

Budgeting & Planning Redesign Workflow

What we know about the existing interface and interaction:

- Poor information architecture - Menu head disconnected from the body concept.
- What action can I perform on “No Budget”?
- Menu redundancy across reports and actions (e.g., Change Password).
- Layout is dense and containers carry the same weight as information. Titles carry greater weight than pertinent information.
- Cognitive flow of menu layout. What is the main menu and what is the submenu?
- Generated/displayed reports don't lend themselves to resizing. Though they can be moved around, they cover important information for the specific project, but still show access to other projects (unnecessary when so focused on current report).
- Login type and scope not apparent.
- Customers are overwhelmed by the amount of information. After using the system for a while, seasoned veterans get used to the “inner workings”, but new people or infrequent users need lots of training and support.
- Project Managers don't like using the interface and often get others to input their work for them while maintaining a legacy Excel spreadsheet.
- Reports are often printed and distributed instead of accessed and displayed during meetings and reviews. Report containers are heavy and carry the same if not more weight than the information they are trying to provide. Unnecessary layout/coloring and report configuration elements make eye flow through the reports a strenuous event.

Original Interface Screenshots

In **Figure 1** the Reports & Actions menu is part of Cost Analysis, but completely disconnected as a related menu. Redundancy is apparent, for example, in the expanded Actions section where Change Password is an action. Change Password changes the password for the person logged in, not for Cost Analysis. When switching to Budget Development, Change Password displays again, and successively for all sections. Note that the main horizontal menu - Cost Analysis, Budget Development, etc. pertains to the selected project. In the case of **Figure 1**, Project 1002 is the selected and navigable project until another project is selected.

Container elements in **Figure 1** create heavy readability/strain issues due to the weight of the containers being at or greater than the information they contain. Note that even the labels, such as Project Title, carry greater weight than the pertinent information, which is the actual project title.

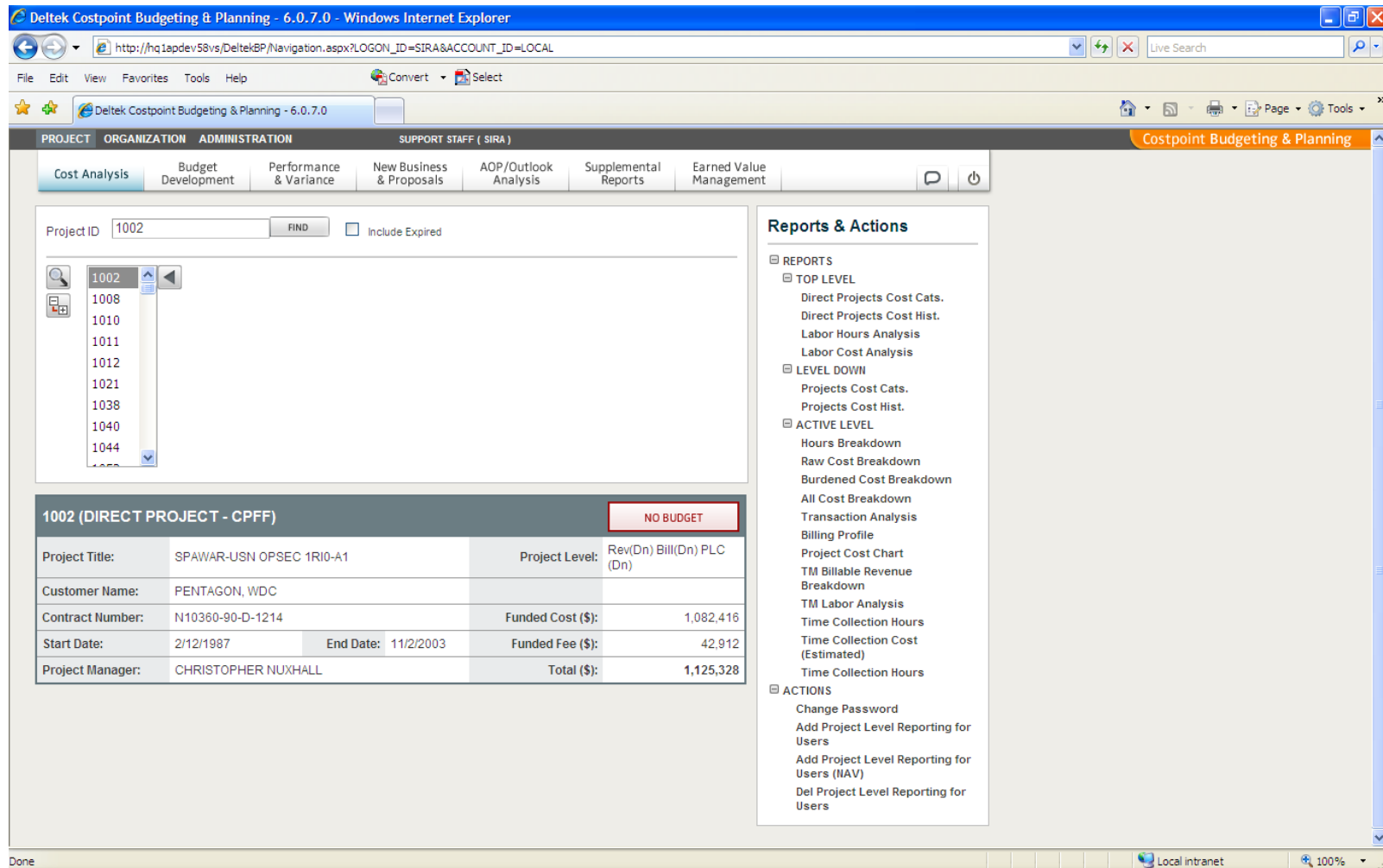


Figure 1 - Landing page

In **Figure 2** the displayed report - Hours Breakdown covers important information. Resizing does not work in a responsive way so table information is either cut off or displayed in an unreadable way when resized. Minimizing makes the user choose either the report or the project information for Cost Analysis, but both cannot be viewed, compared, or analyzed at the same time. Additionally, engaging with further reports and actions or building out subsections of project 1008 requires minimization of the Hours Breakdown report as well.

Deltek Costpoint Budgeting & Planning - 6.0.7.0 - Windows Internet Explorer

http://hq1apdev58vs/DeltekBP/Navigation.aspx?LOGON_ID=SIRA&ACCOUNT_ID=LOCAL

File Edit View Favorites Tools Help Convert Select

Deltek Costpoint Budgeting & Planning - 6.0.7.0

PROJECT ORGANIZATION ADMINISTRATION SUPPORT STAFF (SIRA)

Cost Analysis Budget Development Performance & Variance New Business & Proposals AOP/Outlook Analysis Supplemental Reports Earned Value Management

Project ID: 1008.008 Include Expired

1002 008
1008 009
1010 010
1011
1012

Reports & Actions

- REPORTS
 - Projects
 - Costs
 - Labor Analysis
 - Project Level
 - Costs
 - Hours and Costs Breakdown

Project / Cost Analysis - Windows Internet Explorer

Hours Breakdown - 1008.008

Export .xls PDF Close

08/31/2005 Employee Vendor

Name	Project ID	Home Org	ITD Hours	AUG-05	JUL-05	JUN-05	MAY-05	APR-05	MAR-05	FEB-05
<input type="checkbox"/> FAGAN, KATHERINE (000254)			0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
FAGAN, KATHERINE (000254)	1008.008	1.1.1.10	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
<input type="checkbox"/> KIRKLAND, MICHAEL (001132)			26.0	26.0	0.0	0.0	0.0	0.0	0.0	0.0
KIRKLAND, MICHAEL (001132)	1008.008	1.1.1.10	26.0	26.0	0.0	0.0	0.0	0.0	0.0	0.0
<input type="checkbox"/> MORRISSEY, WESLEY (000047)			77.5	77.5	0.0	0.0	0.0	0.0	0.0	0.0
MORRISSEY, WESLEY (000047)	1008.008	1.1.1.10	77.5	77.5	0.0	0.0	0.0	0.0	0.0	0.0
<input type="checkbox"/> NEGRAY, ROBERT (000482)			0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
NEGRAY, ROBERT (000482)	1008.008	1.1.1.10	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total			103.5	103.5	0.0	0.0	0.0	0.0	0.0	0.0

Done Local intranet 100%

Users
Add Project Level Reporting for Users (NAV)
Del Project Level Reporting for Users

Figure 2 - Generated/displayed report

First Stage Redesign Elements

- Cognitive flow to main menu and general page layout
- Geometric/mockup Layout
- Information Architecture
 - Navigation
 - Hierarchy

Reading project information in **Figure 3** is much more fluid and processed by the user in a much more confident way.

Note: As you progress through the following static mockups, keep in mind that pointer changes and mouse events on the actual page will provide visual cues to users when judging cognitive levels for Budgeting and Planning. Visual understanding of this can be defined by creating a working prototype previous to any actual development.

Figure 3 shows a landing page after the user logs in. Notice the textual content in the top area of the page hierarchy. Understanding of the left-hand title, Costpoint Budgeting & Planning, provides location context that is processed right away and begins to introduce small degrees of confidence building. The page canvas is blank and ready for work. Project is the focus and no project is selected. Other more subdued text is ready to be filled as the project is defined.

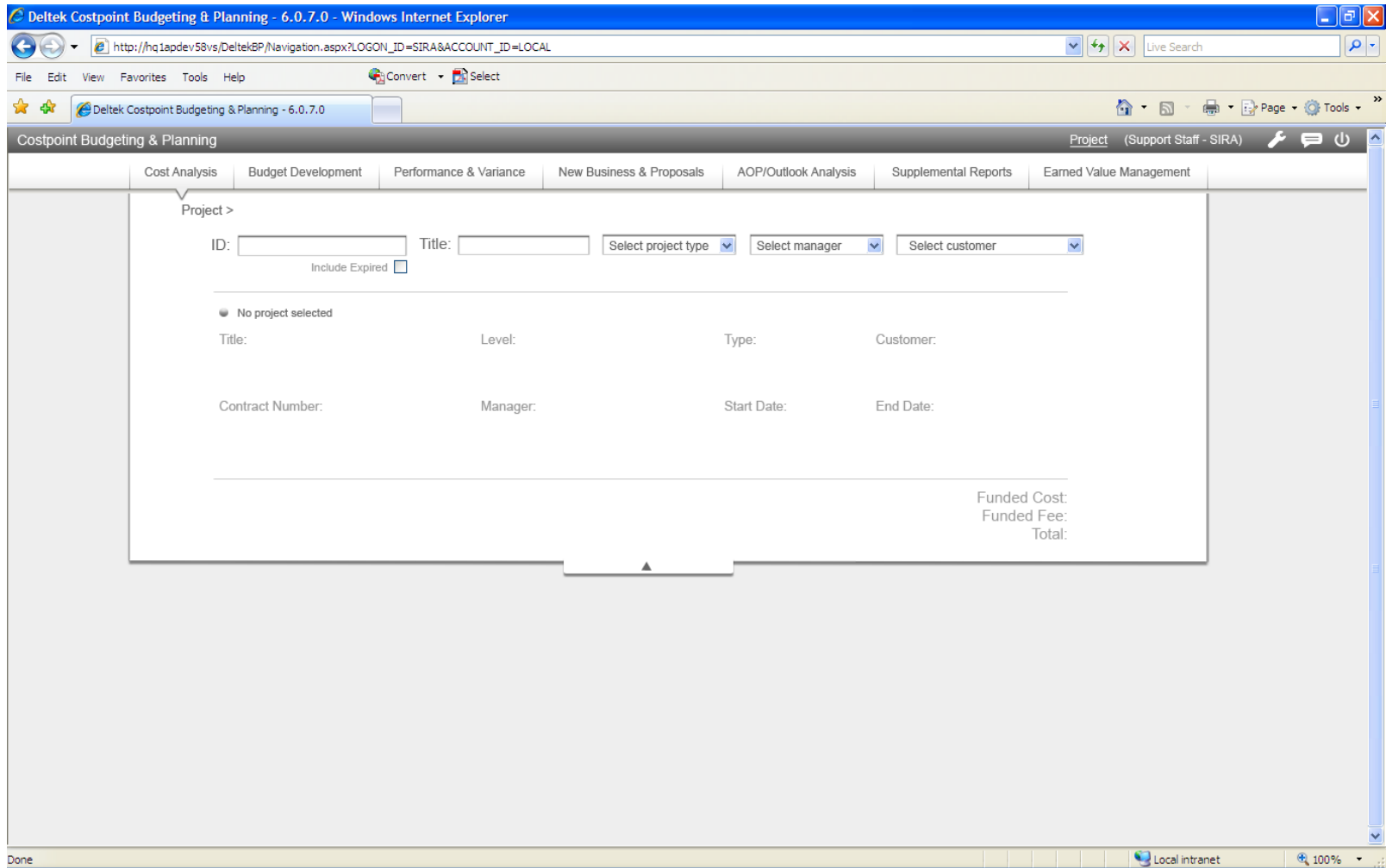


Figure 3 - Landing Page focus Cost Analysis

In **Figure 4** To the right are links for various system-wide and project-centric controls. Examples in the next two mockups include switching from the current login type (i.e., Project) to other available login types. In the first example, both Organization and Administration are available to the user; note that this user also has rights to all modules in the main menu. Also of note for login context is the defined Project login in parentheses, Support Staff – SIRA. This could be further defined with the user’s name to build upon context location and confidence. In the original design, Project, Organization, and Administration looked to be part of the horizontal main menu in some way.

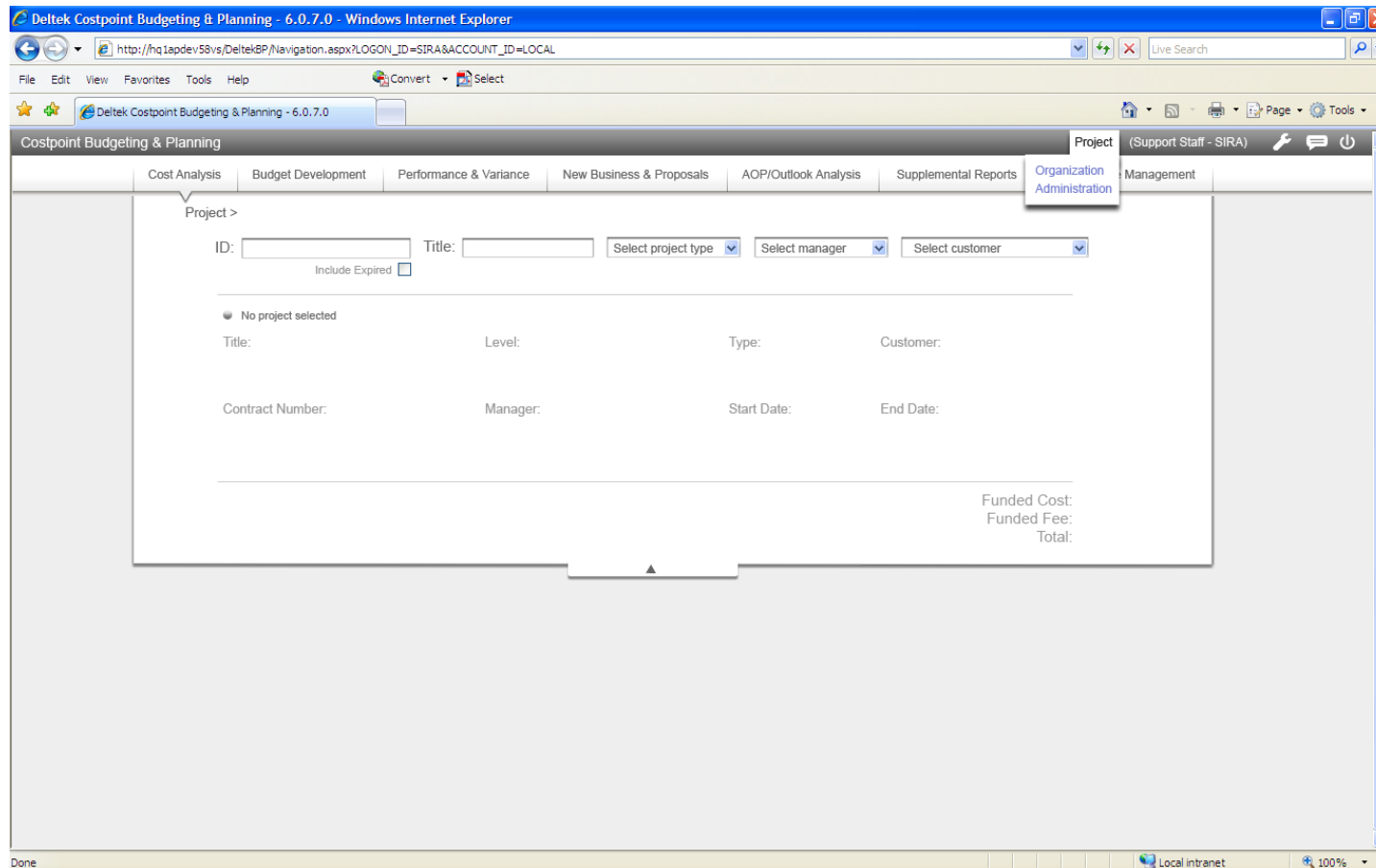


Figure 4 - Login View (logged in under Project)

In **Figure 5** the Settings or Utilities Menu is displayed, effectively removing miscellaneous options from the previous right-hand menu on the page grouped with reports and actions. This settings menu is a central location for grouping functions applicable to login type as well as system-wide, such as changing password. These can be differentiated by creating sections on the menu that displays with categorized headings, similar to what you will see in the next mockups for reports and actions.

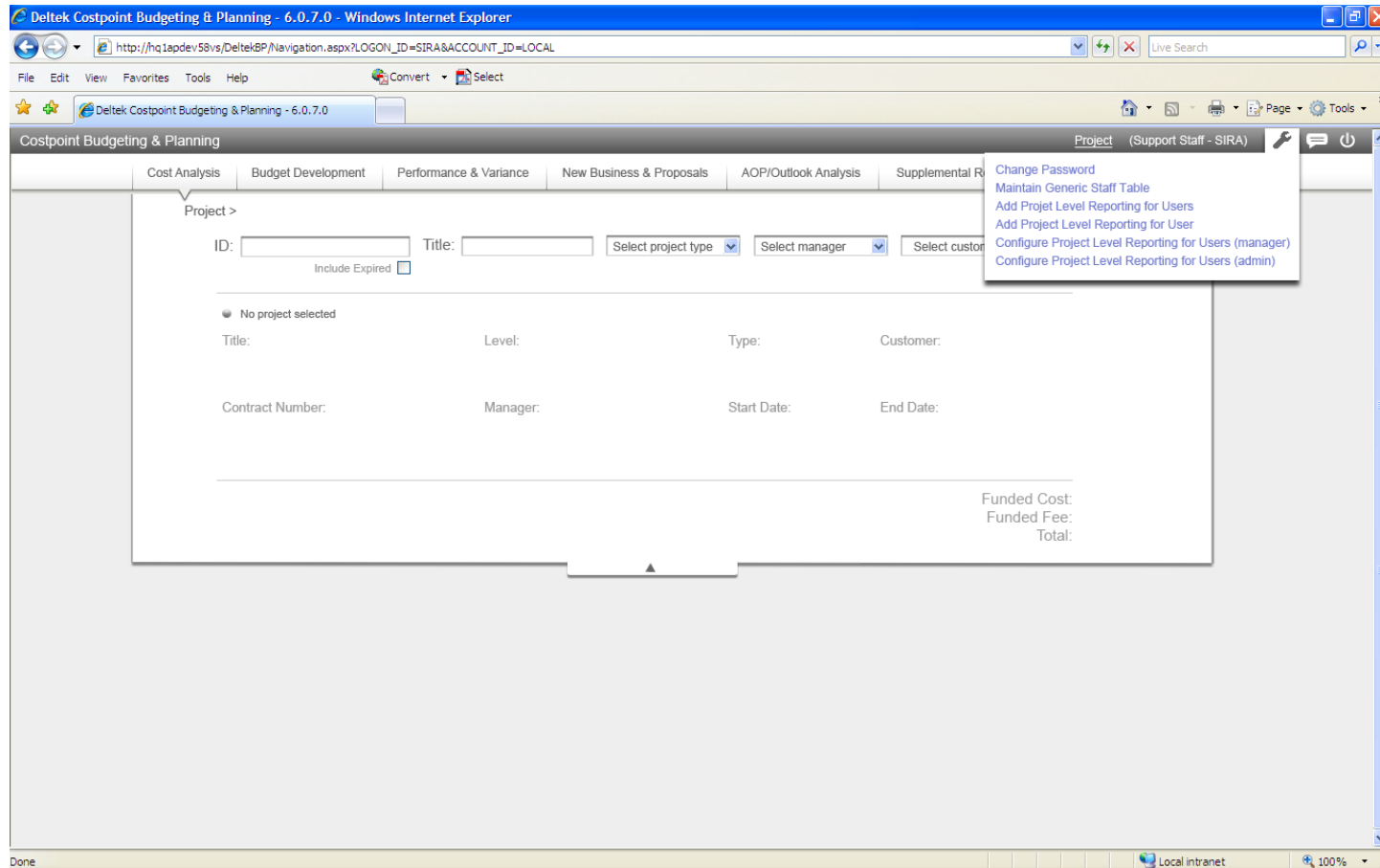


Figure 5 - Tools (System-wide tools grouped, redundancy removed)

Figure 6 shows the display after a project is selected. To select a project, the user can enter data into any of the fields in the search grid, including Project ID, Title, Type, Manager, or Customer. When data is entered into a field, a smart lookup will display (example: The user starts typing the project IDs first number '1' and all the projects that start with '1' are displayed. As the user types the second number, '0', the list decreases to only those projects that start with '10' and so on until the user filters all the way to the example, 1002, or selects 1002 from the list displayed in the lookup). After a project is selected, the project information block is populated with the project's title, customer name, contract number, etc.

The displayed project information carries greater weight than the labels and is elevated off the page in presentation. No Budget in the original design (**Figure 1**) looks like a button, but is not, so here in **Figure 6** it is displayed in its true and necessary form - a prominent status indicator.

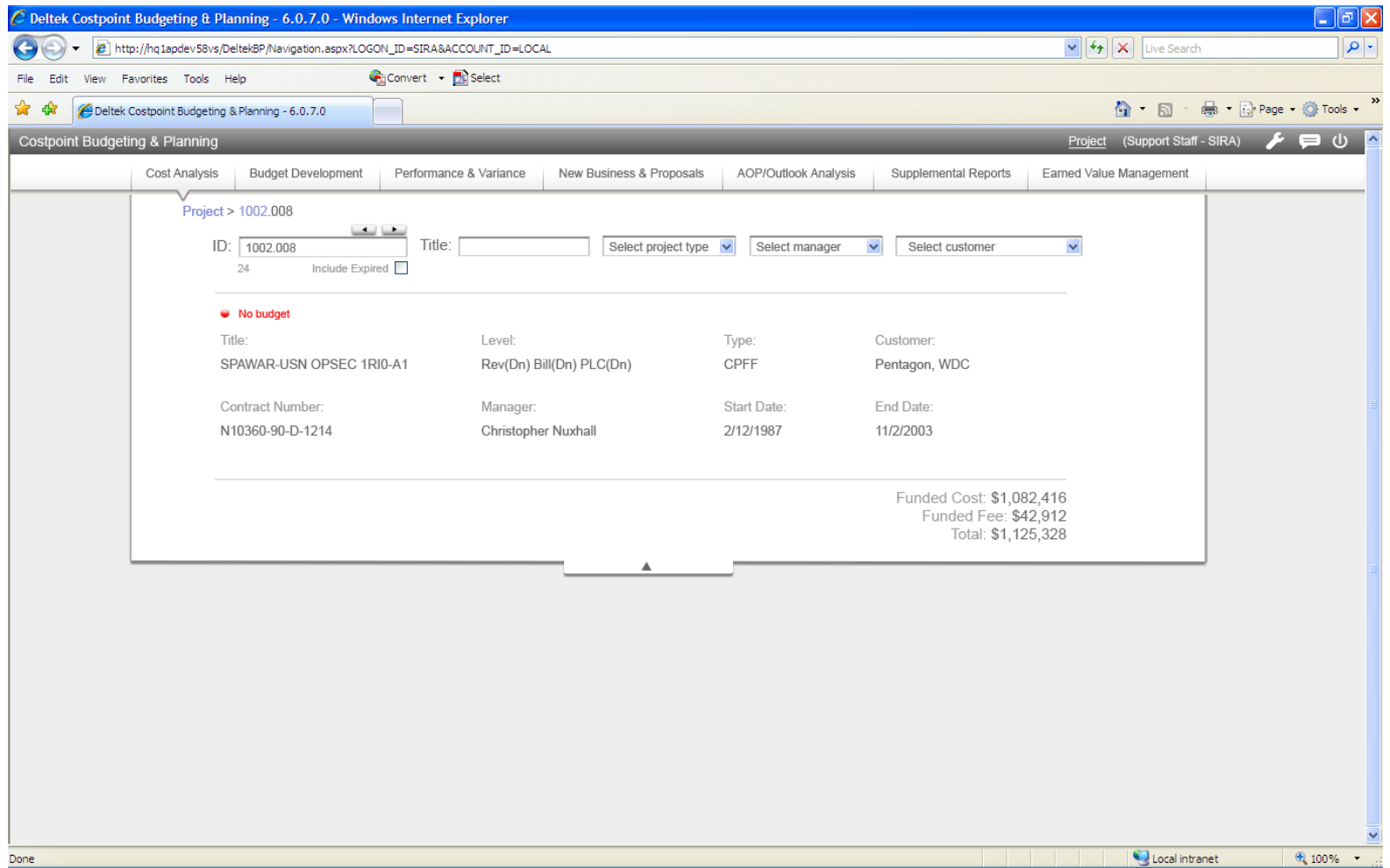


Figure 6 - Project Selected to Active Level

Figure 7 switches focus from Cost Analysis to Budget Development, understood by the downward pointing triangle at the bottom of the Budget Development menu item.

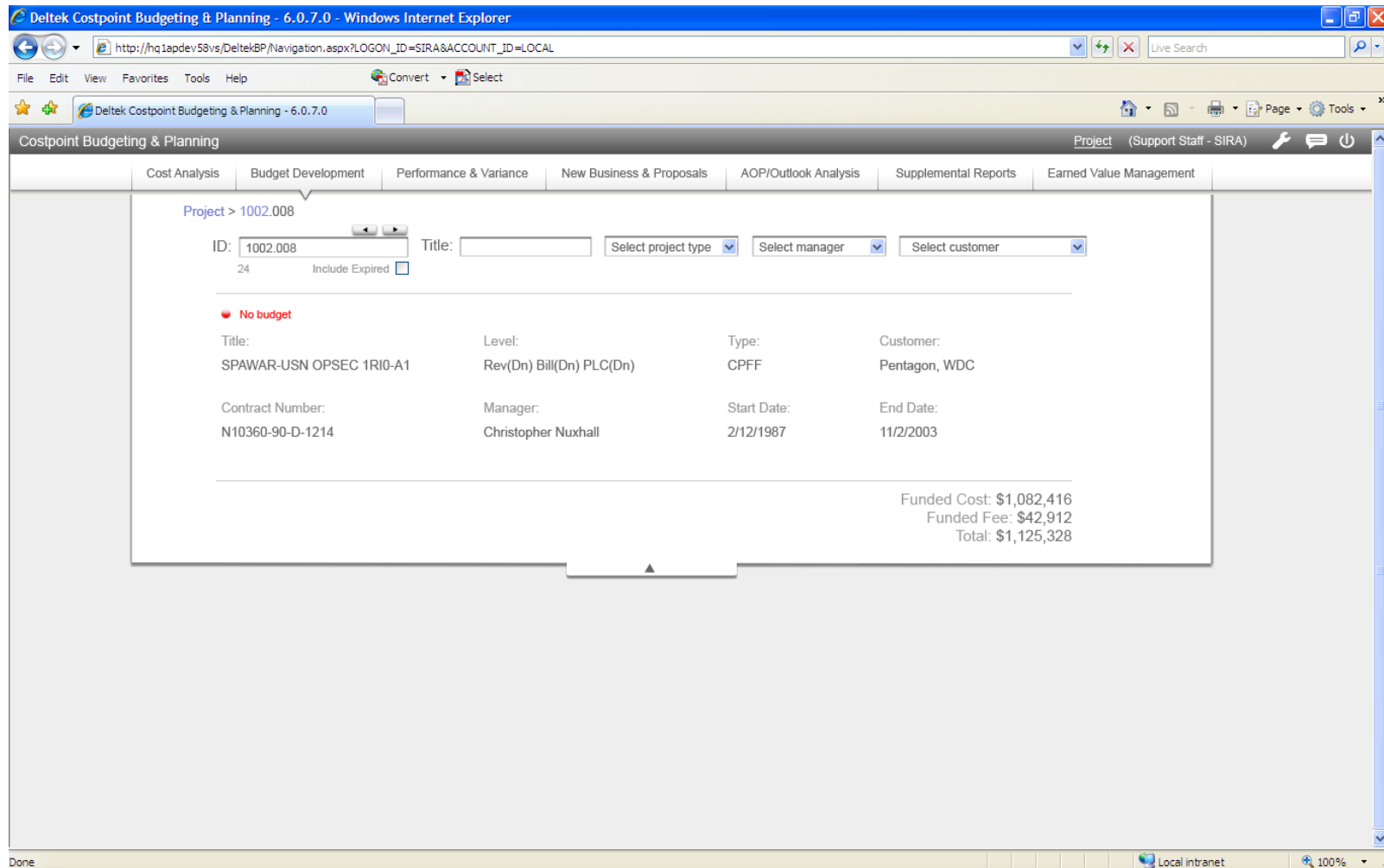


Figure 7 - Focus Budget Development

Figure 8 shows the Cost Analysis mega menu. The mega menu or flyout menu is displayed by mousing over Cost Analysis in the main menu. Since this is the default page for login and the current mockups series, no clicking is necessary to provide focus.

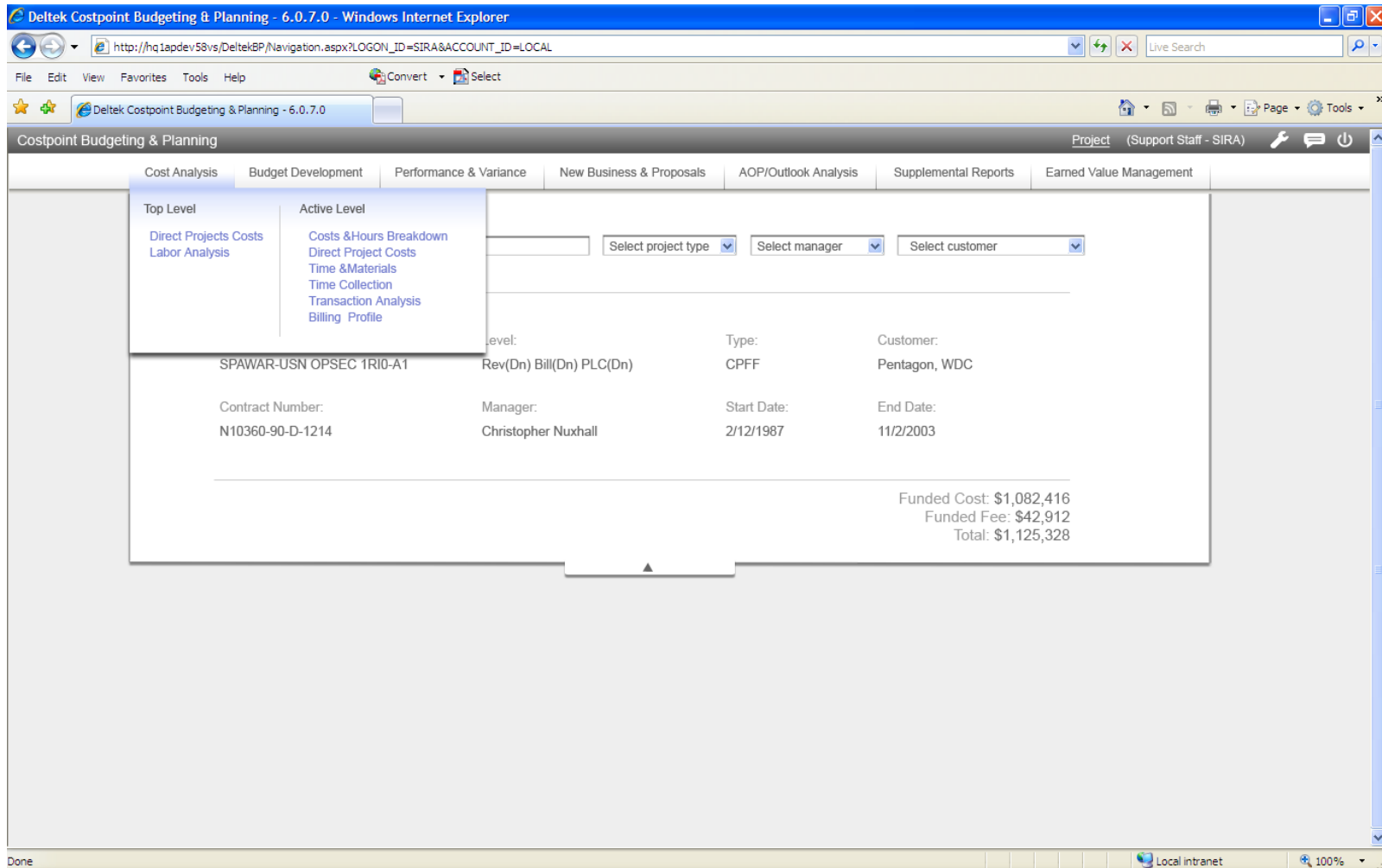


Figure 8 - Cost Analysis menu displayed

Figure 9 shows the Budget Development menu after the user mouses over Budget development in the main menu. Context focus though, is still on Cost Analysis. To change from, for example, the Cost Analysis context to Budget Development the user clicks Budget Development in the main menu or clicks a report or action on the mega menu. With this latter selection, in addition to launching the respective selection, page focus is changed to Budget Development. Sections are clearly marked, not overwhelming, and easily scannable/readable by the human eye.

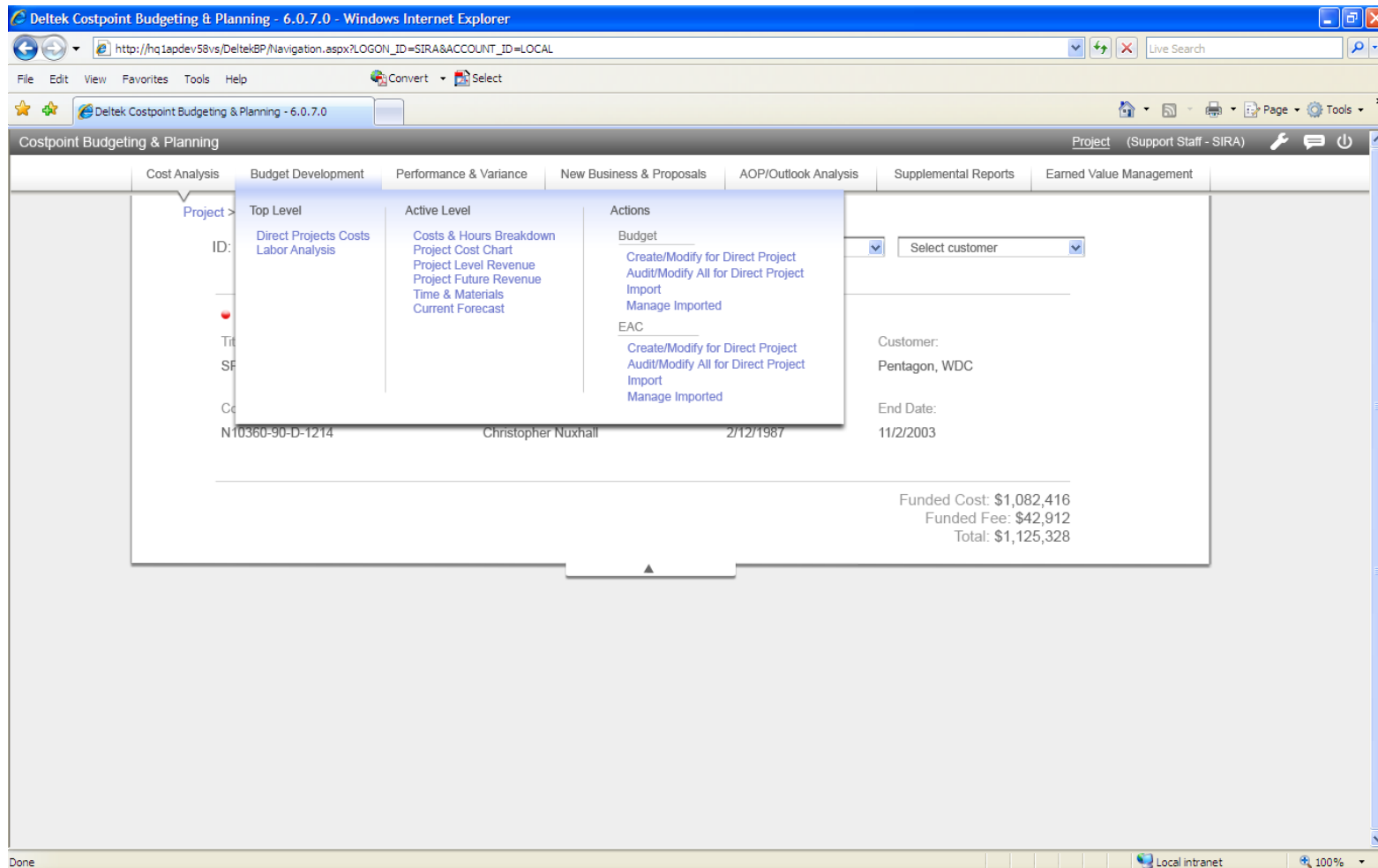


Figure 9 - Select Costs & Hours Breakdown from menu

In **Figure 10** the project information “shade” is retracted when the Costs and Hours Breakdown report configuration is displayed. Both the report and project information are still visible and the “shade” can be expanded to show more information. The report is currently pinned to the background, but can be lifted off and moved, minimized, and room can be made for multiple reports without the necessity of toggling through several different windows and trying to keep a mental track of very complex information.

Note the focus change, as described previously, to Budget Development in **Figure 10**. The user clicked Budget Development from the main menu, the mega menu retracted, report configuration for the selected report displays, and the page is ready for further project work (e.g., changes to project page selection or selection of a report or action from the mega menu by mousing over again).

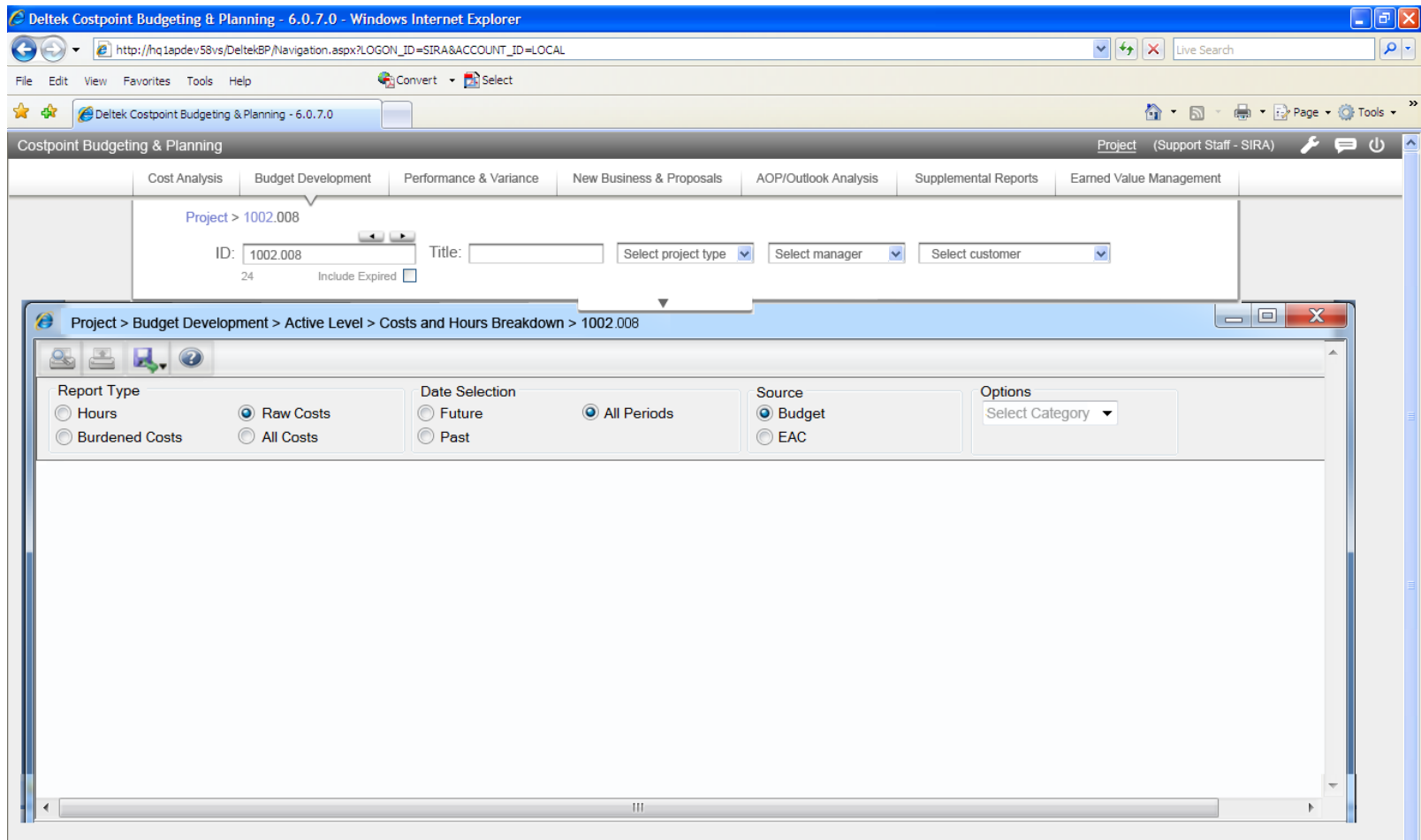


Figure 10 - Report Configuration Display

In **Figure 11** the Costs and Hours Breakdown report is configured and run, and information is displayed.

Project > 1002.008
 ID: 1002.008 Title: Select project type Select manager Select customer
 24 Include Expired

Project > Budget Development > Active Level > Costs and Hours Breakdown > 1002.008

Project	Category	ID	Name	Total Raw Budget	ITD Raw Budget	Dec-12	Jan-12	Feb-12	Mar-12	Apr-12	May-12	Jun-12
1011.023	Labor	000660	ABERNATHIE, TIMOTHY	15,219.41	15,219.41	0	0	0	0	0	0	0
1011.023	Labor	000277	BEALL, PHILIP	28,905.64	28,905.64	0	0	0	0	0	0	0
1011.023	Labor	000910	GANDY, TERI	9,741.66	9,741.66	0	0	0	0	0	0	0
1011.023	Labor	000652	GERTENRICH, MICHELLE	6,823.95	6,823.95	0	0	0	0	0	0	0
1011.023	Labor	001373	KERNEK, KYLE	18,909.50	18,909.50	0	0	0	0	0	0	0
1011.023	Labor	001223	LAKE, TONY	18,765.13	18,765.13	0	0	0	0	0	0	0
1011.023	Labor	000873	LEFTWICH, LIZETTE	27,796.31	27,796.31	0	0	0	0	0	0	0
1011.023	Labor	000631	MAJEWSKI, DEREK	46,648.65	46,648.65	0	0	0	0	0	0	0
1011.023	Labor	000482	NEGRAY, ROBERT	29.52	29.52	0	0	0	0	0	0	0
1011.023	Labor	000311	PRATT, ELIZABETH	17,697.46	17,697.46	0	0	0	0	0	0	0
1011.023	Materials	10278	BELL POWDER COATING, INC.	1,290.00	1,290.00	0	0	0	0	0	0	0
1011.023	Materials	10279	BELL POWER COATING, INC.	576.00	576.00	0	0	0	0	0	0	0
1011.023	Materials	001761	BOOTH, MICHAEL	39,806.25	39,806.25	0	0	0	0	0	0	0
1011.023	Materials	10414	CD LYON CONSTRUCTION, INC	13,144.16	13,144.16	0	0	0	0	0	0	0
1011.023	Materials	10817	FARIN INDUSTRIES, INC.	20,000.00	20,000.00	0	0	0	0	0	0	0
1011.023	Materials	11123	J&R MACHINE, INC.	23,856.00	23,856.00	0	0	0	0	0	0	0
1011.023	Materials	12257	UNION TOOL	7,750.00	7,750.00	0	0	0	0	0	0	0
1011.023	Subcontracts	10114	AMSEC LLC	39,900.94	39,900.94	-147.06	0	0	0	0	0	0
1011.023	Travel	000277	BEALL, PHILIP	194.90	194.90	0	0	0	0	0	0	0

Figure 11 - Report Generated/Displayed