

**2015**



**2019**

# THE WFM DESIGN DOCS

# 2015?!?!

Who cares what  
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The docs we have today are designed to **maximize designers' time and influence** in WFM's planning cycles. Knowing how the docs evolved will help you understand what to expect from them.

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Uniquely among the Imaging tracks, WFM's Wireframes are treated as requirements, and tracked at a level beyond the design org. If you decide to change them, you should understand who needs to be involved and adjust expectations for how long it will take.

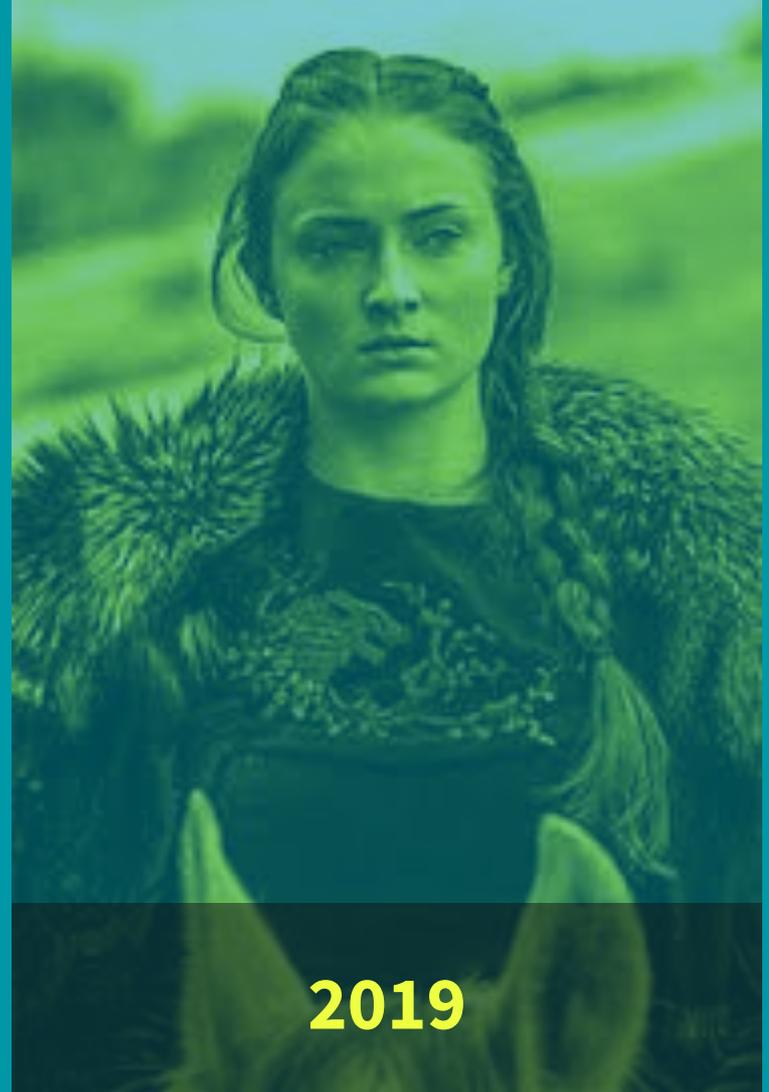
## WFM DESIGN DOCS IN 2015

- Formal, elaborate, academic, helpful, virtuous, unwieldy.
- Designed for a different world than the one they found themselves in.

**2015**

## WFM DESIGN DOCS TODAY

- Adapted to their environment (V&V, Scrum Teams).
- Result of a strategic, track-vetted, massive refactor in SP6.
- Took a lot of work to get them that way.
- They're not for you.



2019

# WFM in 2015

3 full-time designers

Last sprint of a release (V&V)  
spent updating wireframes to  
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On WFM, **wireframes are considered requirements**. The system must exactly match the wireframe prior to release.

- **Theory:** Gives design leverage to push the product to meet UX standards.
- **Practice:** Crunch time + limited dev resources means designers usually have to change the wireframes to match what the team ended up building.

# WFM in 2015

3 full-time designers

Last sprint of a release (V&V)  
spent updating wireframes to  
match the system

During V&V, QA compares every wireframe to the build and files bugs when they don't match.

Usually, we just change the wireframes.

But we do have the option to refuse to do that, which would trigger a track-wide review.

This principled refusal is a nuclear option. We don't want to lose it, but it should never come to that.

# WFM in 2015

3 full-time designers

Last sprint of a release (V&V)  
spent updating wireframes to  
match the system

POs and PMs use this sprint to plan the next release.

Strategically, if we want to **influence the product**, this is where we should be spending **most of our time** -- helping to understand and shape the release and making sure our roadmap is socialized as part of the solution.

# WFM in 2015

3 full-time designers

Last sprint of a release (V&V)  
spent updating wireframes to  
match the system

Instead, design teams were spending  
the majority of their time in this sprint  
updating docs from the last release.

# WFM in 2015

3 full-time designers

Last sprint of a release (V&V)  
spent updating wireframes to  
match the system

The V&V process for design docs involved a huge amount of tedious coordination among designers about who would update what part of the docs (as you'll see in a moment).

It was insane.

The designers who created it knew it was insane.

They dreaded it.

# WFM in 2015

3 full-time designers

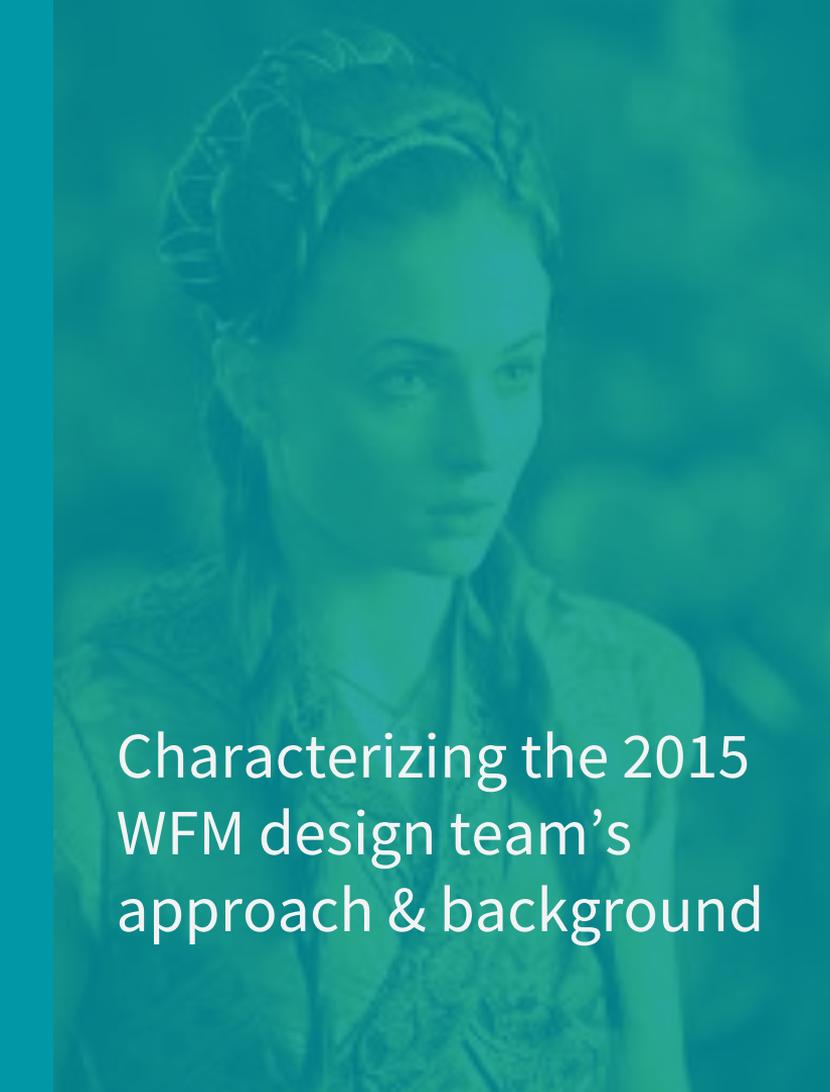
Last sprint of a release (V&V)  
spent updating wireframes to  
match the system

I was hired to help change / fix this.

# WFM in 2016

4 full-time designers

- Anna von Reden
- Erika Gatts
- Susanna Zlotnikov
- Suzanne Kafantaris (May 2016)



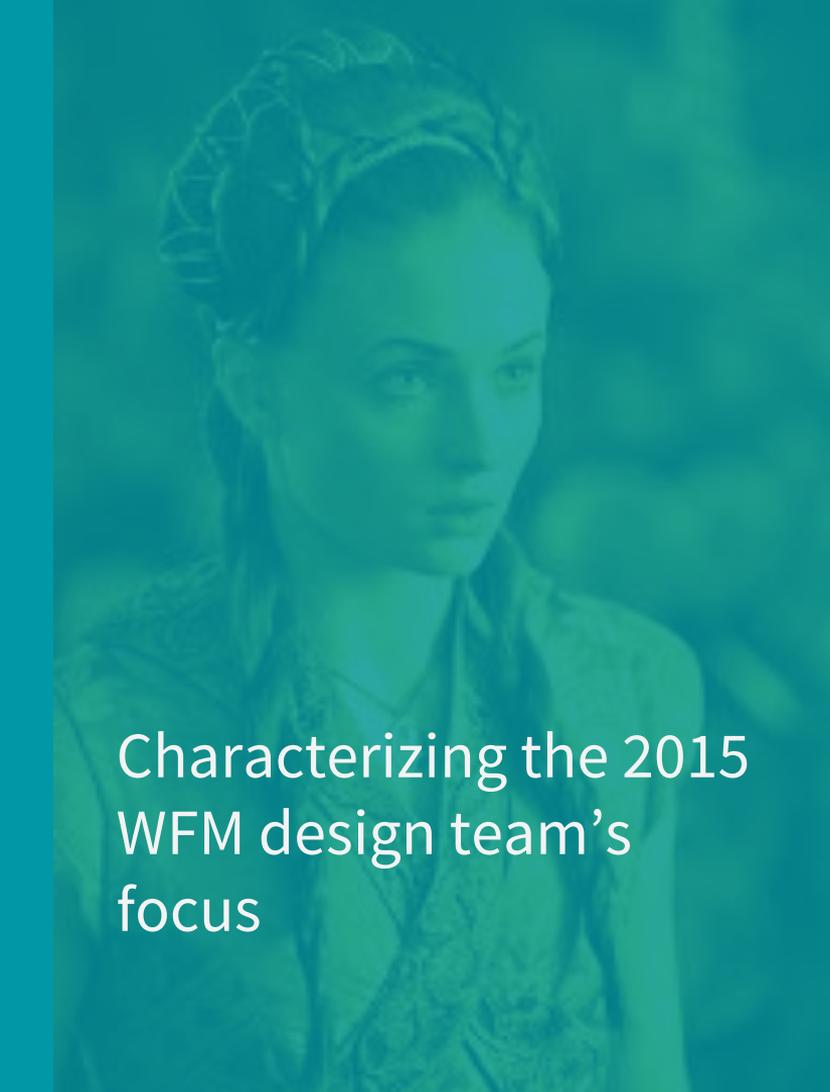
## Characterizing the 2015 WFM design team's approach & background

**High-integrity** approach to researching / documenting workflows. UPMC = academic institution, committed to research.

**Adversarial** relationship to POs (who want design options *ASAP*).

**Limited experience** with gnarly enterprise systems and their flavor of scrum / agile.

**SDx & Vx.** Limited digital design experience. Resist applying design patterns globally, every feature an independent research project. Quiet, scholarly environment. Design done in silos. No team crits.

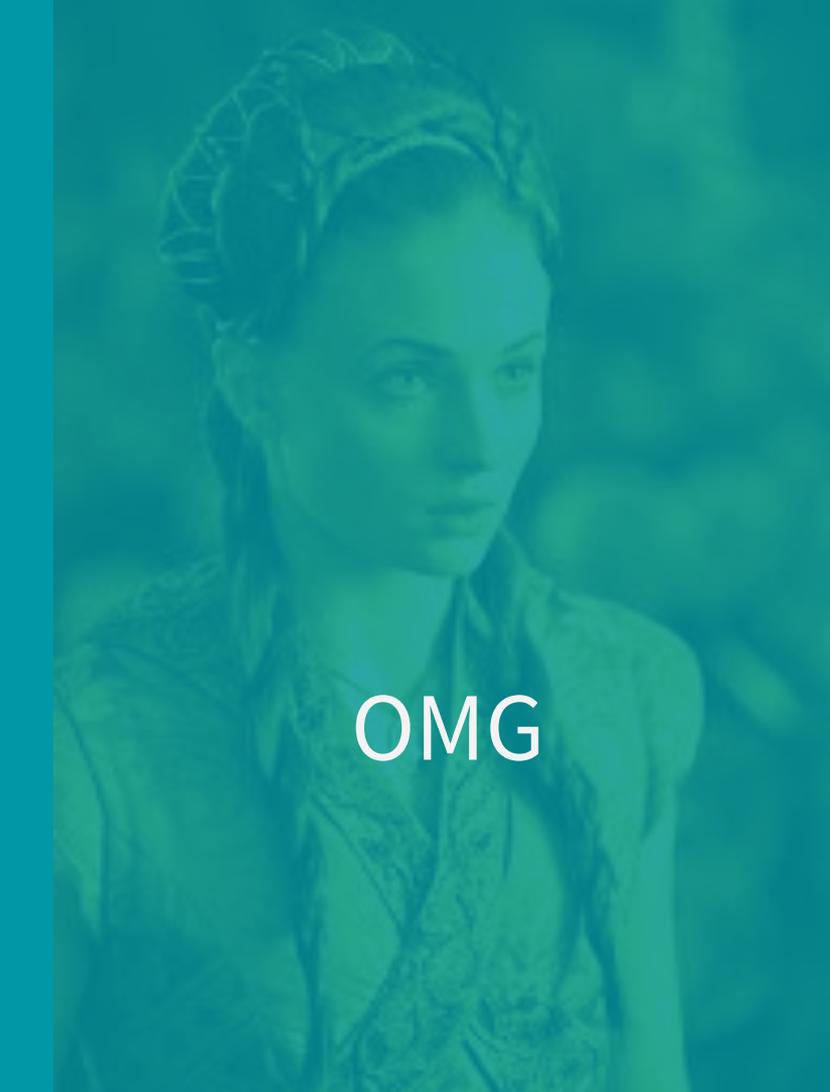


## Characterizing the 2015 WFM design team's focus

### TIME BREAKDOWN DURING SP4:

- 5% release planning
- 30% research
- 15% wireframe dev
- 10% dev team iteration
- 40% V&V docs wrangling

Mostly collaborating with POs  
Mostly collaborating with each other  
Mostly solo



OMG

## TIME BREAKDOWN DURING SP4:

- 5% release planning
- 30% research
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Mostly collaborating with POs  
Mostly collaborating with each other



Only one designer of three could be spared from V&V for this.

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## SOLUTION APPROACH

Goal: Figure out how much time we want for upfront planning activities and apply strategic cuts elsewhere to get it.

Focus on areas we (the design org) can control, stop fighting things we can't (not gonna change GE's market strategy or pressure on POs for faster turnaround on design).

Fix "keystone" problems.

Propose cheap, incremental pilot changes that can be rolled back, not terminal or expensive solutions.

- 5% release planning

- 30% research

- 25% wireframe creation

- 40% V&V docs wrangling

- 10% release planning
- 30% research
- 20% wireframe creation
- 40% V&V docs wrangling

Why in the world did it  
take this long to update  
these docs?

- 10% release planning
- 30% research
- 20% wireframe creation
- 40% V&V docs wrangling

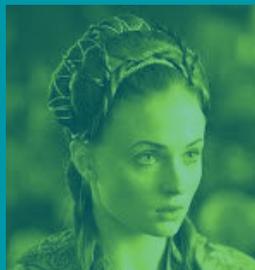
## The docs were designed to support shared dev team understanding...

- 1 wireframe for every feature.
- Elaborate doc structure, more like a printed book than production docs. Tons of front-matter, change-logs, *chapters*...
- Communicated high-level feature intent, workflows, research results. Lots of examples using full system context. Encoded changes to the feature over multiple releases + detailed specs for colors, fonts, spacing, and HDx components (OG GE design system).

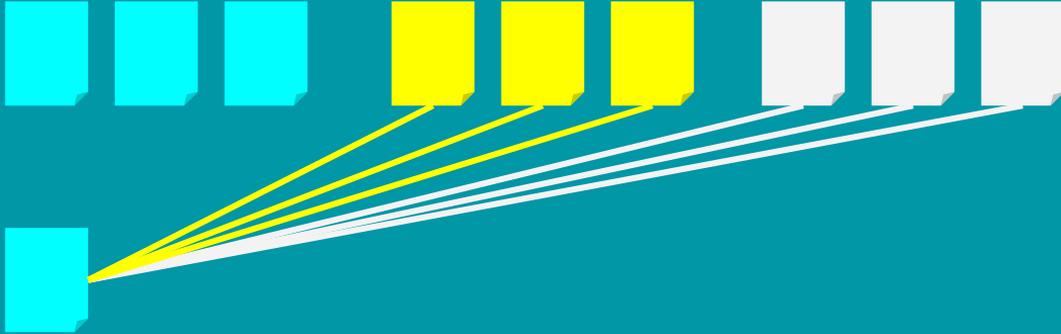
- 10% release planning
- 30% research
- 20% wireframe creation
- 40% V&V docs wrangling

## V&V testers filed bugs against:

- Typos, misspellings, page numbers, callouts, chapter numbers, headings.
- Visual differences between the built system and *any* images appearing in a wireframe, including those used only for helpful surrounding context.
- Any differences between the specced and built colors, fonts, spacing and HDx components.

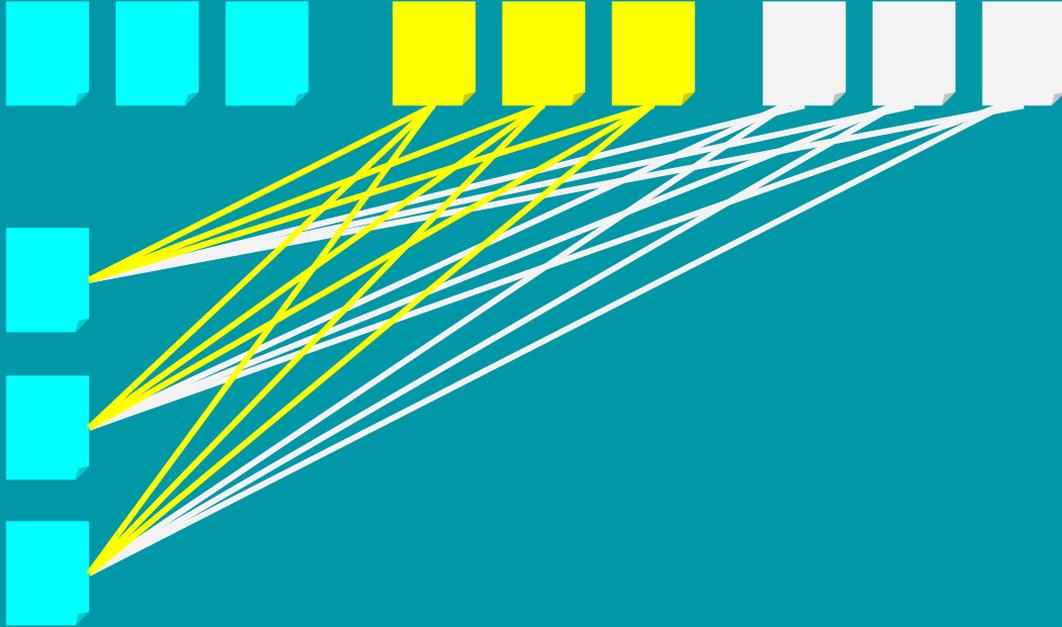


Wireframes produced in silos. No crits. Lots of images of the existing system provided for holistic context.



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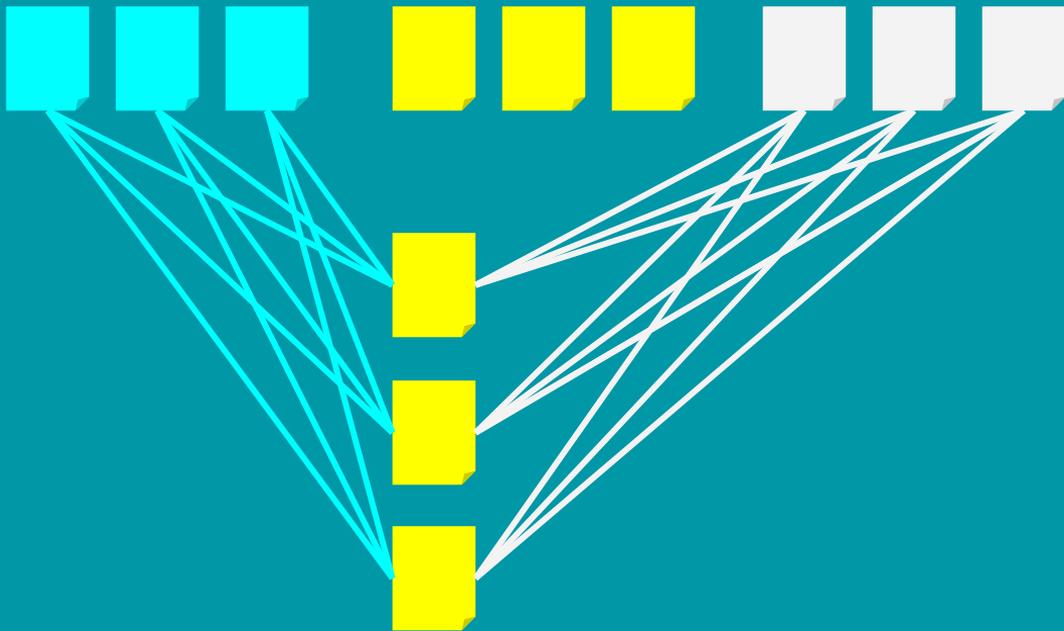
V&V -- all images in every doc checked for accuracy against changes elsewhere.



Wireframes produced in silos. No crits. Lots of images of the existing system provided for holistic context.

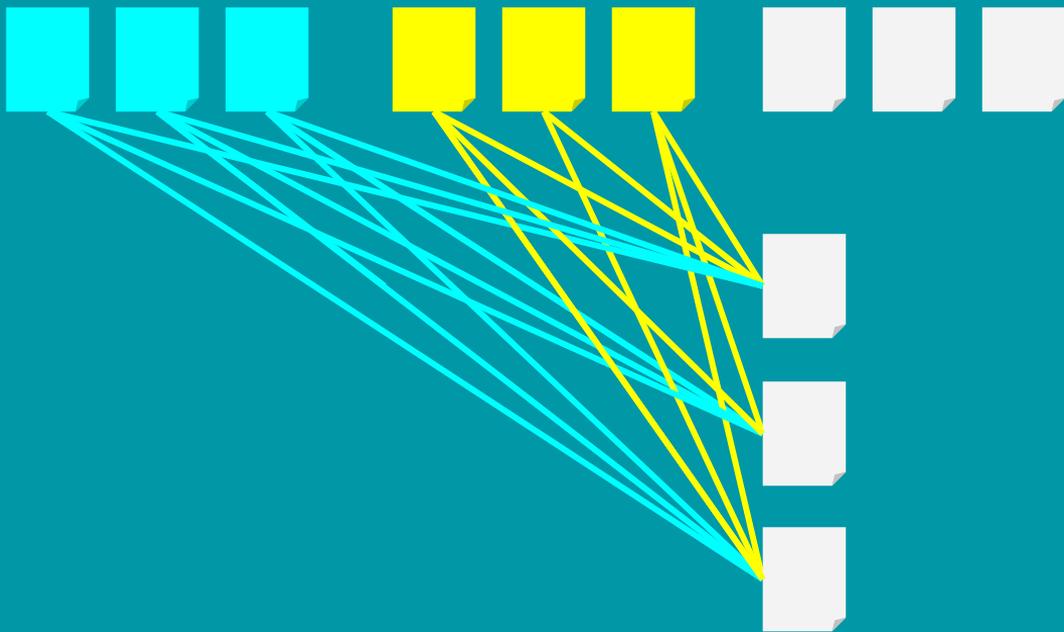
*Every image in every doc is required to show the latest state.*

So they all have to be checked against each other...



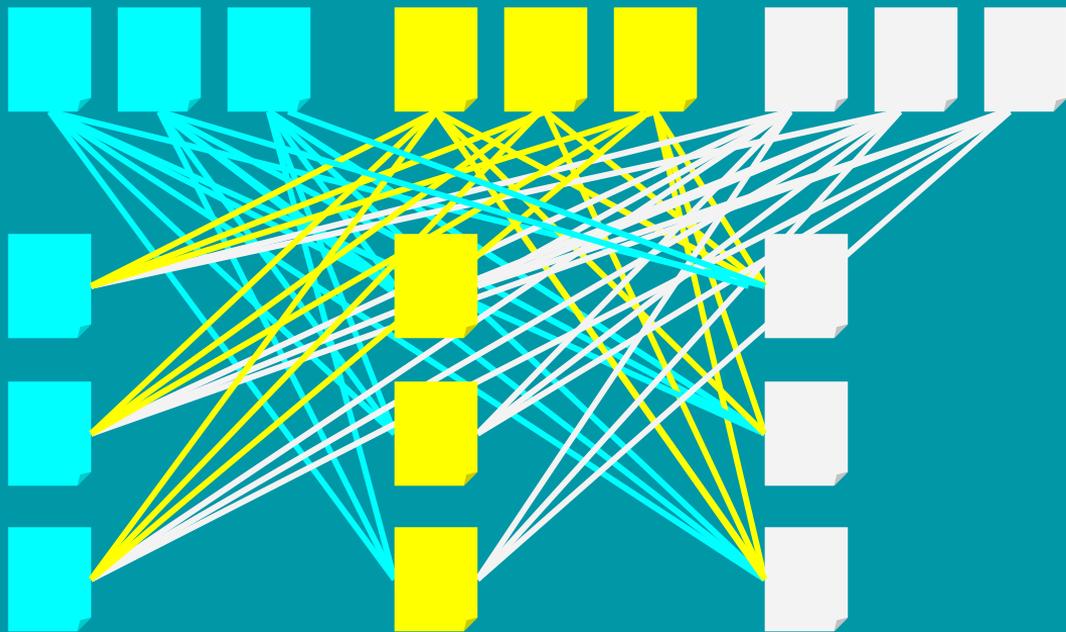
Wireframes produced in silos. No crits. Lots of images of the existing system provided for holistic context.

And they all have to be corrected if there are discrepancies.



Wireframes produced in silos. No crits. Lots of images of the existing system provided for holistic context.

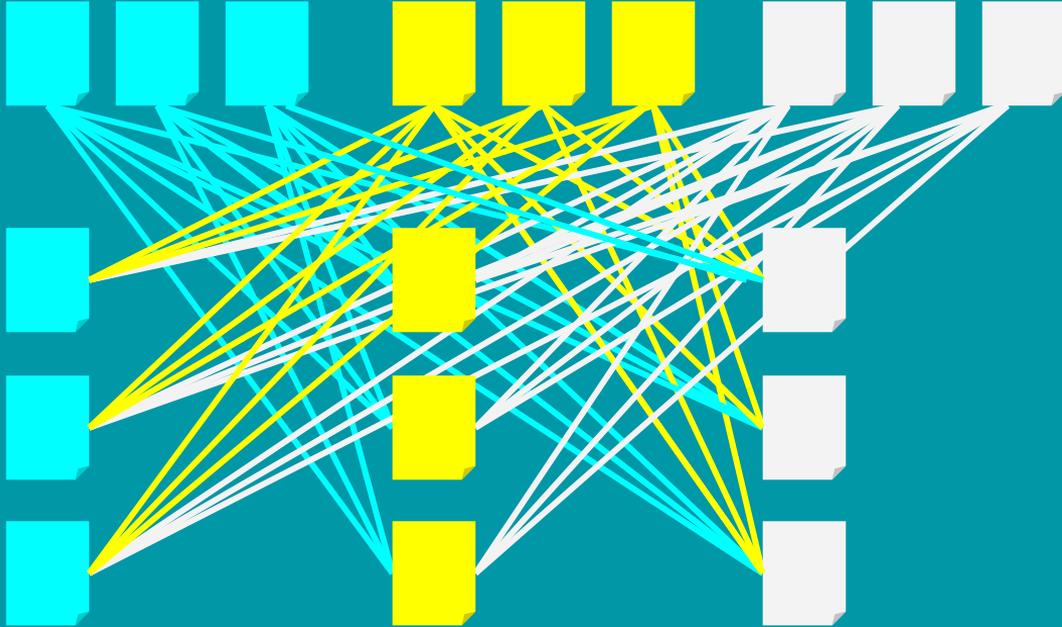
Those corrections need to be coordinated among docs and designers.



Wireframes produced in silos. No crits. Lots of images of the existing system provided for holistic context.

In *this system*, with these external documentation requirements, **context is expensive.**

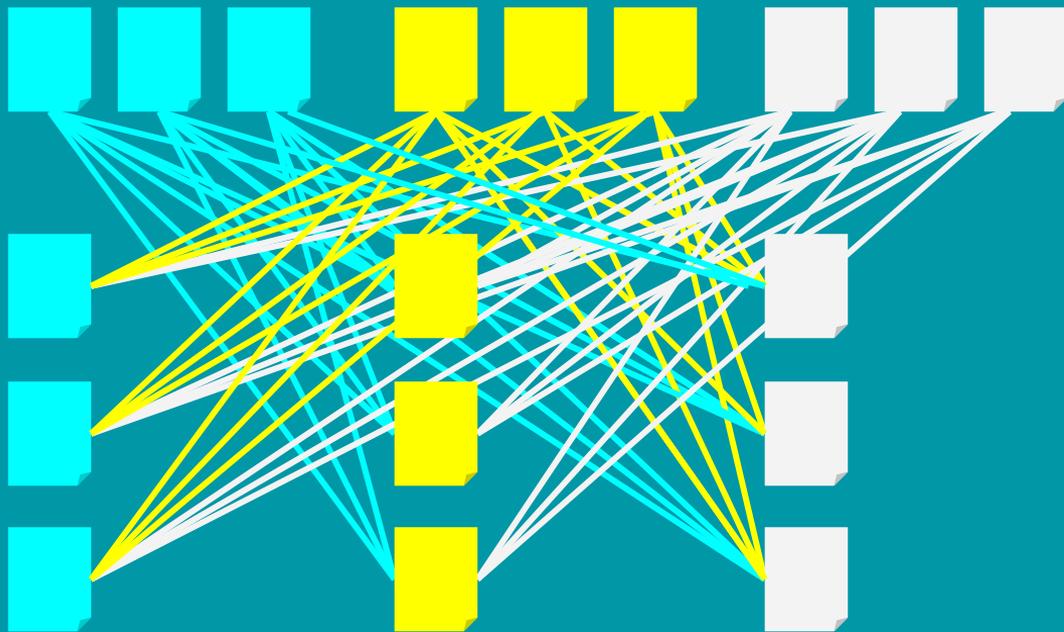
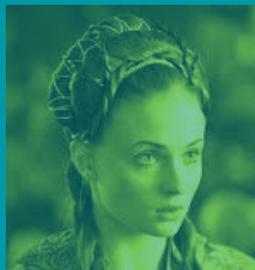
*Helpfulness is expensive.*



Aside: contextualizing a feature for the benefit of the development team is the PM / PO's job.

They have many more scalable, agile and managed ways to do this (user stories, DoRs, standups).

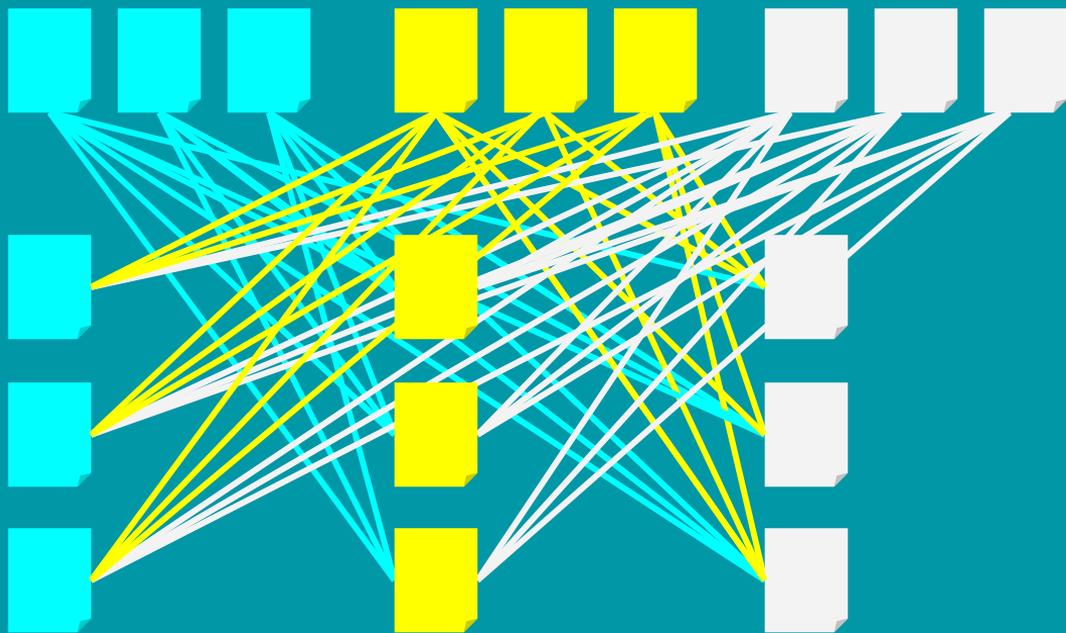
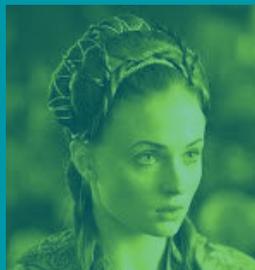
Just because design *can* do this, doesn't mean it's an effective or strategic use of design resources-- especially when the cost of doing this is so high.



The problem was actually *worse* than it looks here, because...

- Every document encoded multiple feature states over multiple releases, in “chapters” ...
- ...making it hard to use symbols and other global system assets. *Every single instance had to be updated.*
- Frontmatter and cruft in the docs made it hard for designers unfamiliar with a particular doc structure to unpick which parts needed to change.

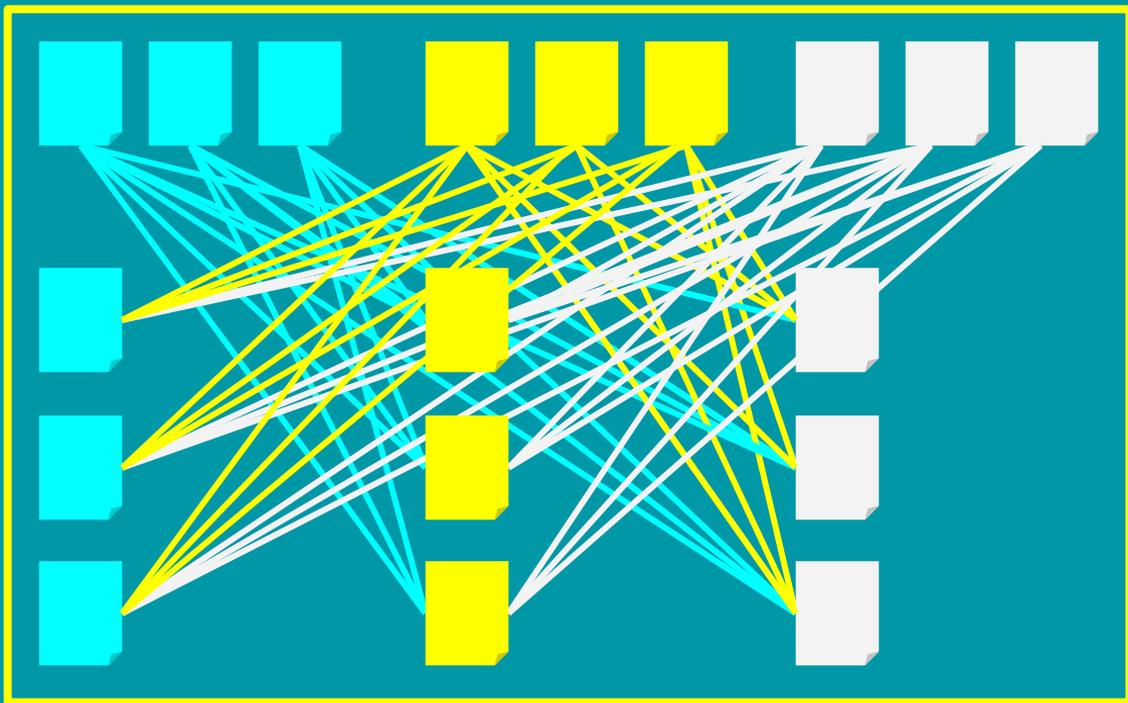
This nest of intertwined cross-doc contaminations took *three full-time designers four weeks* to sort out, coordinate and fix, every release.



These designers had the best intentions, but they were bringing Medieval tools to an industrial system.

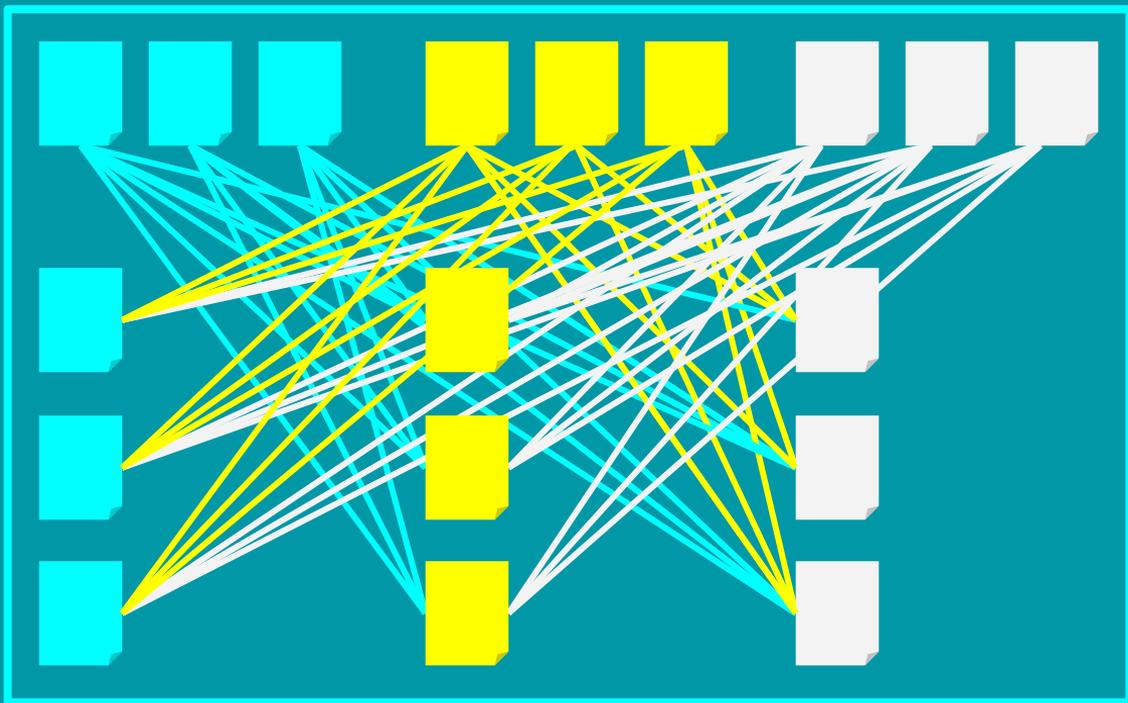
Root problems:

- Crusty docs.
- High cost of providing helpful context.
- Non-linear increase in maintenance costs over time.



As a design team, we had control over these two aspects of the docs. We could make them less crusty, and we could mask out all but the specific elements we were working on.

- Crusty docs.
- High cost of providing helpful context.
- Non-linear increase in maintenance costs over time.

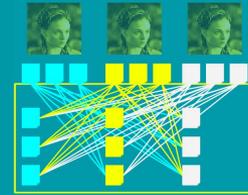


This was the argument we used to get track-level buy-in to change the overall doc structure and deliverables expected of us, which required other people to do work updating test scripts and such.

- Crusty docs.
- High cost of providing helpful context.
- Non-linear increase in maintenance costs over time.

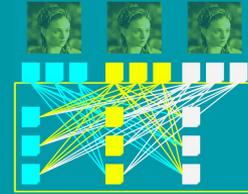
The cost of cross-checking and updating every feature doc for every release increases exponentially over time.

R1: 9 feature docs

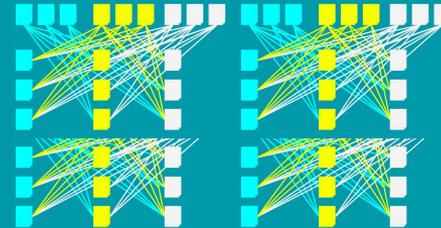


The cost of cross-checking and updating every feature doc for every release increases exponentially over time.

R1: 9 feature docs



R2: 9 feature docs +  
R1: 9 feature docs =  
18 feature docs

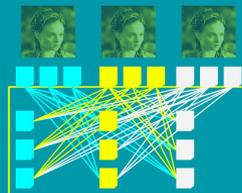


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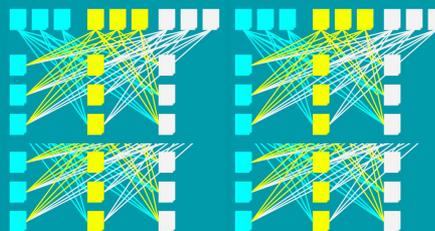
This cost is borne by the entire track, not just design.

This is expensive for everyone!

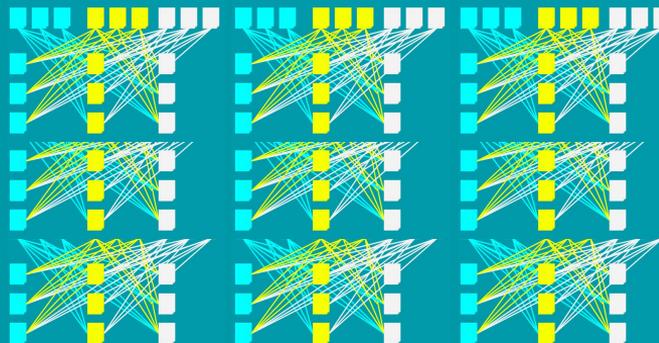
R1: 9 feature docs



R2: 9 feature docs +  
R1: 9 feature docs =  
18 feature docs



R3: 9 feature docs +  
R2: 9 feature docs +  
R1: 9 feature docs =  
27 feature docs





## WFM Core Design Team in 2017

Jenica Welch

Steph Wirtz

Suzanne Kafantaris

In 2017 the design team that created the original WFM doc structure slowly peeled off (one to an Enterprises project for Microsoft, another to Iceland, another to Product Management for ZFP).

A more experienced, cynical and grizzled team of designers took over.

That team took a strategic bonesaw to the design docs.



First, we streamlined the doc templates, which we control:

- Stripped out front-matter, chaptering, in-doc pagination, change logs and other cruft.
- Deep cuts to feature intent, research results, secondary helper workflows.
- Removed or masked all visual context unrelated to a specific feature.



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We did have to socialize these changes internally and get the blessing of our design managers to make them.



This is why so many of our design docs have components that look like this.

It looks half-assed. No designer would put this in their portfolio.

It's a strategic adaptation to the V&V process.

We aggressively mask out all content and context unrelated to the specific component being described, so we won't have to cross-check it for V&V bugs.



First, we streamlined the doc templates, which we control:

- Stripped out front-matter, chaptering, pagination, change logs and other cruft.
- Deep cuts to feature intent, research results, secondary helper workflows.
- Removed or masked all visual context unrelated to a specific feature.

Next, we worked with PO's and dev mgt (especially **Chloe Bark**) on a new doc structure to address the looming feature-doc scalability crisis.

Remember: these docs were owned and tracked by QA.

We could change what was inside them, but we couldn't change their names or just stop delivering some of them without permission from the track.

## Other problems we wanted to solve:

- Decouple research results from V&V docs so they can be more easily searched for reuse.
- Decouple proposed future state and roadmap goals from V&V docs. Find another way to express the design roadmap (spoiler: prototype).
- Restrict docs to feature changes in a single release.
  - Lets us take advantage of global symbols and get a view of the state of the system for a release as a whole.
  - Easier to find and update information tied to patches for older releases.

The result (today) is that we deliver two kinds of wireframes:

Component Wireframes

Workflow Wireframes

## Component Wireframes

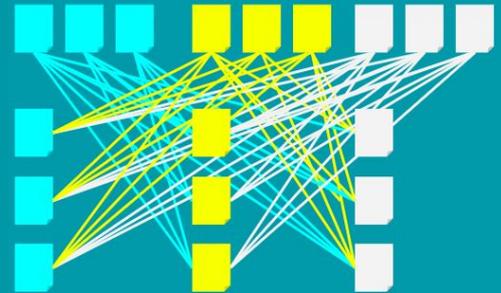
## Workflow Wireframes

- **PRIMARY CONSUMER:** QA Teams in charge of V&V.
- **PRIMARY PURPOSE:** From design perspective, maintains UX as a keeper of requirements, and retains our leverage to push teams to change things that don't meet our standards.

# Component Wireframes

## Workflow Wireframes

- Explicitly **not** intended to communicate **context, research, or related workflows in different components.**
- Explicitly **not** intended to provide **baseline ground truth** for the product as a whole.
- Because....

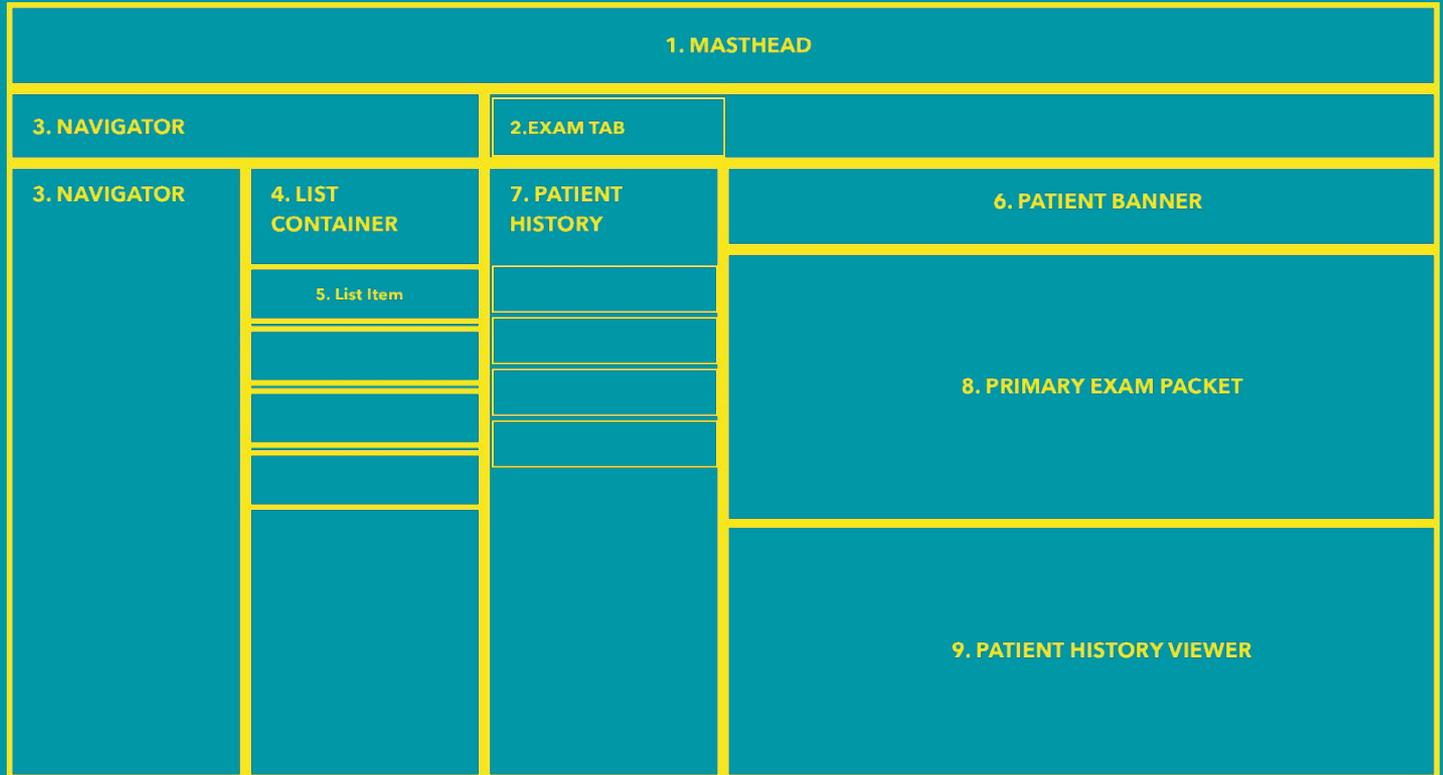


## Component Wireframes

## Workflow Wireframes

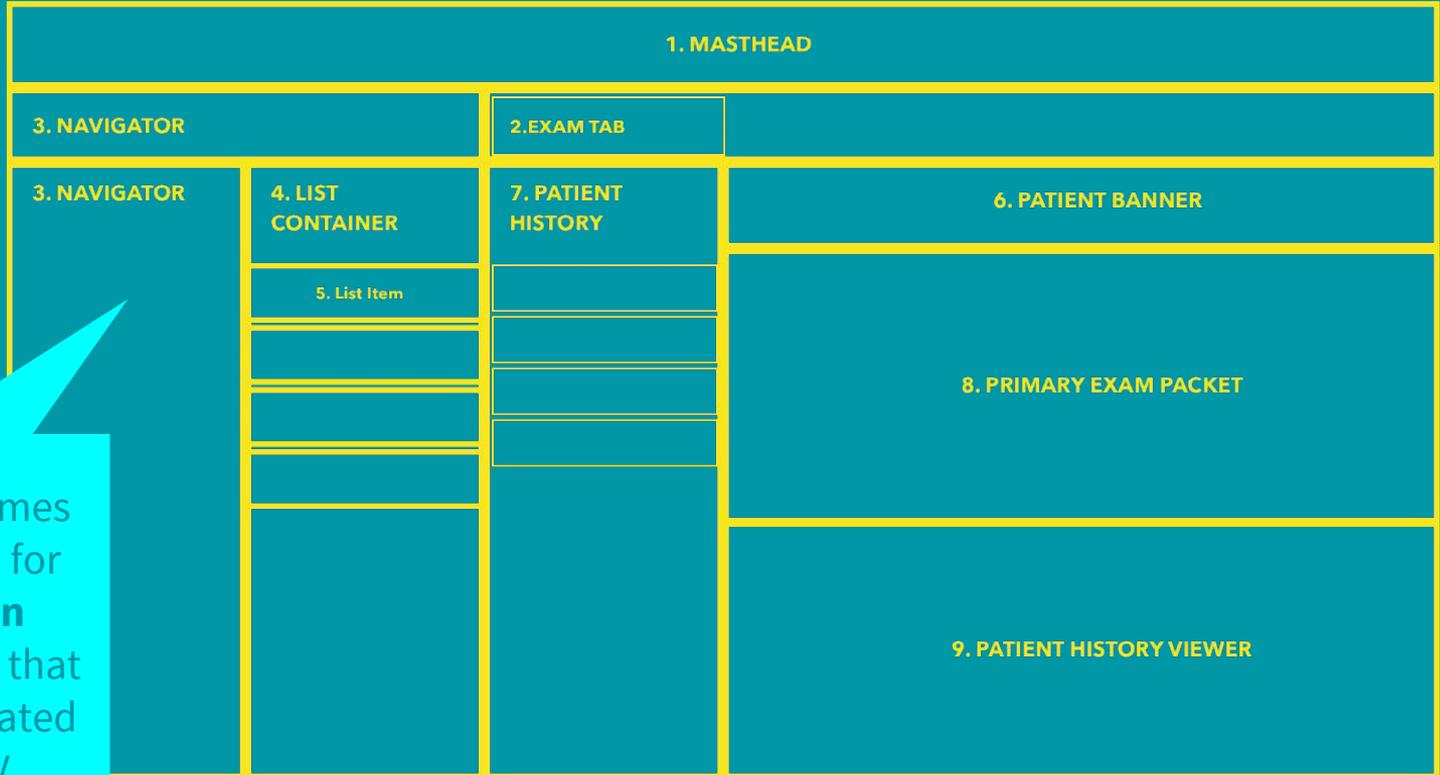
- Document structure designed to address scalability concerns with feature-focused wireframes.
- Pared dozens of feature docs down to 10, each describing the features of one high-level WFM component. No cross-component pollution.
- There are never more than 10 docs to update during the V&V sprint for any given release.

Official WFM  
Component  
Map and  
Component  
Wireframe  
names for V&V



10. SIGN IN

Official WFM  
Component  
Map and  
Component  
Wireframe  
names for V&V



Changing these names -- as we want to do for “**Navigator**” to “**Pin Bar**” -- is a process that needs to be negotiated with QA during V&V

# Component Wireframes

## Workflow Wireframes

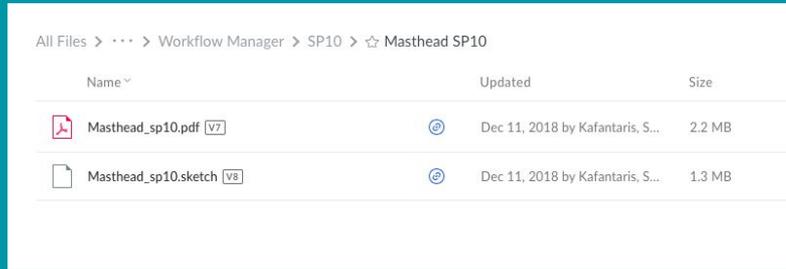
All Files > NGIP (Next Generation Imaging) > Workflow Manager > ☆ SP6

Name ▾	Updated
 1 Masthead	Jun 21, 2017 by Kafantaris, Su...
 10 Sign In	Jun 21, 2017 by Kafantaris, Su...
 2 Exam Tabs	Jun 21, 2017 by Kafantaris, Su...
 3 Navigator	Jun 21, 2017 by Kafantaris, Su...
 4 List Container	Jun 21, 2017 by Kafantaris, Su...
 5 List Item	Jun 20, 2017 by Kafantaris, Su...
 6 Patient Banner	Jun 20, 2017 by Kafantaris, Su...
 7 Patient History List	Apr 6, 2018 by Kafantaris, Suz...
 8 Primary Exam Packet	Jun 21, 2017 by Kafantaris, Su...
 9 Patient History Viewer	Jun 20, 2017 by Kafantaris, Su...

- We created the first set of Component Wireframes during SP6 V&V.
- Pulled all relevant details from prior feature docs for 5 releases into a streamlined template for their Component parents.
- Mapped every feature doc to its Component parent in a big spreadsheet, shared with V&V teams.
- Archived all the feature docs from prior releases.

# Component Wireframes

## Workflow Wireframes



All Files > ... > Workflow Manager > SP10 > ☆ Masthead SP10

Name	Updated	Size
 Masthead_sp10.pdf <span>v7</span>	 Dec 11, 2018 by Kafantaris, S...	2.2 MB
 Masthead_sp10.sketch <span>v8</span>	 Dec 11, 2018 by Kafantaris, S...	1.3 MB

Component Wireframe folders contain two files and nothing else:

- Source Sketch file
- Latest PDF

This is so we can easily inspect what's in a source file (usually -- not always -- a 1:1 relationship between Sketch and PDF), brief documents to any audience on the fly, and share direct links with POs and others.

For V&V, we transfer PDFs to the UX Docs folder in Perforce corresponding to the release. We're strict about filenames and location.

# Component Wireframes

## Workflow Wireframes

All Files > NGIP (Next Generation Imaging) > Workflow Manager > ☆ SP6

Name	Updated
1 Masthead	Jun 21, 2017 by Kafantaris, Su...
10 Sign In	Jun 21, 2017 by Kafantaris, Su...
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8 Primary Exam Packet	Jun 21, 2017 by Kafantaris, Su...
9 Patient History Viewer	Jun 20, 2017 by Kafantaris, Su...

We don't carry all Component Wireframes forward into the next release. We only bring forward those that have feature changes.

All Files > NGIP (Next Generation Imaging) > Workflow Manager > ☆ SP8

Name	Updated	Size
List Container	Feb 13, 2018 by Kafantaris, ...	2 Files
List Item	Sep 19, 2017 by A Prior Coll...	2 Files
Navigator	Sep 19, 2017 by A Prior Coll...	2 Files
Patient History List	Feb 13, 2018 by Kafantaris, ...	4 Files
Preliminary sketches	Oct 18, 2017 by A Prior Coll...	10 Files
Primary Exam Packet	Feb 13, 2018 by Kafantaris, ...	2 Files

# Component Wireframes

## Workflow Wireframes

List Container Component wireframe showing typical doc structure:

- Title page with release and last date updated
- Component Map
- Subsections corresponding to high-level features.

V3 ListContainer\_sp10.pdf ©  
List Container SP10 - Updated Mar 22, 2019 by Kafantaris, Suzanne

1 **List Container**  
WIREFRAMES AND BEHAVIOR  
November 12 2018  
SP10

2 Component Map

3 INTRODUCTION

4 Overview & Components

5 What the Data & Behavior

6 Component Mapping

# List Container

## WIREFRAMES AND BEHAVIOR

November 12 2018  
SP10

### Component Map

MASTHEAD

# Component Wireframes

## Workflow Wireframes

All Component Wireframes follow the same structure.

V3 ListItem\_SP10.pdf ©  
List Item SP10 - Updated Dec 11, 2018 by Kafantaris, Suzanne

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- 
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- 

# List Item

## WIREFRAMES AND BEHAVIOR

December 11, 2018  
SP10

### Component Map

MASTHEAD		
NAVIGATOR	Exam Tab - Active	Exam Tab - Inactive

# Component Wireframes

## Workflow Wireframes

They use the same fonts, colors, and document decoration.

V7 Masthead\_sp10.pdf ©  
Masthead SP10 - Updated Dec 11, 2018 by Kafantaris, Suzanne

1 Masthead Component WIREFRAMES AND BEHAVIOR  
2 Component Map  
3  
4  
5  
6  
7

## Masthead Component WIREFRAMES AND BEHAVIOR

December 11, 2018  
SP10

### Component Map

MASTHEAD			
NAVIGATOR		Exam Tab - Active	Exam Tab - Inactive
PANELS WORK AREA	LIST CONTAINER	ASSOCIATED EXAMS	PATIENT BANNER
	List Item	Work Item	
		PATIENT HISTORY	PRIMARY EXAM PACKET
		Prior Request	
		Prior Request	
		Document	

# Component Wireframes

## Workflow Wireframes

Detail showing how features are represented.

V7 Masthead\_sp10.pdf  
Masthead SP10 - Updated Dec 11, 2018 by Kafantaris, Suzanne

7

8

9

10

11

12

13

### CONTEXT

#### Quick Search

- 1 Quick Search
- 2 Advanced Search
- 3 DICOM Q/R  
New button to be configured only for sites that use DICOM Q/R functionality. Use MDN default button for color and styling. Note: this button is also used in the same place for UPMCI's Exceptions Workflow. However this workflow is UPMCI-only and mutually exclusive to the DICOM Q/R workflow.
- 4 To Do Counter

#### Baseline Masthead Specifications

#### Search Bar Specs

**On Focus**

**Lost Focus**

**Time Range in Focus**

**On Type**

**On Focus Patient Name**

**Invalid Entry / Errors**

**On Hover**



# Component Wireframes

## Workflow Wireframes

More on this later.  
First we need to  
cover **Workflow  
Wireframes**

- During the V&V sprint, designers update these docs with changes and new features built during the release.
- We use this time for doc maintenance and tuning, incorporate new Sketch techniques, styles, symbols, and make general document style changes.
- Can use screenshots if it comes to that.
- Working to steadily minimize cruft and incorporate more styleguide-like state models.

# Component Wireframes

## Workflow Wireframes

- **PRIMARY CONSUMER:** Scrum teams.
- **PRIMARY PURPOSE:** Communicate design intent and options (threshold, objective, stretch) for features.
- Specific to the needs of a feature, sprint, and team.
- Not official requirements. Not cross-checked during V&V.
- Show workflows, future-state -- whatever the designer thinks would benefit a scrum team.
- Designers are free to experiment with form, structure, and method of documentation.

# Component Wireframes

## Workflow Wireframes

This is why my WW docs are different for **Baymax** (a mature team that sits near me) and **Imation** (in India - remote in space and time).

- **PRIMARY CONSUMER:** Scrum teams.
- **PRIMARY PURPOSE:** Communicate design intent and options (threshold, objective, stretch) for features.
- Specific to the needs of a feature, sprint, and team.
- Not official requirements. Not cross-checked during V&V.
- Show workflows, future-state -- whatever the designer thinks would benefit a scrum team.
- Designers are free to experiment with form, structure, and method of documentation.

# Component Wireframes

## Workflow Wireframes

This is why my WW template is different from Stanton's. He generated output in Sketchmeasure.

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# Component Wireframes

## Workflow Wireframes

Created as-needed during release sprints and stored in the SPX parent folder for the release (along with their Component Wireframes, which we build later).

All Files > NGIP (Next Generation Imaging) > Workflow Manager > ☆ SP10			
Name		Updated	Size
 List Container SP10		Mar 22, 2019 by Kafantaris,...	2 Files
 List Item SP10		Jan 14, 2019 by A Prior Coll...	2 Files
 Masthead SP10		Dec 11, 2018 by Kafantaris,...	2 Files
 Navigator SP10		Feb 26, 2019 by Kafantaris, ...	2 Files
 Patient Banner SP10		Nov 19, 2018 by Kafantaris,...	2 Files
 Patient History List SP10		Nov 20, 2018 by Kafantaris,...	2 Files
 Primary Exam Packet SP10		Nov 19, 2018 by Kafantaris,...	2 Files
 SP10 WFM Master Sketch File - OBE		Apr 3, 2019 by Kafantaris, S...	10 Files
 V&V Done		Dec 11, 2018 by Kafantaris,...	7 Files
 Workflow Wireframes 		Today by Kafantaris, Suzanne	119 Files

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All Files > ... > Workflow Manager > SP10 > ☆ Workflow Wireframes

Name	Updated	Size
 SP10_Masthead_IntegrationDashboard.sketch  V4	Sep 18, 2018 by Kafantaris, ...	1.3 MB
 SP10_Org-InstituteBasedWorklist_F6298.pdf  V3	May 11, 2018 by Kafantaris,...	947.7 KB
 SP10_SP901_ArchiveAdoptedIcon.pdf  V4	Jul 2, 2018 by Kafantaris, S...	758.3 KB
 SP10_Org-InstituteBasedWorklist_F6298.s...  V3	May 11, 2018 by Kafantaris,...	727.1 KB
 SP10_SP901_ArchiveAdoptedIcon.sketch  V3	Jul 2, 2018 by Kafantaris, S...	692.1 KB
 WFM Extended SP10.pdf	Jun 29, 2018 by Kafantaris, ...	659.6 KB
 SP10_R-ClickMenus_F6136.sketch  V4	May 23, 2018 by Kafantaris,...	513 KB
 SP10_R-ClickMenus_F6136.pdf  V3	May 23, 2018 by Kafantaris,...	457.7 KB
 SP10_CrossSiteScripting_F6381.sketch	Apr 17, 2018 by Kafantaris, ...	422.7 KB
 SP10_Masthead_AboutBox_F6394.sketch  V5	Jun 7, 2018 by Kafantaris, S...	415.9 KB
 US84580_ArchiveImagesError_PatientHistoryV...  V2	Sep 13, 2018 by Kafantaris, ...	366.3 KB
 SP10_RemoveTimelineButton.sketch  V2	Jun 13, 2018 by Kafantaris, ...	343.1 KB

# Component Wireframes

## Workflow Wireframes

These docs are flexible by design. Things often change release-to-release or even within a release, like the file organization scheme and document naming conventions.

All Files > NGIP (Next Generation Imaging) > Workflow Manager > ☆ SP11

Name	Updated	Size
 F1683 - Audit Trail 	Nov 16, 2018 by Kafantaris,...	2 Files
 F2289 - XE Remote Search 	Mar 26, 2019 by Kafantaris,...	8 Files
 F2495 - Manual Viewer Launch from Zero Image St...	Nov 14, 2018 by Kafantaris,...	6 Files
 F4038 - VIP Confidential Patient Workflow	Jan 23, 2019 by A Prior Coll...	4 Files
 F4661 - Manually Compare Selected Studies	Mar 26, 2019 by Kafantaris,...	18 Files
 F4664 - Mark Exam Dictated Transcribed Ref Only ...	Feb 26, 2019 by A Prior Coll...	4 Files
 F4889 - Wildcard Search	Feb 16, 2019 by Kafantaris, ...	1 File
 F6971 - Launch Exam Manager	Feb 15, 2019 by Kafantaris, ...	2 Files
 F6972 - Unreject Exam	Feb 11, 2019 by Kafantaris, ...	3 Files
 F7062 - Exam Type Status	Dec 12, 2018 by A Prior Col...	2 Files
 F7435 - WL Search, Sort and Prioritize Based o... 	Oct 4, 2018 by Kafantaris, S...	0 Files
 F7436 - Configure UV Preferences in WFM 	Oct 25, 2018 by Kafantaris, ...	4 Files

# Component Wireframes

## Workflow Wireframes

Workflow Wireframe sub-folders for different features contain:

- The Sketch source and the latest PDF
- Any related documents we used for context while designing the feature.
- OBE or “Graveyard” folders showing past iterations of the design.

All Files > ... > Workflow Manager > SP11 > ☆ F8004-DirectStreaming

Name	Updated	Size
 Archive Adopted Images Survey Summary.pdf	Apr 5, 2019 by Kafantaris, Suz...	910.8 KB
 F8004_DirectStreaming.pdf [v3]	Apr 5, 2019 by Kafantaris, Suz...	4.4 MB
 F8004_DirectStreaming.sketch [v5]	Apr 5, 2019 by Kafantaris, Suz...	3.1 MB
 Link to Survey	Apr 5, 2019 by Kafantaris, Suz...	--

All Files > ... > Workflow Manager > SP11 > ☆ F2289 - XE Remote Search

Name	Updated	Size
 OBE	Feb 12, 2019 by Kafantaris, Su...	3 Files
 RIS-I Notes copy.pdf 	Oct 23, 2018 by Kafantaris, Su...	1.5 MB
 Search Results WFM.png	Oct 23, 2018 by Kafantaris, Su...	155.9 KB
 SP11_XESearch.pdf [v6]	Mar 26, 2019 by Kafantaris, S...	964 KB
 SP11_XESearch.sketch [v9]	Mar 26, 2019 by Kafantaris, S...	894.2 KB
 SP11_XESearch_Future.sketch	Feb 14, 2019 by Kafantaris, Su...	1.2 MB
 user outreach suggestions.boxnote	Feb 1, 2019 by Kafantaris, Suz...	1.3 KB

# Component Wireframes

## Workflow Wireframes

Example doc for Imation:

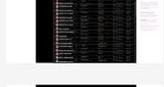
- Component diagrams showing relationships across multiple components.
- Excerpts from the Rally story explaining the feature and intent.
- Detailed walkthrough of interaction states.

V3 SP10\_Org-InstituteBasedWorklist\_F6298.pdf ©  
Workflow Wireframes - Updated May 11, 2018 by Kafantaris, Suzanne

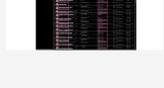
1 

2 

3 

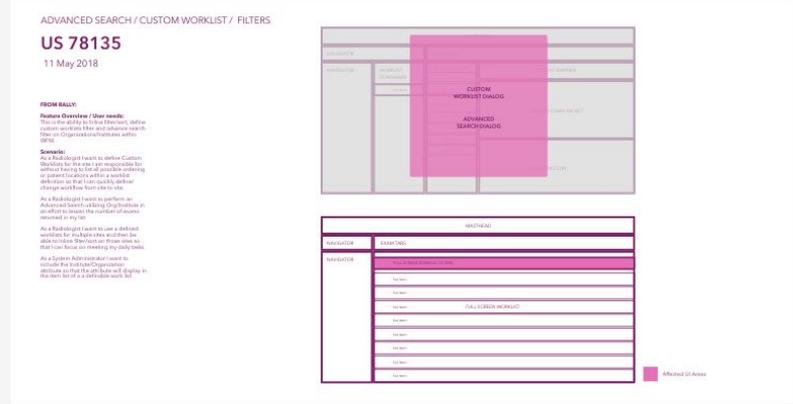
4 

5 

6 

ADVANCED SEARCH / CUSTOM WORKLIST / FILTERS  
US 78135  
11 May 2018

**FROM RALLY**  
**Feature Overview / User needs:**  
This story will allow the System Admins define custom workflow filters and advanced search filters on Org-based worklist within SP10.  
**Scenario:**  
As a Roleplayer I want to define Custom Workflow filters for the Org per organization for which I have the permission to define. I want to be able to define a number of filters and I want to be able to save the filters. I want to be able to change the filters from time to time.  
As a Roleplayer I want to perform an Advanced Search within the System Admins to be able to search for the filters.  
As a Roleplayer I want to use a defined workflow filter to create a custom worklist for the Org for which I have the permission to define.  
As a System Administrator I want to be able to define a number of filters for the Org for which I have the permission to define. I want to be able to change the filters from time to time.

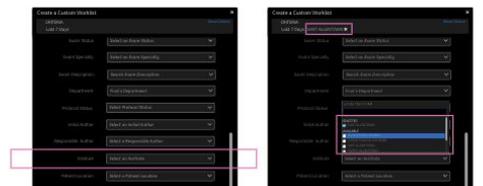


**CUSTOM WORKLIST**

EXISTING (SP9 SCREENSHOT)



PROPOSED (SP16)





# Component Wireframes

## Workflow Wireframes

Example showing Stanton's Sketchmeasure template with full WFM baseline.

V6 F4038 - VIP Confidential Patient Workflow.pdf  
F4038 - VIP Confidential Patient Workflow · Updated Jan 23, 2019 by A Prior Collaborator

- 1
- 2
- 3
- 4
- 5

Feature Name  
**F4038: VIP Confidential Patient Workflow**

Centricity  
Universal  
Viewer

SEARCH ▾ Last Name, First Name MRN / Patient ID Accession Number

1 57



# Component Wireframes

## Workflow Wireframes

At the end of each sprint, some teams will send product screenshots with callouts and detailed emails describing what they built.

I try to update the Workflow Wireframes with that info, even though it's not required. Helps avoid errors when reconciling them to their Component Wireframes later.



During V&V, one designer takes all the **Workflow Wireframes**....

Workflow  
Wireframes





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Workflow Wireframes

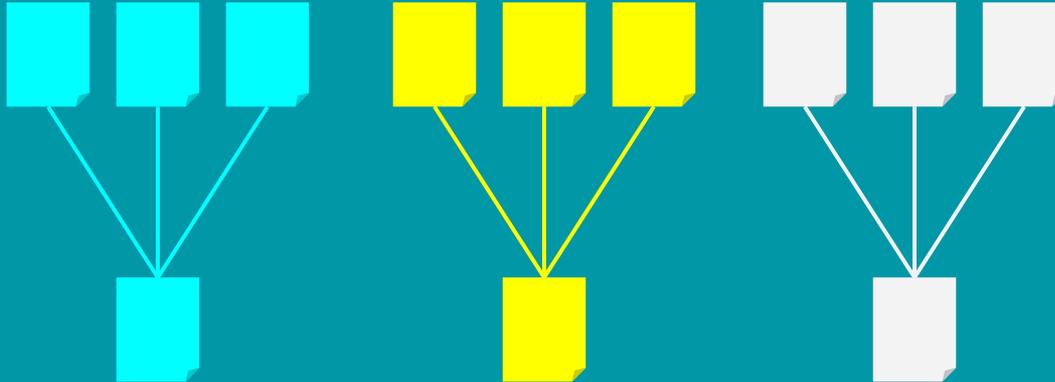


Groups them by the Component they affect....



During V&V, one designer takes all the **Workflow Wireframes**....

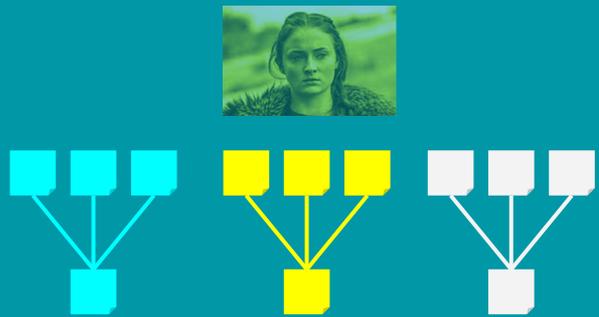
Workflow Wireframes



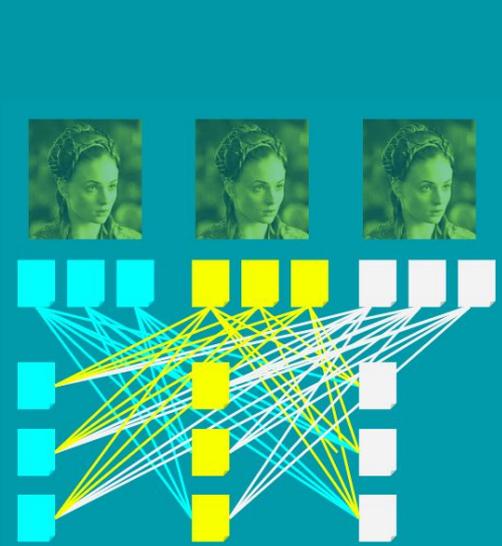
Component Wireframes

Groups them by the Component they affect....

And incorporates their feature changes into their corresponding **Component Wireframes**.



VS.

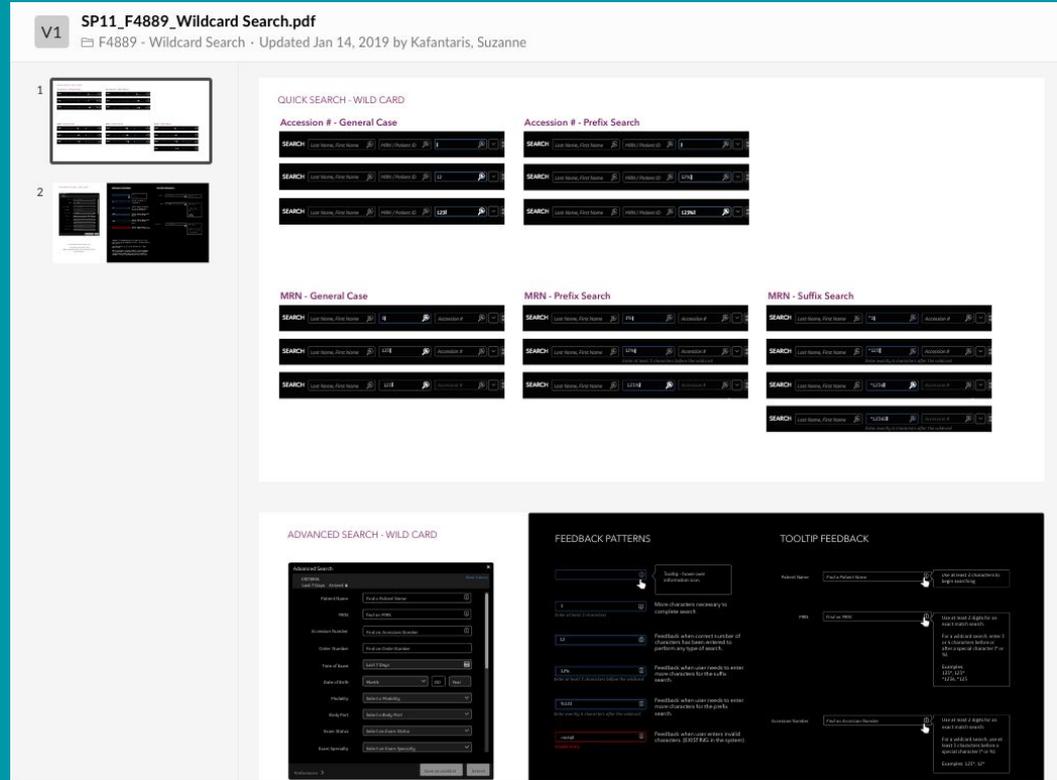




# Workflow Wireframes → Component Wireframes

OTOH, every part of this (smaller, simpler) Workflow Wireframe will probably make it into its corresponding Component doc.

The size and complexity of Workflow Wireframes is usually a function of the maturity of the team building the feature, doesn't always translate to the Component docs.



## ROUGH TIME BREAKDOWN - SP5

- 10% release planning
- 0% roadmap dev & socialization
- 30% research (everything)
- 10% wireframe dev (solo)
- 10% dev team iteration
- 40% V&V docs wrangling

Collab with POs & devs  
Collab with each other  
Solo

## ROUGH TIME BREAKDOWN - SP10

- 15% release planning
- 15% roadmap socialization
- 10% research (as needed)
- 25% wireframe dev (crits, options)
- 20% dev team iteration
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More time for UX activities that have a bigger impact on the product.

## Things to keep in mind

WFM's docs are **narrowly constrained** to specific **features** and **components**. None of them represent holistic ground truth about the product. At any time. Ever. By design.



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**Component Wireframes** are static between releases. They don't get updated until V&V, the last sprint of the release.



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**Component Wireframes** are static between releases. They don't get updated until V&V, the last sprint of the release.



And we don't own these docs -- the track does. We can't make unilateral changes to them without permission from the track.

# A word to WFM's occasional designers....

I know these docs seem confounding.



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I know these docs seem confounding.

You've rooted around in the files looking for a baseline ground truth sketch, found something called "Master Sketch File" and assumed it's what you need.



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It's not.



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It's at least one release out of date.



# A word to WFM's occasional designers....

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It's not.

It's at least one release out of date.

I use those "Master" and "Baseline" files like a junkyard, to scavenge for parts.



Their names are definitely confusing. What should we call them instead?

# Invitation to help the docs improve

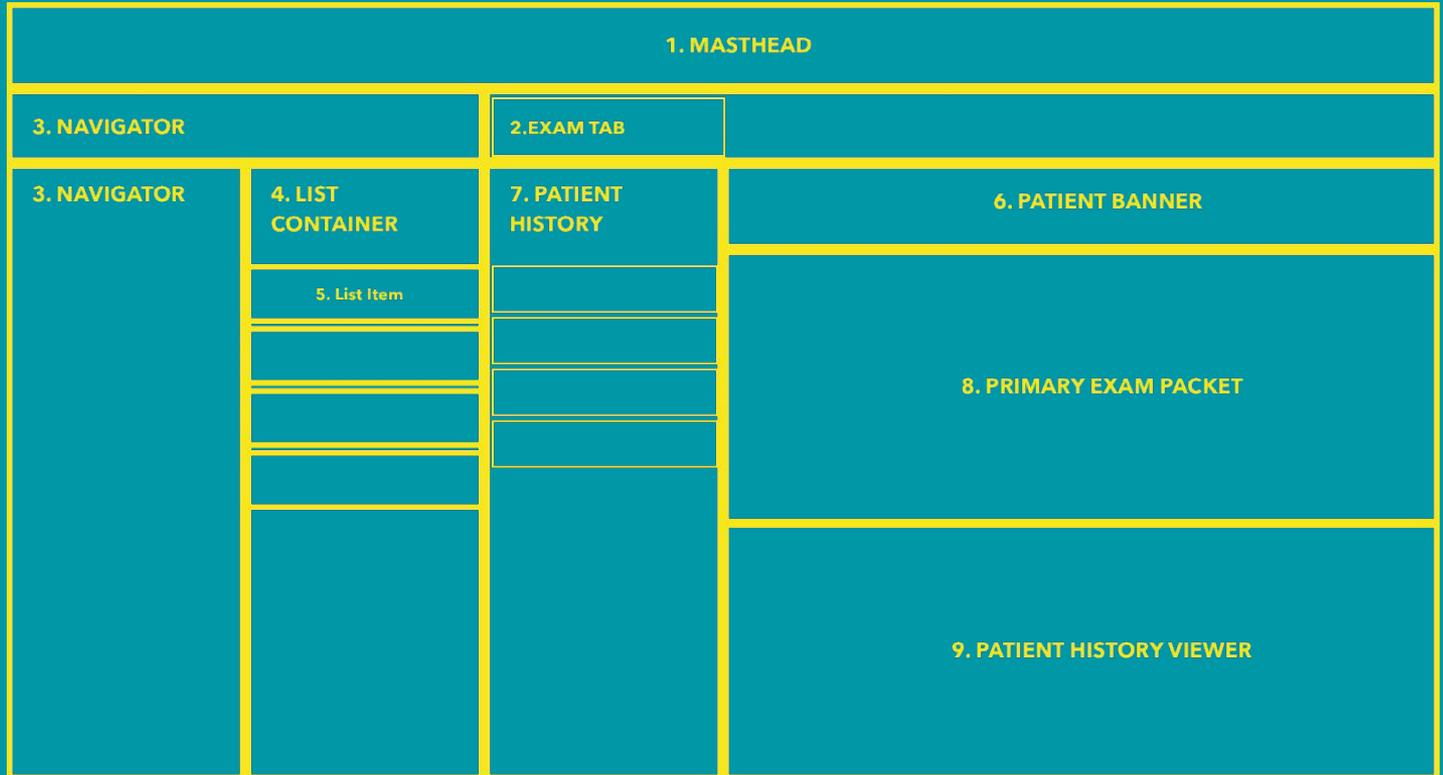
If you see a file anywhere in WFM's docs with a title that misleads or confuses you:

- Grab a screenshot
- Email or Flowdock/Slack it to me
  - “This is confusing. What is it?” OR
  - “X is a better name for this.”

If you need or plan to use a wireframe in the *current release* with egregiously bad symbols, etc., ping me: “I'm using/planning to use this file soon -- can you prioritize cleaning up its symbols?”



Meanwhile, a less error-prone strategy for ensuring your docs show enough context without getting bogged down in tiny details is to use a component map to contextualize your new thing.



## A word to WFM's occasional designers....

If you want something from these docs that you aren't getting...

Look them over, understand the system they're designed for and how they're used across the product team, and make a proposal with recommendations for changing them.

Socialize your proposal and get buy-in from the primary stakeholders in the docs system.



# Future goals for WFM's docs

We should be using a real Style Guide instead of cobbling wireframes together from old parts.

I'm holding off building one for a future-oriented version from Lindsey and the Design System.

# ACTIONS

- Reliable working file for the release
- Named by date it was last updated
- “Make a thing like Lindsey’s WIP doc, make sure it has the latest component parts”
- Socialize Rally at PO/Design sync on Friday