



MISSION

Create one unifying portal and retire the five disparate ones.

Advocate for the end-user and champion the UX / UI company-wide.

Create portal apps relative to the defined UX / UI.

ISSUES

- ▼ Angry external users; angry internal users; disorganized, disconnected portal leadership
- ▼ Too many disparate portal URLs / login credentials
- ▼ Pre-existing front- and backends (Liferay, Open AM, Google Web Toolkit, Ruby on Rails, Angular, Java)
- ▼ Disjointed, difficult to use navigations with cluttered, text-laden, unorganized content
- ▼ Similar apps complete with different data for the exact same customers



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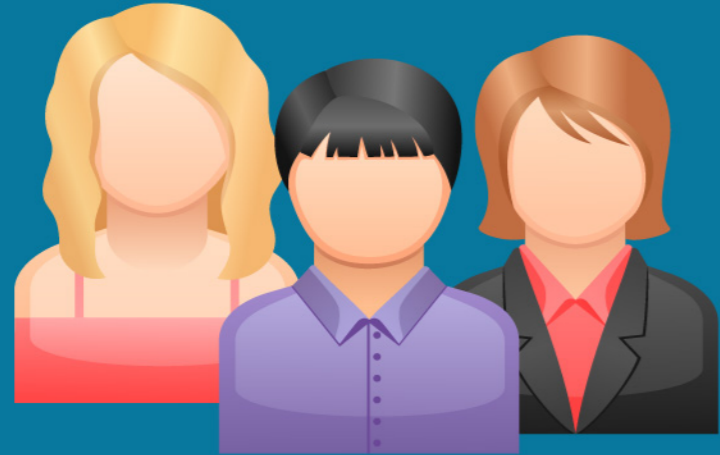
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**OPERATORS (1ST)**



**EXTERNAL (A)**

Angry about their user experiences (plural).  
Can't find the content they are seeking.

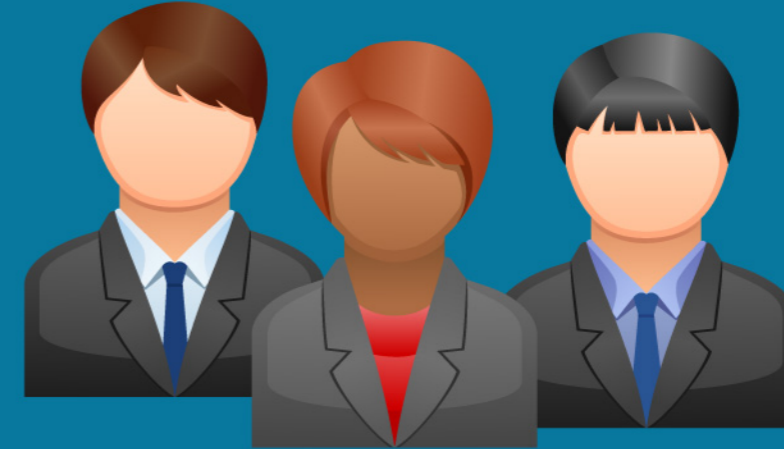
**MANAGERS / DIRECTORS (2ND)**



**EXTERNAL (A)**

Louder noise-makers because of their operators anger towards their poor, lackluster, hard-to-use Sungard portals experiences.

**EXECUTIVES / C-LEVEL (3RD)**



**EXTERNAL (A)**

Threatened to cancel contract renewal unless portal and app development became one of the top priorities due to constant complaints from their direct reports.



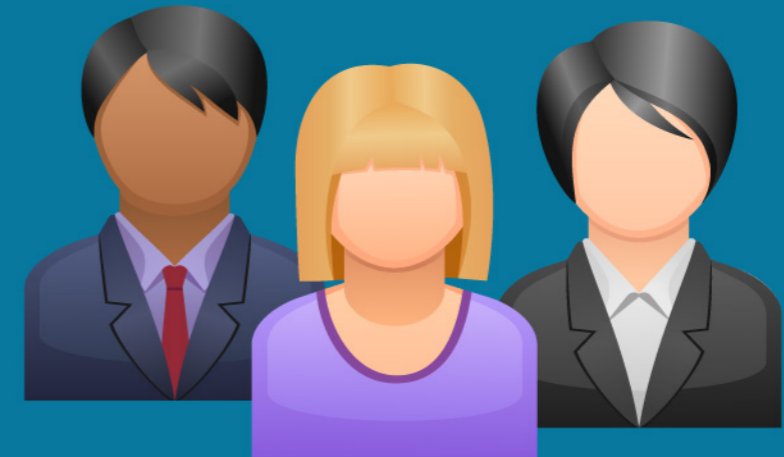
**INTERNAL (B)**

Angry about their user experiences (plural).  
Can't find the content they are seeking.



**INTERNAL (B)**

Hands tied due to dysfunctional leadership not able to focus and prioritize portal and app development.



**INTERNAL (B)**

Frustrated and disappointed with departmental leadership's lack of collaboration across teams to deliver unifying portal experiences company-wide.



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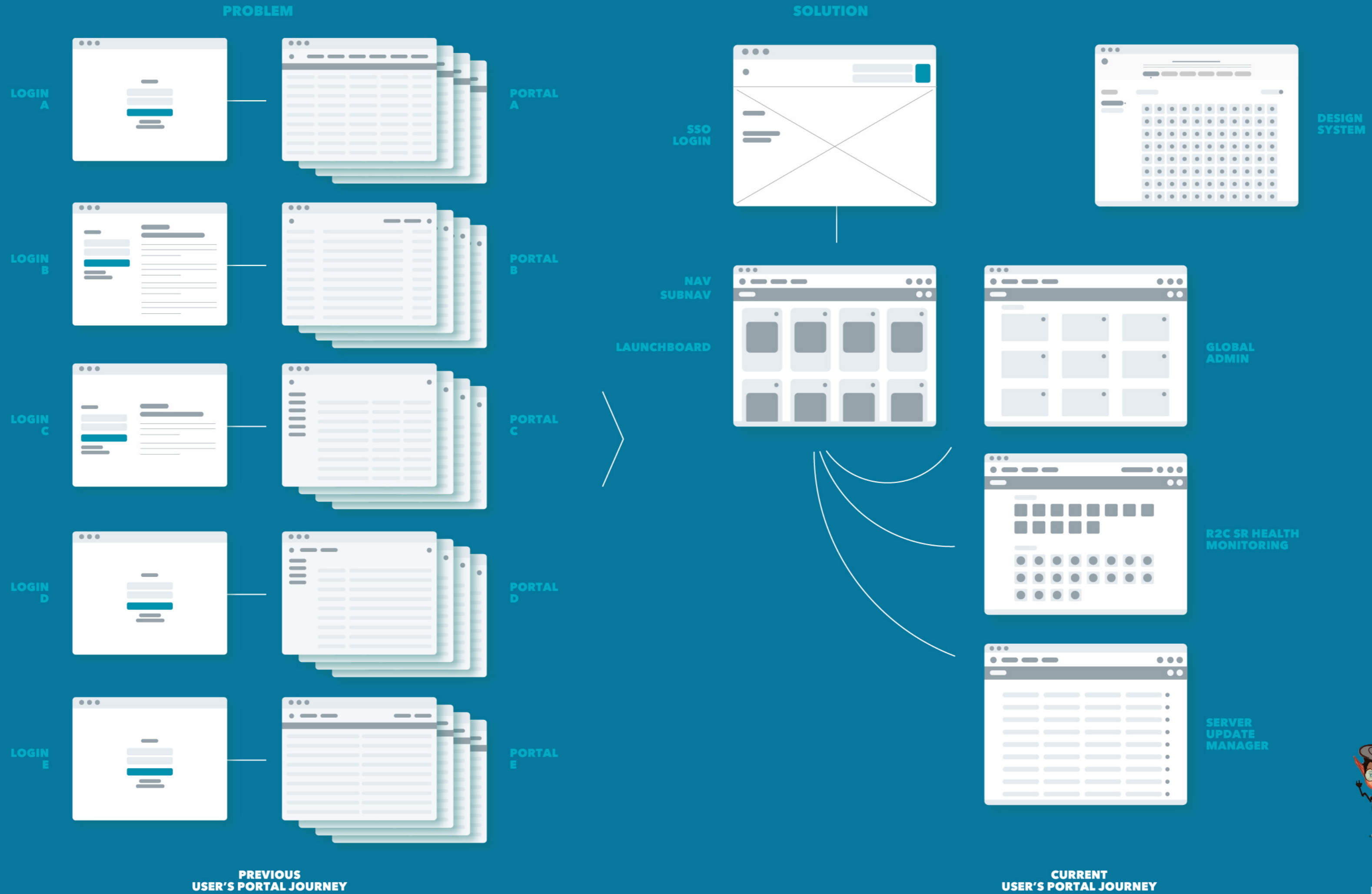
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# The Journey



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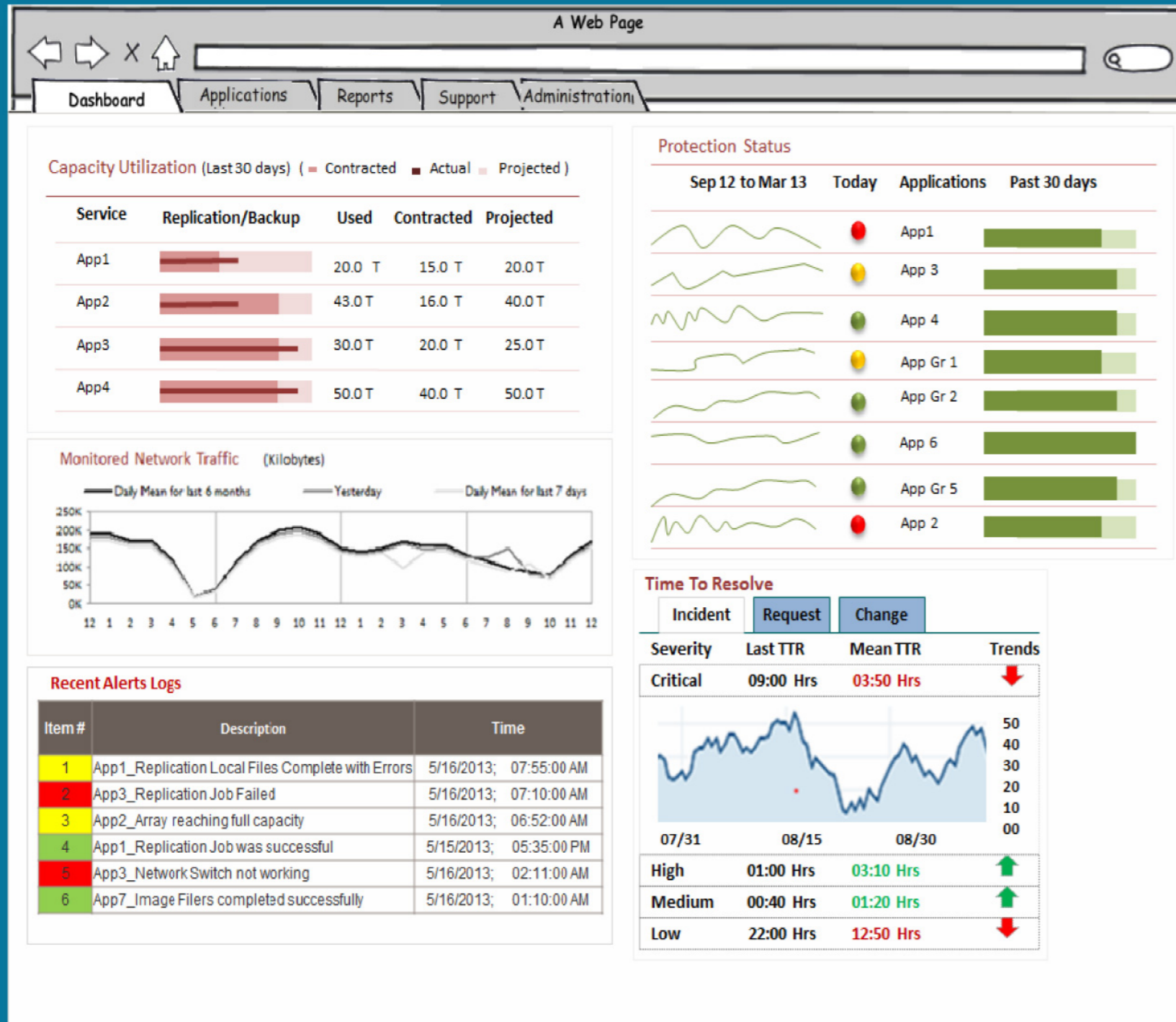
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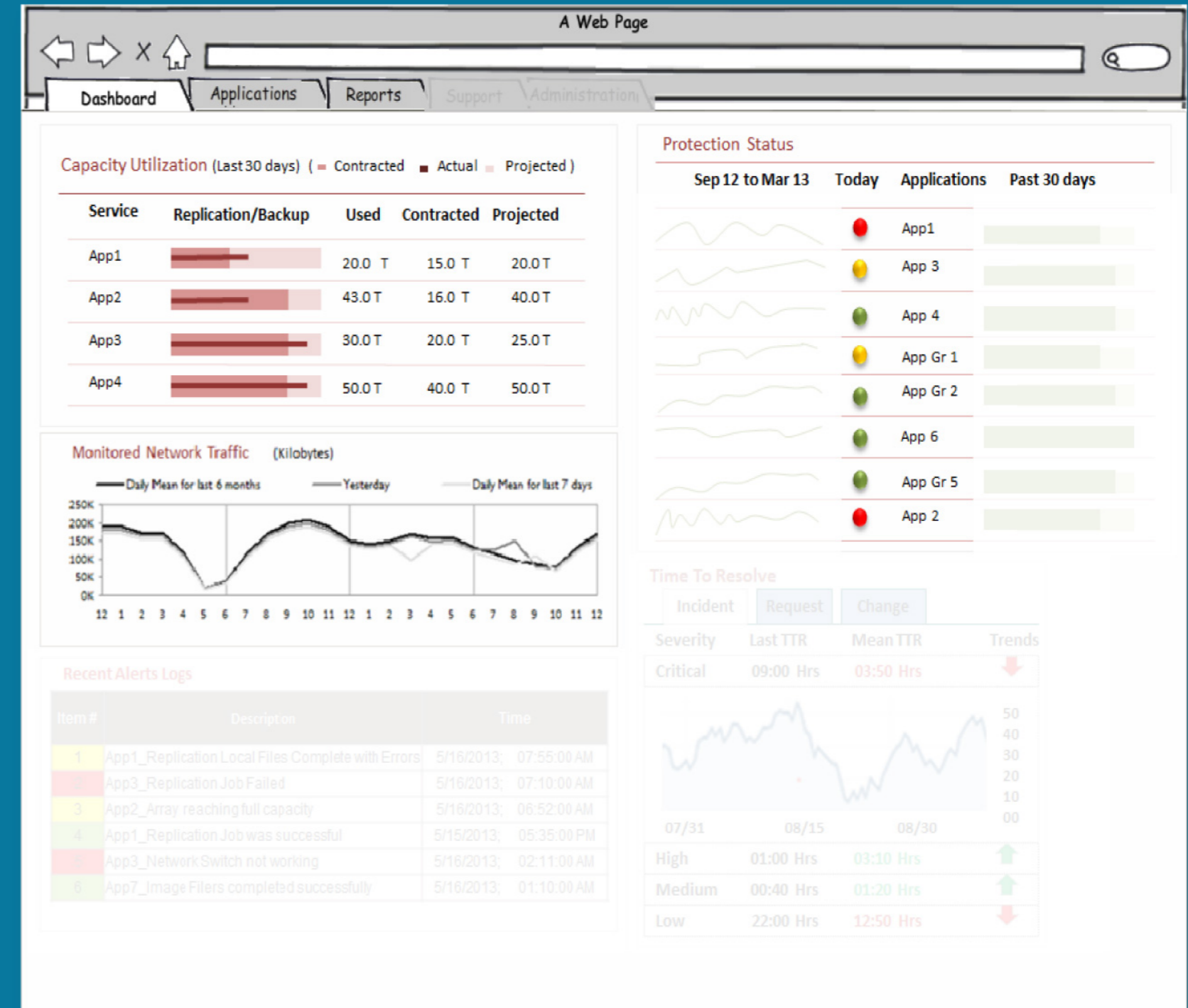
# The Roughs

Ideas presented to users via video conference kickstarting App Development.



## SKETCH A

A rough idea lifting from competitors in the Recovery space presented to future Sungard R2C SR recovery portal users as a means to generate feedback and excitement.



## SKETCH B

A reimagining of the initial sketch based on the combined user feedback from over 25 user interviews.



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# The UX Solution - Phase Two

Recovery Portal Design Layout (Shipped, April 2014)



## 1 User Navigation Area

When pressed, opens a hidden pop-over housing all of the users apps acting as their main portal navigation.

## 2 Logo

Where Sungard's and Reseller's logos reside.

## 3 Navigation Header

This horizontal area contained to the user's navigation (left-side) and user's help (right-side).

## 4 User Help Area (User Profile)

Where the user's logged in name appeared along side a clickable profile icon that when pressed revealed a drawer with additional icons.

## 5 User Help Area (Company Profile)

Where the user's company name appeared along side a clickable company icon that when pressed revealed a drawer with the company profile icon and an optional impersonation feature.

## 6 User Help Area (Information / Help)

Where the user's login date stamp appeared along side a clickable information icon that when pressed revealed a drawer with an information icon that contained contextual help information for the app loaded.

## 7 Sub-Navigation Area

This area updates with the app selected sub-navigation clickable elements. In this app's case, this specific area contained the R2C SR Summary widget which provided an overall prouction environment health overview.

## 8 Sub-Navigation Area (Cont'd)

This area contained ticketing, filtering and reporting icons that when pressed revealed their respective drawers with additional icons with relevant information contextual to the app loaded.

## 9 App Area

This area dedicated to the app loaded's productivity space. This is where the user worked. This example is the R2C SR Phase One

## 10 Footer Area

This area contained the portal legalese, translation switching and optional portal feedback pop-up box.



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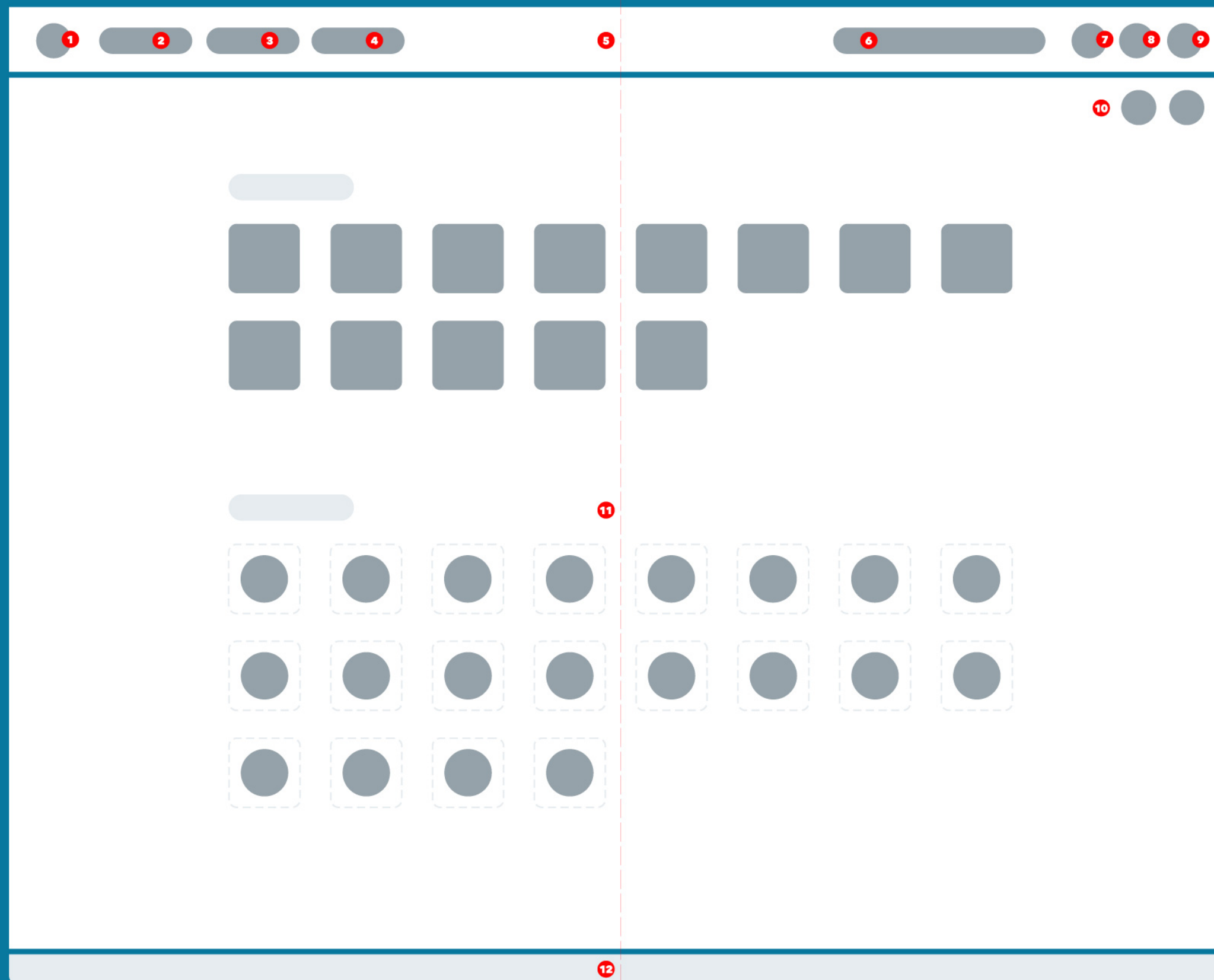


# The UX Solution - Phase Three

Unified Portal Design Layout (Shipped, September 2016)



- 1 Logo**  
Where Sungard's and Reseller's logos reside.
- 2 User Navigation Area (Portal Selector)**  
This area of user navigation acted as the breadcrumb for the user. Specifically, this button was a dropdown allowing the user to select a portal they had access to.
- 3 User Navigation Area (App Selector)**  
This button was a dropdown allowing the user to select apps associated with the selected portal.
- 4 User Navigation Area (Impersonate Selector)**  
This button was a dropdown allowing the user to select a company or a user of a company to impersonate. This was allowed for internal users and reseller users .
- 5 Main Navigation Header Bar**  
This 50px tall navigation bar was the "glue" necessary to unify all of the portals. It sat on top of existing apps as an independent React JS component with isolated HTML, CSS and iconography.
- 6 App Asset Area**  
This area to the right of the User Help Area provided apps with context specific elements. In this example, this area contained the R2C SR Summary health component built in React JS. It was a robust mini-app unto itself with asset, contract, filter and reporting functionalities.
- 7 User Help Area (Ticketing)**  
This area contained the global elements for ticketing, app contextual information and user profile. The ticketing popover was a light-weight veneer for the Service Now App allowing users to create tickets and see the status of existing tickets.
- 8 User Help Area (Information)**  
The information popover displayed contextual, detailed information acting as a quick reference guide for the user after an app was loaded. Each app had their own information relevant to the apps UX.
- 9 User Help Area (Profile)**  
The profile popover provided the user an area to edit their own information. This popover also contained the users contacts and a means to reset their password, declare a disaster and logout.
- 10 Display Swap Area**  
This area was dedicated to swapping the display views between chart and table. Every app designed had a table component and this area was allocated to swap between these views depending on how the user wanted to work.
- 11 App Area**  
This area dedicated to the app loaded's productivity space. This is where the user worked. This example is the R2C SR Phase Two.
- 12 Footer Area**  
This area contained the portal legalese, translation switching and optional portal feedback pop-up box.



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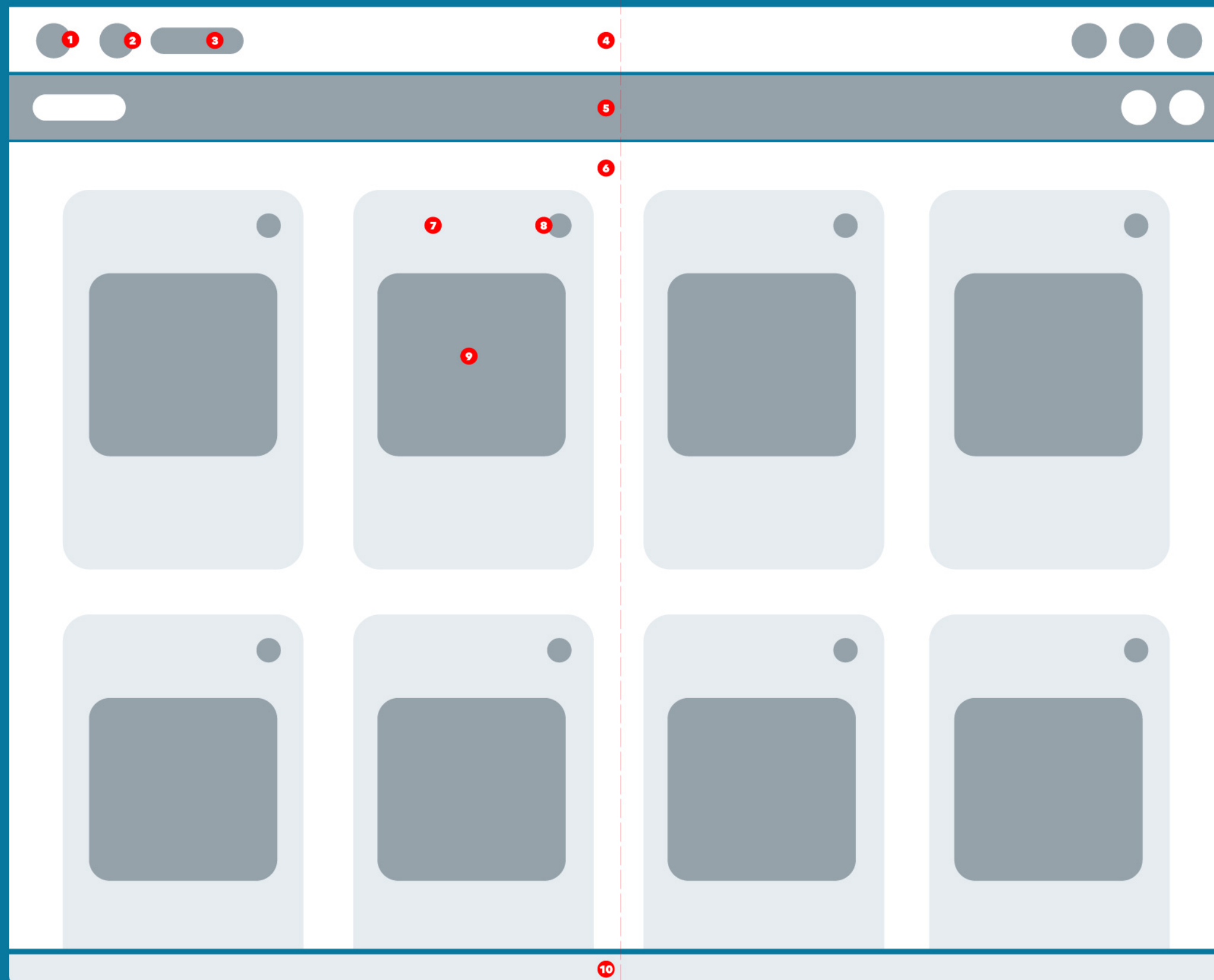


# The UX Solution - Phase Four A

Unified Portal Design Layout (Shipped, September 2017)



- 1 Logo**  
Where Sungard's and Reseller's logos reside.
- 2 User Navigation Area (App Selector)**  
Gone is the portal selector now that Sungard embarks on a completely unified portal. There is no need to portal switch but instead app select. In the eyes of leadership and product marketing, a completely unified portal consisted of a suite of apps only with no previous portal context. This three-bar (hamburger) icon popover organizes the apps according to users contract.
- 3 User Navigation Area (Impersonate Selector)**  
This button was a dropdown allowing the user to select a company or a user of a company to impersonate. This was allowed for internal users and reseller users.
- 4 Navigation Header Bar (Main)**  
This 50px tall navigation bar was the "glue" necessary to unify all of the portals. It sat on top of existing apps as an independent React JS component with isolated HTML, CSS and iconography.
- 5 Sub-Navigation Area**  
This area was dedicated to the app acting as the subnav offering additional, app-contextual elements like display swap. Each app determined what would be in this area. This area became an additional, necessary component to completing the unified project.
- 6 App Area**  
This area dedicated to the app loaded's productivity space. This is where the user worked. This example is the Launchboard.
- 7 App Dashlet**  
This vertical dashlet card provided a brief view into the story of the app the dashlet represented. Depending on the dashlet, the user could interact within it without ever needing to launch it.
- 8 Launch Icon**  
Each dashlet had a launch icon that when pressed opened the full version of the app for the user to see the complete story of the app. Once launched, the App name would appear in the subnav area of the portal (see **5**).
- 9 Chart Element**  
Using Zoomcharts JS, Charts JS, and/or d3JS, this area of the dashlet contained a chart appropriate to telling the data-visualization story of the app represented.
- 10 Footer Area**  
This area contained the portal legalese, translation switching and optional portal feedback pop-up box.



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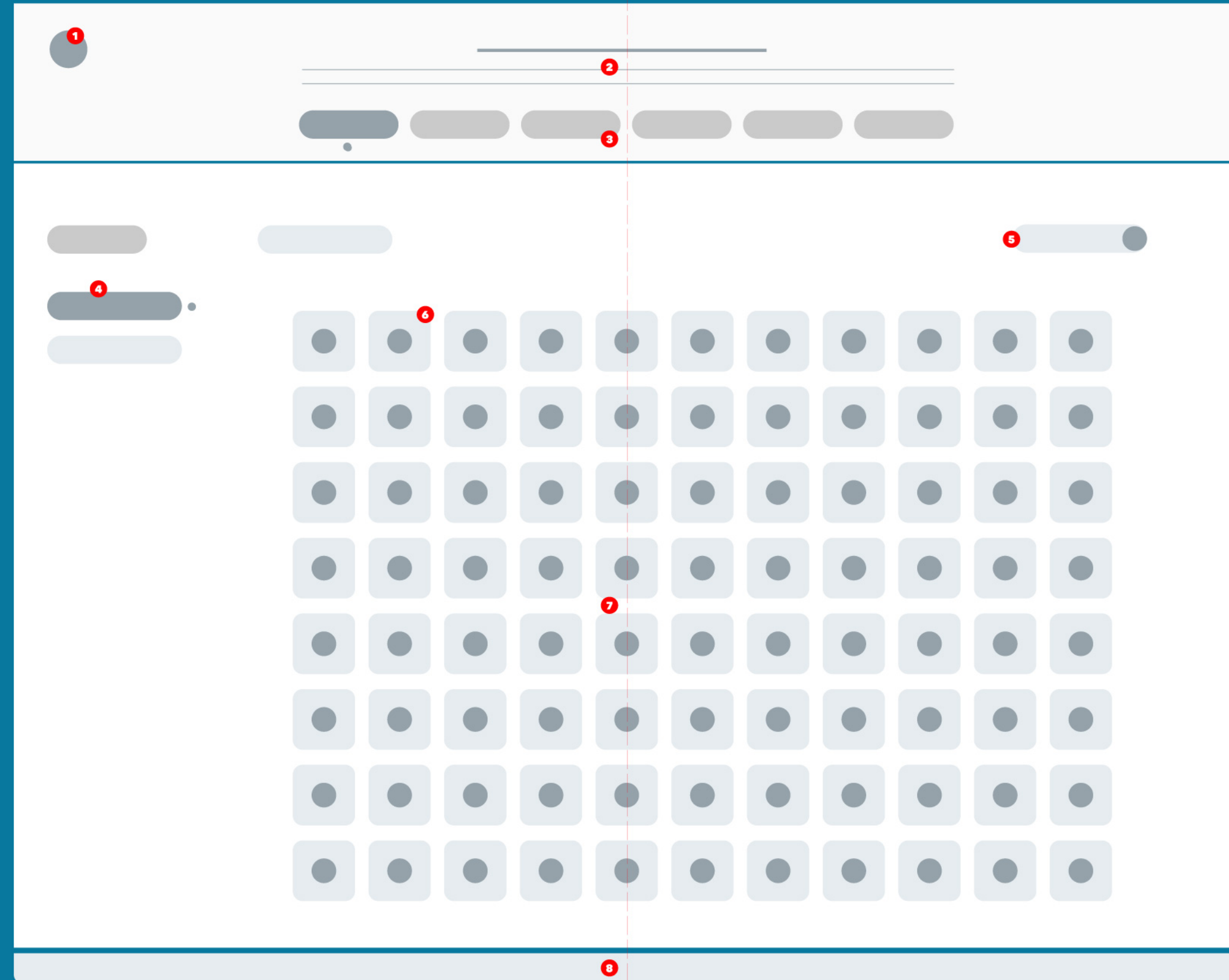
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# The UX Solution - Phase Four B

Unified Portal Design System Layout (Shipped, September 2017)



- 1 Logo**  
Where Sungard's logo reside.
- 2 Text Area**  
Simple "UI Pattern Library" headline with supporting body text.
- 3 Tabbed Navigation (Main)**  
Simple, easy-to-use, bootstrap tab system providing the user with immediate visibility to the main categories allowing the user to choose their path of exploration.
- 4 Sub-Navigation Area**  
This left-handed, side-bar is a nod to traditional web subnav design. The subnav was contextually relevant to the tab selected.
- 5 Search**  
For tab content with a scroll, the search feature offered contextually aware search indexes according to the tab selected allowing users to rapidly collect the element(s) necessary.
- 6 Copy Command**  
A copy command button was attached to each element within the tabbed system offering users a quick way to copy / paste from the design system in PNGUX to their development environment.
- 7 Content Area**  
The bulk of the page was devoted to each tab's content. In this example, the tab chosen is "assets" and the subnav chosen is "iconography".
- 8 Footer Area**  
This area contained the portal legalese, translation switching and optional portal feedback pop-up box.



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