<p>PA-187 Final Documentation Review 0 Requirements</p> <p>PA-186 Review Mark's Technical Section of the Playbook 0 Requirements</p> <p>PA-185 Final Code Review 0 Requirements</p>	<p>PA-211 /Update Deck 0 Requirements</p> <p>PA-182 Create Default Database With 'Seed' Data 0 Requirements</p> <p>PA-176 Documentation - Github 7 Requirements</p> <p>PA-157 Documentation - Data Models 8 Requirements</p> <p>PA-156 Documentation - API Endpoints 15 Requirements</p>	<p>PA-184 Setup HTTPS with Noel 0 Requirements</p> <p>PA-183 Setup Custom Domain Name for Documentation Website: adpq-docs.hotsoftware.com 0 Requirements</p> <p>PA-155 Documentation - Initial Swagger Setup 0 Requirements</p> <p>PA-151 DevOps - Setup Production Environment 7 Requirements</p> <p>PA-150 DevOps - Setup Staging Environment 7 Requirements</p> <p>PA-149 DevOps - Setup GitHub 5 Requirements</p> <p>PA-137 DevOps - Setup Build Server 9 Requirements</p>	
	<p>PA-210 Review/Update Deck 0 Requirements</p> <p>PA-167 Create Seed Data 3 Requirements</p>	<p>PA-165 UXResearch - UI 4 Requirements</p> <p>PA-141 Technical Writeup 0 Requirements</p> <p>PA-140 Complete the Playbook writeup 2 Requirements</p>	

Accountability & Team Communication cont'd



The screenshot shows two side-by-side windows. On the left is a 'Daily Scrum Notes - ADPQ - 2018' document with sections for 2.23.18, 2.22.18, 2.21.18, and 2.20.18, detailing tasks and progress. On the right is a Slack interface showing a channel named '#adpq' with messages from users like @channel, jconnolly, and edobyns.

Daily Scrum Notes - ADPQ - 2018

2.23.18

- Need CRUD for create article
- Landing page endpoints are done
- Found small bug that back end engineer is working thorough
- HTML/CSS starts for first half of designs
 - 90% done by monday
- 2nd half of design will start tuesday-ish.
- Wednesday target is to be able to login and approve an article
- need endpoints for shares, views and trending

2.22.18

- Design:
 - reviewed dashboard designs
 - reviewed Edit ticket designs
 - Ken to mockup create article screen for discussion this afternoon
 - Ken to start on HTML/CSS tomorrow
- Devops:
 - Luis is blocked on automated testing and is waiting on additional API's
 - Front end is working on connecting wireframes to backend
- Dev:
 - Noel working on endpoints
 - Front end is working on connecting wireframes to the backend. Waiting on official designs.

2.21.18

- Action Item:
 - Eric wants to know how we should do content submissions on a daily basis. Right Now it's just in folders on Git.
 - Eric working on swagger
 - Jason working on playbook and UX
 - Ken working on Dashboard Design and comments
 - Luis working on testing - He is currently blocked
 - Noel: Going to create getArticle endpoint
- We have end points on staging but there is no data yet

2.20.18

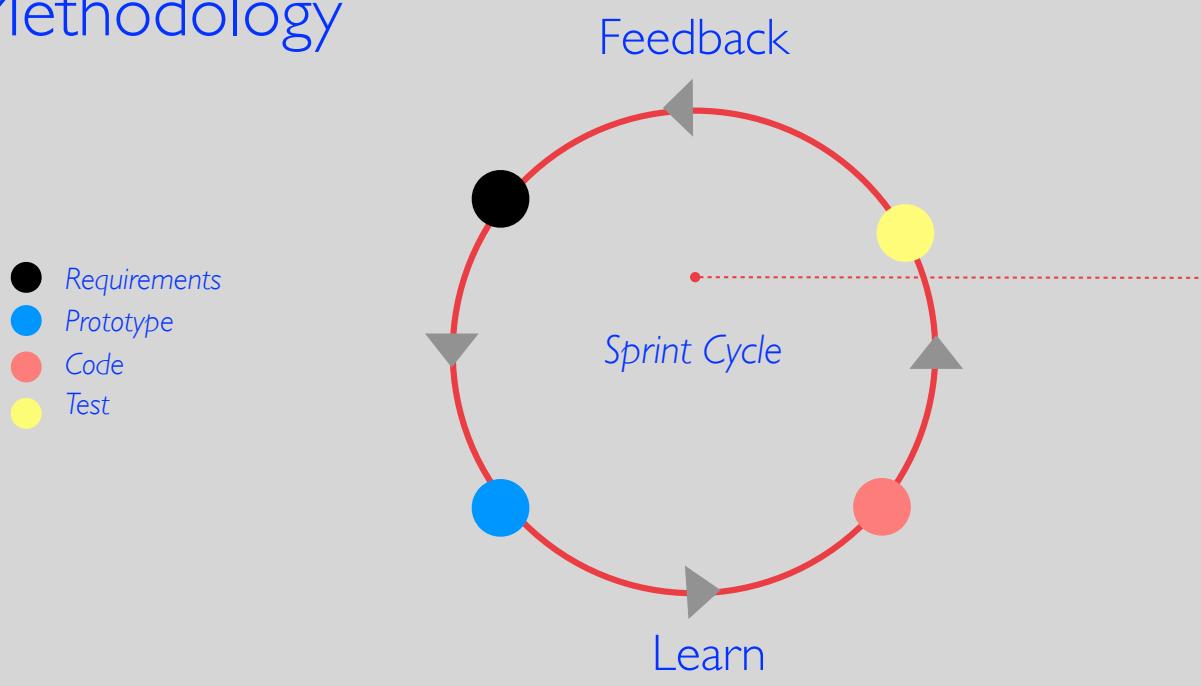
- Staging is now live. adpq-staging.hotsoftware.com
 - Mongo DB is not setup
 - add/remove/etc data
- Sprint planning session
 - sitemap modifications
 - Add article discussions
- Reviewed Designs
- Discussed strategy to get test articles

- Slack was used as a singular day-to-day project communication and collaboration tool.

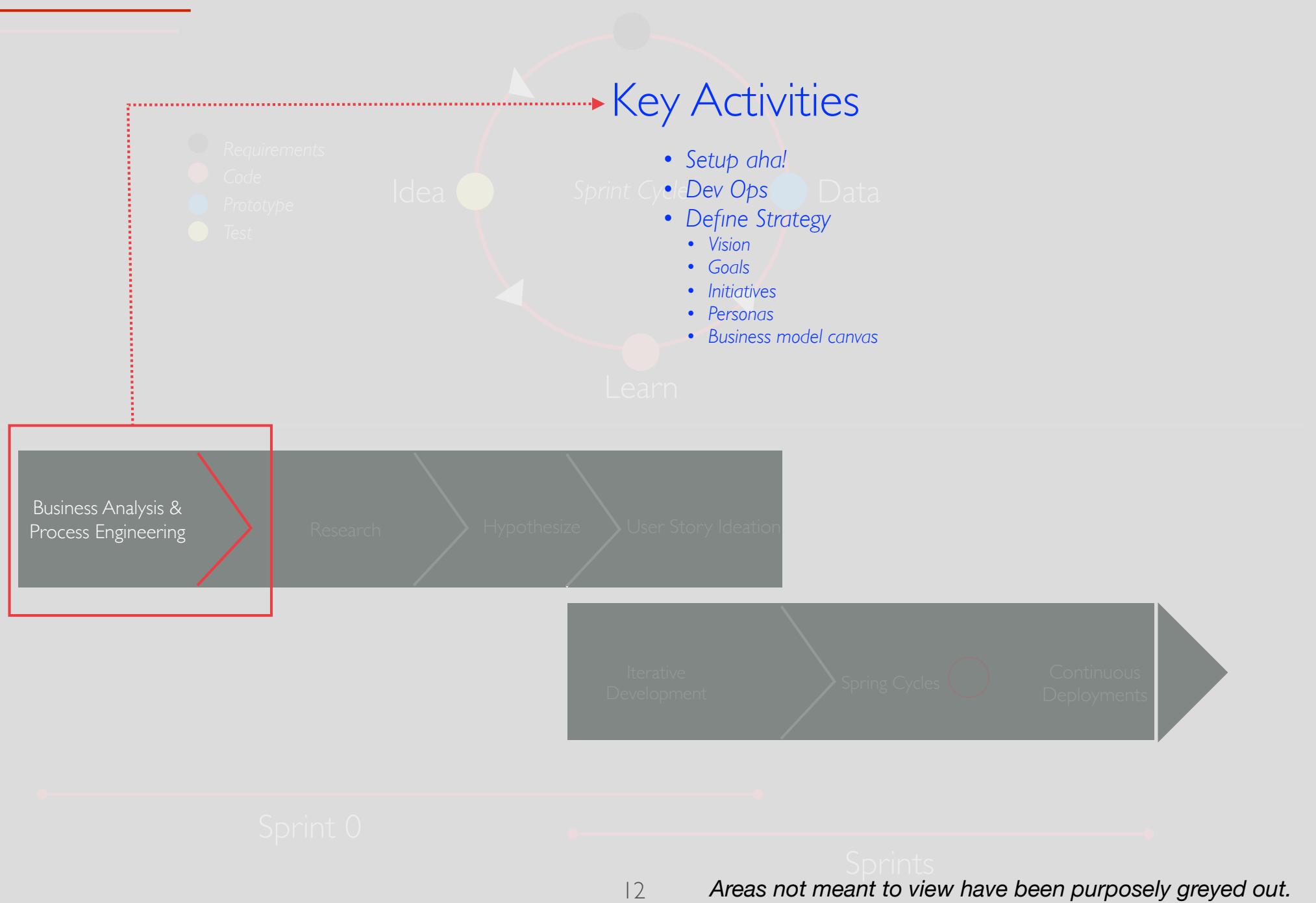
- Notes were compiled during daily scrum meetings to ensure we were on task, not blocked, and/or needed anything from any other team member.

* Viewable versions of these illustrations are in GitHub

Agile Dev. Methodology

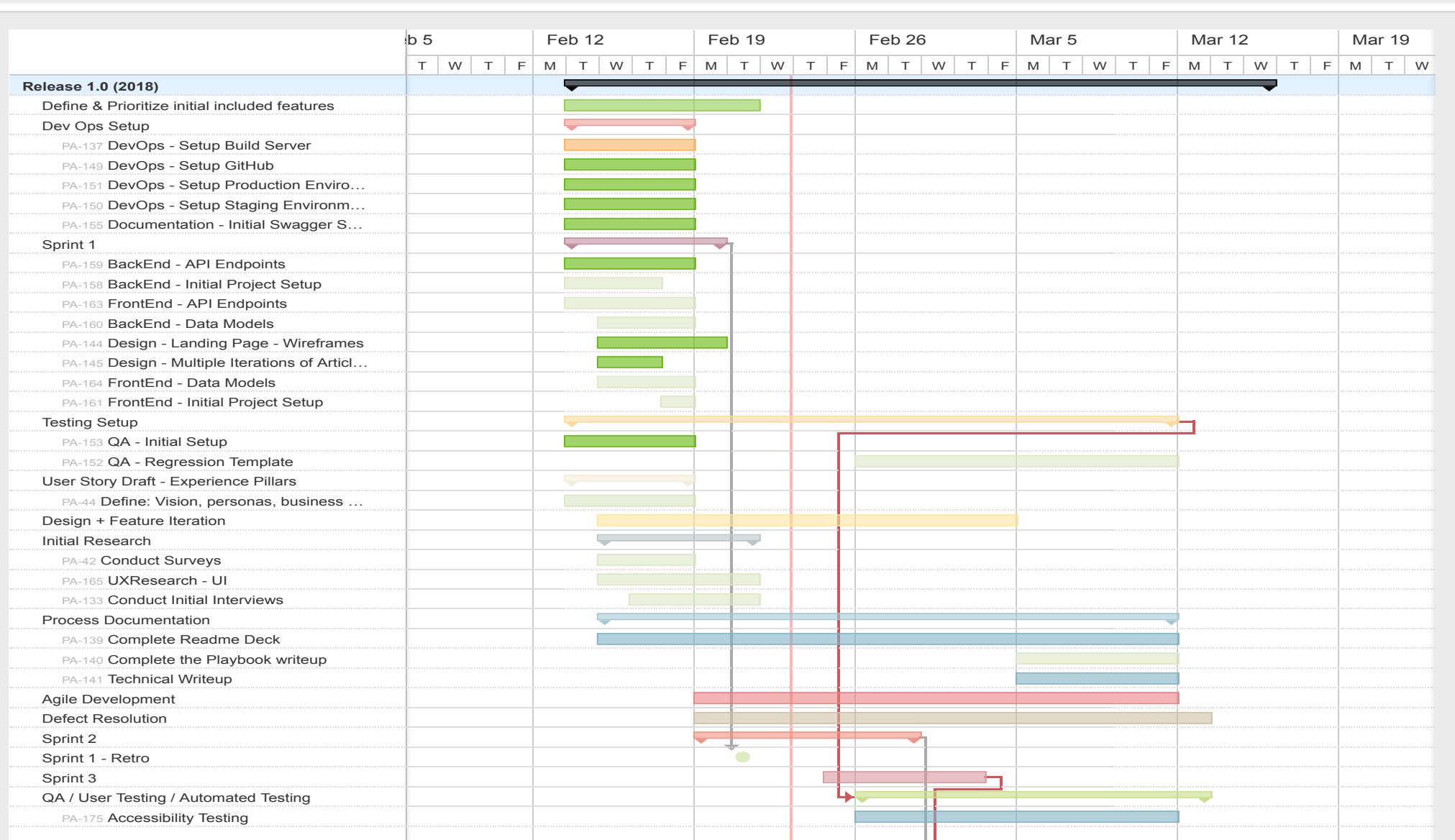


Business Analysis & Process Engineering



Business Analysis & Process Engineering

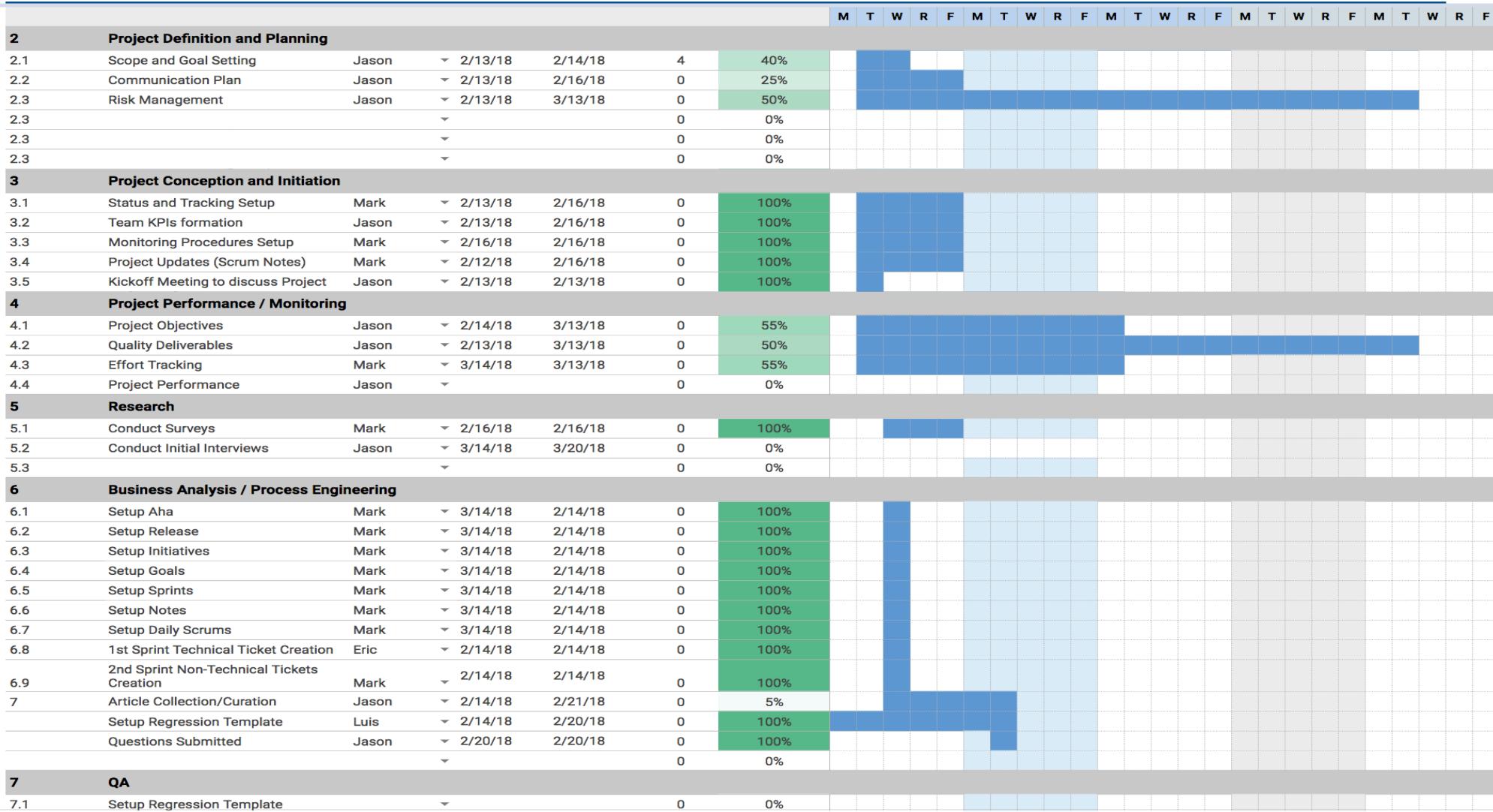
Cadence & Plan



Business Analysis & Process Engineering

Cadence & Plan

ADPQ Gantt Chart



Business Analysis & Process Engineering

Setup aha!

The screenshot displays the Aha! software interface, which is a project management tool. It includes several windows:

- Product Window:** Shows the California Prototype 2018 (ADPQ) product details, including a sidebar with "California (RF)" under "Product Line".
- Release Cadence Report Window:** Shows a table of release tasks for "Release 1.0 (2018)".
- Feature Window:** Shows the "Design - HTML/CSS Conversions" feature with its requirements and tasks.
- Requirements Window:** Shows two detailed requirement cards: PA-148-1 (Landing page) and PA-148-2 (Dashboard).

- Detailed business analysis was conducted and loaded into Aha! for the team to utilize while developing.

- Detailed tickets within each sprint provides each team member with the requirements to develop each feature along with scoring, sprint cadence, release, initiatives, goals, capacity, status, comments, and todo's.

* Viewable versions of these illustrations are in GitHub

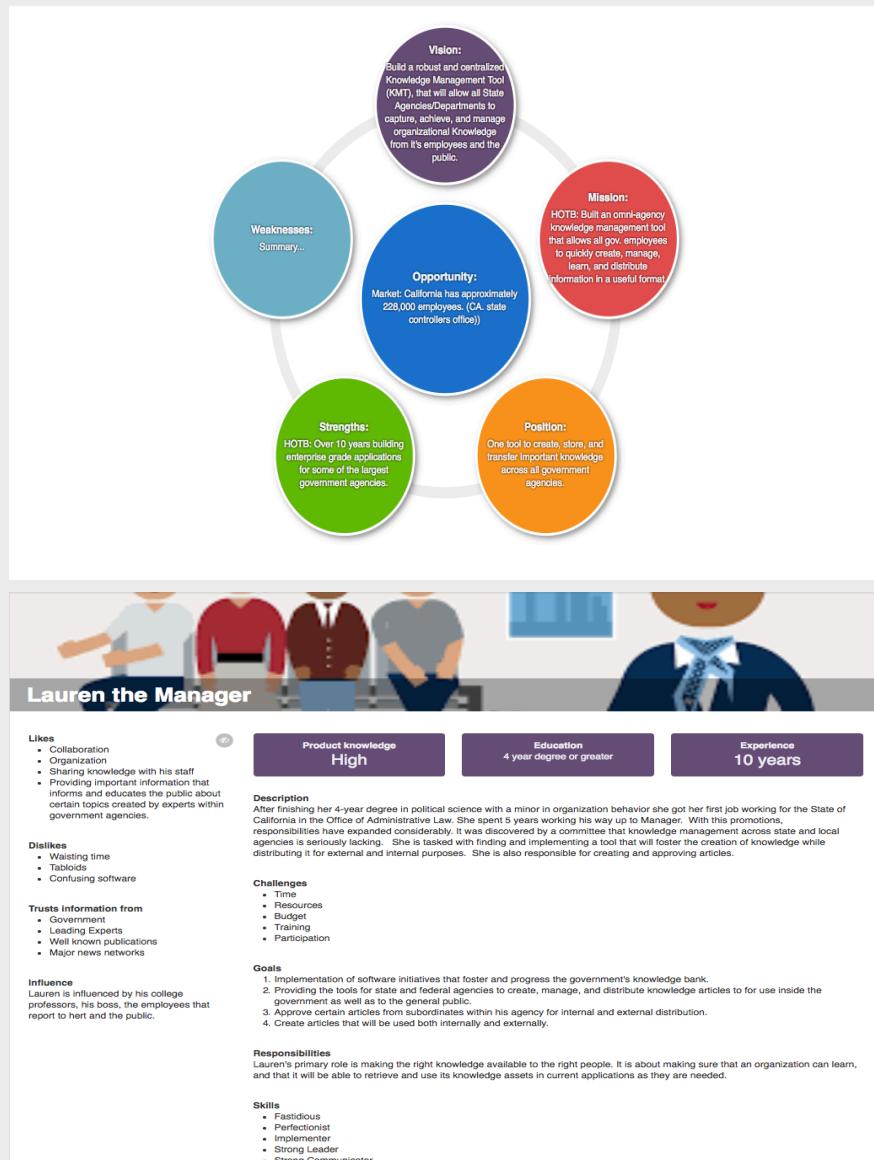
Business Analysis & Process Engineering

Dev-Ops

- At HOTB Software our engineering team manages and commits code using the Github flow methodology (<https://guides.github.com/introduction/flow/>).
- Each developer creates a new branch for specific features which reside in a platform specific folder. A Github web hook triggers automated jobs handled by Jenkins which build code from each platform's latest commit.
- Some of these jobs consist of deploying dockerized Node.js containers to our staging and production AWS ECS Clusters; making nightly backups of the production MongoDB databases; daily health checks to monitor uptime and running automated tests to validate previous updates. In addition to automated tests, our QA engineers conduct manual testing of each update across all platforms.
- If we determine that a developer's update is ready to be merged into the master branch and it has successfully been deployed on staging then he/she will create a pull request on Github. A reviewer will approve the request and merge the code into the staging branch. We then schedule specific dates with customers to tag and push code to the master branch and release production builds to the public.
- We constantly receive feedback during testing and production stages that help determine the workflow and prioritization of each sprint going forward. During our sprint planning meetings and retrospectives each developer has the opportunity to voice any ideas or concerns that may help improve our process and increase efficiency.

Business Analysis & Process Engineering

Defining Strategy

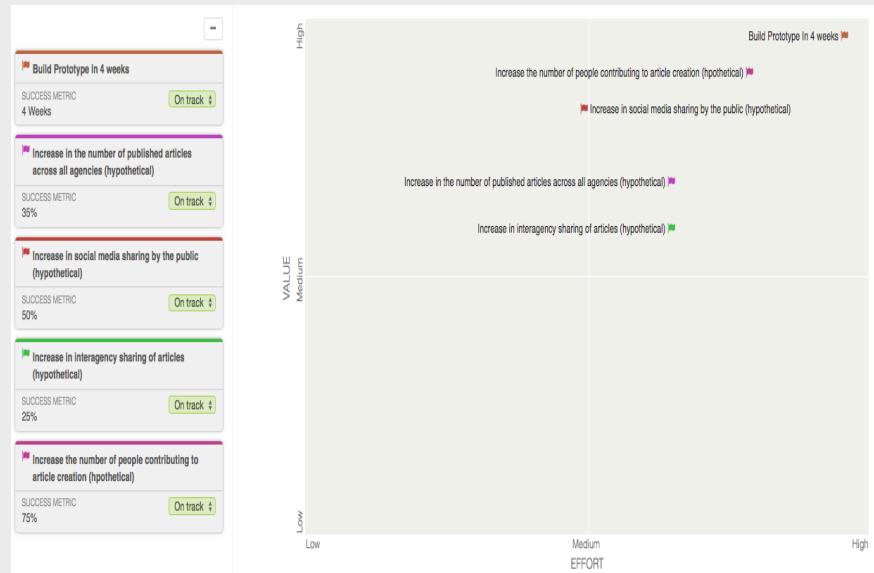
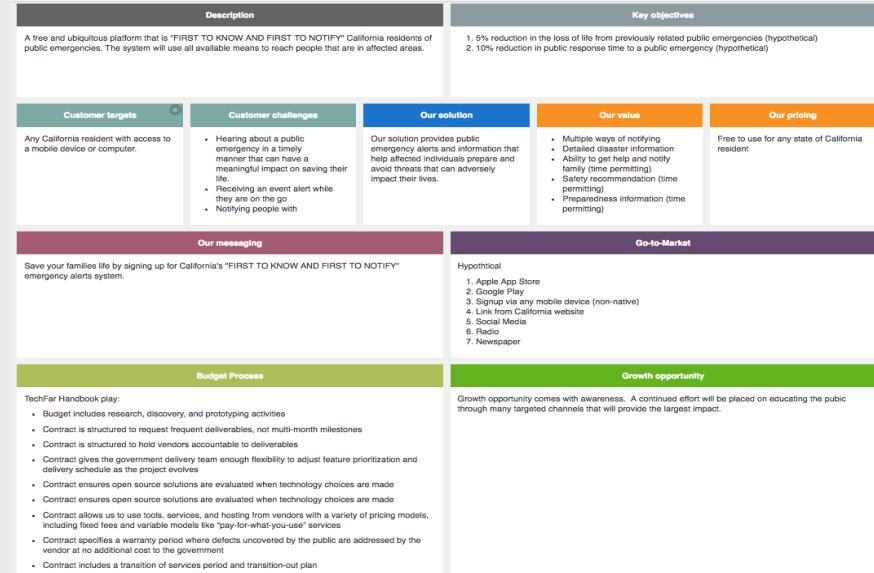


Vision Board

Business Model Canvas

Persona

Goals



Business Analysis & Process Engineering

Defining Strategy

Vision Board



Business Analysis & Process Engineering

Defining Strategy

Business Model Canvas

Description		Key objectives		
A free and ubiquitous platform that is "FIRST TO KNOW AND FIRST TO NOTIFY" California residents of public emergencies. The system will use all available means to reach people that are in affected areas.		1. 5% reduction in the loss of life from previously related public emergencies (hypothetical) 2. 10% reduction in public response time to a public emergency (hypothetical)		
Customer targets	Customer challenges	Our solution	Our value	Our pricing
Any California resident with access to a mobile device or computer.	<ul style="list-style-type: none">Hearing about a public emergency in a timely manner that can have a meaningful impact on saving their life.Receiving an event alert while they are on the goNotifying people with	Our solution provides public emergency alerts and information that help affected individuals prepare and avoid threats that can adversely impact their lives.	<ul style="list-style-type: none">Multiple ways of notifyingDetailed disaster informationAbility to get help and notify family (time permitting)Safety recommendation (time permitting)Preparedness information (time permitting)	Free to use for any state of California resident
Our messaging		Go-to-Market		
Save your families life by signing up for California's "FIRST TO KNOW AND FIRST TO NOTIFY" emergency alerts system.		Hypothetical <ul style="list-style-type: none">Apple App StoreGoogle PlaySignup via any mobile device (non-native)Link from California websiteSocial MediaRadioNewspaper		
Budget Process		Growth opportunity		
TechFar Handbook play: <ul style="list-style-type: none">Budget includes research, discovery, and prototyping activitiesContract is structured to request frequent deliverables, not multi-month milestonesContract is structured to hold vendors accountable to deliverablesContract gives the government delivery team enough flexibility to adjust feature prioritization and delivery schedule as the project evolvesContract ensures open source solutions are evaluated when technology choices are madeContract ensures open source solutions are evaluated when technology choices are madeContract allows us to use tools, services, and hosting from vendors with a variety of pricing models, including fixed fees and variable models like "pay-for-what-you-use" servicesContract specifies a warranty period where defects uncovered by the public are addressed by the vendor at no additional cost to the governmentContract includes a transition of services period and transition-out plan		Growth opportunity comes with awareness. A continued effort will be placed on educating the public through many targeted channels that will provide the largest impact.		

Business Analysis & Process Engineering

Defining Strategy

Personas



Lauren the Manager

Likes

- Collaboration
- Organization
- Sharing knowledge with his staff
- Providing important information that informs and educates the public about certain topics created by experts within government agencies.

Dislikes

- Waisting time
- Tabloids
- Confusing software

Trusts information from

- Government
- Leading Experts
- Well known publications
- Major news networks

Influence

Lauren is influenced by his college professors, his boss, the employees that report to her and the public.

Product knowledge
High

Education
4 year degree or greater

Experience
10 years

Description
After finishing her 4-year degree in political science with a minor in organization behavior she got her first job working for the State of California in the Office of Administrative Law. She spent 5 years working her way up to Manager. With this promotion, responsibilities have expanded considerably. It was discovered by a committee that knowledge management across state and local agencies is seriously lacking. She is tasked with finding and implementing a tool that will foster the creation of knowledge while distributing it for external and internal purposes. She is also responsible for creating and approving articles.

Challenges

- Time
- Resources
- Budget
- Training
- Participation

Goals

1. Implementation of software initiatives that foster and progress the government's knowledge bank.
2. Providing the tools for state and federal agencies to create, manage, and distribute knowledge articles to for use inside the government as well as to the general public.
3. Approve certain articles from subordinates within his agency for internal and external distribution.
4. Create articles that will be used both internally and externally.

Responsibilities
Lauren's primary role is making the right knowledge available to the right people. It is about making sure that an organization can learn, and that it will be able to retrieve and use its knowledge assets in current applications as they are needed.

Skills

- Fastidious
- Perfectionist
- Implementer
- Strong Leader
- Strong Communicator

Business Analysis & Process Engineering

Defining Strategy

Personas



Curious Cary

Likes

- Sharing knowledge
- Church and community gatherings
- Keeping her family informed

Dislikes

- Liars
- Gossip
- Fake news

Trusts information from

- Information posted on social media sites by her close friends and family.
- Newspapers
- Niche columnists/editorials
- Blogs
- Government Agencies

Influence

- Social Media
- Husband
- Kids
- Pastor
- Teachers
- Local first responders

Product knowledge
Medium

Education
When to a 4 year college but never graduated.

Experience
14 years

Description
Cary is married with a 2 and 13-year-old boy and girl. She is highly active within her church and is considered to be a leader in the community. She prides herself on always being "in the know". People come to her with questions that may impact their community, children, school, or their church. She uses many different sources of information but when it comes to the government she does not like to rely on the news as each station is biased. She prefers to go to the source and find information for the different agencies written by the agencies themselves.

Challenges

- Time
- Balancing home life with obligations to her church, school, and community.
- Staying on top of everything

Goals

- Raising two healthy and educated kids
- Providing for her family
- Keeping up with current events

Responsibilities

- Running community and church events
- Motherhood
- Wife
- Making sure her family is safe

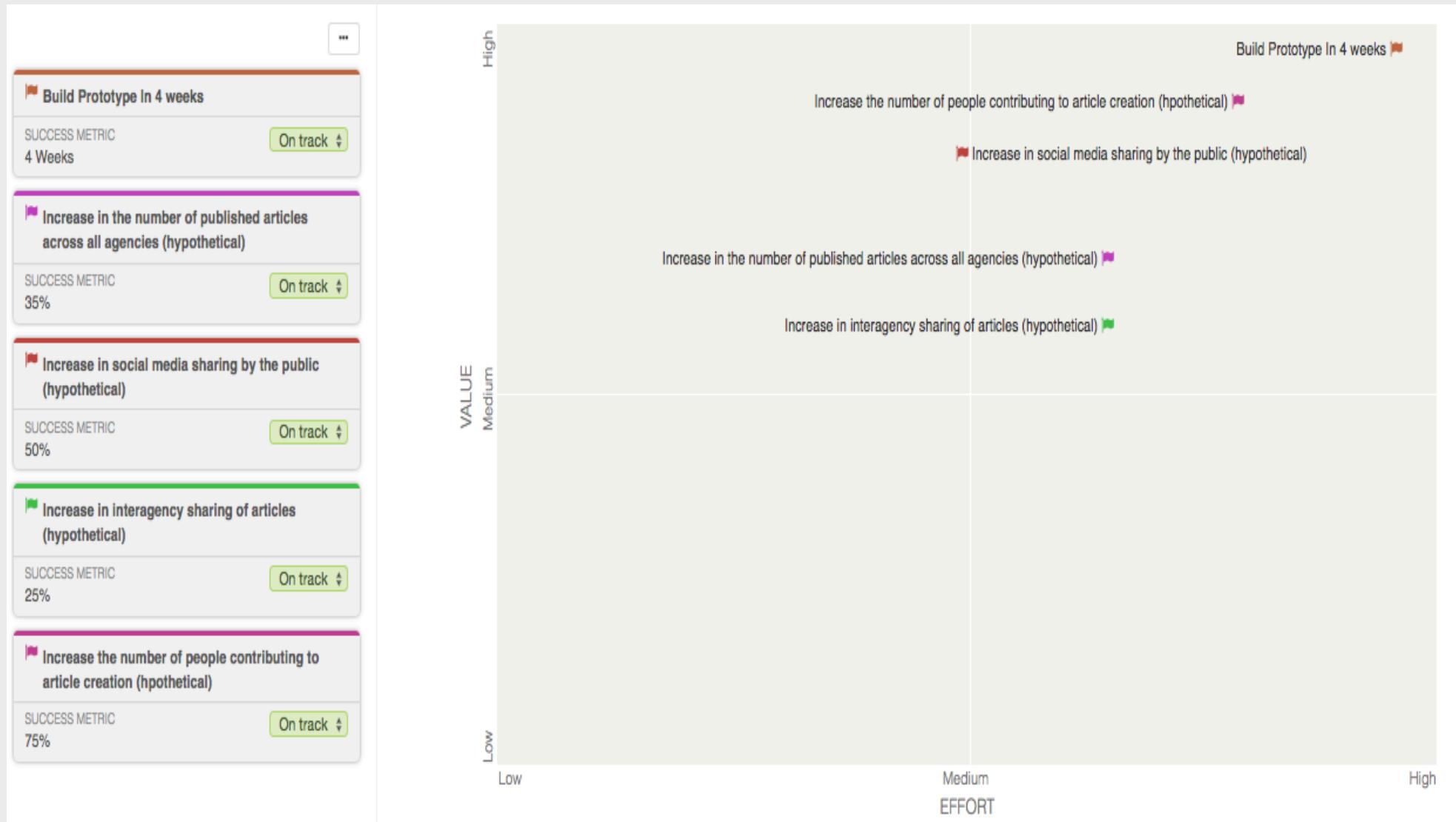
Skills

- Raising a family
- public speaking
- Organizational skills

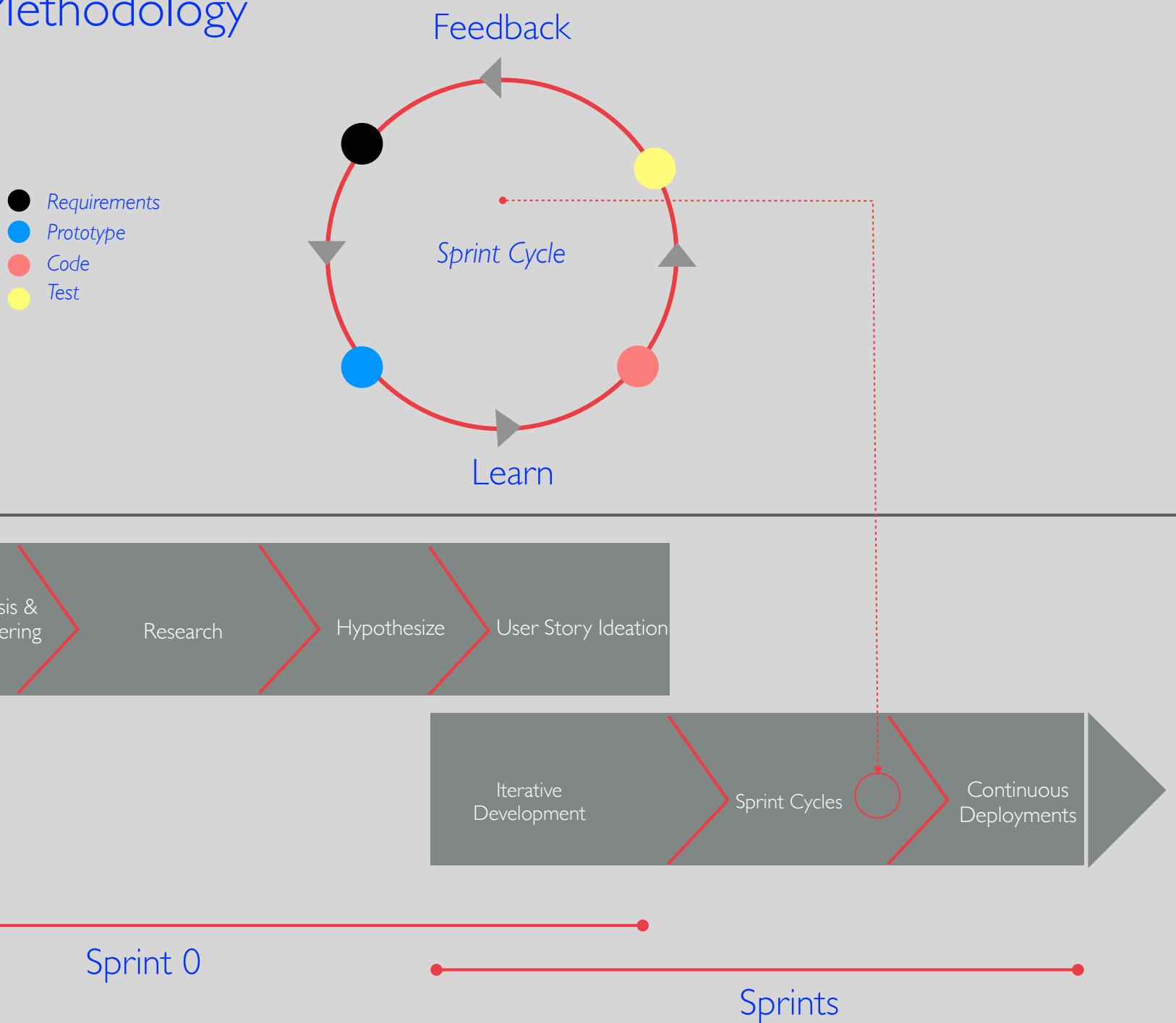
Business Analysis & Process Engineering

Defining Strategy

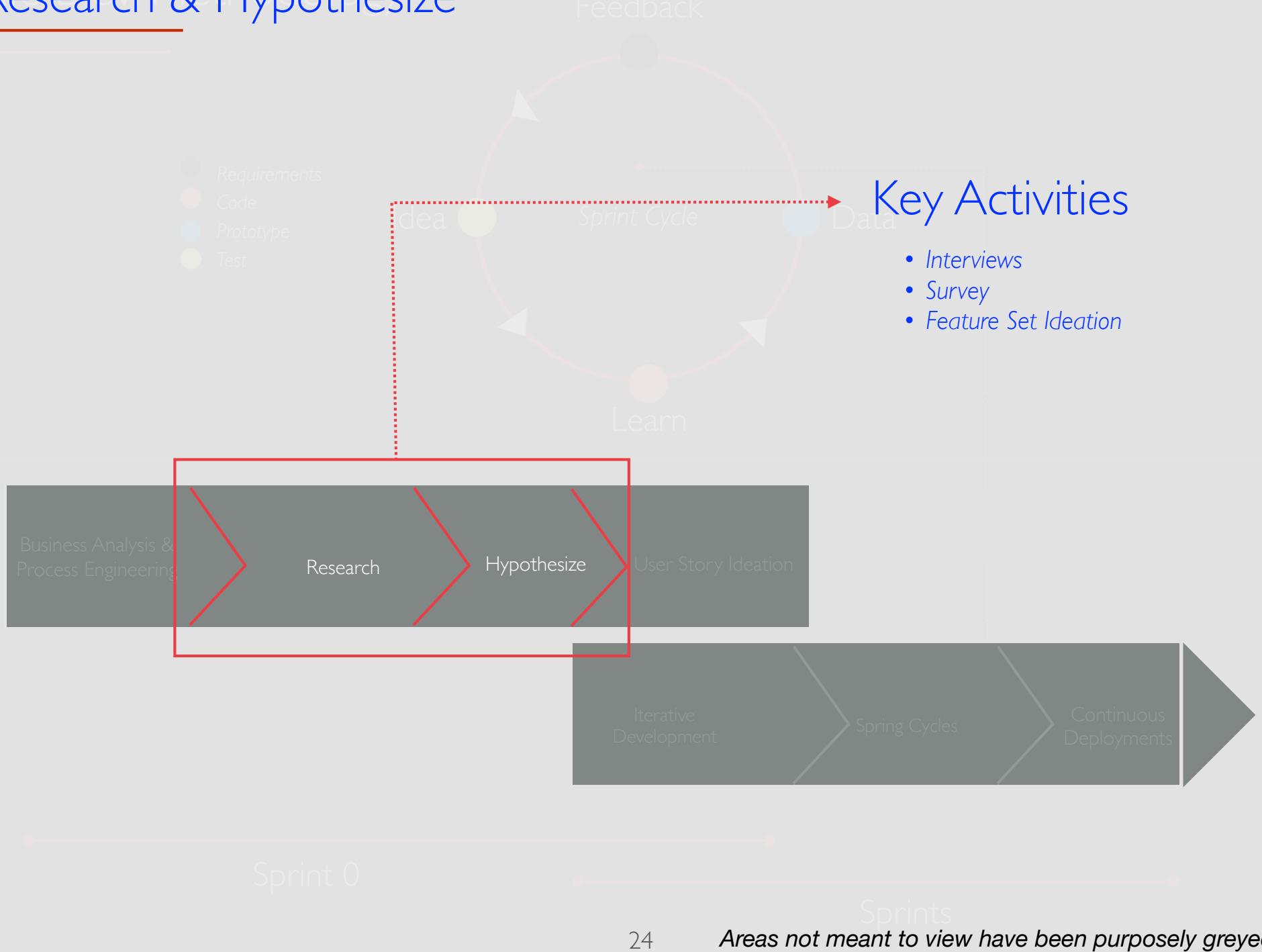
Goals



Agile Dev. Methodology



Research & Hypothesize



Research & Hypothesis

Interviews



Dan Streit
Founder
Single Source Training



Patty Smith
Mother of 2



Mindy Jones
Government Manager

Research & Hypothesis

Interviews



Our goals for the interview process was to locate and interview managers at government agencies who are responsible for the creation, curation, and management of knowledge within their government agency, and people who fit the persona of curious minded intellectuals who find value from obtaining information from different government agencies.

Research & Hypothesis

Interviews



Dan Streit
Founder
Single Source Training

California Prototype - Interview 1

Interviewee: Dan Streit
Founder, Single Source Training

Single Source Training provides clients with e-learning and knowledge management platforms to train and certify their employees and contractor base. Creating better service, compliance, sales, in the ever changing regulatory environment we have a custom document management system that allows tracking and transparency for all parties to the transaction.

This interview was conducted to obtain user feedback on the Creating, Sharing and Development of Knowledge Articles.

General Questions Regarding Knowledge Management Systems:

Who are the primary user groups of Knowledge Management Systems?

You typically have three types of users: Administrators, Authors and Consumers of information. Sometimes these roles overlap, other times not, but its best to think out each of these functions as a separate use case.

What is more important, viewing Knowledge Articles or creating Knowledge Articles?

The goal of any KMT system should be the ability to provide easy access to information. Creating KA's is important and there are best practices around the creation of those, but without the ability to easily access KA content, the system is not doing its job.

What would you consider best practices for KA creation?

Knowledge Article creation needs to be simple and straight forward. You want to keep the authoring and editing to a single page if possible. If you have to go through multiple pages of navigation and friction into this process will ultimately reduce the number of articles that get created and will likely result in only a few articles being created by a select few that were brave enough to go through the entire process. The beauty of a KMT is to allow all parties within an organization to showcase their respective strengths through KA creation.

Should authors be allowed to approve their own articles?

In certain situations, the author and approver can be one in the same, but its best to have a check and balance to make sure content is appropriate before being widely available.

.....

A decorative graphic consisting of overlapping colored rectangles (pink, purple, blue) on a white background.

We started our interview with the Founder of Single Source Training, Dan Streit. Dan has been providing e-Learning and Knowledge Management Systems to enterprise clients for years. In the interview he provided valuable insight into the primary use cases of creating, sharing and developing Knowledge Management Articles.

Research & Hypothesis

Interviews



Patty Smith
Mother of 2

With one of our personas matching a mother who is hyper focused on family and community involvement we focused our energy exploring how she obtains and provides information to her family and community regarding local government information

“I serve at my local church and volunteer at my children’s school so it’s important to stay up on what is happening with the government, especially local agencies that are not covered on the news very much.”

“My family, friend, and community depend on me to find information from agencies that impacts us locally.”

Research & Hypothesis

Interviews



Mindy Jones
Government Manager

Mindy works with a government agency and is responsible for the management and distribution of content, knowledge, and public awareness.

“ At our agency we have very few tools that I would consider to be used in knowledge management. ”

“ One of the single largest issues we have at our agency when creating articles is the lack of workflow and a formal approval process. We pretty much use a third party tool that barely gets the job done. ”

Research & Hypothesis Survey

The screenshot shows a Google Form titled "Government Knowledge Survey". The left sidebar contains questions about media consumption and government information sources. The main content area displays two pie charts. The first chart, titled "Where do you primarily obtain important public information from different government agencies?", shows the following distribution:

Source	Percentage
Government Websites	47.1%
Television	21.4%
Radio	14.3%
Newspaper	14.3%

The second chart, titled "What is your primary reason for obtaining government information", shows the following distribution:

Reason	Percentage
Obtain important information on your community	38.5%
Obtain important information on the national government	14.3%
Research	14.3%
Curiosity	7.1%

We commissioned Google Forms to conduct a survey covering identified people with profiles and personas in our target demographic.

The screenshot shows a Google Form titled "Customer Survey (Knowledge Management Tool)". The left sidebar contains questions about knowledge management implementation. The main content area displays two charts. The first chart, titled "Is there a general consensus in your organization about what knowledge management means?", is a bar chart with the following data:

Response	Count	Percentage
Expert Use of information	1	(8.3%)
No	2	(16.7%)
Record, search, find, view info...	1	(8.3%)
Yes	5	(41.7%)
no	1	(8.3%)
yes	1	(8.3%)

The second chart, titled "Is your organization doing anything it calls knowledge management?", is a pie chart with the following data:

Response	Percentage
No	33.3%
Yes	66.7%

We were able to plot data that revealed meaningful insights that directed our efforts.

* Viewable versions of these illustrations are in GitHub

Research & Hypothesis

Surveys

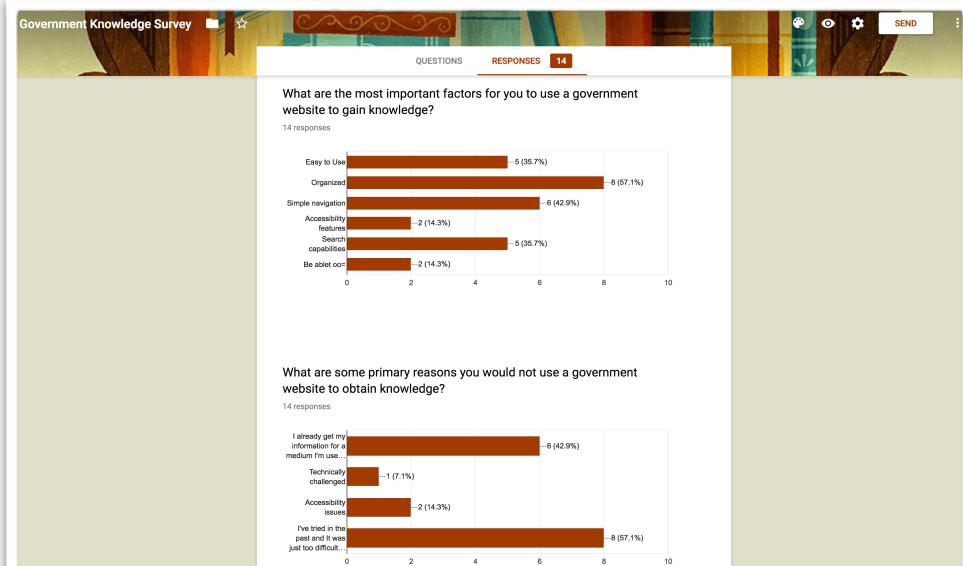
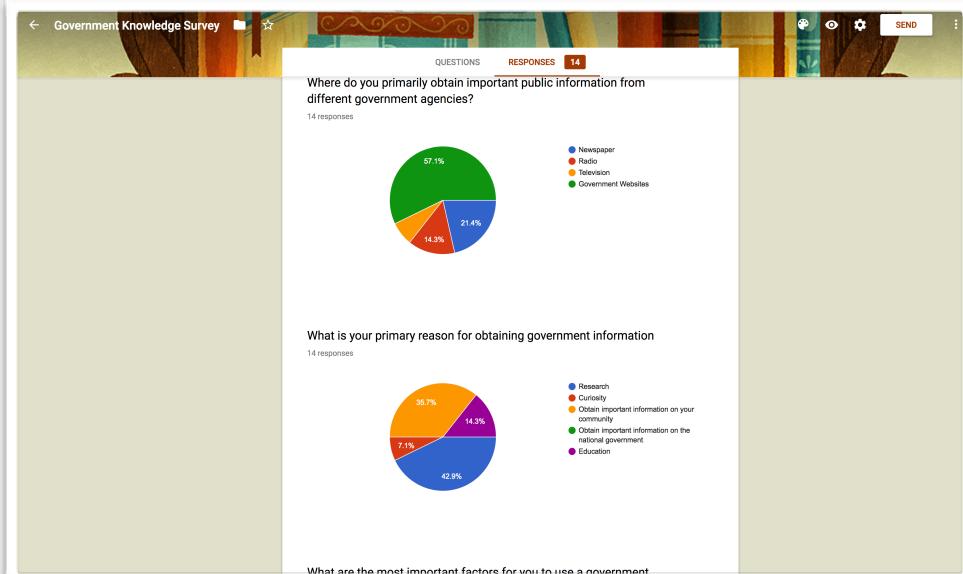
Public:

When polling the general public our hypothesis was confirmed that the vast majority of respondents would first go through a government website to find, read, and learn about specific topics written by agencies. However, we were surprised to find that most people thought government websites were complex and not well organized, preventing them from using the site in the future.

Government Managers:

Our hypothesis was confirmed that the vast majority of respondents don't have a tool to measure the impact a KA tool would have on their management efforts. Leaving a large opportunity to develop and rollout a omni-agency tool that provides empirical and measurable benefits. However, we were surprised to find that most people/agencies don't have a tool or framework to properly codify the knowledge being gathered across personal and agencies.

Research & Hypothesis Survey - General Public



Key insights:

- Vast majority of respondents polled would use a KA tool if it had simple navigation.
- The top feature request was a quick search tool to locate specific articles written from government agencies.
- The first place the general public look to locate government knowledge is on government websites.

Research & Hypothesis

Survey - Government Manager



Key insights:

- Gov. agencies are not using knowledge management to measure impact and/or success.
- Most important aspect of a knowledge management tool is intelligence gathering.
- Most important use of a KM tool was for knowledge reuse.
- Most important feature requests are for article creation, editing, and publishing.

* Viewable versions of these illustrations are in GitHub

Research & Hypothesis

Synthesis for Minimal Viable Product (MVP)

Key Experience Pillars

- Built a KM tool that promotes knowledge creation
- Build KM tool that promotes knowledge sharing
- Build KM tool that promotes knowledge development
- System settings

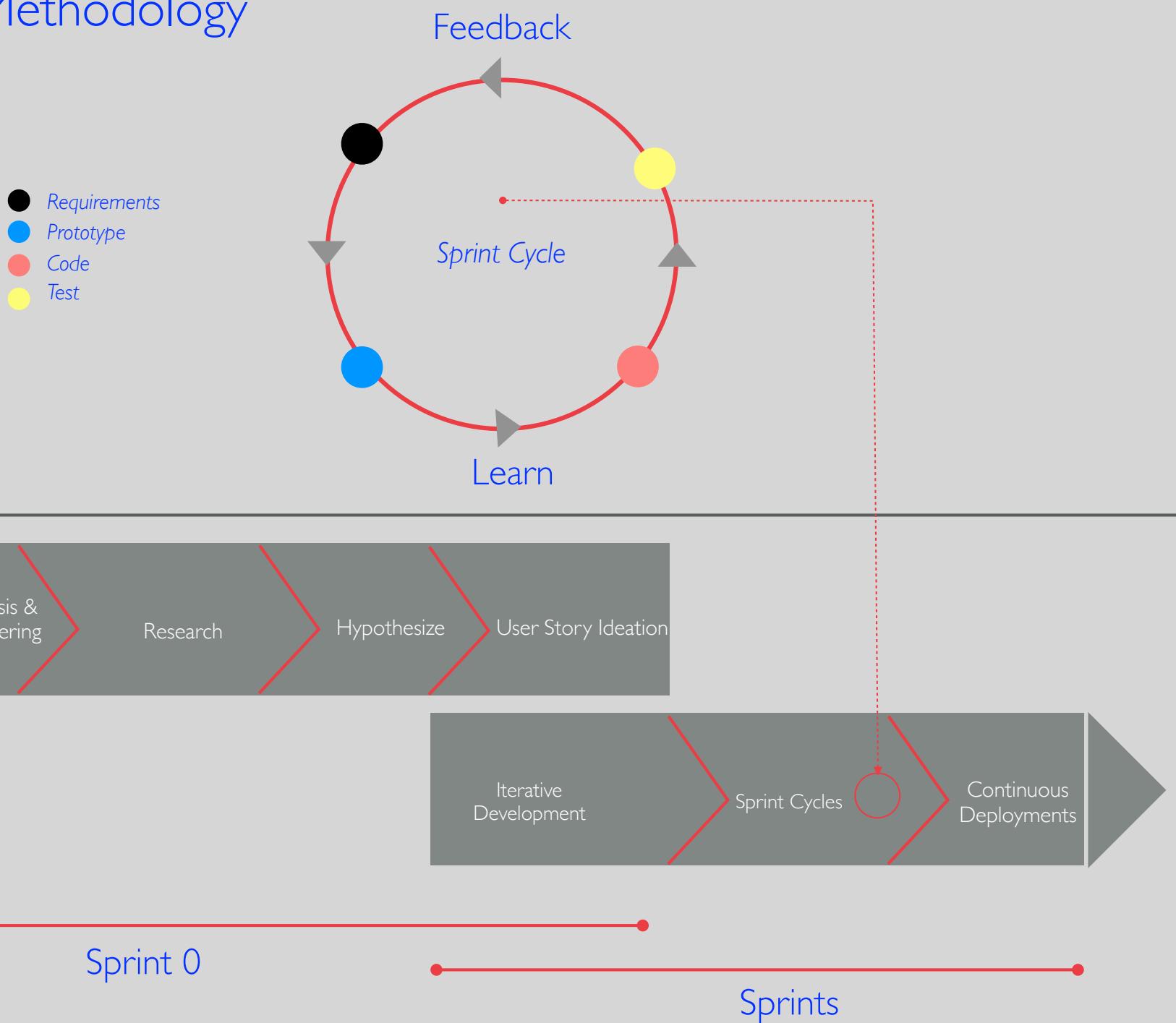
Main Features

- Create/edit articles
- Share articles over social and email
- Role-based access
- WYSIWYG editor
- Workflow management for article approval
- Bi-directional commenting
- Ability to add/edit/delete users
- System learns from user behavior and past articles
- Create similar articles based on trending articles algorithms.
- Suggested tagging based on learning from previous tags
- Robust article search capabilities
- KPI's dashboard
- Notifications

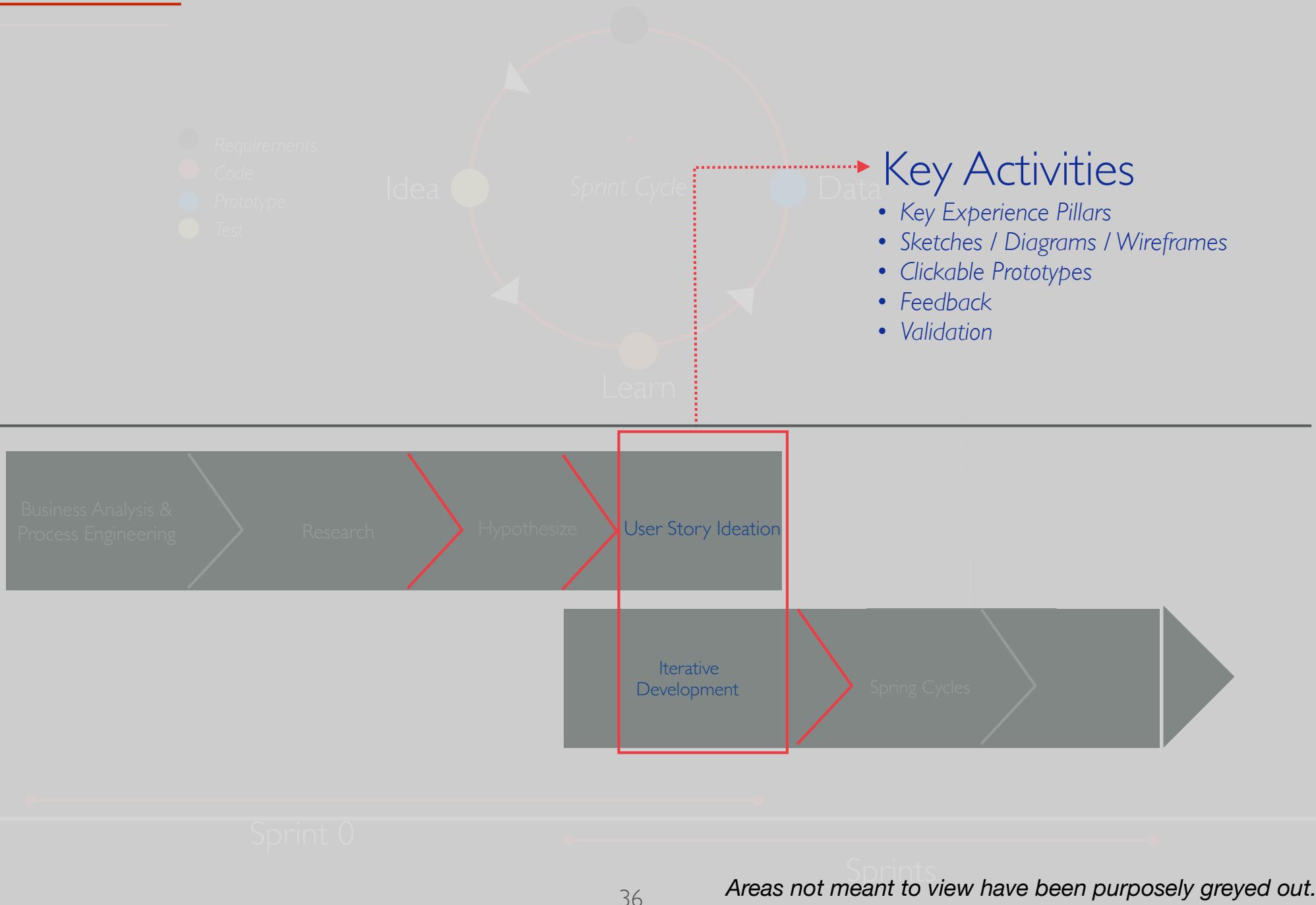
Design Attribution

- Simple - logical Flow
- Familiar Language
- Usability
- Web Content Accessibility Guidelines (WCAG)
- U.S. Web Design Standards
- Easy Navigation

Agile Dev. Methodology



User Story Ideation & Iterative Development



User Story Ideation & Iterative Development

With that task of building a KM tool, we focused our efforts on executing against the three defining experience pillars of the application; knowledge creation, knowledge sharing, and knowledge development. These principals drove all user story ideation and engineering efforts.

Messaging:

A robust knowledge management tool that fosters knowledge creation, provides tools to share this knowledge privately or ubiquitously, and encourages knowledge development within agencies and the general public.

Public:

Cary is married with a 2 and 13-year-old boy and girl. She is highly active within her church and is considered to be a leader in the community. She prides herself on always being "in the know". People come to her with questions that may impact their community, children, school, or their church. She uses many different sources of information but when it comes to the government she does not like to rely on the news as each station is biased. She prefers to go to the source and find information for the different agencies written by the agencies themselves.

Government Manager:

Mindy a college graduate and current manager of an agency working with other government agencies. Her primary role is making the right knowledge available to the right people. It is about making sure that an organization can learn, and that it will be able to retrieve and use its knowledge assets in current and future applications as they are needed.

User Story Ideation & Iterative Development

Product Market Fit:

Our application would be defined as a success (product market fit) when there was quantifiable metrics around a substantial increase from the previous baseline of published articles, article sharing (internally/externally) number of people contributing to the creation of articles, and the number of articles read (internally/externally).

Creating & Publishing Articles:

Creating and publishing articles was interactively streamlined across 5 sprints to make the process of creating and publishing articles extremely easy and intuitive. The philosophy was “make article creation easy, then more articles would be created.” An integral part of making the system easy to use was enabling the system to learn from user interaction and from previous articles. That feature programmatically intertwined with workflow management was the framework that guided our engineering efforts.

Sharing / Viewing / Reading Articles:

Sharing articles internally and externally was a tentpole feature that had to provide social media sharing and direct sharing capabilities through email. Sharing had to be tethered to rules in the system that prevented unwanted or unauthorized sharing. Increasing the number of articles shared would cascade into an increase of people internally/externally viewing and reading articles.

User Story Ideation & Iterative Development

Key Experience Pillars

As HOTB Software Solutions

Experience Pillars - Knowledge Management Tool

Overview

Your users' worlds are inevitably more complicated than what is observable on the surface. This exercise is a framework to help you strive to understand what you're asking your users to do and the impact it will have on them.



Key User Experiences

Software and service are always framed by user

Key Experience Pillar # 1:

1. Key User Experience:
 - a. Build a Knowledge Management Tool that promotes Knowledge Creation.
2. User Stories + Features:
 - i. User story 1: As a government employee I want to be able to create

Key Experience Pillar # 2:

1. Key User Experience:
 - a. Build a Knowledge Management Tool that promotes Knowledge Sharing.
2. User Stories + Features:
 - i. User story 1: As a user of the KA tool, I want to see the articles I have

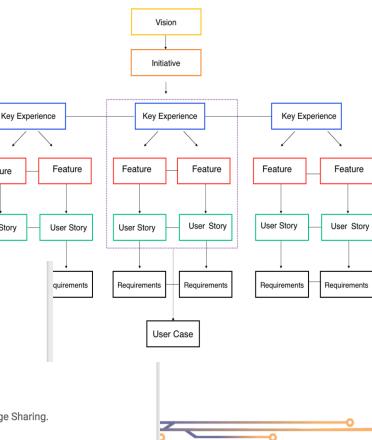
Key Experience Pillar # 3:

1. Key User Experience:
 - a. Build a Knowledge Management Tool that promotes Knowledge Development.
2. User Stories + Features:
 - i. User story 1: As a user of the KA tool I want the system to learn from my

Key Experience Pillar # 4:

1. Key User Experience:
 - a. Brief Description: General System Setup
2. User Stories + Features:
 - i. User story 1: As a platform user I want to be able to easily create a login, ability to view/edit my profile and if given the authority be able to change system settings.
 1. Feature Description: User creation through email and password.
 2. Feature Description: User will have a profile section that will provide them the ability to edit:
 - a. Name information
 - b. Email
 - c. PW reset
 - d. Notifications: (only on the admin profile)
 - i. Turn on/off notifications for email
 - e. Upload Attachments
 - f. Can be turned on/off by admin when creating users
 3. Feature Description: Administrators will have access to system wide settings that give them the ability to edit/change:
 - a. Manage users: Create/edit/delete users
 - b. Article Settings: Ability to turn on/off the two types of article templates: Public, Private (Backlogged)
 - c. Notifications: Ability to globally turn on/off: sms, and email for the platform. (Backlogged)
 3. Requirements:
 - a. Business Requirements:
 - i. Setup should be easy and use standard protocol seen throughout the web
 - b. Functional/Non-Functional Requirements:
 - i. Only admin has access to settings
 - ii. Only the user can request PW reset
 - iii. Notifications:

Idea Documentation and Structure



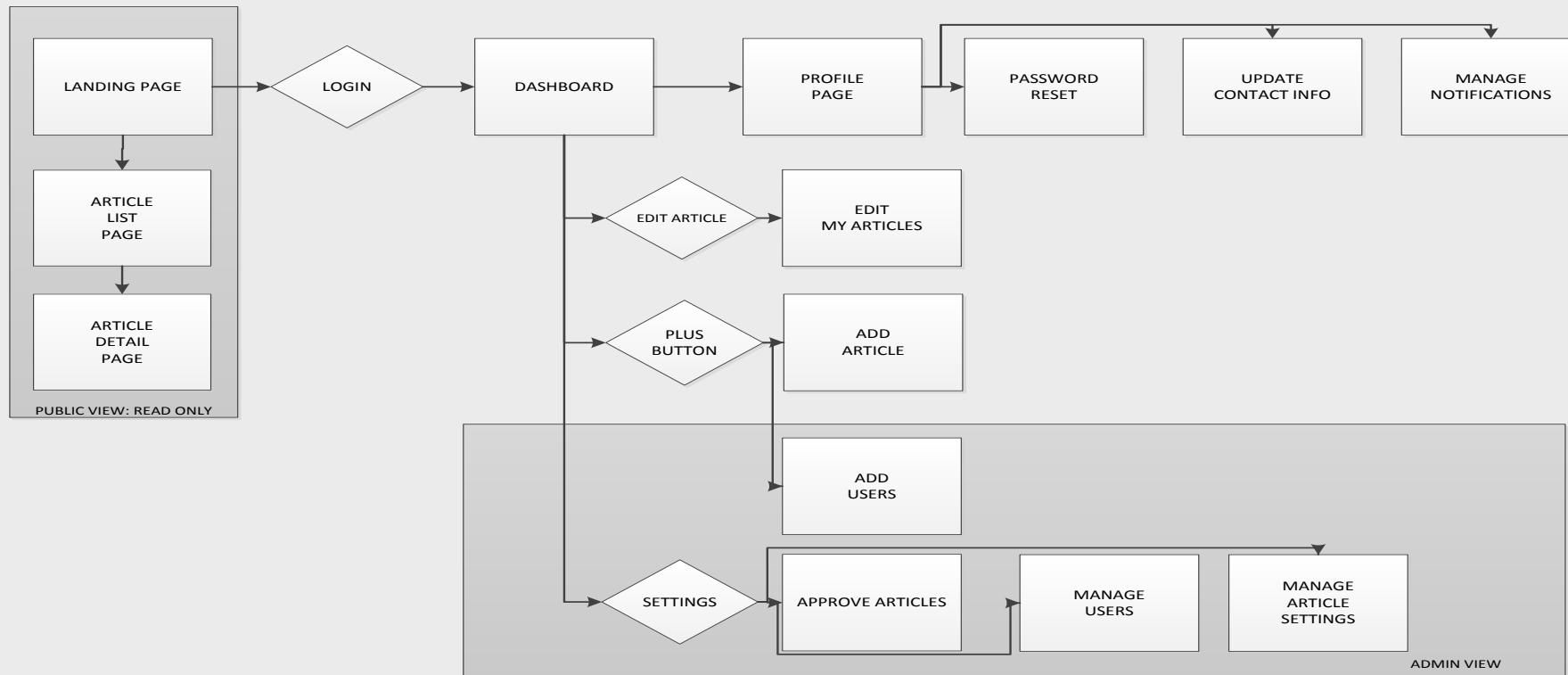
User Stories

We initiated our development process by conducting both internal discovery and using surveys and interviews to steer the ideation and creation of the the initial user stories.

Subsequently, we validated our findings with additional interviews to polish the design and feature sets. This holistic approach allowed us to pivot multiple times within the first 3 sprints rendering a product that finds product market fit.

User Story Ideation & Iterative Development Diagrams

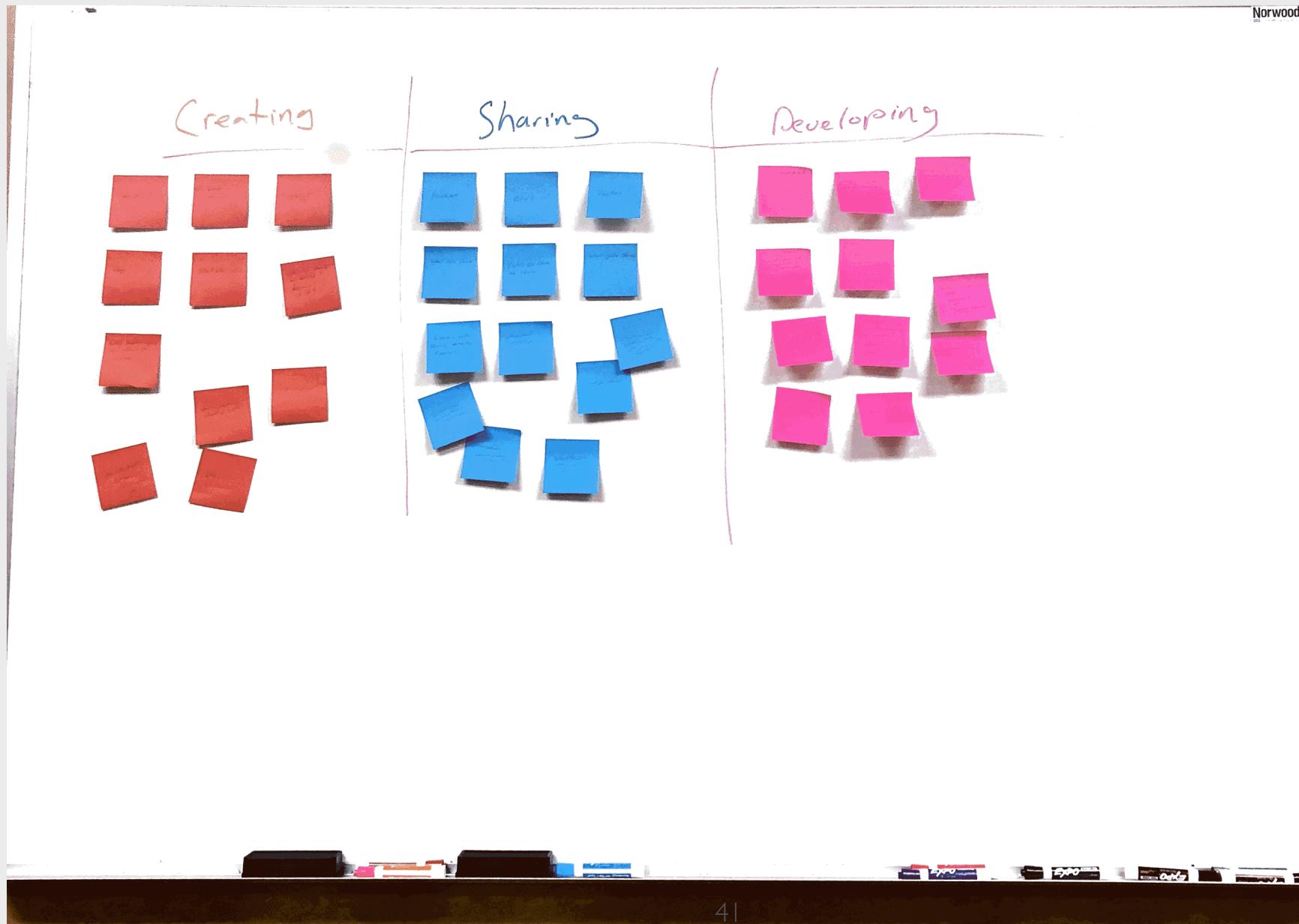
Iterative design methods were used for rapid prototyping. Initial storyboarding, diagrams and wireframes conceptualized the direction and were validated against actual users.



Key features

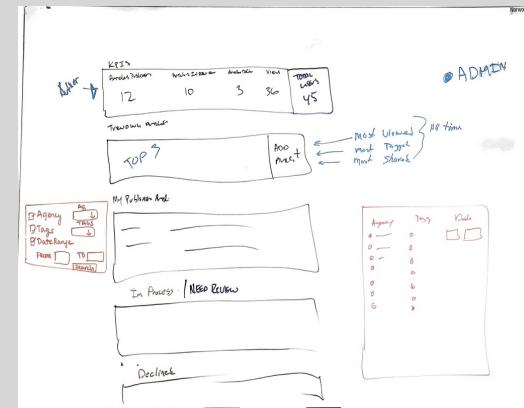
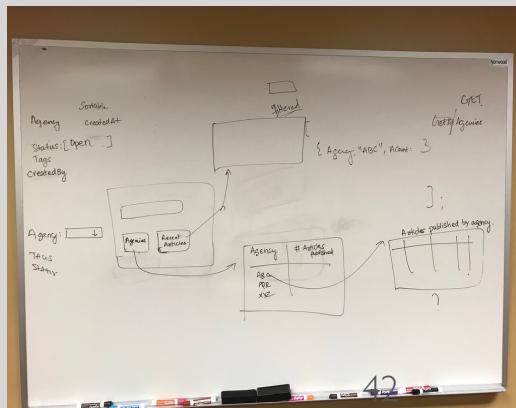
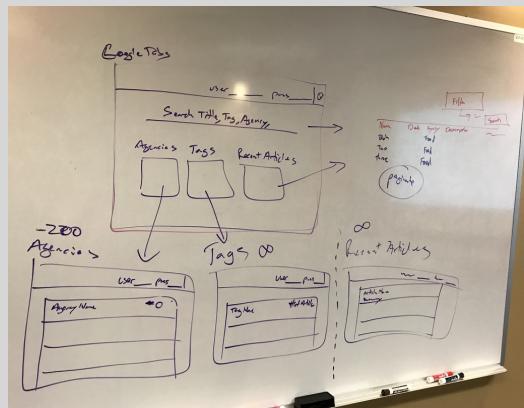
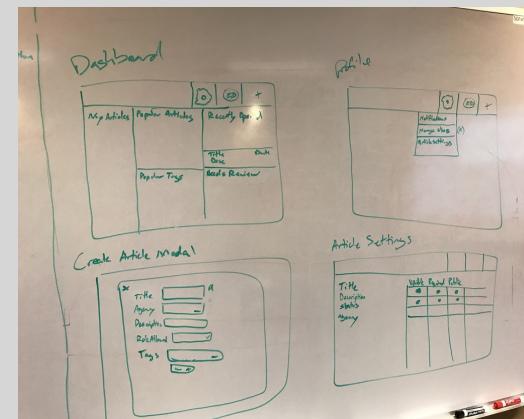
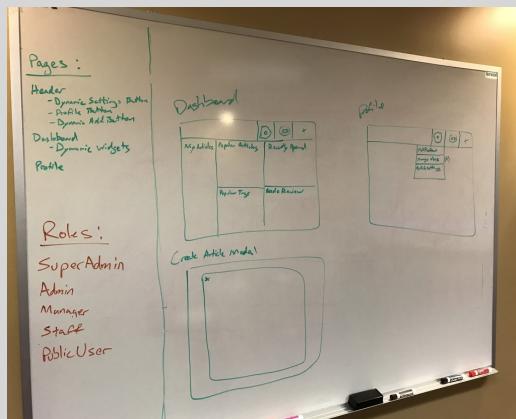
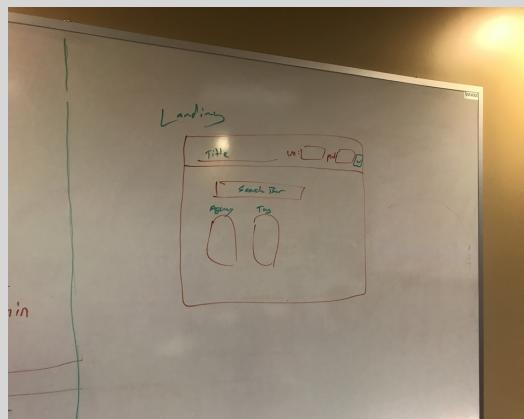
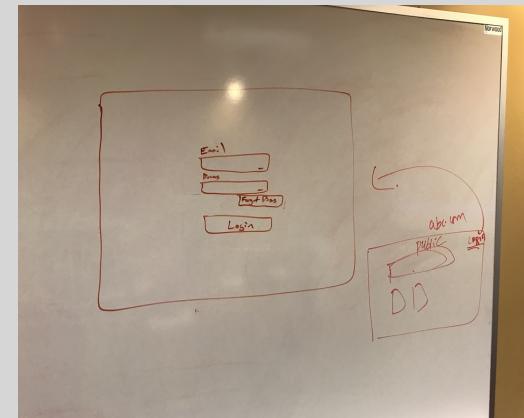
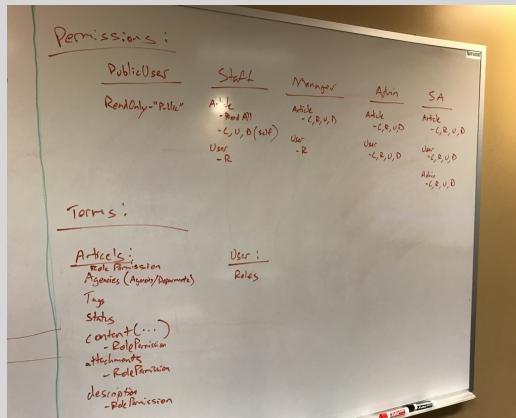
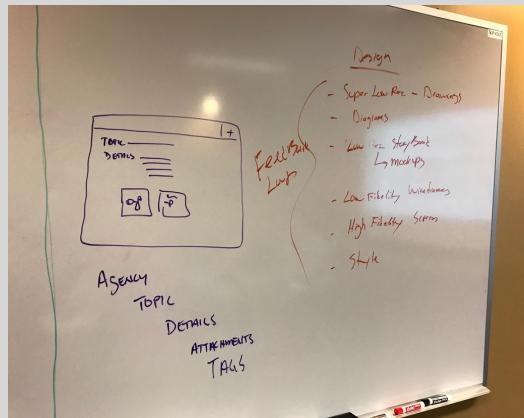
- Create/edit articles
- Share articles over social and email
- Role-based access
- KPI's dashboard
- System learns from user behavior and past articles
- Create similar articles based on trending articles algorithms.
- Suggested tagging based on learning from previous tags
- Robust article search capabilities
- Notifications
- WYSIWYG editor
- Workflow management for article approval Bi-directional commenting
- Ability to add/edit/delete users

User Story Ideation & Iterative Development - Brainstorming & Storyboard - Version

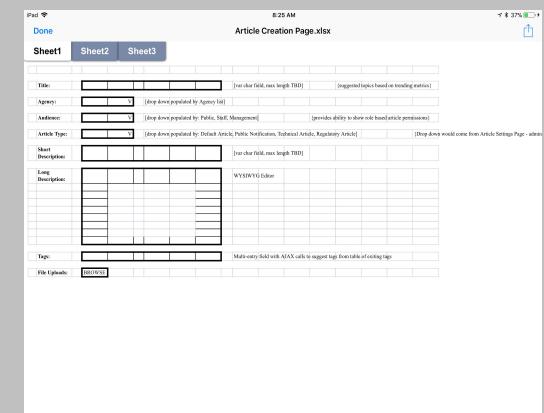
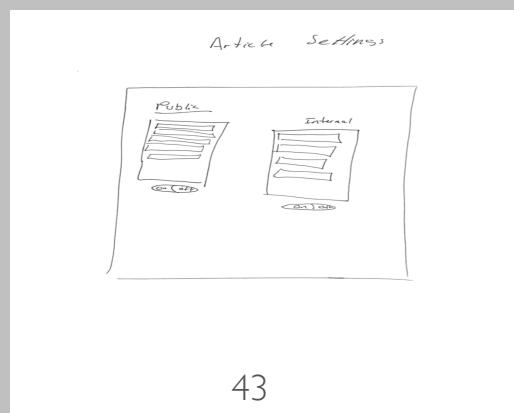
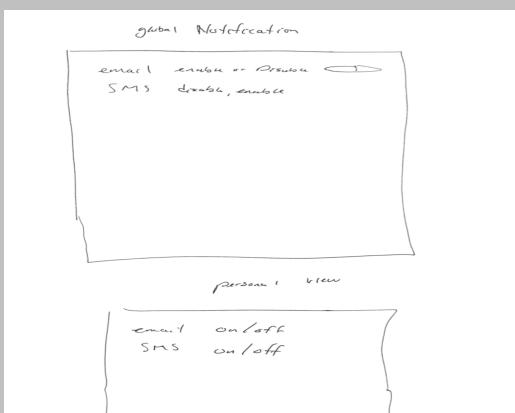
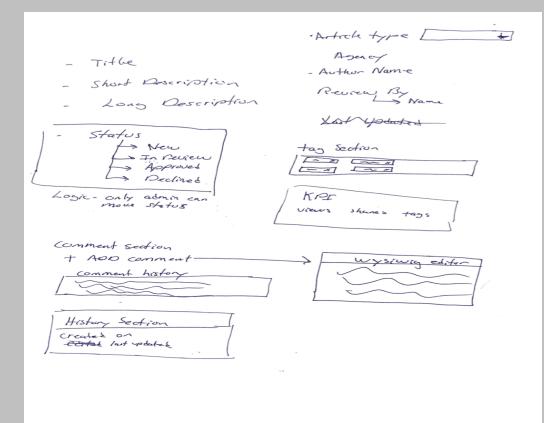
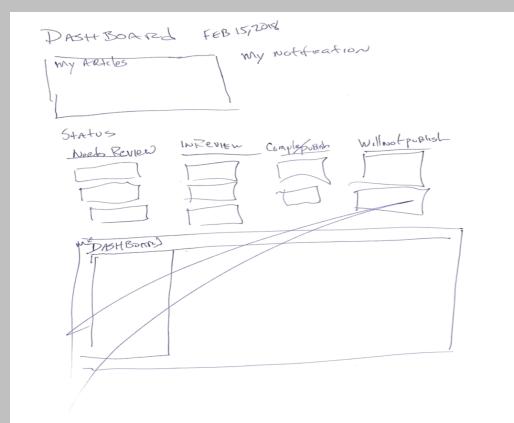
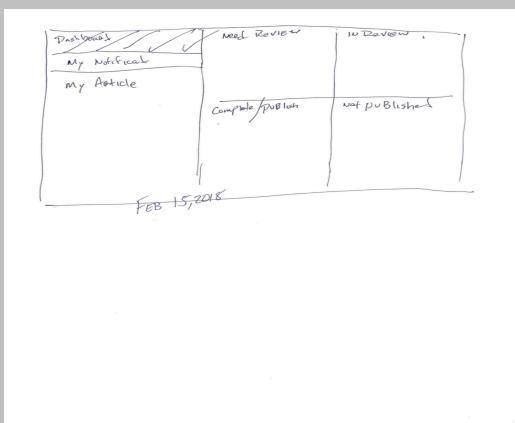
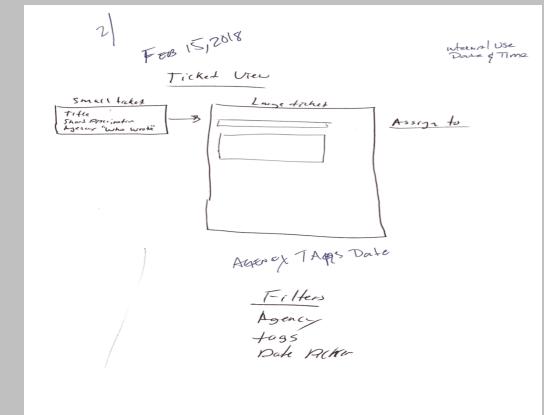
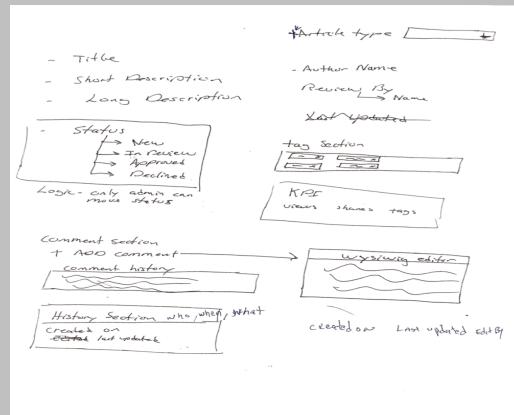
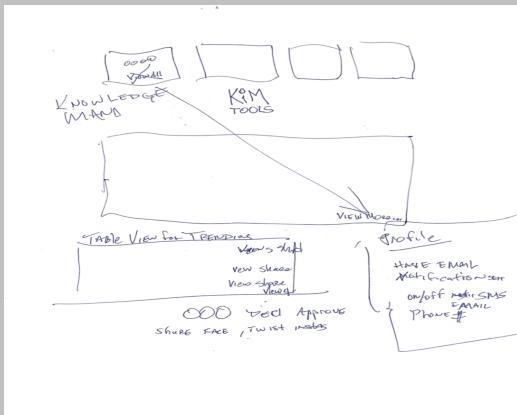


User Story Ideation & Iterative Development

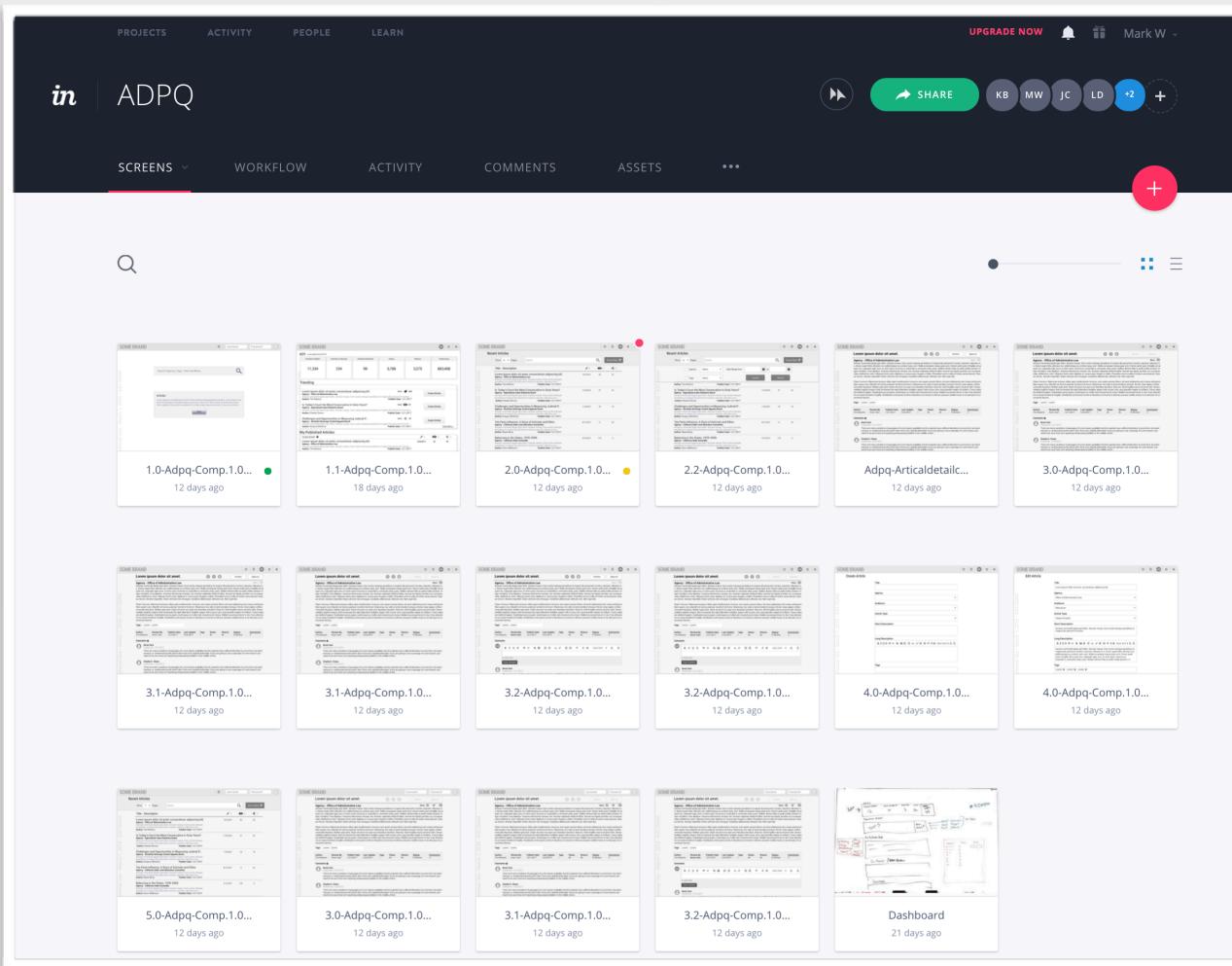
Storyboard/Whiteboard - Version 1



User Story Ideation & Iterative Development Sketches and Drawings - Version 1



User Story Ideation & Iterative Development Wireframes - Version I

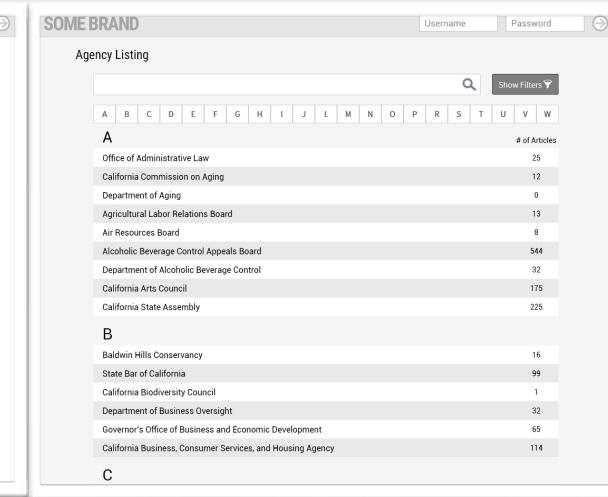
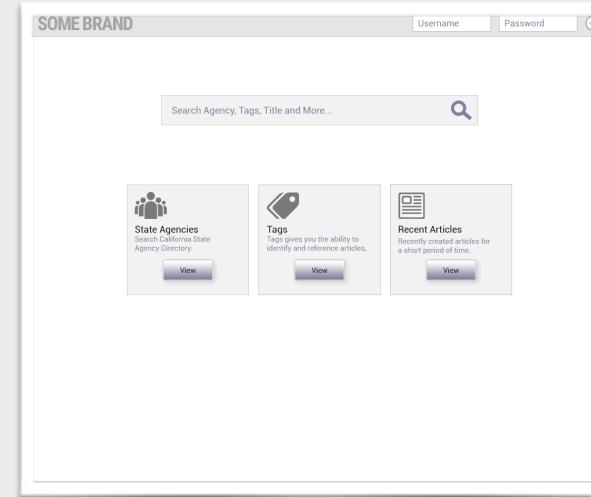


Clickable Prototypes

Invision was used for rapid prototyping, team collaboration, and was critical in driving feedback from the internal team and interviewees.

User Story Ideation & Iterative Development Feedback

During the initial prototyping phase we used our interviews and surveys as direct influencers over the design and feature direction.



Section	Agency	# of Articles
A	Office of Administrative Law	25
A	California Commission on Aging	12
A	Department of Aging	0
A	Agricultural Labor Relations Board	13
A	Air Resources Board	8
A	Alcoholic Beverage Control Appeals Board	544
A	Department of Alcoholic Beverage Control	32
A	California Arts Council	175
A	California State Assembly	225
B	Baldwin Hills Conservancy	16
B	State Bar of California	99
B	California Biodiversity Council	1
B	Department of Business Oversight	32
B	Governor's Office of Business and Economic Development	65
C	California Business, Consumer Services, and Housing Agency	114

“It’s important for me to be able to search across many different agencies because my community relies on me to deliver important information that may impact their families.”

User Story Ideation & Iterative Development Feedback

During the initial prototyping phase we used our interviews and surveys as direct influencers of the design and feature direction.



“

Sometimes I find it hard to search and locate articles that are important to me. Super cumbersome! ”

Internal Use - Feb 15, 2018 - 03:13:48PM

SOME BRAND

Recent Articles

Show 7 Pages Search

Title - Description	<input type="button" value="📅"/>	<input type="button" value="👁"/>	<input checked="" type="checkbox"/>
Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Agency - Office of Administrative Law Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus...	12/5/2017	36	2/15/2018
Is Today's Court the Most Conservative in Sixty Years? Agency - Agricultural Labor Relations Board Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus...	7/15/2016	21	2/15/2018
Challenges and Opportunities in Measuring Judicial P.. Agency - Alcoholic Beverage Control Appeals Board Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus...	1/14/2017	18	2/14/2018
Tea Party Influence: A Story of Activists and Elites. Agency - California Debt Limit Allocation Committee Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus...	8/11/2017	11	2/11/2018
Balancing in the States, 1978-2009. Agency - California State Assembly Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus...	4/10/2017	178	2/10/2018
The Systemic Effects of Politically Motivated Retirem... Agency - Department of Alcoholic Beverage Control Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus...	2/6/2016	77	2/5/2018
Does Legal Doctrine Matter? Unpacking Law and Pol... Agency - Department of Alcoholic Beverage Control Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus...	12/3/2015	118	2/3/2018

Showing 1 to 7 of 10 Pages

User Story Ideation & Iterative Development Feedback

During the initial prototyping phase we used our interviews and surveys as direct influencers of the design and feature direction.



“Currently, articles and content are so disorganized and there is zero workflow management. I never know what articles I need to review, approve, or decline. I need something that keeps me and my staff organized”

“I wish we had an easy way of creating similar articles to the ones that are really popular.”

The image displays a user interface for a platform named 'SOME BRAND'. On the left, a 'My Dashboard' section is shown with a summary of notifications, recent articles, new users, and new tags. It also lists the '10 Most Popular Tags' including Children, Alcohol, Veteran, Fee Court, Liquor, License, Life, California, and Beach. Below this is a 'My Articles' section with a list of articles, each with a title, creation date, and update date. To the right, there are four main content sections: 'Trending', 'Complete', 'Will Not Publish', and 'Challenges and Opportunities'. Each section contains a list of articles with similar metadata. At the bottom of each content section is a page navigation bar with links for 'Prev', '1', '2', '3', '4', '5', '6', and 'Next'. On the far right, a sidebar menu is visible with options like 'Action Menu', 'Edit My Notifications', 'Edit My Articles', 'Edit My Dashboard', 'Reset My Password', and 'Logout'. The sidebar also shows a list of items under 'In Review' and 'Is To Do' with their respective creation and update dates.

User Story Ideation & Iterative Development Feedback

During the initial prototyping phase we used our interviews and surveys as direct influencers of the design and feature direction.



“

My staff needs a way of creating an article in the system without having to go out and use Word”

SOME BRAND

Create Article

Title

Agency

Audience

Article Type

Short Description

Long Description

Tags

File Uploads No file chosen

User Story Ideation & Iterative Development Feedback

During the initial prototyping phase we used our interviews and surveys as direct influencers of the design and feature direction.



“We have been stuck in the stone ages and would love the opportunity to share public articles over social media, not just email.”

Internal Use - March 1, 2018 - 8:01:00AM

SOME BRAND

Username Password

Agency - Office of Administrative Law

Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus m s. Donec quam felis, ultricies nec, pellentesque eu, pretium quis, sem. Nulla consequat massa quis enim. Donec pede justo, fringilla vel, ai quet nec, vulputate eget, arcu. In enim justo, rhoncus ut, imperdiet a, venenatis vitae, justo. Nullam dictum felis eu pede mollis pretium. In eger tincidunt. Cras dapibus. Vivamus elementum semper nisi. Aenean vulputate eleifend tellus. Aenean leo ligula, porttitor eu, consequat vitae, eleifend ac, enim. Aliquam lorem ante, dapibus in, viverra quis, feugiat a, tellus. Phasellus viverra nulla ut metus varius laoreet. Quis ue rutrum. Aenean imperdiet. Etiam ultricies nisi vel augue. Curabitur ullamcorper ultricies nisi. Nam eget dui.

Etiam rhoncus. Maecenas tempus, tellus eget condimentum rhoncus, sem quam semper libero, sit amet adipiscing sem neque sed ipsum Nam quam nunc, blandit vel, luctus pulvinar, hendrerit id, lorem. Maecenas nec odio et ante tincidunt tempus. Donec vitae sapien ut liber venenatis faucibus. Nullam quis ante. Etiam sit amet orci eget eros faucibus tincidunt. Duis leo. Sed fringilla mauris sit amet nibh. Donec sodales sagittis magna. Sed consequat, leo eget bibendum sodales, augue velit cursus nunc, quis gravida magna mi a libero. Fusce vulpu ate eleifend sapien. Vestibulum purus quam, scelerisque ut, mollis sed, nonummy id, metus. Nullam accumsan lorem in dui. Cras ultricies mi eu turpis hendrerit fringilla. Vestibulum ante ipsum primis in faucibus orci luctus et ultrices posuere cubilia Curae; In ac du quis mi co sectetur laciniia.

Tags: [Lorem](#) [Lorem](#)

Author:	Review By:	Publish Date:	Last Update:	Tags	Views:	Shares:	Status:	Comments:
Tim Roberts	Kevin Hart	12/1/2017	12/5/2017	1	36	36	In Review	2

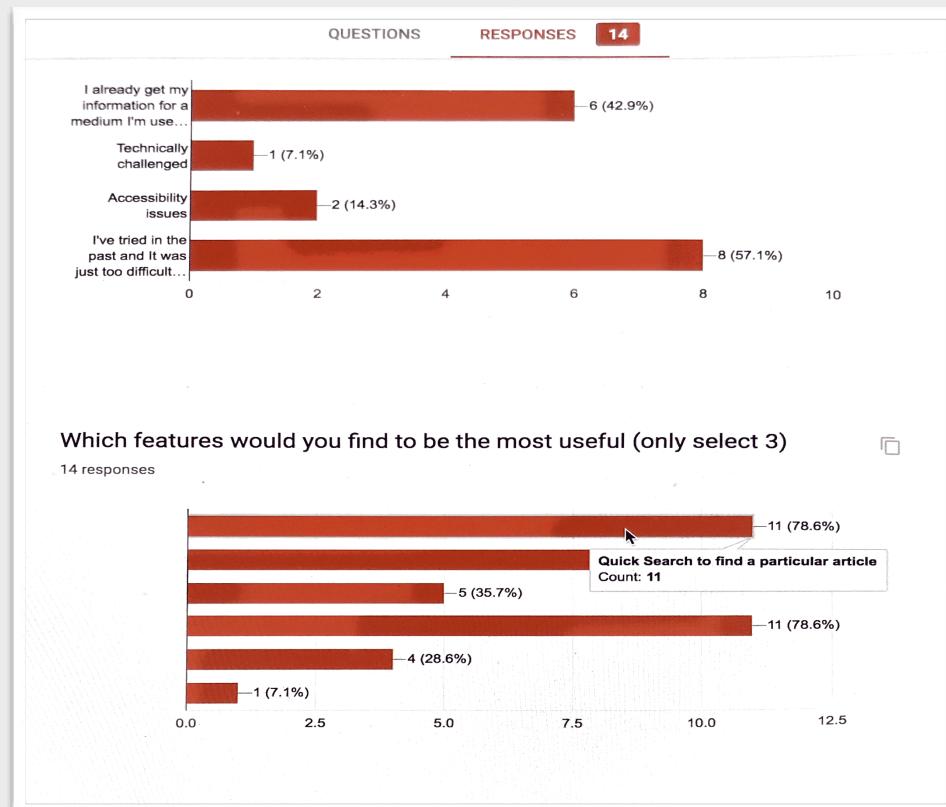
Comments

Kevin Hart
Published: 12/1/2017
There are many variations of passages of Lorem Ipsum available, but the majority have suffered alteration in some form, by inject humour, or randomised words which don't look even slightly believable. If you are going to use a passage of Lorem Ipsum, you need to be sure there isn't anything embarrassing hidden in the middle of text.

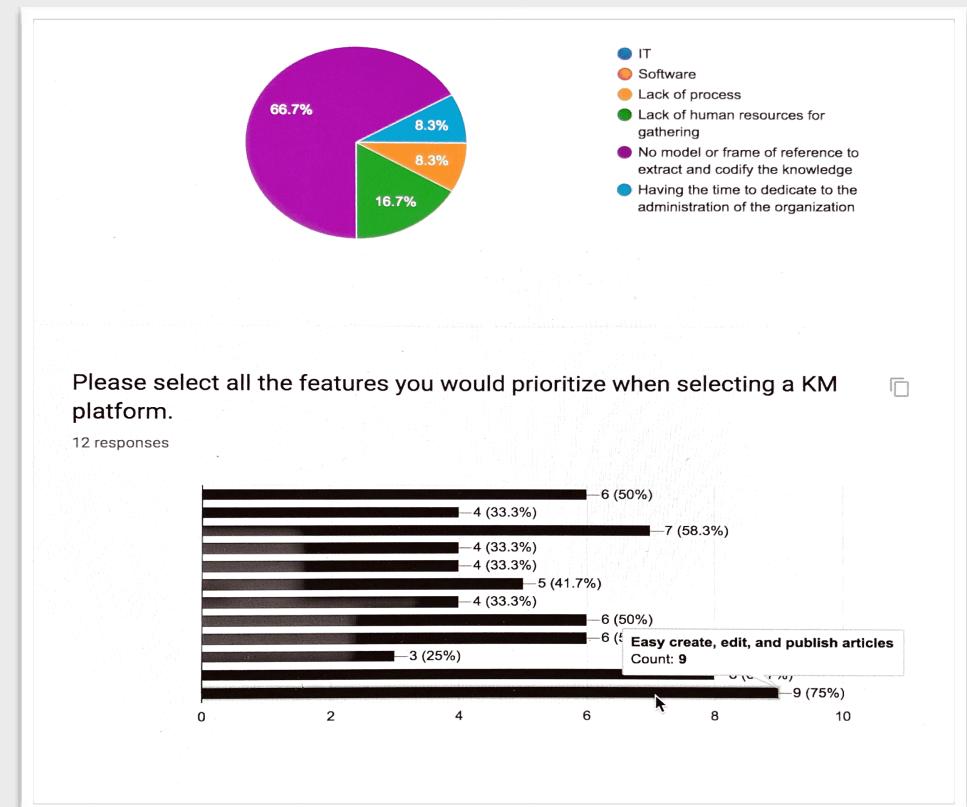
Charles E. Cheez
Published: 12/5/2017
There are many variations of passages of Lorem Ipsum available, but the majority have suffered alteration in some form, by inject humour, or randomised words which don't look even slightly believable. If you are going to use a passage of Lorem Ipsum, you need to be sure there isn't anything embarrassing hidden in the middle of text.

User Story Ideation & Iterative Development Validation

During the initial prototyping phase we used our interviews and surveys as additional story points that directly influenced the design and feature direction.



Quick search was among the most important features.



Multiple location alert tracking was important.

User Story Ideation & Iterative Development

Validation



Archetype Validation



After our diagrams and wireframes were completed we initiated feedback from our original interviewees that directly effected our iterations.

User Story Ideation & Iterative Development Validation

Revisions

Additional iterations were made from our validation interviews

Internal Use - Feb 22, 2018 - 12:01:00AM

SOME BRAND

Recent Articles

Show 6 Pages Search Show Filters

Agency Select Date Range from to
 Tags Select Cancel Search

Author: Tim Roberts Publish Date: 12/1/2017

Is Today's Court the Most Conservative in Sixty Years?
Agency - Agricultural Labor Relations Board
Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus...
Author: Charles Elmore Publish Date: 12/1/2017

Challenges and Opportunities in Measuring Judicial P...
Agency - Alcoholic Beverage Control Appeals Board
Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus...
Author: Gregory McHenry Publish Date: 12/1/2017

Tea Party Influence: A Story of Activists and Elites.
Agency - California Debt Limit Allocation Committee
Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus...
Author: Wyatt Borja Publish Date: 12/1/2017

Balancing in the States, 1978-2009.
Agency - California State Assembly
Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus...
Author: Steve Matheson Publish Date: 12/1/2017

The Systemic Effects of Politically Motivated Retirem...
Agency - Department of Alcoholic Beverage Control
Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus...
Author: Roy Ramsay Publish Date: 12/1/2017

Showing 1 to 6 of 10 Pages

Prev 1 2 3 4 5 6 7 8 Next



Internal Use - March 1, 2018 - 8:01:00AM

SOME BRAND

Recent Articles

Show 6 Pages Search Show Filters

Title - Description

Edit View Share Print

12/5/2017 36 36

Is Today's Court the Most Conservative in Sixty Years?
Agency - Office of Administrative Law
Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus...
Author: Tim Roberts Publish Date: 12/1/2017

Challenges and Opportunities in Measuring Judicial P...
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Author: Wyatt Borja Publish Date: 12/1/2017

Balancing in the States, 1978-2009.
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Author: Steve Matheson Publish Date: 12/1/2017

The Systemic Effects of Politically Motivated Retirem...
Agency - Department of Alcoholic Beverage Control
Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus...
Author: Roy Ramsay Publish Date: 12/1/2017

Showing 1 to 6 of 10 Pages

Prev 1 2 3 4 5 6 7 8 Next

“ I found the search functionality to be ok. It would be a lot easier if there was a way to filter and sort. ”

Revision:

Added the ability to filter by date created, number of views, and shares and added filters by tags, agency, and date range.

User Story Ideation & Iterative Development Validation - Revisions Cont'd.

Internal Mockup 5.2018 - 80% PAIN

SOME BRAND

System Metrics - Last Update 2/22/2018

Articles Publish	Articles In Review	Articles Declined	Views	Shares	Total Users
11,334	234	99	5,788	3,275	883,408

Articles To Review

- Most: 444 < 22 Create Similar
- Is Today's Court the Most Conservative in Sixty Years? Agency - Agricultural Labor Relations Board Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis dis parturient montes... Author: Charles Elmore Publish Date: 12/1/2017
- Challenges and Opportunities in Measuring Judicial P... Agency - Alcoholic Beverage Control Appeals Board Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis dis parturient montes... Author: Gregory McHenry Publish Date: 12/1/2017

Approved Articles

- Most: 36 < 36 Create Article + View More...
- Is Today's Court the Most Conservative in Sixty Years? Agency - Agricultural Labor Relations Board Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis dis parturient montes... Author: Charles Elmore Publish Date: 12/1/2017
- Challenges and Opportunities in Measuring Judicial P... Agency - Alcoholic Beverage Control Appeals Board Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis dis parturient montes... Author: Gregory McHenry Publish Date: 12/1/2017

Declined Articles

- New: Creation Date: 12/1/2017
- New: Creation Date: 12/1/2017
- In Review: Creation Date: 12/1/2017
- Approved: Creation Date: 12/1/2017
- Declined: Creation Date: 12/1/2017



Complaint:

“The workflow screen was all over the place. Too busy and difficult to navigate.”

Internal Mockup 5.2018 - 80% PAIN

SOME BRAND

My Article Metrics - Last Update 2/22/2018

Articles Publish	Articles In Review	Articles Declined	Views	Shares
11,334	234	99	5,788	3,275

Trending Articles

- Most: 444 < 22 Create Similar
- Is Today's Court the Most Conservative in Sixty Years? Agency - Agricultural Labor Relations Board Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis dis parturient montes... Author: Charles Elmore Publish Date: 12/1/2017
- Challenges and Opportunities in Measuring Judicial P... Agency - Alcoholic Beverage Control Appeals Board Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis dis parturient montes... Author: Gregory McHenry Publish Date: 12/1/2017

My Published Articles

- Most: 36 < 36 Create Article + View More...
- Is Today's Court the Most Conservative in Sixty Years? Agency - Agricultural Labor Relations Board Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis dis parturient montes... Author: Charles Elmore Publish Date: 12/1/2017
- Challenges and Opportunities in Measuring Judicial P... Agency - Alcoholic Beverage Control Appeals Board Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis dis parturient montes... Author: Gregory McHenry Publish Date: 12/1/2017

My Non-Published Articles

- New: Creation Date: 12/1/2017
- New: Creation Date: 12/1/2017
- In Review: Creation Date: 12/1/2017
- Approved: Creation Date: 12/1/2017
- Declined: Creation Date: 12/1/2017

Revision:
Improved and greatly simplified article workflow management for admin.

User Story Ideation & Iterative Development Validation - Revisions Cont'd.



Request:

“It would be amazing if I could quickly create a similar article to the ones that are trending the most! ”

Revision:

We algorithmically defined trending articles by combining the the most views and shares into a scoring system, then provided the user the ability to create a similar article that carries over similar attributes.

The screenshot shows a web application interface for 'SOME BRAND'. At the top, there's a header with the brand name and a 'K8' icon. Below it is a table titled 'My Article Metrics' with columns: Articles Publish, Articles In Review, Articles Declined, Views, and Shares. The data is as follows:

Articles Publish	Articles In Review	Articles Declined	Views	Shares
11,334	234	99	5,788	3,275

Below this is a section titled 'Trending Articles' with three items listed:

- 1. Most views: 444, 22 shares. Article title: 'Is Today's Court the Most Conservative in Sixty Years?'. Agency: Office of Administrative Law. Publish Date: 12/1/2017.
- 2. Second most views: 21, 29 shares. Article title: 'Challenges and Opportunities in Measuring Judicial P...'. Agency: Agricultural Labor Relations Board. Publish Date: 12/1/2017.
- 3. Third most views: 18, 11 shares. Article title: 'Challenges and Opportunities in Measuring Judicial P...'. Agency: Alcoholic Beverage Control Appeals Board. Publish Date: 12/1/2017.

Each item has a 'Create Similar' button. Below the trending section is a section titled 'My Published Articles' with three items:

- 1. Article title: 'Is Today's Court the Most Conservative in Sixty Years?'. Agency: Agricultural Labor Relations Board. Publish Date: 12/1/2017.
- 2. Article title: 'Challenges and Opportunities in Measuring Judicial P...'. Agency: Alcoholic Beverage Control Appeals Board. Publish Date: 12/1/2017.
- 3. Article title: 'Tea Party Influence: A Story of Activists and Elites'. Agency: California Debt Limit Allocation Committee. Publish Date: 12/1/2017.

Below these is a section titled 'My Non-Published Articles' with three items:

- 1. Article title: 'Balancing in the States, 1978-2009'. Agency: California State Assembly. Publish Date: 12/1/2017.
- 2. Article title: '...'. Agency: Publish Date: 12/1/2017.
- 3. Article title: '...'. Agency: Publish Date: 12/1/2017.

User Story Ideation & Iterative Development Validation - Revisions Cont'd.



Request:

“ I need a way for my staff and the public to share over social media, not just email. ”

Revision:

We added the ability to share over two social media providers including Facebook and Twitter.

SOME BRAND

Username Password

Share:

Decline Approve

Agency - Office of Administrative Law

Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus m s. Donec quam felis, ultricies nec, pellentesque eu, pretium quis, sem. Nulla consequat massa quis enim. Donec pede justo, fringilla vel, ai quet nec, vulputate eget, arcu. In enim justo, rhoncus ut, imperdiet a, venenatis vitae, justo. Nullam dictum felis eu pede mollis pretium. In eger tincidunt. Cras dapibus. Vivamus elementum semper nisi. Aenean vulputate eleifend tellus. Aenean leo ligula, porttitor eu, consequa vitae, eleifend ac, enim. Aliquam lorem ante, dapibus in, viverra quis, feugiat a, tellus. Phasellus viverra nulla ut metus varius laoreet. Quis ue rutrum. Aenean imperdiet. Etiam ultricies nisi vel augue. Curabitur ullamcorper ultricies nisi. Nam eget dui.

Etiam rhoncus. Maecenas tempus, tellus eget condimentum rhoncus, sem quam semper libero, sit amet adipiscing sem neque sed ipsum Nam quam nunc, blandit vel, luctus pulvinar, hendrerit id, lorem. Maecenas nec odio et ante tincidunt tempus. Donec vitae sapien ut liber venenatis faucibus. Nullam quis ante. Etiam sit amet orci eget eros faucibus tincidunt. Duis leo. Sed fringilla mauris sit amet nibh. Donec sodales sagittis magna. Sed consequat, leo eget bibendum sodales, augue velit cursus nunc, quis gravida magna mi a libero. Fusce vulpu ate eleifend sapien. Vestibulum purus quam, scelerisque ut, mollis sed, nonummy id, metus. Nullam accumsan lorem in dui. Cras ultricies mi turpis hendrerit fringilla. Vestibulum ante ipsum primis in faucibus orci luctus et ultrices posuere cubilia Curae; In ac dui quis mi co sectetur lacinia.

Tags: [Lorem](#) [Lorem](#)

Author:	Review By:	Publish Date:	Last Update:	Tags	Views:	Shares:	Status:	Comments:
Tim Roberts	Kevin Hart	12/1/2017	12/5/2017	1	36	36	In Review	2

Comments

KB

B I U S “ ” <> % Sans Serif

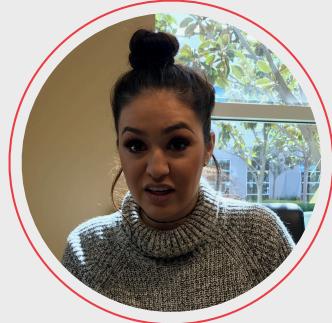
Attach files

Save Comment

Kevin Hart
Published: 12/1/2017
There are many variations of passages of Lorem Ipsum available, but the majority have suffered alteration in some form, by inject humour, or randomised words which don't look even slightly believable. If you are going to use a passage of Lorem Ipsum, you need to be sure there isn't anything embarrassing hidden in the middle of text.

Charles E. Cheez
Published: 12/5/2017
There are many variations of passages of Lorem Ipsum available, but the majority have suffered alteration in some form, by inject humour, or randomised words which don't look even slightly believable. If you are going to use a passage of Lorem Ipsum, you need to be sure there isn't anything embarrassing hidden in the middle of text.

User Story Ideation & Iterative Development Validation - Revisions Cont'd.



Complaint:

“The ability to create articles is great but we also need an wysiwyg editor so we don't have to create an article in word, edit it, then import to a system.”

Revision:

We added an inline wysiwyg editor to the create/edit article screen.

Internal Use - March 1, 2018 - 8:01:00AM

SOME BRAND

Create Article

Title

Agency

Audience

Short Description

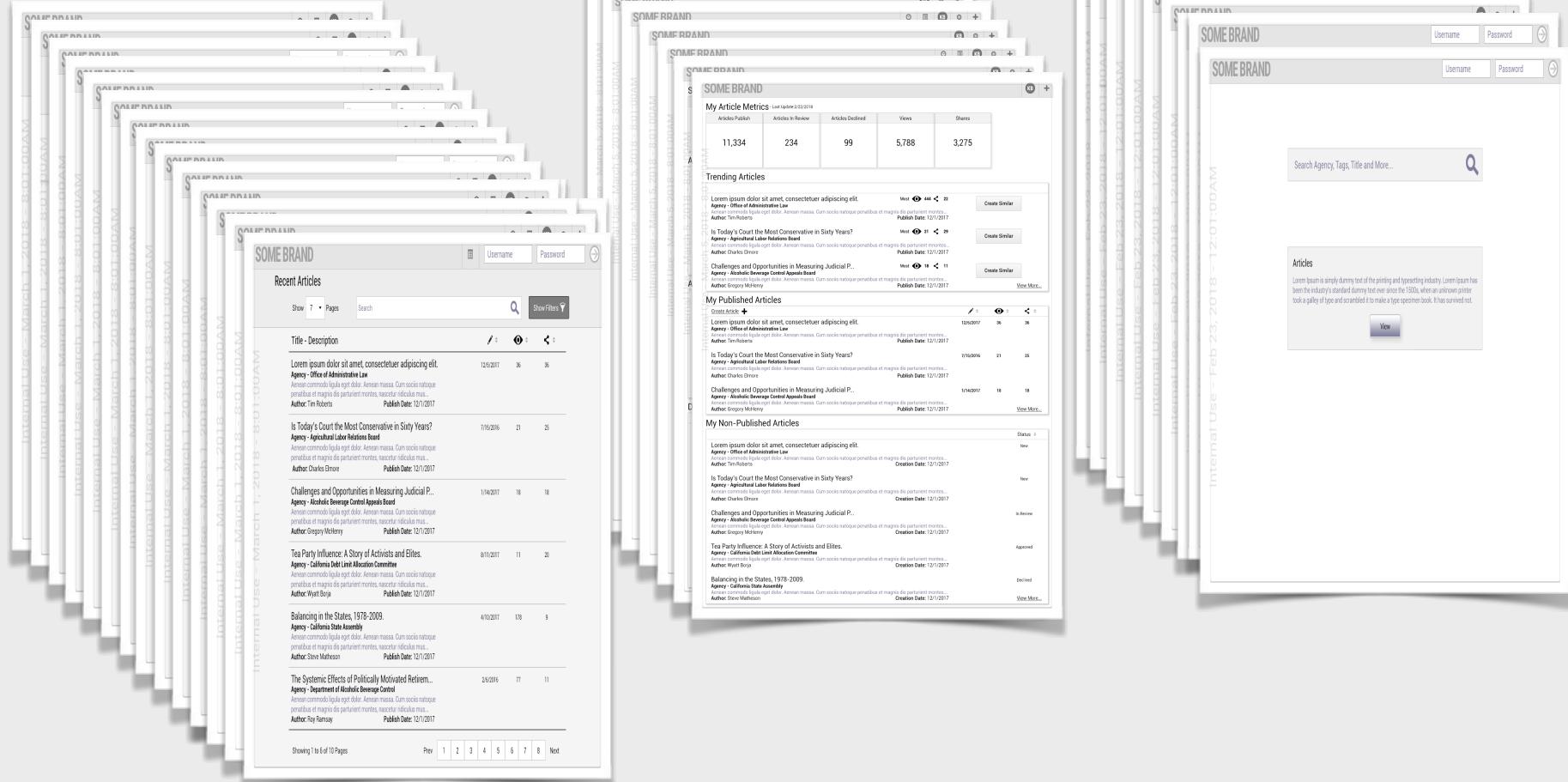
Long Description

Suggested Tags

Tags (Comma delimited)
 add a tag

File Uploads
 No file chosen

User Story Ideation & Iterative Development Revision History



Revisions:

Over the course of 4 sprints we were able to make over 10 major designs revisions with hundreds of smaller changes.

User Story Ideation & Iterative Development

High Fidelity Prototype - Product Market Fit

The image displays six wireframe prototypes of a knowledge management system, arranged in two columns of three. Each prototype is a screenshot of a web-based application with a blue header bar and a white background.

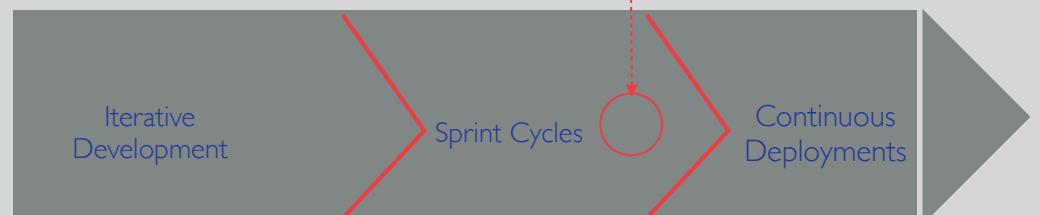
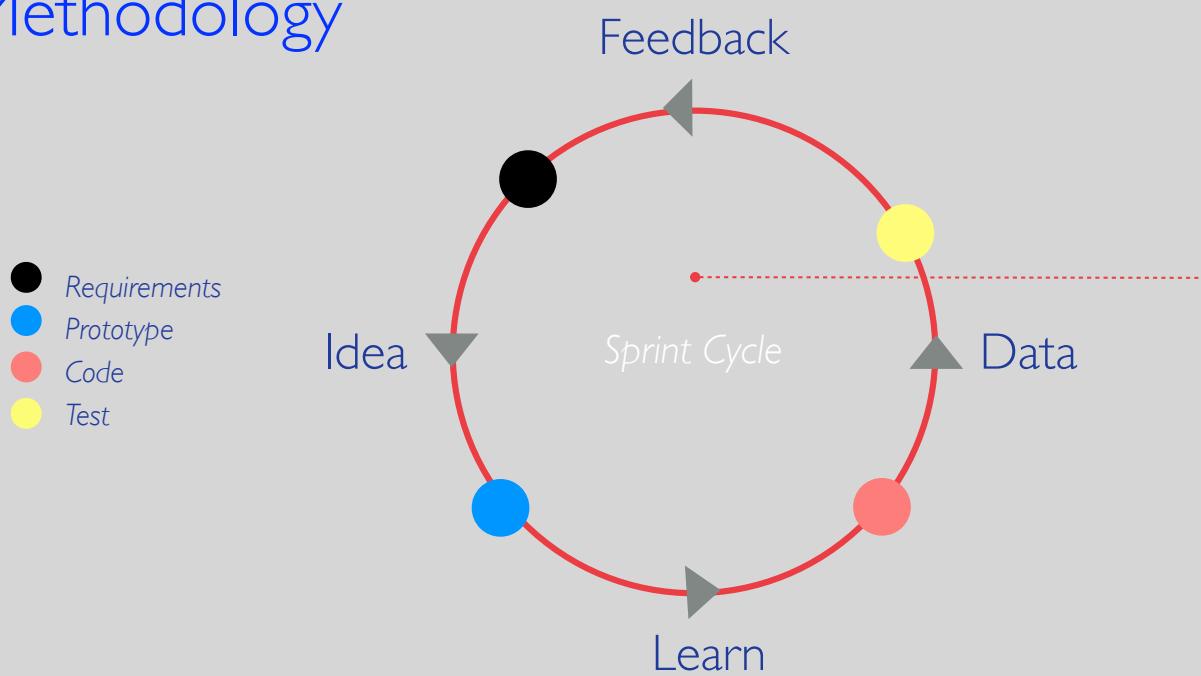
- Top Left:** A login screen titled "Welcome to the ADPQ Knowledge Articles System". It includes fields for "Email Address" and "Password", a "Forgot Password?" link, and a "Log In" button. Below the form is a note about viewing recent articles and a "View" button.
- Top Middle:** A dashboard titled "My Article Metrics" showing metrics: 13 articles created, 5 articles reviewed, 4 articles deleted, 526 views, and 40 likes. Below this is a section titled "Trending Articles" with a list of articles from various authors and agencies. Further down are sections for "My Published Articles" and "My Non-Published Articles", each listing several articles with their titles, authors, and publication dates.
- Top Right:** A "Create Article" form. It has fields for "Title (max 60 characters)", "Agency (you can only create articles for your assigned agency)" (set to "Office of Administrative Law"), "Audience" (set to "Public Article"), "Short Description (max 500 characters)", "Long Description" (with rich text editor), "Suggested Tags" (with a list of tags like "health", "commission", "aging", "age", "alzheimers", etc.), and "Tags (comes defined)" (with a list of tags like "adults", "aging", "age", "alzheimers", "diseases", "senior", "elbow", "health", "geriatric care"). There are "Cancel" and "Save" buttons at the bottom.
- Bottom Left:** A "Manager Users" page showing a list of users with "Edit" and "Remove" buttons next to each name.
- Bottom Middle:** A "Create User" form. It requires "First Name", "Last Name", "Email" (which is highlighted in yellow), "Password", and "Confirm Password". It also includes "User defined creation rules" (set to "Agency: Agricultural Labor Relations Board") and a "Can upload attachments" checkbox. There are "Cancel" and "Save" buttons.
- Bottom Right:** A "Fan Don't let Fans Drive Drunk" article page. The title is "Fans Don't let Fans Drive Drunk". The summary says: "The National Highway Traffic Safety Administration is teaming up with the National Highway Traffic Safety Administration to remind motorists to designate a sober driver before the game begins. Drunk driving is a common problem, but it's going to be a serious problem. Distracted driving is another issue that can have serious results." The article has a "Review By" field (set to "John Lennon"), "Published Date" (3/15/2018), "Last Update" (3/15/2018), "Tags" (set to "drunk driving", "sober", "precaution"), and a "Comments" section with one pending comment from John Lennon.

Platform

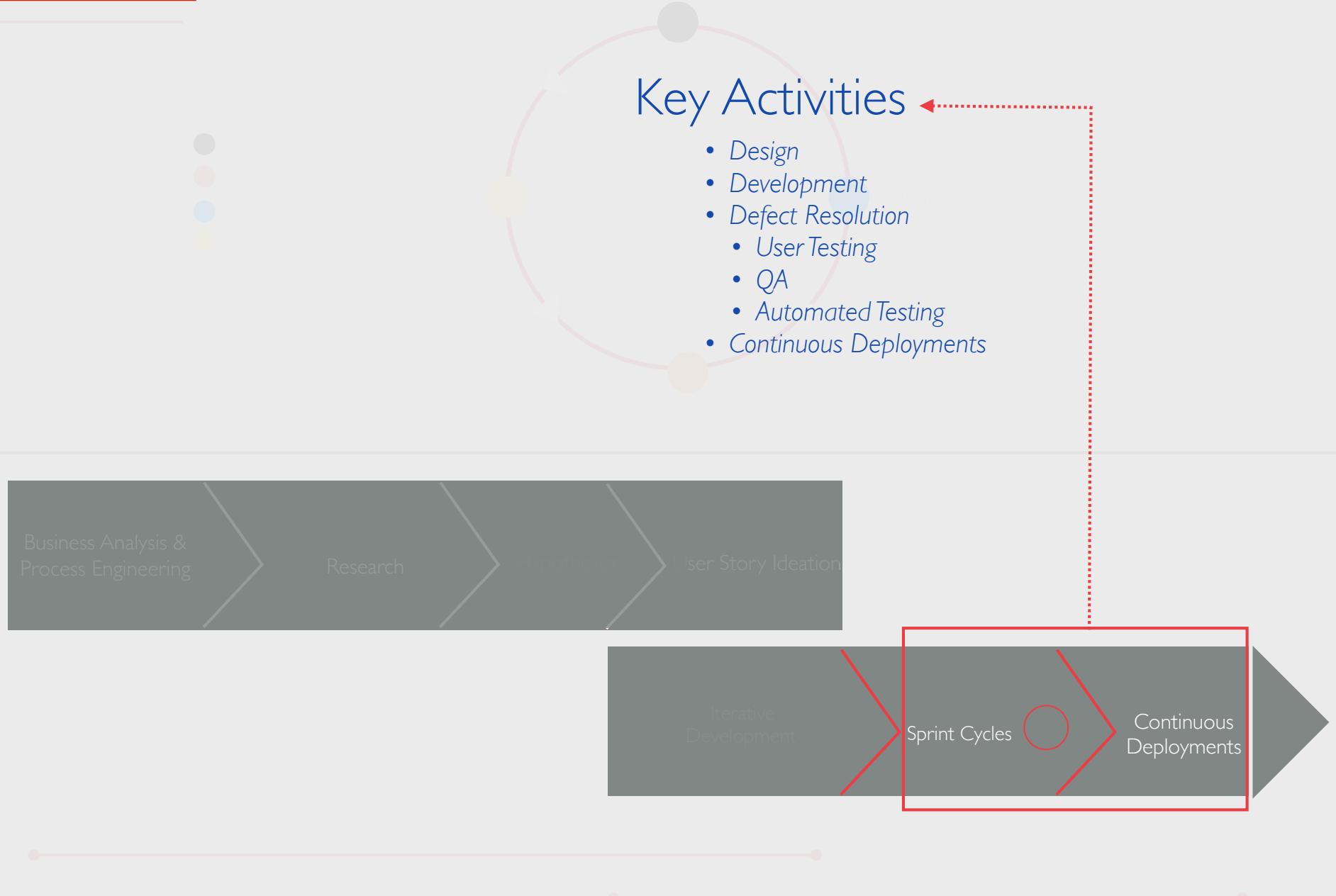
- Fully Responsive
- Fluid design
- Simple to understand language
- Accessibility best practices
- Logical sense of order and flow

- Able to easily come back and edit certain information
- Visual
- Consistent design throughout
- Contextual

Agile Dev. Methodology

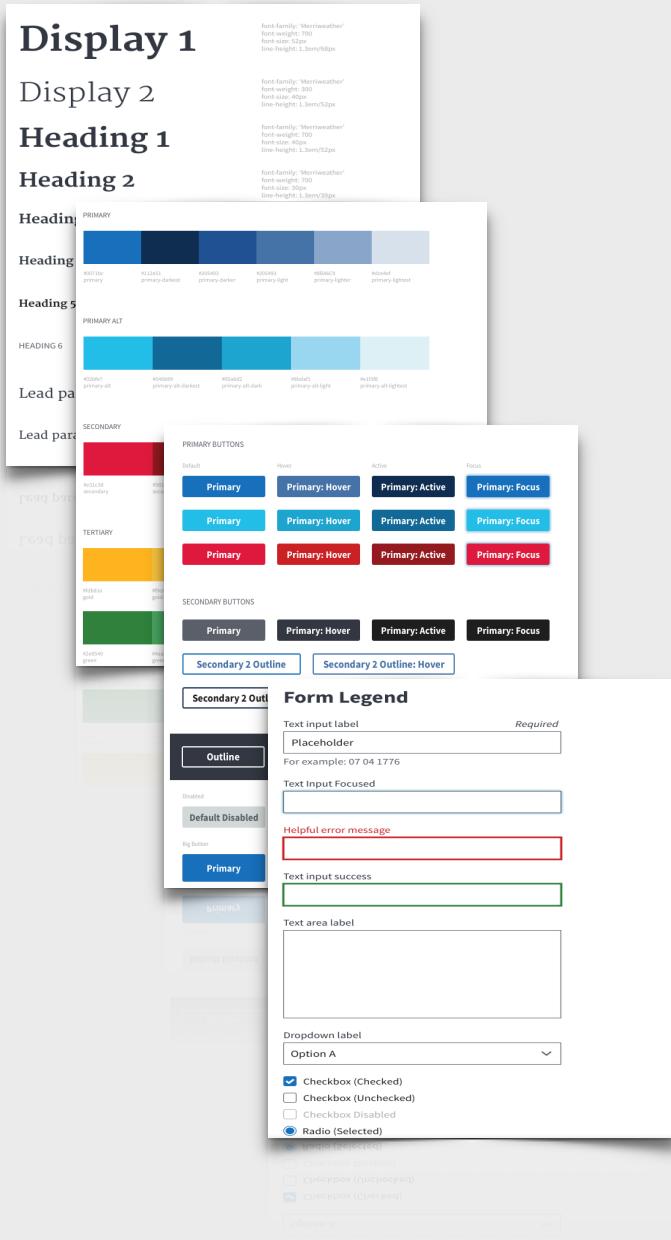


Sprint Cycles



Sprint Cycles

Design



User Experience (UX)

When creating the design language we focused on 8 essential elements:

1. Color
2. Interactions
3. Photography
4. Animations
5. Inspirations
6. Typography
7. Shapes
8. Patterns / Textures

A style guide was created and used to direct the overall look and feel with consistent styling throughout the application. It was important the design accurately represented the feedback and requirements for the project as well as US Web Design Standards.

Sprint Cycles

Design

Design Language / Content

Knowledge Management Tool			
Inspiration <ul style="list-style-type: none">• Minimal• Functional• Legible• Simple• Contrast• Zendesk• KMT• Govm't sites	Interactions <ul style="list-style-type: none">• Simple• Minimal• Utility• Required• No Large Forms	Color <ul style="list-style-type: none">• White• Grey• Blue• Red- Secondary	Typography <ul style="list-style-type: none">• Larger Fonts• Open Source & System Fonts• Black & White
Photography <ul style="list-style-type: none">• N/A	Shapes <ul style="list-style-type: none">• Iconography• Basic Shapes• No Dynamic Shapes	Patterns &Textures <ul style="list-style-type: none">• Patterns that reflect urgency• Branding Opportunity	Animations <ul style="list-style-type: none">• Slide In• Slide Down• Appear

Sprint Cycle User Testing

UAT Checklist

Web Project Team Awareness / Preparations
Has the project team been made aware of its role in advising on changes to business processes and procedures?
Has the project team been made aware of its role in providing support for all testing issues?
Has the project team been made aware of its role in tracking and managing website bugs?
UAT Team Preparations
Has the UAT team been defined?
Does the UAT team understand its responsibility in executing the test cases and ensuring that the final outcomes of the tests are satisfactory?
Has the UAT team been told about its role and responsibility in ensuring that all test case input sources and output results are documented?
Has the UAT team agreed that the test cases provides comprehensive and effective coverage of all aspects of functionality of the application?
Has the UAT team been told about its role in documenting bugs/problems and working with the project team to resolve problems identified during testing?
Does the UAT team understand the responsibilities and required actions for each category of problem identified during testing?
Has the UAT team been made aware of its role in accepting the results on behalf of the relevant user population?
Does the UAT team understand that it must recognize any changes necessary to existing processes and take a lead role in ensuring that the changes are made and communicated to other users?
Does the UAT team understand its role in verifying performance on business critical functions?
Does the UAT team understand its role in confirming the integrity of data?
Does the UAT team understand its role in assessing system final production readiness?
Test Preparation
Has the plan for acceptance testing been created?
Have all possible system functions been described?
Is all input data available that is required for testing?
Has acceptance criteria been defined on which the completion of the acceptance test will be judged?
Have all user specific constraints been considered?
Has the testing procedure been defined?
Have test cases been created to discover contradictions between the software product and the requirements?
Have test cases been created to review whether timing constraints are met by the system?
Test Execution and Evaluation
Were all steps of the test run documented?
Was the acceptance test performed according to the test plan?
Did the users review the test results?
Are the services provided by the system in compliance with user requirements?
Were all defect documented?

Process

User testing is initially prepared against a thorough preparedness checklist.

Subsequently, user tests are measured against key metrics that are tracked as they proceed through core functionality.

Metrics:

- Fully Responsive
- Fluid design
- Simple to understand language
- Logical sense of order and flow
- Able to easily come back and edit certain information
- Visual
- Consistent design throughout
- Contextual

Sprint Cycles

User Testing



Dan Streit
Founder
Single Source Training

Our later stage prototype was thoroughly tested by Dan who is a domain expert in knowledge management systems.

Recommendations

- Recommendation 1: Have clear and separate roles and functions for Article Creation versus Article Approval.
- Recommendation 2: Article creation should occur on a single page.

California Prototype - Interview 1

Interviewee: Dan Streit

Founder, Single Source Training

Single Source Training provides clients with e-learning and knowledge management platforms to train and certify their employees and contractor base. Creating better service, compliance, sales, in the ever changing regulatory environment we have a custom document management system that allows tracking and transparency for all parties to the transaction.

This interview was conducted to obtain user feedback on the Creating, Sharing and Development of Knowledge Articles.

General Questions Regarding Knowledge Management Systems:

Who are the primary user groups of Knowledge Management Systems?

You typically have three types of users: Administrators, Authors and Consumers of information. Sometimes these roles overlap, other times not, but its best to think out each of these functions as a separate use case.

What is more important, viewing Knowledge Articles or creating Knowledge Articles?

The goal of any KMT system should be the ability to provide easy access to information. Creating KA's is important and there are best practices around the creation of those, but without the ability to easily access KA content, the system is not doing its job.

What would you consider best practices for KA creation?

Knowledge Article creation needs to be simple and straight forward. You want to keep the authoring and editing to a single page to make it easier to create and publish articles. Introducing friction into this process will ultimately reduce the number of articles that get created and will likely result in only a few articles being created by a select few that were brave enough to go through the entire process. The beauty of a KMT is to allow all parties within an organization to showcase their respective strengths through KA creation.

Should authors be allowed to approve their own articles?

In certain situations, the author and approver can be one in the same, but its best to have a check and balance to make sure content is appropriate before being widely available.

Lessons Learned

- Testers found our design and included features on par, and in some cases better than commercial Knowledge Management systems. They also found the system to have a modern design, natural flow, and was easily navigated post login.
- Improved and clear language describing each section with appropriate calls to action.
- Requested streamlined administrative article workflow.
- Creation rules and permissions should be controlled at the staff level.



Results & Changes



Administrative approval process was simplified and cleaned up based on direct user feedback.

- Created natural flow by eliminating confusion
- Outlined sections clearly and identified calls to action
- Simplified article creation to a single page
- Moved article creation rules and permissions to the user level.

Sprint Cycles

User Testing



Results & Changes

Before

SOME BRAND

My Dashboard

My Notifications

Articles	Recent Articles	New Users	New Tags
11,634	22	11	53

10 Most Popular Tags: Children, Alcohol, Veteran, Fee, Court, Liquor, License, Life, California, Beach

My Articles

Showing 1 to 4 of 10 Pages

Prev	1	2	3	4	5	6	Next
------	---	---	---	---	---	---	------

Trending

Showing 1 to 4 of 10 Pages

Prev	1	2	3	4	5	6	Next
------	---	---	---	---	---	---	------

Complete

Showing 1 to 8 of 10 Pages

Prev	1	2	3	4	5	6	Next
------	---	---	---	---	---	---	------

Will Not Publish

Showing 1 to 4 of 10 Pages

Prev	1	2	3	4	5	6	Next
------	---	---	---	---	---	---	------

After

ADPO KNOWLEDGE

My System Metrics

Articles Published	Articles In Review	Articles Declined	Views	Shares	Users
2	8	1	36	0	17

Articles To Review

What if... a 7.0 earthquake hit the San Francisco Bay area?
Agency - Noel & Eric
We live in a world more interconnected than ever before. Humans can't live without technology and technology can't live without humans. What happens when a 7.0 earthquake hits along the Hayward Fault?
Author: John Lennon

Trauma Scene Cleaning Information
Agency - Noel & Eric
With regards to cleaning and infection control . . . rules and guidelines used by the health care community should be used as reference for trauma scene practitioners.
Author: John Lennon

Fans Don't let Fans Drive Drunk
Agency - Noel & Eric
SACRAMENTO, CA – On Sunday, February 4, football fans across the country will gather with friends and family to watch Super Bowl LII.
Author: John Lennon

Approved Articles

Things you should know about the NCAA tourney...
Agency - Alcoholic Beverage Control Appeals Board
There will be a lot of upsets this year due to the high level of parity among the leagues and the natural bias toward larger conference opponents.
Author: Jason Connolly

California Horse Racing Board
Agency - California Victim Compensation Board
While there are a number of ways in which a horse can be exposed, it is important to remember that the trainer can limit the vast majority of them.
Author: Raghu Jonnala

Declined Articles

What to do After an Earthquake
Agency - California Victim Compensation Board
Learn what to do during an earthquake, and how to strengthen your home to prepare for an earthquake
Author: Raghu Jonnala

Sprint Cycles User Testing



Results & Changes

Before

SOME BRAND

System Metrics - Last Update 2/22/2018

Articles Published	Articles In Review	Articles Declined	Views	Shares	Total Users
11,334	234	99	5,788	3,275	883,408

Articles To Review

Most 444 < 22
Agency - Office of Administrative Law
Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis dis parturient montes...
Author: Tim Roberts
Publish Date: 12/1/2017

Is Today's Court the Most Conservative in Sixty Years?
Most 21 < 29
Agency - Agricultural Labor Relations Board
Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis dis parturient montes...
Author: Charles Elmore
Publish Date: 12/1/2017

Challenges and Opportunities in Measuring Judicial P...
Most 18 < 11
Agency - Alcoholic Beverage Control Appeals Board
Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis dis parturient montes...
Author: Gregory McHenry
Publish Date: 12/1/2017

View More...

Approved Articles

Create Article +
Most 444 < 22
Agency - Office of Administrative Law
Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis dis parturient montes...
Author: Tim Roberts
Publish Date: 12/1/2017

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Agency - Agricultural Labor Relations Board
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View More...

Declined Articles

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Author: Gregory McHenry
Creation Date: 12/1/2017

Tea Party Influence: A Story of Activists and Elites.
Most 18 < 11
Agency - California Debt Limit Allocation Committee
Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis dis parturient montes...
Author: Wyatt Boja
Creation Date: 12/1/2017

Balancing in the States, 1978-2009.
Most 18 < 11
Agency - California State Assembly
Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis dis parturient montes...
Author: Steve Matheson
Creation Date: 12/1/2017

After

ADPO

My Article Metrics

Articles Published	Articles In Review	Articles Declined	Views	Shares
0	5	0	0	0

Trending Articles

California Horse Racing Board
Most 34 < 1
Agency - California Victim Compensation Board
While there are a number of ways in which a horse can be exposed, it is important to remember that the trainer can limit the vast majority of them.
Author: Raghu Jonnala
Publish Date: 3/15/2018

Things you should know about the NCAA tourney...
Most 15 < 0
Agency - Alcoholic Beverage Control Appeals Board
There will be a lot of upsets this year due to the high level of parity among the leagues and the natural bias toward larger conference opponents.
Author: Jason Connolly
Publish Date: 3/15/2018

My Published Articles

Create Article +
Most 34 < 1
Agency - California Victim Compensation Board
While there are a number of ways in which a horse can be exposed, it is important to remember that the trainer can limit the vast majority of them.
Author: Raghu Jonnala
Publish Date: 3/15/2018

My Non-Published Articles

Status

What if... a 7.0 earthquake hit the San Francisco Bay area?
pending
Agency - Noel & Eric
We live in a world more interconnected than ever before. Humans can't live without technology and technology can't live without humans. What happens when a 7.0 earthquake hits along the Hayward Fault?
Author: John Lennon
3/15/2018

Trauma Scene Cleaning Information
pending
Agency - Noel & Eric
With regards to cleaning and infection control... rules and guidelines used by the health care community should be used as reference for trauma scene practitioners.
Author: John Lennon
3/15/2018

Fans Don't let Fans Drive Drunk
pending
Agency - Noel & Eric
SACRAMENTO, CA – On Sunday, February 4, football fans across the country will gather with friends and family to watch Super Bowl LII.
Author: John Lennon
3/15/2018

After

ADPO

My System Metrics

Articles Published	Articles In Review	Articles Declined	Views	Shares	Users
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Articles To Review

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pending
Agency - Noel & Eric
SACRAMENTO, CA – On Sunday, February 4, football fans across the country will gather with friends and family to watch Super Bowl LII.
Author: John Lennon

Approved Articles

X What if... a 7.0 earthquake hit the San Francisco Bay area?
pending
Agency - Noel & Eric
We live in a world more interconnected than ever before. Humans can't live without technology and technology can't live without humans. What happens when a 7.0 earthquake hits along the Hayward Fault?
Author: John Lennon
3/15/2018

California Horse Racing Board
pending
Agency - California Victim Compensation Board
While there are a number of ways in which a horse can be exposed, it is important to remember that the trainer can limit the vast majority of them.
Author: Raghu Jonnala
3/15/2018

Declined Articles

Status

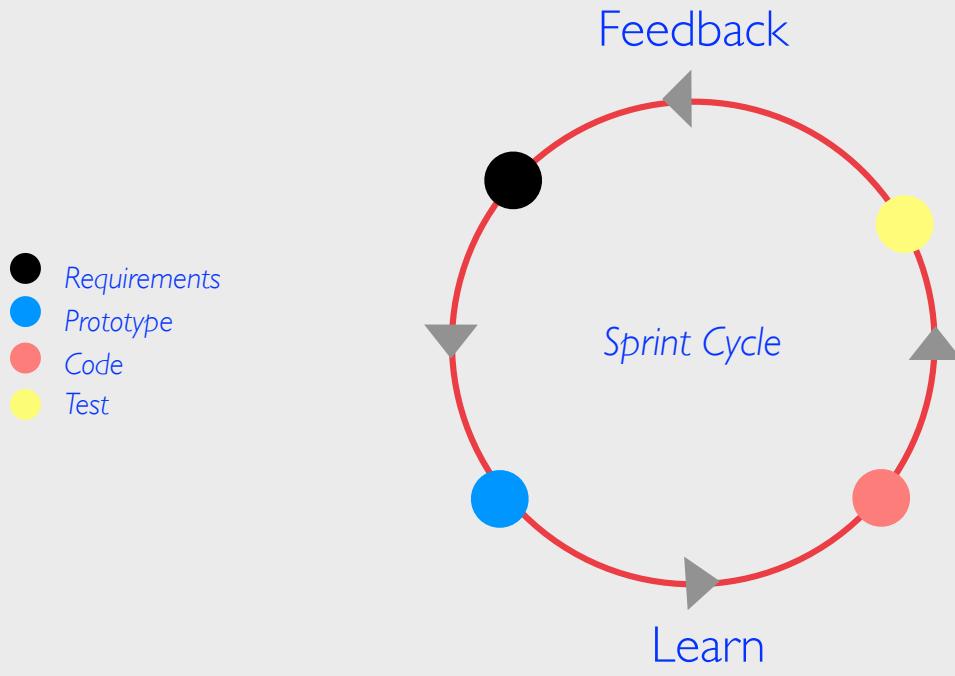
What to do After an Earthquake
declined
Agency - California Victim Compensation Board
Learn what to do during an earthquake, and how to strengthen your home to prepare for an earthquake
Author: Raghu Jonnala

Admin could add articles

Staff can only create new articles

Admin no longer can add articles

Sprint Cycles Development



Agile

HOTB uses an Agile Development methodology that refines and improves the product over small sprints guided by a feedback and validation loop. This rapid prototyping process allows our small, collaborative teams to be flexible, fast, and iterative throughout each sprint cycle.

Sprint Cycles Development

The screenshot displays two main sections: a task list for 'Release 1.0 (2018)' and a feature backlog titled 'Parking Lot'.

Release 1.0 (2018) Tasks:

- PA-206 Design- HTML/CSS- Bugs In development Bug fix
- PA-205 Back End - Bugs In development Bug fix
- PA-204 Front End - Bugs In development Bug fix
- PA-203 Design - Mobile Responsive mockups - 2nd half of Designs Under consideration New
- PA-202 Design - HTML/CSS - 2nd half of Designs Under consideration New

Parking Lot Backlog (Showing 5 of 5):

- PA-181 Research/Setup SMS Provider Under consideration New
- PA-188 Front End - Tags - Autocomplete Under consideration New
- PA-189 Front End - Hover Over Logic - Sharing Under consideration New
- PA-191 BACKLOG - Approve Article - Role-Based Escalation logic Under consideration New
- PA-194 Configure Amazon SNS with Noel Under consideration New

Table View (Bottom):

Release name	Feature ref. #	Feature name	Req reference #	Requirement name	Requirement status	Requirement assigned to	Req. Status changed to Under consideration	Req. Status changed to In design	Req. Status changed to Design Review	Req. Status changed to Ready to develop	Req. Status changed to In development	Req. Status changed to Dev Complete	Req. Status changed to QA	Req. Status changed to Production
Release 1.0 (2018)	PA-42	Contact Survey	PA-42-1	Build Survey	[Open]	Mark Wile	Feb 25, 2018							
Release 1.0 (2018)	PA-44	Contact Survey	PA-44-1	Expense Pillars document	[In development]	Mark Wile	Feb 25, 2018							
Release 1.0 (2018)	PA-44	Define Vision personal	PA-44-2	Business model canvas	[In development]	Mark Wile	Feb 25, 2018							
Release 1.0 (2018)	PA-44	Define Vision personal	PA-44-3	Business Model Canvas	[In development]	Mark Wile	Feb 25, 2018							
Release 1.0 (2018)	PA-44	Define Vision personal	PA-44-4	Overview	[In development]	Mark Wile	Feb 25, 2018							
Release 1.0 (2018)	PA-44	Define Vision personal	PA-44-5	Vision Board	[In development]	Mark Wile	Feb 25, 2018							
Release 1.0 (2018)	PA-44	Define Vision personal	PA-44-6	Goals	[In development]	Mark Wile	Feb 25, 2018							
Release 1.0 (2018)	PA-44	Define Vision personal	PA-44-7	Initiatives	[In development]	Mark Wile	Feb 25, 2018							
Release 1.0 (2018)	PA-132	Conduct Initial Interview	PA-132-1	Draft Interview Questions	[Open]	Jason Connolly	Feb 15, 2018							
Release 1.0 (2018)	PA-132	Conduct Initial Interview	PA-132-2	Contact interview	[Open]	Jason Connolly	Feb 15, 2018							
Release 1.0 (2018)	PA-132	Conduct Initial Interview	PA-132-3	Conduct interview notes and summaries themes and outcomes	[In development]	Jason Connolly	Feb 15, 2018							
Release 1.0 (2018)	PA-137	DevOps Setup	PA-137-1	Setup Jenkins Build Server	[Open]	Eric Delyns	Feb 14, 2018							
Release 1.0 (2018)	PA-137	DevOps Setup	PA-137-2	Create Jenkins Build Server	[Open]	Eric Delyns	Feb 14, 2018							
Release 1.0 (2018)	PA-137	DevOps Setup	PA-137-3	Create EC2 Instances for Jenkins	[Open]	Eric Delyns	Feb 14, 2018							
Release 1.0 (2018)	PA-137	DevOps Setup	PA-137-4	Build Jenkins Pipeline	[Open]	Eric Delyns	Feb 14, 2018							
Release 1.0 (2018)	PA-137	DevOps Setup	PA-137-5	Install & Configure Jenkins	[Open]	Eric Delyns	Feb 14, 2018							
Release 1.0 (2018)	PA-137	DevOps Setup	PA-137-6	Create AWS SSO Task To Trigger Jenkins jobs	[Open]	Eric Delyns	Feb 14, 2018							
Release 1.0 (2018)	PA-137	DevOps Setup	PA-137-7	Create AWS SSO Task To Trigger Jenkins jobs	[Under consideration]	Eric Delyns	Feb 14, 2018							
Release 1.0 (2018)	PA-137	DevOps Setup	PA-137-8	Create AWS SSO Task To Trigger Jenkins jobs	[Under consideration]	Eric Delyns	Feb 14, 2018							
Release 1.0 (2018)	PA-137	DevOps Setup	PA-137-9	Create Staging Branch Deployment Scripts	[Open]	Eric Delyns	Feb 14, 2018							
Release 1.0 (2018)	PA-137	DevOps Setup	PA-137-10	Create Staging Branch Deployment Scripts	[Open]	Eric Delyns	Feb 14, 2018							
Release 1.0 (2018)	PA-137	DevOps Setup	PA-137-11	Create Staging Branch Deployment Scripts	[Open]	Eric Delyns	Feb 14, 2018							
Release 1.0 (2018)	PA-137	DevOps Setup	PA-137-12	Create Job to Backup Deployment Scripts	[Under consideration]	Eric Delyns	Feb 15, 2018							
Release 1.0 (2018)	PA-140	Complete the Playbook	PA-140-1	Review playbook	[Open]	Jason Connolly	Feb 15, 2018							
Release 1.0 (2018)	PA-140	Complete the Playbook	PA-140-2	Complete responses to Playbook check	[Open]	Jason Connolly	Feb 15, 2018							
Release 1.0 (2018)	PA-142	QA - Automated Tests	PA-142-1	GET /api/v1 - Get All Tags	[Under consideration]	Luis F. Escobar-Orler	Feb 15, 2018							
Release 1.0 (2018)	PA-142	QA - Automated Tests	PA-142-2	GET /api/v1 - Get All	[Under consideration]	Luis F. Escobar-Orler	Feb 15, 2018							

Feature Backlog

An emphasis was placed on user outcomes which drove the creation of the user stories and the feature backlog. Features were then prioritized based on research, continuous feedback, user testing, and time.

Tickets were then created for each feature set and requirements. A backlog of features and bugs were compiled and evaluated for inclusion at the beginning of each sprint to determine priority.

Sprint Cycles Development

Release 1.0 (2018)

Mar 13, 2018 Showing 67 of 67

Category	Count	Status
Capacity	25d	
PA-206 Design - HTML/CSS- Bugs	0	N/A
In development		Bug fix
bugs		
PA-205 Back End - Bugs	0	N/A
In development		Bug fix
bugs		
PA-204 Front End - Bugs	0	N/A
In development		Bug fix
bugs		
PA-203 Design - Mobile Responsive mockups - 2nd half of Designs	0	0
Under consideration		New
Design		
PA-202 Design - HTML/CSS - 2nd half of Designs	0	0
Under consideration		New
Design		
GDM-73 Design - High Fidelity - 2nd half of Designs	0	0
Under consideration		New
Design		
PA-201 Design - Wireframes - Settings- Notifications Page	0	0
In development		New
Design		
PA-200 Design - Wireframes - Settings - Article Settings	0	N/A
In design		New
Design		

> Parking Lot

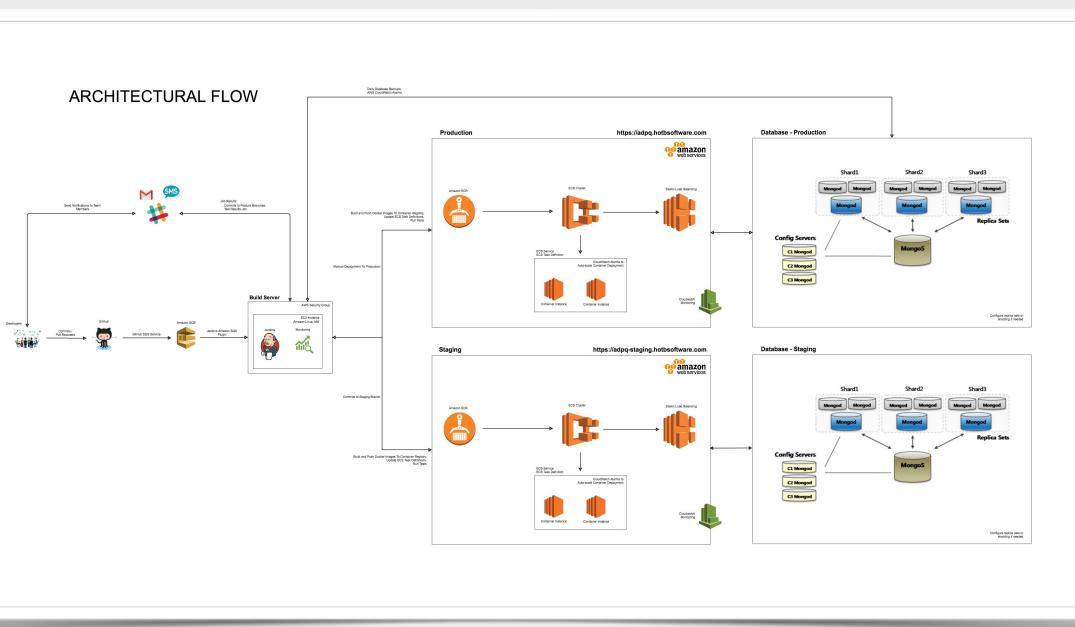
Showing 5 of 5

PA-181 Research/Setup SMS Provider	0	N/A
Under consideration		New
Back End	Backlog	
PA-188 Front End - Tags - Autocomplete	0	N/A
Under consideration		New
Backlog	Front End	
PA-189 Front End - Hover Over Logic - Sharing	0	N/A
Under consideration		New
Backlog	Design/Front End	
PA-191 BACKLOG - Approve Article - Role-Based Escalation logic	0	N/A
Under consideration		New
Backlog		
PA-194 Configure Amazon SNS with Noel	0	N/A
Under consideration		New
Backlog		

Sprint Cycles Development

Release name	Feature ref. #	Feature name	Req. reference #	Requirement name	Requirement status	Requirement assigned to	Req. Status changed to Under consideration	Req. Status changed to In design	Req. Status changed to Design Review	Req. Status changed to Ready to develop	Req. Status changed to In development	Req. Status changed to Dev Complete	Req. Status changed to QA	Req. Status ch
Release 1.0 (2018)	PA-42	Conduct Surveys	PA-42-1	Build surveys	Dev Complete	Mark Witte	Feb 20, 2018				Feb 20, 2018	Feb 22, 2018		
Release 1.0 (2018)	PA-42	Conduct Surveys	PA-42-2	Conduct Surveys	Dev Complete	Mark Witte	Feb 20, 2018			Feb 20, 2018		Feb 26, 2018		
Release 1.0 (2018)	PA-44	Define: Vision, personas, business model canvas, competitors, initiatives, goals.	PA-44-1	Experience Pillars document	In development	Mark Witte	Feb 15, 2018					Mar 01, 2018		
Release 1.0 (2018)	PA-44	Define: Vision, personas, business model canvas, competitors, initiatives, goals.	PA-44-2	Personas	Dev Complete	Mark Witte	Feb 15, 2018					Mar 01, 2018		
Release 1.0 (2018)	PA-44	Define: Vision, personas, business model canvas, competitors, initiatives, goals.	PA-44-3	Business Model Canvas	Dev Complete	Mark Witte	Feb 15, 2018					Mar 01, 2018		
Release 1.0 (2018)	PA-44	Define: Vision, personas, business model canvas, competitors, initiatives, goals.	PA-44-4	Overview	In development	Mark Witte	Mar 01, 2018					Mar 01, 2018		
Release 1.0 (2018)	PA-44	Define: Vision, personas, business model canvas, competitors, initiatives, goals.	PA-44-5	Vision Board	In development	Mark Witte	Mar 01, 2018					Mar 01, 2018		
Release 1.0 (2018)	PA-44	Define: Vision, personas, business model canvas, competitors, initiatives, goals.	PA-44-6	Goals	In development	Mark Witte	Mar 01, 2018					Mar 01, 2018		
Release 1.0 (2018)	PA-44	Define: Vision, personas, business model canvas, competitors, initiatives, goals.	PA-44-7	Initiatives	In development	Mark Witte	Mar 01, 2018					Mar 01, 2018		
Release 1.0 (2018)	PA-133	Conduct Initial Interviews	PA-133-1	Draft interview questions	Dev Complete	Jason Connolly	Feb 15, 2018				Feb 20, 2018	Feb 23, 2018		
Release 1.0 (2018)	PA-133	Conduct Initial Interviews	PA-133-2	Conduct Interview	Dev Complete	Jason Connolly	Feb 15, 2018					Feb 23, 2018		
Release 1.0 (2018)	PA-133	Conduct Initial Interviews	PA-133-3	Compile interview notes and summarize key themes and outcomes	In development	Jason Connolly	Feb 15, 2018					Feb 23, 2018		
Release 1.0 (2018)	PA-137	DevOps - Setup Build Server	PA-137-1	Setup IAM Role For Build Server	Dev Complete	Eric Dobyns	Feb 14, 2018					Feb 14, 2018		
Release 1.0 (2018)	PA-137	DevOps - Setup Build Server	PA-137-2	Create Build Server Security Group To Restrict Access	Dev Complete	Eric Dobyns	Feb 14, 2018					Feb 14, 2018		
Release 1.0 (2018)	PA-137	DevOps - Setup Build Server	PA-137-3	Create EC2 Instance for Build Server	Dev Complete	Eric Dobyns	Feb 14, 2018					Feb 14, 2018		
Release 1.0 (2018)	PA-137	DevOps - Setup Build Server	PA-137-4	Install & Configure Jenkins	Dev Complete	Eric Dobyns	Feb 14, 2018					Feb 14, 2018		
Release 1.0 (2018)	PA-137	DevOps - Setup Build Server	PA-137-7	Create AWS SQS Task To Trigger Jenkins Jobs	Dev Complete	Eric Dobyns	Feb 14, 2018					Feb 14, 2018		
Release 1.0 (2018)	PA-137	DevOps - Setup Build Server	PA-137-9	Create Feature Branch Deployment Scripts	Under consideration	Eric Dobyns	Feb 14, 2018					Feb 20, 2018		
Release 1.0 (2018)	PA-137	DevOps - Setup Build Server	PA-137-10	Create Staging Branch Deployment Scripts	Dev Complete	Eric Dobyns	Feb 14, 2018					Feb 20, 2018		
Release 1.0 (2018)	PA-137	DevOps - Setup Build Server	PA-137-11	Create Slack, Email or SMS Build Notifications	Dev Complete	Eric Dobyns	Feb 15, 2018					Feb 20, 2018		
Release 1.0 (2018)	PA-137	DevOps - Setup Build Server	PA-137-12	Create Job to Backup Production DB Nightly	Under consideration	Eric Dobyns	Feb 15, 2018					Feb 20, 2018		
Release 1.0 (2018)	PA-140	Complete the Playbook wtfuep	PA-140-1	Review playbook guidelines	Dev Complete	Jason Connolly	Feb 15, 2018					Feb 20, 2018		
Release 1.0 (2018)	PA-140	Complete the Playbook wtfuep	PA-140-2	Complete responses to Playbook checklist	Dev Complete	Jason Connolly	Feb 15, 2018				Feb 23, 2018	Mar 06, 2018		
Release 1.0 (2018)	PA-142	QA - Automated Tests	PA-142-1	GET /tags - Get All Tags	Under consideration	Luis F. Escobar-Driver	Feb 15, 2018							
Release 1.0 (2018)	PA-142	QA - Automated	PA-142-2	GET /agencies - Get All Agencies	Under consideration	Luis F. Escobar-Driver	Feb 15, 2018							

Sprint Cycles Development



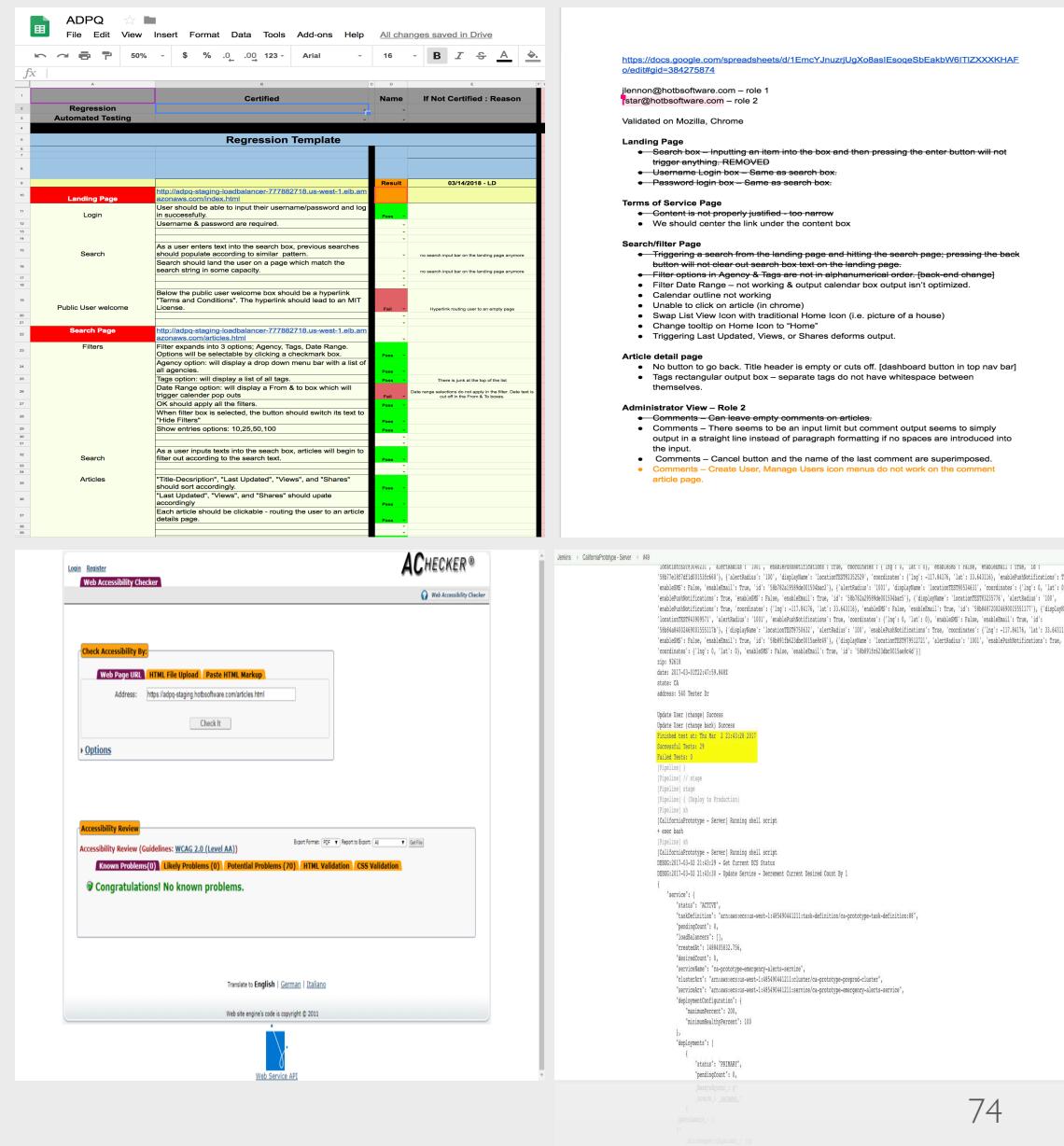
Architecture

Our API is built using dockerized Node.js containers deployed on Amazon EC2 Instances. The EC2 instances are managed with Amazon ECS and auto-scale based on incoming traffic. All incoming traffic is passed through an elastic load balancer which automatically distributes incoming application traffic across multiple Amazon EC2 instances.

Our databases are comprised of a MongoDB cluster that can scale by adding replica sets to ensure high availability in case one of the servers goes down. Additionally, Write throughput can be scaled up by sharding the database.

We use Jenkins to automate the deployment of docker containers for our staging and production API environments; make nightly backups of the staging and production databases; build and deploy the website to its staging environment; and schedule automated tests than run each night.

Sprint Cycles Defect Resolution



Defect resolution and QA started with test plans based on iterative user stories that were reviewed at the beginning of each sprint. As features were slotted into each sprint, testing considerations and test plans were formulated and developed.

Upon each code release, user testing would start the testing process with full unit, regression, accessibility, and smoke tests, while automated testing ran concurrently.

Bug tickets were created and backlogged and slotted into each sprint according to capacity and time.

Methods

- User Acceptance Testing
 - Unit Test
 - Smoke Tests
 - Regression Template
 - Accessibility Testing
 - Test Scripts written in Python to test back-end API's and user facing functionality.

* Viewable versions of these illustrations are in GitHub

Sprint Cycles

Defect Resolution

```
Jenkins > CaliforniaPrototype - Server > #49
locationsTTSN783040231, alertRadius: '100', enablePushNotifications: true, coordinates: { 'lng': 0, 'lat': 0}, enableSMS: false, enableEmail: true, id: '5bb771ef17df1d1013fc660'}, {alertRadius: '100', displayName: 'locationTTSN92352529', coordinates: { 'lng': -117.84176, 'lat': 33.643116}, enablePushNotifications: true, enableSMS: false, enableEmail: true, id: '5bb782a19398de0150ba2c'}, {alertRadius: '1001', displayName: 'locationTTSN0534631', coordinates: { 'lng': 0, 'lat': 0}, enablePushNotifications: true, enableSMS: false, enableEmail: true, id: '5bb782a19395de00150abed'}, {alertRadius: '100', displayName: 'locationTTSN3235776', 'alertRadius: '100', enablePushNotifications: true, coordinates: { 'lng': -117.84176, 'lat': 33.643116}, enableSMS: false, enableEmail: true, id: '5bb84872002469001551177'}, {displayname: 'locationTTSN74399571', 'alertRadius: '1001', enablePushNotifications: true, coordinates: { 'lng': 0, 'lat': 0}, enableSMS: false, enableEmail: true, id: '5bb8782a19359de00150abed'}, {displayname: 'locationTTSN750432', 'alertRadius: '100', enablePushNotifications: true, coordinates: { 'lng': 0, 'lat': 0}, enableSMS: false, enableEmail: true, id: '5bb84872002469001551177'}, {displayname: 'locationTTSN79151271', 'alertRadius: '1001', enablePushNotifications: true, coordinates: { 'lng': 0, 'lat': 0}, enableSMS: false, enableEmail: true, id: '5bb891fcsf3dc015ae8ed4d'}
zip: 92818
date: 2017-03-01T22:47:59.848Z
state: CA
address: 540 Teeter Dr

Update User (change) Success
Update User (change back) Success
Finished test at: Thu Mar 2 21:43:28 2017
Successful Tests: 28
Failed Tests: 2
[Pipeline] }
[Pipeline] // stage
[Pipeline] stage
[Pipeline] { [Deploy to Production]
[Pipeline] sh
[CaliforniaPrototype - Server] Running shell script
+ exec bash
[Pipeline] sh
[CaliforniaPrototype - Server] Running shell script
DEBUG:2017-03-02 21:43:29 - Get Current ECS Status
DEBUG:2017-03-02 21:43:30 - Update Service - Decrement Current Desired Count By 1
{
  "service": {
    "status": "ACTIVE",
    "taskDefinition": "arn:aws:ecs:us-west-1:485490441211:task-definition/ca-prototype-task-definition:88",
    "pendingCount": 0,
    "loadBalancers": [],
    "currentCount": 1488405832.756,
    "desiredCount": 0,
    "serviceName": "ca-prototype-emergency-alerts-service",
    "clusterArn": "arn:aws:ecs:us-west-1:485490441211:cluster/ca-prototype-preprod-cluster",
    "serviceArn": "arn:aws:ecs:us-west-1:485490441211:service/ca-prototype-emergency-alerts-service",
    "deploymentConfiguration": {
      "maximumPercent": 200,
      "minimumHealthyPercent": 100
    },
    "deployments": [
      {
        "status": "PRIMARY",
        "pendingCount": 0,
        "currentCount": 1488405832.756
      }
    ]
  }
}
```

Automated Tests

Our automated Python tests ran continuously via set intervals or upon manual triggers made by the dev team. The Python tests all inherit from the API Wrapper script which contains constants, functions, and other tools utilized by our QA team in their various tests. We took this approach for two reasons: first, because it allowed for less repetitive and more modularized code, and second, because it allows for encapsulation wherein changes made to the wrapper would affect all other scripts through transference.

Sprint Cycles Continuous Deployments

[x] master [x] origin/master [x] origin/HEAD Merge pull request #14 from jsonconly/patch-1
Update README.md

[x] origin/weblint [x] weblint Merge branch 'web/int' of https://github.com/HOTB-Software/CaliforniaPrototype into web/int
Merge branch 'weblint' of https://github.com/HOTB-Software/CaliforniaPrototype into web/int
add resubscribe button

Conflicts fix

Merge branch 'weblint' of https://github.com/HOTB-Software/CaliforniaPrototype into web/int
missed a line from conflicts

Merge remote-tracking branch 'origin/master' into web/int.
zoom user map in, change subscribe to register
finish conflicts

conflicts

added map above mobile web
moved alert create form
fixed zoom on admin map
fixed issue where admin map recenters on user location
recentered admin map

Check in

added location and type fields to create alert on admin
check in

changed wording for account recovery pages and login
fixed responsiveness issues, added edit location
admin pages

Delete Location

Phone verification, google maps hover
phonocode and settings
edit typography on login
delete button to added locations
minor style changes, remove enable sms switch
body content changes, removed phone registration, added settings

Edit Location update

GMaps location markers
phone registration flow
Add location
login, register & s
added phone number autoformatting and validation

d2e8a2	eddybonyHOTB	eddybony@hotbot...	Tuesday, 10-3PM
716780	Jason Connolly	<jconnolly@hotsoft.com>	Tuesday, 10-3 PM
bedf919	Raghul Jonnala	<raghul.jonnala@HOTB...	Tuesday, 10-3 PM
3ac90ca	kwitts	<kwitts@twinkit@gmail.com>	Tuesday, 2-21 PM
5ab441	kwitts	<kwitts@twinkit@gmail.com>	Tuesday, 2-21 PM
d32a614	Raghul Jonnala	<raghul.jonnala@HOTB...	Tuesday, 2-59 PM
02c68f1	Raghul Jonnala	<raghul.jonnala@HOTB...	Tuesday, 2-12 PM
65f458b	kwitts	<kwitts@twinkit@gmail.com>	Tuesday, 11-4 PM
4637088	kwitts	<kwitts@twinkit@gmail.com>	Tuesday, 11-4 PM
0410959	kwitts	<kwitts@twinkit@gmail.com>	Tuesday, 11-4 PM
b2c3331	kwitts	<kwitts@twinkit@gmail.com>	Tuesday, 11-10 PM
b5d209e	kwitts	<kwitts@twinkit@gmail.com>	Tuesday, 11-9 PM
4986560	kwitts	<kwitts@twinkit@gmail.com>	Tuesday, 12-32 PM
34880d0	kwitts	<kwitts@twinkit@gmail.com>	Tuesday, 12-32 PM
93d4594	kwitts	<kwitts@twinkit@gmail.com>	Tuesday, 12-32 PM
f97e54d	kwitts	<kwitts@twinkit@gmail.com>	Tuesday, 12-32 PM
81ee488	kwitts	<kwitts@twinkit@gmail.com>	Tuesday, 12-32 PM
473731	Raghul Jonnala	<raghul.jonnala@HOTB...	Tuesday, 12-31 PM
3395859	kwitts	<kwitts@twinkit@gmail.com>	Tuesday, 12-31 PM
585b6c7	Raghul Jonnala	<raghul.jonnala@HOTB...	Tuesday, 12-31 PM
101783	kwitts	<kwitts@twinkit@gmail.com>	Tuesday, 12-31 PM
166eaa0	kwitts	<kwitts@twinkit@gmail.com>	Tuesday, 12-31 PM
e3cf0fb	Raghul Jonnala	<raghul.jonnala@HOTB...	Tuesday, 12-30 PM
5008af	Raghul Jonnala	<raghul.jonnala@HOTB...	Tuesday, 12-30 PM
8196464	Raghul Jonnala	<raghul.jonnala@HOTB...	Tuesday, 12-28 PM
8074640	Raghul Jonnala	<raghul.jonnala@HOTB...	Tuesday, 12-27 PM
a6b674	kwitts	<kwitts@twinkit@gmail.com>	Tuesday, 12-25 PM
7406542	kwitts	<kwitts@twinkit@gmail.com>	Tuesday, 12-25 PM
5751788	kwitts	<kwitts@twinkit@gmail.com>	Tuesday, 12-01 PM
4981fe	kwitts	<kwitts@twinkit@gmail.com>	Tuesday, 12-00 PM
a473ea	Raghul Jonnala	<raghul.jonnala@HOTB...	Tuesday, 11-55 AM
7669308	Raghul Jonnala	<raghul.jonnala@HOTB...	Tuesday, 11-53 AM
2061628	kwitts	<kwitts@twinkit@gmail.com>	Tuesday, 11-50 AM
f149ca	Raghul Jonnala	<raghul.jonnala@HOTB...	Tuesday, 11-49 AM
aet345	Raghul Jonnala	<raghul.jonnala@HOTB...	Tuesday, 11-49 AM
947e01	Kristina Beck	<kristinabeck@hotbot...	Tuesday, 11-41 AM

We made several deployments over the course of the project using our continuous integration and continuous deployment methods setup using Docker and Jenkins. Deployments and automated test scripts were initiated each time a commit was made to a development branch.

Scope Adjustments

Features Slated for Future Release

Given time constraints, certain features that were initially designed and considered were slated for future releases. Below are items that would normally be delivered in subsequent releases.

- SMS Notification
- Forget password retrieval functions that do not require an administrator
- Enhanced role based escalation logic for approving articles
- Auto-complete tagging
- Ability to turn on/off the two types of article templates: Public and Private
- Ability to globally turn on/off: sms, and email for the platform
- Notifications tied to article disposition changes
- Deep-linking notifications
- Additional Admin Roles
- Support for Spanish and other languages
- Embedded knowledge Base for customer support

Final Release Highlights

Using agile as our foundation, HOTB was able to successfully complete 5 sprints which were driven by research and user centric feedback.

This resulted in an omni-agency knowledge management tool that aims to systematize the process of creating, sharing, archiving, and developing additional knowledge.

The tool was built from the ground up to have a simple user-interface, role management, easy escalation/approval workflow management, and unique features that encourage knowledge development by learning from existing articles.

Platform feature highlights include:

- An algorithmic analysis of previous articles total shares and views while providing the staff member the ability to create a similar article that carries over similar attributes.
- The system continuously learns from tagging behavior and provides suggested tags for additional articles
- The tool offers two user roles with different access levels that anchor specific workflow's with the system.
- Key performance metrics for specific roles
- Ability to share across FB.Twitter.And Email
- Administrative ability to review, approve, and decline articles
- Wysiwig editor
- Bi-directional Commenting
- Mobile responsive design
- User management
- Notification management

If time permitted, we had a significant backlog of user stories with corresponding features centered around providing additional opportunities to enhance the process of creating, sharing, and archiving knowledge.

Thank You