Care Packs

Background

HP offered enterprise customers an enormous number of extended warranty options ("Care Packs") – too many to cope with.

Otherwise-identical packages that differed only in their duration were treated as multiple discrete offerings – and were not even grouped together.

Assignment

Any proposal to impose order on this chaotic non-system was sure to meet strong resistance. So I was asked to give stakeholders half a dozen options to choose among.

My main recommendation was to separate duration from other package features, thereby cutting the total number of Care Packs by up to 80%. Here are a few of my other proposals.

Care Packs: Color treatment to facilitate scanning

Even if we can't do anything more ambitious with the way CPs are presented, smart color treatment will make our existing listings much easier to scan and to compare.

In this treatment, each facet (duration, turnaround time, service venue, etc.) has its own color, making it easier for the user to pick out a facet they are interested in across multiple listings and draw comparisons.

Each entire listing is clickable, regardless of color. The colors shown here are for illustration purposes only.

Status quo, for reference only

- HP 5 year Nbd Onsite with Accidental Damage Protection and Defective Media Retention WS Only HW Svc
- HP 3 year Next Business Day Onsite with Accidental Damage Protection Workstation only Hardware Serv
- HP 4 year Next Business Day Onsite with Accidental Damage Protection Workstation only Hardware Serv
- HP 3 year 4 hour Onsite Workstation Only Hardware Support
- HP 3 year 4 hour 24x7 Onsite Workstation Only Hardware Support
- HP 1 yearr Post Warranty Next business day onsite w/Defective Media Retention WS Only HW Service
- HP 3 year 4 hour Onsite Workstation Only Hardware Support
- HP 3 year 4 hour 24x7 Onsite Workstation Only Hardware Support
- HP 1 year Post Warranty 4 hour 24x7 Onsite Workstation Only Hardware Support
- HP 5 year 4 hour 13x5 Onsite Workstation Only Hardware Support
- HP 4 year 4 hour Onsite Workstation Only Hardware Support
- HP 5 year 4 hour Onsite Workstation Only Hardware Support
- HP 4 year 4 hour 24x7 Onsite Workstation Only Hardware Support
- HP 5 year 4 hour 24x7 Onsite Workstation Only Hardware Support
- HP 3 year Next business day Onsite with Defective Media Retention Workstation Only Hardware Support
- HP 4 year Next business day Onsite with Defective Media Retention Workstation Only Hardware Support
- HP 5 year Next business day Onsite with Defective Media Retention Workstation Only Hardware Support
- HP 3 year Next business day Onsite Optional Customer Self Repair Desktop/Workstation Only HW Service
- HP 5 year Next business day onsite w/ Accidental Damage Protection Workstation Only Hardware Support
- HP 3 year 4 hour 9x5 Onsite with Defective Media Retention Workstation Only Hardware Support
- HP 4 year 4 hour 9x5 Onsite with Defective Media Retention Workstation Only Hardware Support
- HP 5 year 4 hour 9x5 Onsite with Defective Media Retention Workstation Only Hardware Support
- HP 3 year 4 hour 13x5 Onsite with Defective Media Retention Workstation Only Hardware Support
- HP 4 year 4 hour 13x5 Onsite with Defective Media Retention Workstation Only Hardware Support
- HP 5 year 4 hour 13x5 Onsite with Defective Media Retention Workstation Only Hardware Support
- HP 3 year 4 hour 24x7 Onsite with Defective Media Retention Workstation Only Hardware Support
- HP 4 year 4 hour 24x7 Onsite with Defective Media Retention Workstation Only Hardware Support
- HP 5 year 4 hour 24x7 Onsite with Defective Media Retention Workstation Only Hardware Support
- HP 1 year ComputraceComplete Tracking and Recovery Service
- HP 3 year ComputraceComplete Tracking and Recovery Service
- HP 4 year ComputraceComplete Tracking and Recovery Service
- HP 5 year ComputraceComplete Tracking and Recovery Service
- HP 2 year Computrace Complete Tracking and Recovery Service
- HP 1 year Computrace Data Protection Service
- HP 3 year Compturace Data Protection Service
- HP 4 year Computrace Data Protection Service
- HP 5 year Compturace Data Protection Service

Recommended color treatment

- HP 5 year Nbd Onsite with Accidental Damage Protection and Defective Media Retention WS Only HW Svc
- HP 3 year Next Business Day Onsite with Accidental Damage Protection Workstation only Hardware Serv
- HP 4 year Next Business Day Onsite with Accidental Damage Protection Workstation only Hardware Serv
- HP 3 year 4 hour Onsite Workstation Only Hardware Support
- HP 3 year 4 hour 24x7 Onsite Workstation Only Hardware Support
- HP 1 yearr Post Warranty Next business day onsite w/Defective Media Retention WS Only HW Service
- HP 3 year 4 hour Onsite Workstation Only Hardware Support
- HP 3 year 4 hour 24x7 Onsite Workstation Only Hardware Support
- HP 1 year Post Warranty 4 hour 24x7 Onsite Workstation Only Hardware Support
- HP 5 year 4 hour 13x5 Onsite Workstation Only Hardware Support
- HP 4 year 4 hour Onsite Workstation Only Hardware Support
- HP 5 year 4 hour Onsite Workstation Only Hardware Support
- HP 4 year 4 hour 24x7 Onsite Workstation Only Hardware Support
- HP 5 year 4 hour 24x7 Onsite Workstation Only Hardware Support
- HP 3 year Next business day Onsite with Defective Media Retention Workstation Only Hardware Support
- HP 4 year Next business day Onsite with Defective Media Retention Workstation Only Hardware Support
- HP 5 year Next business day Onsite with Defective Media Retention Workstation Only Hardware Support
- HP 3 year Next business day Onsite Optional Customer Self Repair Desktop/Workstation Only HW Service
- HP 5 year Next business day onsite w/ Accidental Damage Protection Workstation Only Hardware Support
- HP 3 year 4 hour 9x5 Onsite with Defective Media Retention Workstation Only Hardware Support
- HP 4 year 4 hour 9x5 Onsite with Defective Media Retention Workstation Only Hardware Support
- HP 5 year 4 hour 9x5 Onsite with Defective Media Retention Workstation Only Hardware Support
- HP 3 year 4 hour 13x5 Onsite with Defective Media Retention Workstation Only Hardware Support
- HP 4 year 4 hour 13x5 Onsite with Defective Media Retention Workstation Only Hardware Support
- HP 5 year 4 hour 13x5 Onsite with Defective Media Retention Workstation Only Hardware Support
- HP 3 year 4 hour 24x7 Onsite with Defective Media Retention Workstation Only Hardware Support
- HP 4 year 4 hour 24x7 Onsite with Defective Media Retention Workstation Only Hardware Support
- HP 5 year 4 hour 24x7 Onsite with Defective Media Retention Workstation Only Hardware Support
- HP 1 year ComputraceComplete Tracking and Recovery Service
- HP 3 year ComputraceComplete Tracking and Recovery Service
- HP 4 year ComputraceComplete Tracking and Recovery Service
- HP 5 year ComputraceComplete Tracking and Recovery Service
- HP 2 year Computrace Complete Tracking and Recovery Service
- HP 1 year Computrace Data Protection Service
- HP 3 year Compturace Data Protection Service
- HP 4 year Computrace Data Protection Service
- HP 5 year Compturace Data Protection Service

Care Packs: Color treatment close up

Status quo excerpt

- ☐ HP 5 year Nbd Onsite with Accidental Damage Protection and Defective Media Retention WS Only HW Svc
- ☐ HP 3 year Next Business Day Onsite with Accidental Damage Protection Workstation only Hardware Serv
- ☐ HP 4 year Next Business Day Onsite with Accidental Damage Protection Workstation only Hardware Serv
- ☐ HP 3 year 4 hour Onsite Workstation Only Hardware Support
- ☐ HP 3 year 4 hour 24x7 Onsite Workstation Only Hardware Support
- ☐ HP 1 yearr Post Warranty Next business day onsite w/Defective Media Retention WS Only HW Service
- ☐ HP 3 year 4 hour Onsite Workstation Only Hardware Support

Recommended color treatment excerpt

- ☐ HP 5 year Nbd Onsite with Accidental Damage Protection and Defective Media Retention WS Only HW Svc
- ☐ HP 3 year Next Business Day Onsite with Accidental Damage Protection Workstation only Hardware Serv
- ☐ HP 4 year Next Business Day Onsite with Accidental Damage Protection Workstation only Hardware Serv
- ☐ HP 3 year 4 hour Onsite Workstation Only Hardware Support
- ☐ HP 3 year 4 hour 24x7 Onsite Workstation Only Hardware Support
- ☐ HP 1 yearr Post Warranty Next business day onsite w/Defective Media Retention WS Only HW Service
- ☐ HP 3 year 4 hour Onsite Workstation Only Hardware Support

Care Packs: Listing options

The idea: For any given product, pick the 3 best/most popular/most helpful CPs (by whatever criteria) and feature them, while making other options available with a bit more effort.

Care Packs for HP Z230 Tower Workstation E2A60UT-U.S. - English localization

Top 3 Care Pack options

☐ USD **999** per year   HP 3 year Next Business Day Onsite with Accidental Damage Protection Workstation only Hardware Serv

☐ USD **888** per year   HP 3 year 4 hour 24x7 Onsite Workstation Only Hardware Support

☐ USD **777** per year   HP 1 yearr Post Warranty Next business day onsite w/Defective Media Retention WS Only HW Service

See more Care Pack options

Show Care Packs that cover:	...and last this long:	...with this response time:	
All problem types ▾	All durations ▾	All response times ▾	Show

Request custom Care Pack

If user selects a single option in a dropdown, show that selection:

...with this response time:

| Next business day ▾ |

If, however, the user selects 2+ options, show "Multiple selected" in the dropdown:

...with this response time:

| Multiple selected ▾ |

Display (beneath these dropdowns) Care Pack listings that match the criteria specified in the dropdowns, in the same format shown above.

The idea: Enable users to slice and dice options however they like, experiment, and compare their top candidates.

Care Packs for HP Z230 Tower Workstation E2A60UT-U.S. - English localization

Filters   Include: ☑ Under USD 500   ☑ USD 500+   Duration: | All durations ▾ |

| All durations ▾ |

☐ 1 year (17)
☐ 2 years (23)
☐ 3 years (54)
☐ 4 years (9)
☐ 5 years (14)

Sort first by | Please select ▾ | then by | Please select ▾ | then by | Please select ▾ |

| Please select ▾ |
Top sellers
Part number
Duration
Problems covered
Response time
Service venue
Service method
When it takes effect
Price per year

Default sort (i.e., order of preference) TBD

Gray out or omit any listing that was selected in a prior dropdown

Top seller	Compare	Part number	Duration (years)	Problems covered	Response time	Service venue	Service method	When it takes effect	Price per year (USD)
●	☐	99999	2	Accidental damage	Next bus. day	Onsite	Replace	Immediate	111
●	☐	88888	5	See details	4 hours	Offsite	Exchange	Post-warranty	222
	☐	77777	1	Defective media	Next bus. day	Remote	Replace	Immediate	333
	☐	66666	1	Data	6 hours	Return to HP	Exchange	Post-warranty	444
	☐	55555	5	Tracking, recovery	Next bus. day	Remote	Replace	Immediate	555

Compare selections

Hover 0.5 sec over any listing in any column

Next bus. day	Onsite	Replace
4 hour		
Next b		
6 hour		
Next bus. day	Remote	Replace

Next business day
This means we will respond by 5PM Pacific the next day, excluding weekends and company holidays. lorem ipsum dolor sic rapsidus additional info either generic for this term or custom to this specific CP & product

Care Packs: Presentation of individual CP facets

Status quo (for reference only)

HP 1 year Post Warranty Return Thin Client Only Service

Technical Specifications	
Coverage period (month)	12
Warranty type	P
Carepack registration flag	Yes
Care Pack type	Electronic
UNSPSC code	81111812

Overview	HP Hardware Support Offsite Return Service offers high-quality return-to-HP service levels with remote telephone support and offsite repair for eligible products at an HP designated repair center. The service includes offsite repair or replacement, materials and parts, labor, and the cost of the return shipment. HP offers service levels with flexible shipment options to the HP designated repair center, as detailed below. Some service levels are also available with optional service features such as accidental damage protection or defective media retention.

Recommendation

HP 3 year Next Business Day Onsite with Accidental Damage Protection and Defective Media Retention Hardware Support

Price per year:	USD **999**
Duration:	3 years
Problems covered:	Acidential Damage Protection Defective Media Retention PC Tracking/Tracing
Service venue:	Onsite
Service method:	Exchange
Coverage hours:	Mon-Fri 13 hours (excluding certain holidays); see note below
Response time:	Next business day (excluding certain holidays)
Logistics:	Customer ship defective, Courier ship replacement
When it takes effect:	During warranty period
Notes:	• The days covered match the standard workweek of the worksite's country, which may differ from Monday through Friday. • Limitations, exclusions, etc. lorem ipsum • Further info lorem ipsum dolor sic rapsidus et nunc • Whatever else there is to say lorem ipsum dolor sic rapsidus et nunc

Full details

Purchase

Excluded holidays (USA)

New Year's Day
Memorial Day
July 4
Labor Day
Thanksgiving
Day after Thanksgiving
Christmas

Identify the country whose holidays are being excluded. Clicking the link could bring up a list of countries, from which the user could select a different country to see which holidays are excluded there.

We could do the same sort of thing with the word "country" in the first sample note shown here.

Creating custom asset labels

Background

HP's enterprise customers buy laptops & other equipment in large quantities. As a service, HP will ship each unit with a customer-designed identification label showing serial number, bar code, and/or other info.

Included here is only a sampling of pages from the design doc.

Assignment

Simplify the unwieldy tool that customers must use to create their custom "asset labels."

Creating custom asset labels: Status quo

Critique of status quo: This long scrolling page assumed the user already knew how to create a label, even though it is a task any given customer would do only infrequently. Each potential element was treated independently, so the user got little sense of how their label design was working as a whole.

It was possible to drag and drop elements from the artwork section onto the "label canvas," but the two were located so far apart that the user would rarely see both on screen at the same time.

Text & barcodes section: State 1

Text & barcodes   up to 50 items   [Add Item]

Select information type.. ▼   preview: [Delete]

Text & barcodes section: State 2

Text & barcodes   up to 50 items   [Add Item]

UUID ▼   Code 39 barcode ▼   preview:

☐ include predecessor

110E8400E29B11D4A716446655440000

Drag and drop to your canvas   [Delete]

HP

Configuration and Deployment Services

Welcome, John Boykin
Log out

Working on behalf of Discovery Dien Corp Test
Return to admin tools

Home   My services   My projects   My resources   My actions

Configure your label service: AY111AV - john test   [Save]

— Select label settings

Do you want this label to appear on your: *   ● product   ○ package

Please choose your label's size: *   ☑ Let HP decide   OR   Choose from the following: Select size.. ▼

Please select orientation: ● Landscape   ○ Portrait

Label canvas 50 x 30mm; 2.0 x 1.2 in

How to use the label canvas

You will be able to drag and drop items, size them and arrange the layout of your label as you upload artwork and create text & barcode items. Please avoid overlapping items on your label's canvas and allow a reasonable amount of spacing in between them.

View a tutorial

Note: Your asset tag image(s) may display in color but they will be printed in black and white only. Modification of the content layout may be required to fit the selected asset tag size. You will be contacted by HP if this happens with your asset tag creation.

— Platform & Placement

Platform	Model	Placement	Orientation	Action
Notebook	HP EliteBook 8570p	HP will determine placement per platform	No, please do not rotate it.	Edit / Remove

Model, placement & orientation info added through "Add model & placement" button to above table only be validated and saved when click "Save" button.

[Add model & placement]

Artwork section: State 1

Artwork   upload upto 5 image files
(file size & formats: DOC, DOCX, PDF, PNG, BMP, DIB, JPG, TIF, TIFF, JPE, JPEG, GIF, – maximum 5MB for each image)

[Add image]   [Add image]   [Add image]   [Add image]   [Add image]

Drag and drop to your canvas (×5)

[Delete] (×5)

Artwork section: State 2

Artwork   upload upto 5 image files
(file size & formats: DOC, DOCX, PDF, PNG, BMP, DIB, JPG, TIF, TIFF, JPE, JPEG, GIF, – maximum 5MB for each image)

[Add image]   [Add image]   [Add image]   [Add image]

Drag and drop to your canvas (×5)

[Delete] (×5)

Creating custom asset labels: Recommended redesign

Default for each field is as shown here

Name of label lorem ipsum dolor sic

Plan your label

Who will design label? ● I will, on this page
　　　　　　　　　　　　　　　○ Let HP design label

Apply label to: ● Product
　　　　　　　　　　○ Package

Label size: ● Let HP decide
　　　　　　　　○ This size: [Select size ▼]

Orientation: ● Landscape
　　　　　　　　　○ Portrait

Platform: Notebook Change

Model: HP EliteBook 8570p Change

Placement:

Upper left	**Upper right**
Product image *Back*	
Lower left	**Lower right**

Custom location

Upper left	
Product image *Front*	
	Lower right

Custom location

Build your label

To add an element, click +
To move an element, drag it
To resize an element, drag its corner handles
To remove an element, drag it off of label

[+]   Click + to add an image, free text, or pre-set data such as a bar code

50 x 30mm; 2.0 x 1.2 in

[Save]

○ I will, on this page

● Let HP design label
　　Optional: Upload image of precedent to base this label on

Clicking "Upload image" launches the standard Windows browse and upload procedure.

When the upload is complete, display the user's image in the "Elements for HP to include on your label" box (see later page of this doc).
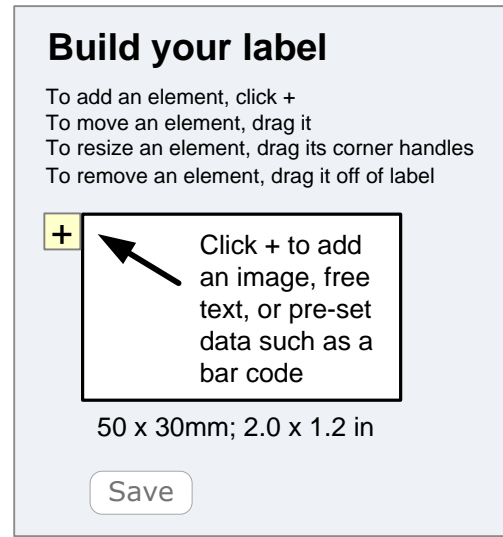
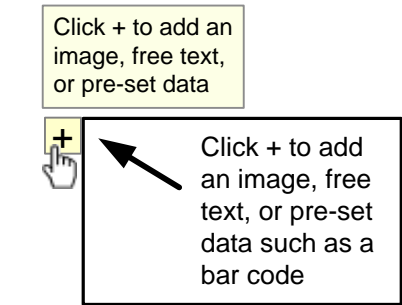Save is disabled until 1+ elements have been added, then it comes to life

[Save]

Present widget(s) TBD to specify a different platform or model
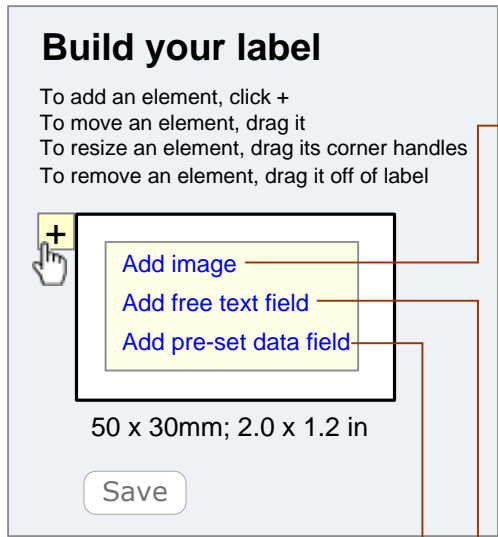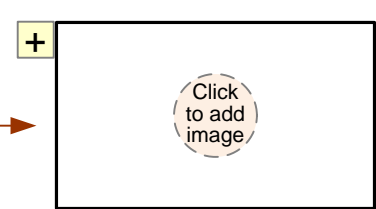
Canvas states

State 1 (default)

Build your label

To add an element, click +
To move an element, drag it
To resize an element, drag its corner handles
To remove an element, drag it off of label

+ | Click + to add an image, free text, or pre-set data such as a bar code

50 x 30mm; 2.0 x 1.2 in

Save

ToolTip

Click + to add an image, free text, or pre-set data

+ | Click + to add an image, free text, or pre-set data such as a bar code

State 2: + has been clicked

Build your label

To add an element, click +
To move an element, drag it
To resize an element, drag its corner handles
To remove an element, drag it off of label

+

Add image
Add free text field
Add pre-set data field

50 x 30mm; 2.0 x 1.2 in

Save

State 3a: "Add image" has been clicked

+

Click to add image

Any new placeholder always goes in dead center, both horizontally and vertically

State 3b: "Add free text field" has been clicked

+

Click to enter free text
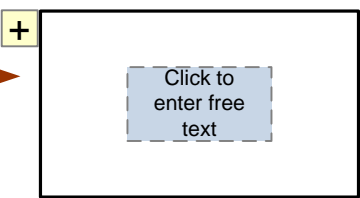
State 3c: "Add pre-set data field" has been clicked

+

Click to add pre-set data
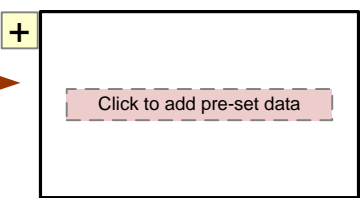
State 4: Elements have been added

Build your label

To add an element, click +
To move an element, drag it
To resize an element, drag its corner handles
To remove an element, drag it off of label

+

Walmart
Property of @Walmart Labs. All contents confidential.

UUID

50 x 30mm; 2.0 x 1.2 in

Save
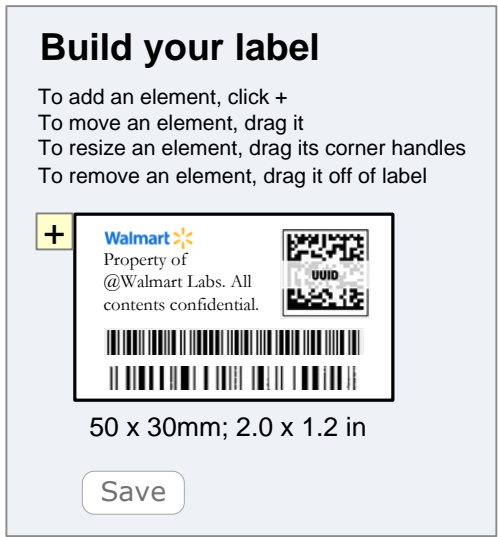
State 5: User adds an element while other Items are present

Build your label

To add an element, click +
To move an element, drag it
To resize an element, drag its corner handles
To remove an element, drag it off of label

+

Walmart
Property of @Walmart Labs. All

UUID

Click to add pre-set data

50 x 30mm; 2.0 x 1.2 in

Save

Overlapping

Any new placeholder always goes in center, even if it overlaps other elements that are already on canvas.

Each element is, in effect, on its own layer. Layers are stacked in order of chronology, with the most recently added layer on top. If possible, we offer standard means of moving layers to the back or the front. If we can't, then we just keep the default.

Each element appears at full strength unless there is an overlap, in which case the element on the higher layer appears slightly transparent (say, 20%, as in State 5) so the user can see what is beneath it.

Until the user clicks Save, we don't care about overlaps. We consider overlaps a temporary condition of a work in progress. But if the user does click Save while there are still any overlaps, at that point we display an error message: "Some elements are overlapping. Please eliminate overlaps before saving" and offer two buttons: Cancel [highlighted as default] and Ignore overlap. If the user chooses to ignore the overlap, we respect their choice.

The same applies to elements spilling part-way over the edge of the canvas.

Creating custom asset labels: Recommended redesign details

Image sizing handles

When any element is clicked, sizing handles (boxes) appear at each corner. They work the same as in Illustrator, Visio, PowerPoint, etc.
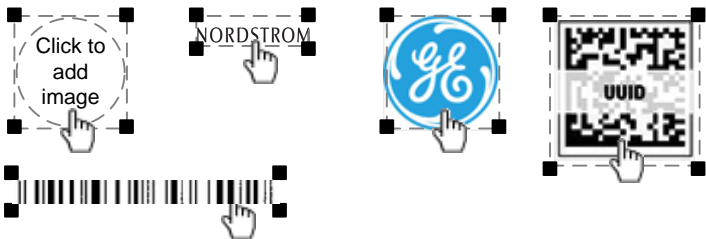
Scaling images

Automatically scale image to size of placeholder AND automatically replace placeholder with bounding box matching aspect ratio of image. User may not change aspect ratio of image (so there are no handles in middles), but may make it larger or smaller by dragging sizing handles in corners. For example:

Original size of placeholder

Click to add image

Original size of image

NORDSTROM

WRONG way to match them

NORDSTROM

RIGHT way to match them

NORDSTROM

User may resize at will

NORDSTROM

Minimum sizes for pre-set data

Barcodes and other pre-set data may be unusable if they are too small. So we will set minimum sizes for each kind of pre-set data. The user may not shrink them down smaller than that.

Pre-set data

Click to add pre-set data

Pre-set data
- Select data type ▾
- Select format ▾
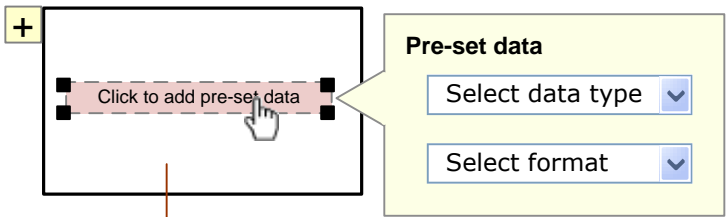
On click,
- the same set of widgets and choices we offer now except static text appear in flyout, each as determined by prior selection.
- the sizing handles appear, as described at left

Example of multiple widgets

Pre-set data
- Asset range ▾
- Select range ▾
- Select format ▾
- ☑ Include predecessor
- Asset number:
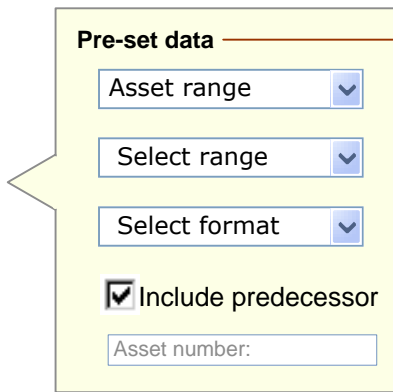
Once the user is finished specifying a particular pre-set data field, the generic "Pre-set data" heading is replaced with the specified datatype ("Serial number," "MAC address," "Asset range," etc.).

User has specified pre-set data

Clicking any specified pre-set data element brings up its specification widgets (see above)

Hover 0.5 second over any pre-set data element

MAC Address details, range, info 222 – 999 lorem ipsum dolor sic rapsidus et populus nunc
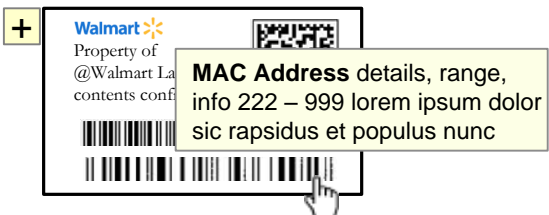
Current preset data
- Asset range
- UUID
- MAC-address string 1
- MAC-address string 2
- Estimated warranty end date
- Date of manufacturing
- Estimated shipping date
- HP serial number
- Product name
- Customer PO #
- Static text

Real entries, sizes, orientation, & content

These wireframes show placeholder elements for illustration only. In the real tool, we would show the user's real entries and selections and actual images.

Canvas size: Default to 50 x 30 mm, switch to whatever size user selects.

In both the canvas and placement widgets, label representations appear in the currently-selected orientation.
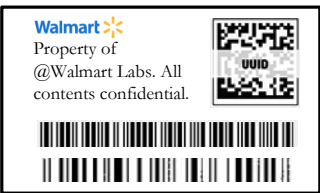
Label size options

- ◉ Let HP decide
- ○ This size: Select size ▾
  - 50mm x 20mm
  - 50mm x 30mm
  - 45mm x 40mm
  - 63mm x 30mm
  - 75mm x 40mm

Removing & recovering elements

User may remove any element by either
- dragging it completely off of the canvas and then taking focus away from it, or
- right-clicking the element and selecting "Delete" from the menu

The first time an element is deleted, add a "Bring back" link or button to recover deleted elements if the user changes their mind. A flyout would display all deleted elements, most recent at top. User would click any to have it re-appear in the label, centered horizontally and vertically on the topmost layer.

If and when there are 0 deleted elements remaining, omit the "Bring back" link/button.

Build your label

To add an element, click +
To move an element, drag it
To resize an element, drag its corner ha...
To remove an element, drag it off of lab...

Click any deleted element to put it back on label

MAC address string 2

Manufactured 09-21-2014

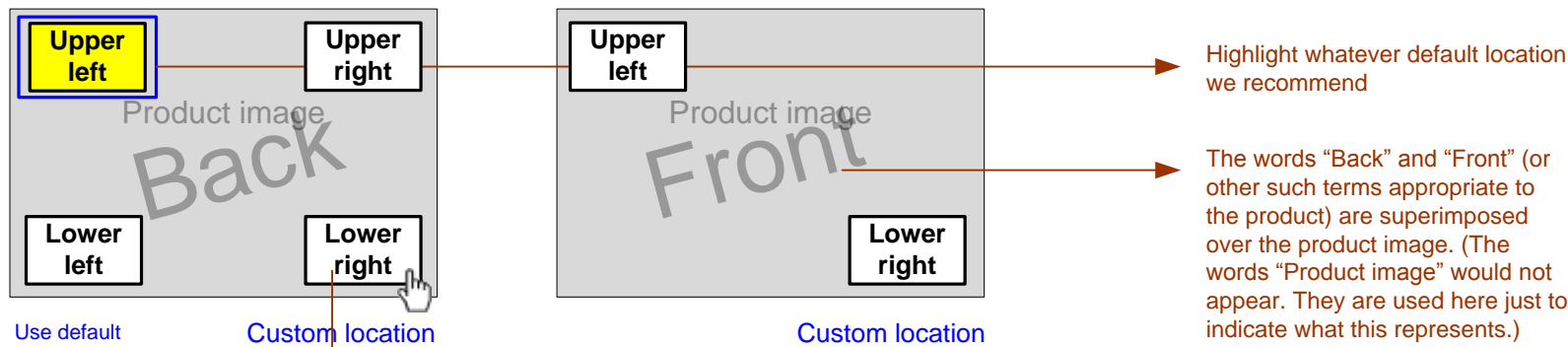Serial 987 6543 2123

50 x 30mm; 2.0 x 1.2 in

Bring back

Save

Creating custom asset labels: Recommended redesign details (cont.)
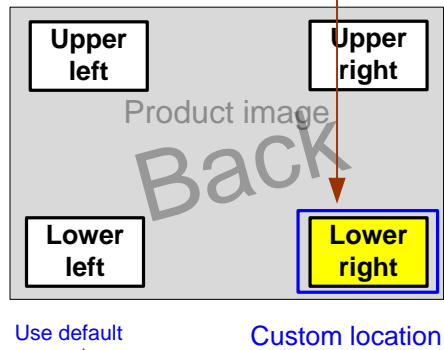
Location

Image of selected product, with a sample label in each standard location. Each label placeholder is in the selected orientation and is a clickable hotspot.

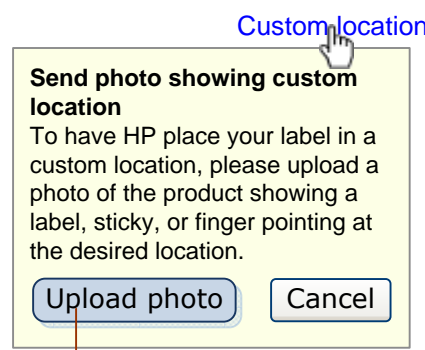Location options offered will vary from model to model.

Upper left		Upper right
	Product image **Back**	
Lower left		Lower right

Use default   Custom location

Upper left	
	Product image **Front**
	Lower right

Custom location

→ Highlight whatever default location we recommend

→ The words "Back" and "Front" (or other such terms appropriate to the product) are superimposed over the product image. (The words "Product image" would not appear. They are used here just to indicate what this represents.)

User has clicked a standard location

Upper left		Upper right
	Product image **Back**	
Lower left		**Lower right**

Use default   Custom location

Clicking "Use default" restores the display to the original state, with the default location highlighted. Only one location at a time is ever highlighted.

User has clicked "Custom location"

Custom location

Send photo showing custom location
To have HP place your label in a custom location, please upload a photo of the product showing a label, sticky, or finger pointing at the desired location.

[Upload photo]   [Cancel]

If user clicks "Custom location," fails to upload a photo, and then clicks a standard location, accept the standard location selection and reset the custom location material to its default state.
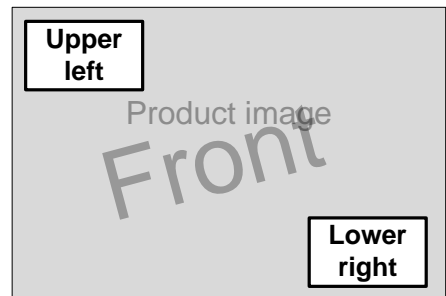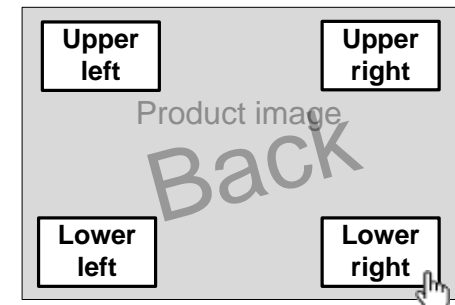
Clicking "Upload photo" launches the standard Windows browse and upload procedure. When the upload is complete, display the user's photo under the heading "Custom location." Remove "Custom location" links from our two standard location images.
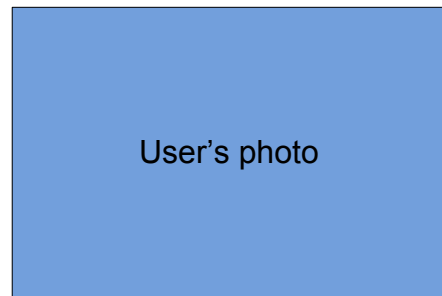
User has uploaded photo

User can change their mind about the custom location by either

- unchecking the checkbox in front of the "Custom location" heading or

- clicking any standard location or "Use default."

Their photo disappears, but is not forgotten: If they change their mind again and re-check the checkbox, their photo reappears without them having to re-upload it.

Upper left		Upper right
	Product image **Back**	
Lower left		Lower right

Use default   Custom location

Upper left	
	Product image **Front**
	Lower right

Custom location

☑ **CUSTOM LOCATION**

User's photo
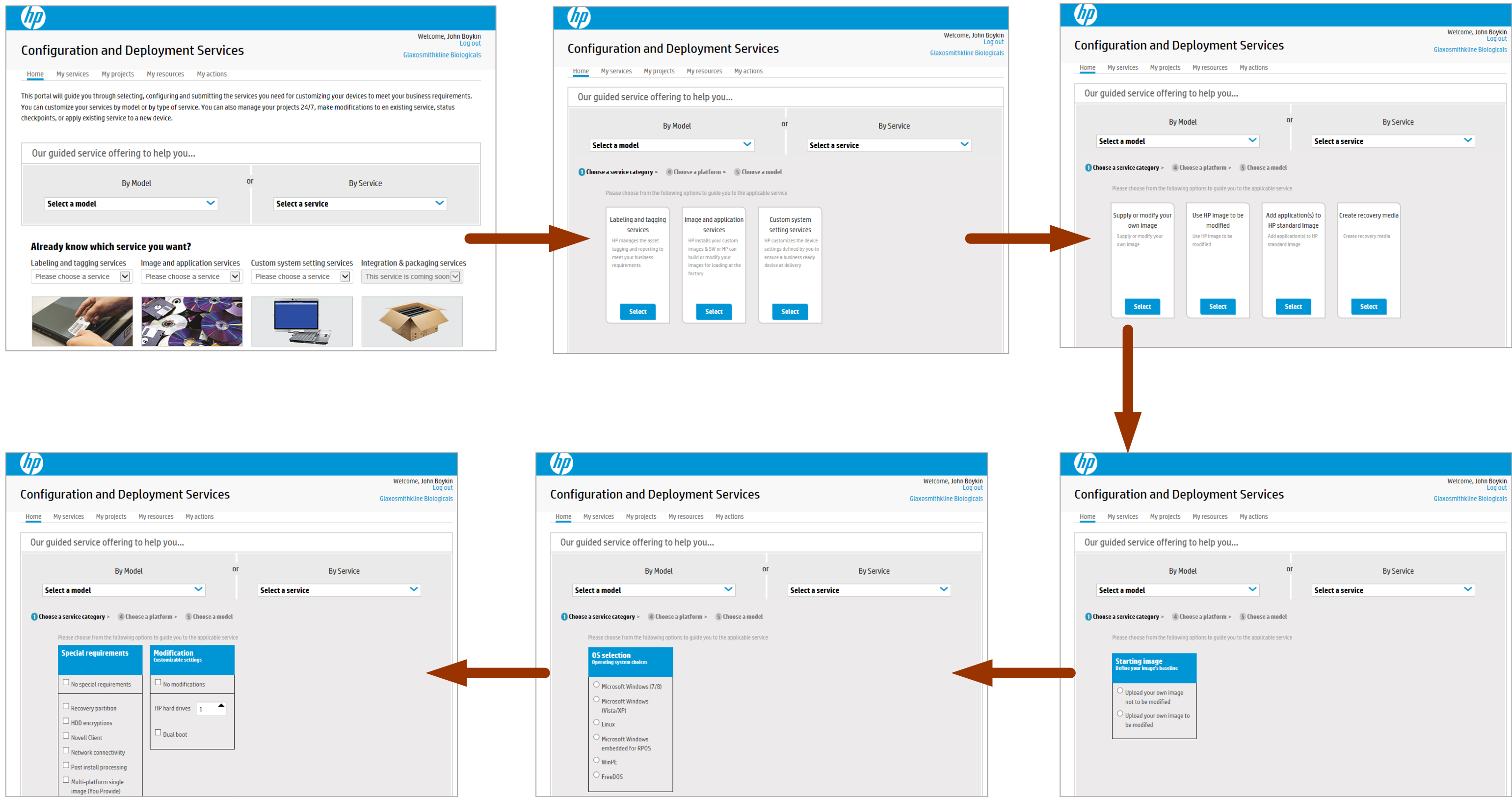
Customize services

Background

When HP's enterprise customers order hardware, they often want customized services. To specify what they want, they had to work through a series of confusing screens.

Assignment

Simplify an unwieldy tool for customizing services.

Customizing services: Home page

Status quo (for reference only)

Customizing services: Recommended new home page & shuffler

Replace the current series of screens with a single screen that contains multiple widgets. Reveal each widget only in response to a selection in the prior widget ("shuffler"). The widgets offer the same options that we currently offer on separate screens.

Starting state

LOGO

Customize your services

Welcome, Barbara Cunningham
Glaxosmithkline Biologicals

Home   My services   My projects   My resources   My actions   Log out

Here you can
- customize your services to customize your HP devices
- manage your projects 24/7
- modify an existing service, status checkpoints, or apply existing service to a new device.

Set up a service

Select platform

Please select ▾

Footer

Shuffler: Part-way through

Set up a service

Select platform

Desktop ▾

Select model

HP Compaq Pro 6300 MT ▾

Select service

Image & application ▾

Select service type

Supply or modify your own image ▾

Shuffler: End state

Select platform

Desktop ▾

Select model

HP Compaq Pro 6300 MT ▾

Select service

Image & application ▾

Select service type

Supply or modify your own image ▾

Specify plan for image

Upload your own image NOT to be modified ▾

Specify OS

Microsoft Windows (7/8) ▾

Special requirements

☐ No special requirements

☐ Recovery partition
☑ HDD encryptions
☐ Novell Client
☐ Network connectiviity
☐ Post install processing
☐ Multi-platform single image (you provide)

Modifications (customizable settings)

☐ No modifications

Number of HP hard drives: 2 ▲▼
☑ Dual boot

Specific service, according to selections above

AY101AV: HP PC Image Modification &
Load Service

Submit

At final step, add
appropriate action
button (e.g., Submit)

Customizing services: Complete set of widgets

A

Select service

Please select ▼
Labeling and tagging
Image & application
Custom system setting
Integration & packaging
Other

B

Select service type

Please select ▼
Supply or modify your own image
Use HP image to be modified
Add application(s) to HP standard image
Create recovery media

C

Specify plan for image

Please select ▼
Upload your own image to be modified
Upload your own image **NOT** to be modified

D

Specify OS

Please select ▼
Microsoft Windows (7/8)
Microsoft Windows (Vista/XP)
Linux
Microsoft Windows embedded for RPOS
WinPE
FreeDOS

E (2 groups of widgets)

Special requirements

- ☐ No special requirements
- ☐ Recovery partition
- ☐ HDD encryptions
- ☐ Novell Client
- ☐ Network connectiviity
- ☐ Post install processing
- ☐ Multi-platform single image (you provide)

Modifications (customizable settings)

- ☐ No modifications
- Number of HP hard drives: [   ] ▲▼
- ☐ Dual boot

F

Specific service, according to selections above

AY101AV
HP PC Image Modification & Load Service

[Continue]

"Specific service…" material appears when user makes the first selection in the Special requirements or Modifications widgets. As the user proceeds making selections, the specific service displayed may change.

"Continue" button is the user's means of indicating that they are finished making selections in the checkboxes. It disappears after it is clicked.

If user goes back and makes any changes in the Special requirements or Modification widgets, a different specific service MAY be displayed as a result, but this has no effect on the work the user may have done on subsequent widgets (Select platform, Select model, etc.).

G

Select platform

Please select ▼
Desktop
Notebook
Point of sale
Thin client
Workstation

H

Select model

Please select ▼
HP Compaq Elite 8300 AiO
HP Compaq Elite 8300 CMT
HP Compaq Elite 8300 MT
HP Compaq Elite 8300 SSF
HP Compaq Elite 8300 USDT
HP Compaq Pro 4300 SFF
HP Compaq Pro 6300 AiO
HP Compaq Pro 6300 MT
HP Compaq Pro 6300 SFF
HP Compaq Pro 6305 MT
HP Compaq Pro 6305 SFF
HP EliteDesk 800 G1 SFF
HP EliteDesk 800 G1 TWR
HP EliteDesk 800 G1 USDT
HP EliteDesk 800 G1 AiO
HP ProDesk 400 G1 MT
HP ProDesk 400 G1 SFF
HP ProDesk 490 G1 SFF
HP ProDesk 600 G1 SFF
HP ProDesk 600 G1 TWR
HP ProDesk 600 G1 AiO

Current workflow sequences (for reference only)

We currently offer 2 workflows. The 2 are identical except for their starting point. We should pick one or the other and offer only that one. I recommend configuring by service.

Configure by service

A	Select service
B	Select service type
C	Specify plan for image
D	Specify OS
E	Special requirements & Modifications
F	Specific service, according to selections above
G	Select platform
H	Select model

Configure by model

G	Select platform
H	Select model
A	Select service
B	Select service type
C	Specify plan for image
D	Specify OS
E	Special requirements & Modifications
F	Specific service, according to selections above

Table width problem

Background

Tables on enterprise portal were often too wide.
Translations made the problem even worse,
with contents unable to fit in cells.
User had to go to some other page for details.

Assignment

Find a way to offer needed info within narrow
windows.

Table width problem

Problem: Some of our tables are too wide to fit on smaller screens, especially when translated into German or other languages.

We are already looking at ways to tweak the formatting to make more-efficient use of our available horizontal space. Beyond that, we might consider more-significant departures from the status quo along the lines of the sketches on the following pages.

Solution: Show on the surface only the minimal columns the user needs to identify which item they are interested in and for decision-maker to take action. They then click that listing to expand it to reveal in context whatever additional info there is.

Specific options to minimize horizontal space

- Limit each field value display to 25 characters, truncating as necessary in the middle to display the first 13 and last 10 characters.
- Omit minor info (year from dates, cents from amount, requesters' first names). Show them in details display only.
- Represent status with icons.
- Instead of request date, show number of days old the request is
- Replace headers "Request name" with "Name" and "Requester" with "From" or "By"
- Instead of fixed widths for columns, make each column no wider than necessary to contain its actual contents (plus minimal cell padding)
- Enable users to customize which columns display.

Status quo, for reference only

Date Submitted	Expires	Requester	Request Number	Quote Number	Request Name	Amount *	Status	Action
03/14/14	04/13/14	HP Requester	37492265		Test PR	HKD 16,877.80	Pending	Reject Approve
12/19/13		HP Manager	36599003		workflow_test	USD 1,302.21	Approved	Submit
12/18/13		HP Manager	36583562		Training Test	USD 3,906.63	Approved	Submit
12/07/13		HP Requester	36485695		Test_Pr_Mtp	USD 2,175.60	Pending	Reject Approve
12/07/13		HP Requester	36485480		TestPR	USD 2,282.28	Pending	Reject Approve
10/12/13		HP Requester	35928859	35928651	Simontest	USD 474.05	Pending	Reject Approve
09/25/13		HP Requester	35782758		Test PR	USD 2,259.00	Pending	Reject Approve

Status quo: Translated into German

Narrow table treatment sample

State 1: Default (collapsed)

Purchase requests
Customize display

Action	Name ⬍	USD ⬍	⬍	⬍	From ⬍
OK No	Phoenix expansion	9,999	~	3/14	Simmons
OK No	Year-end buying binge	8,888	~	12/19	Selander
➡	Name of this request	7,777	✓	12/18	Anderson
OK No	Open Tallahassee office	666	~	12/07	Simmons
➡	Long name tru… in middle	5,555	✓	12/07	Selander
OK No	Phoenix expansion	444	~	10/12	Anderson
➡	Year-end buying binge	333	✓	9/25	Simmons
OK No	Name of this request	2,222	~	8/28	Selander
OK No	Other request's name	111	~	8/21	Anderson

On hover 0.5 second

Action buttons
OK I approve
No I reject
➡ Submit to HP

State 2: Expanded

Purchase requests
Customize display

Action	Name ⬍	USD ⬍	⬍	⬍	From ⬍
OK No	Phoenix expansion	9,999	~	3/14	Simmons
OK No	Year-end buying binge	8,888	~	12/19	Selander
➡	Name of this request	7,777	✓	12/18	Anderson
OK No	Open Tallahassee office	666	~	12/07	Simmons

3   Configurable HP ProBook 6470b Notebook
2   HP RDX USB 3.0 Gen8 DL Server Module Docking Station

Expires: 01/07/14
Request #: 9876543
Quote #:   1234567

| Cart details | Account info | Shipping & billing |

➡	Long name tru… in middle	5,555	✓	12/07	Selander
OK No	Phoenix expansion	444	~	10/12	Anderson
➡	Year-end buying binge	333	✓	9/25	Simmons
OK No	Name of this request	2,222	~	8/28	Selander
OK No	Other request's name	111	~	8/21	Anderson

Tabs

Cart details | Account info | Shipping & billing
Edit

Configurable HP ProBook 6470b Notebook
Reference model ID: 16955559
Config ID: 13745573
Quant. 3 x USD 1,302.21 = USD 3,906.63

HP RDX USB 3.0 Gen8 DL Server Module Docking Station
Product #: C8S08A
Quant. 2 x USD 123.45 = USD 246.90

Subtotal: USD 4,153.53
Estimated shipping: USD 28.08
Tax: USD 107.87
Estimated total: USD **4,289.48**

Cart details | **Account info** | Shipping & billing
Edit

William Rasmussen
B2B Petrox - US
546-999-9999
546-999-9990 fax
wrasmussen@petrox.com

Department ID: 123
Employee ID: 98765432
Project code: Eagle Bone
Paym't method: PO

Comments: Lorem ipsum dolor sic rapsidus et nunc bumbulum

Cart details | Account info | **Shipping & billing**

Shipping address   Edit   **Billing address**   Edit

Petrox Energy N.A.
IT Department
9876 S. Gatorade Rd.
Tallahassee, FL 12319
United States

Petrox Energy N.A.
Accounting
3155 N. Greeley, Bldg 123
Atlanta, GA 30319-123
United States

wrasmussen@petrox.com
546-999-9999
546-999-9990 fax

acctpayable@petrox.com
546-999-9995
546-999-9960 fax

Options: Economy (ground) –
3 to 6 business days, FedEx –
1 day

Comment lorem ipsum dolor
sic rapsidus et nunc

Instructions lorem ipsum dolor
sic rapsidus et nunc

Narrow table treatment sample: Customize display flyout

Customize display

⬍	From ⬍
3/14	Simmons
12/19	Selander
12/18	Anderson
12/07	Simmons
12/07	Selander
10/12	Anderson
9/25	Simmons
8/28	Selander
8/21	Anderson

"Customize display" clicked

Customize display ☒

Columns to display
Drag to change sequence

- ☑ Action
- ☑ Name of PR
- ☑ Amount (USD)
- ☑ Status
- ☑ Date requested
- ☑ From requester

- ☐ Expires
- ☐ Request number
- ☐ Quote number

Highlight on mouseover

Customize display ☒

Columns to display
Drag to change sequence

- ☑ Action
- ☑ Name of PR
- ☑ Amount (USD)
- ☑ Status
- ☑ Date requested
- ☑ From requester

- ☐ Expires
- ☐ Request number
- ☐ Quote number

Drag in process

Customize display ☒

Columns to display
Drag to change sequence

- ☑ Action
- ☑ Name of PR   ☑ Date requested
- ☑ Amount (USD)
- ☑ Status
- ☑ Date requested
- ☑ From requester

- ☐ Expires
- ☐ Request number
- ☐ Quote number

End state after drag

Customize display ☒

Columns to display
Drag to change sequence

- ☑ Action
- ☑ Name of PR
- ☑ Date requested
- ☑ Amount (USD)
- ☑ Status
- ☑ From requester

- ☐ Expires
- ☐ Request number
- ☐ Quote number

[Save] [Cancel]

Whatever columns are currently displayed appear in the same sequence here, each checked. All checked items are grouped together.

Whatever additional columns we offer are listed together, unchecked, beneath the group of checked listings. A small space separates the two groupings.

If user unchecks any checked listing, that listing travels (in a 0.5 second-long animation) down to the bottom of the unchecked grouping, then all listings beneath the original location move up (in a 0.5 second-long animation) to close the vacated space.

If user checks any unchecked listing, the system waits 1 second for the user to initiate a drag. If they do not, the newly-checked listing travels (in a 0.5 second-long animation) to the bottom of the checked grouping. As soon as it arrives, any unchecked items beneath the original location move up (in a 0.5 second-long animation) to close the vacated space.

Note that wording of column headings appearing here does not necessarily match the wording as they appear in the table itself. Reason: In the table, wording needs to be kept to a bare minimum to conserve horizontal space – and in some cases, no column header wording appears at all; but in this flyout we have plenty of room and thus can afford to make wording more self-explanatory.

An item does not have to be checked before it can be dragged, but dragging it and releasing it in a different location checks it.

During drag,
- original listing changes appearance to remind user of its original location
- a ghost clone of the listing travels as a unit
- a horizontal bar snaps into place between listings as ghost listing travels.

If user tries to drag a listing into the midst of the unchecked items, the system automatically places it at the end of the checked items.

Releasing a listing back in its original location is the same as having done nothing at all.

"Save" and "Cancel" action buttons appear only once any change has been made.

Clicking "Save" closes the flyout and implements the change(s).

Clicking "Cancel" closes the flyout and leaves the table as it was.