



UI Analysis for PCS

November 1, 2011

Any analysis for strategic usage of PCS must address specific Agency goals. This paper posed possible Agency goals and describes how they can be achieved via various UI platforms and designing, while noting potential risks.

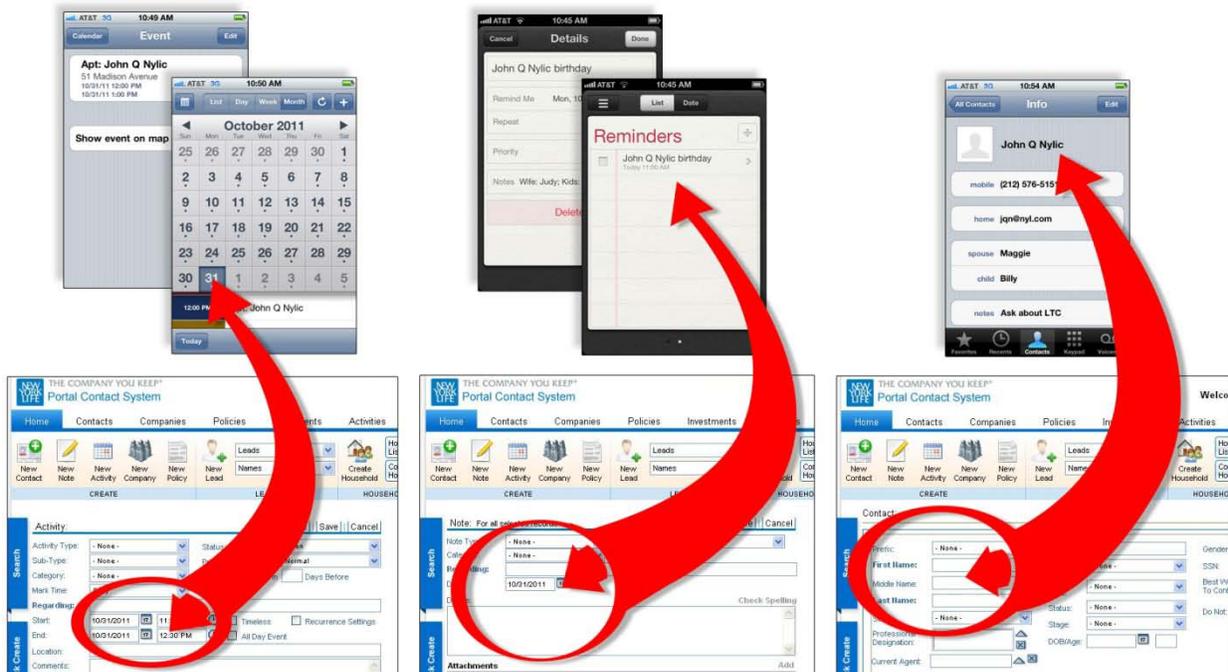
1. Integration and reuse of data

Agency would like to be doing business smarter through seamless integration of existing data to platform specific, non-proprietary apps.

Actively managing PCS data should not require the use of PCS. The easier we can make it to seamlessly manage data, the more robust and up-to-date the data will be.

Calendar entries, task lists, and contact information are each independent functions that require the data to be integrated but not necessarily the entry and use of the data.

These are generic functions that only require the appropriate connections and business logic to leverage existing apps.



In the previous three examples targeted specific apps would sync between the applications and allow two-way interaction for the user to enter event information, schedule reminders or enter contact information.

Interaction:

PCS	App
<ul style="list-style-type: none"> • Launch PCS • Authenticate User • Retrieve the appropriate screen • Enter Data 	<ul style="list-style-type: none"> • Launch App • Enter Data

Porting PCS data in a disconnected setting poses challenges not limited to hosting confidential data. As a result it would most likely pose security issues requiring device safety measures to ensure the protection of proprietary data. This conflicts with Agency’s wish to avoid such security baggage.

There is perhaps a delta between the data provided and availability of key information requiring security measures that needs to be explored.

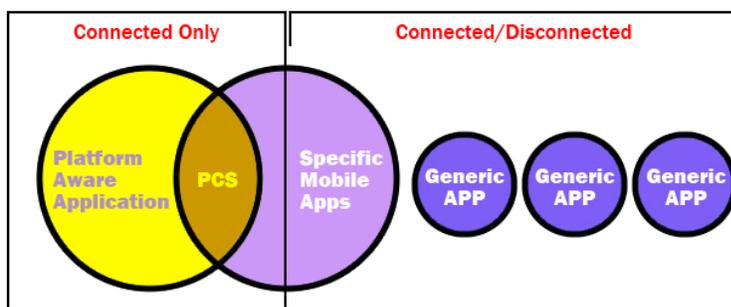
2. Targeted PCS Functionality

Agents need to perform specialized functions utilizing PCS data to perform tasks quicker.

PCS contains robust functionality that goes beyond the generic business functions.

Here we have the opportunity to not simply port the current application but make strategic enhancements driven by agent interviews, agent user testing and Agency input.

Identifying the delta of this functionality can help agents easily interact with confidential data, and connect the New York Life Agent with a wide variety of connected and disconnected functionality.



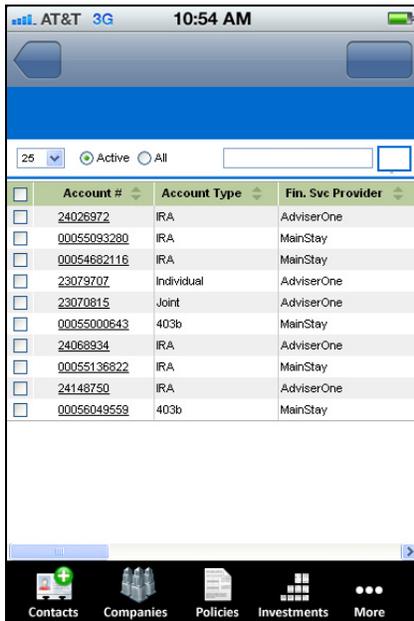
Specific Mobile Apps that display based on PCS data have the unique challenge of handling both connected and disconnected modes to service functionality and data needs.

This effort would most likely develop a separate platform based UI implementation utilizing Solution Architecture recommendations for viability timing and tools.

3. Platform aware re-use

New York Life needs to provide PCS functionality intelligently based on the device and situation.

Much of the current PCS application works through iPad devices and various browser implementations, though, there are some functions that do not. Thoroughly testing the functions on various interfaces can identify the parts that require remediation. This is only part of the compatibility task.



The underlying PCS code is sufficiently robust to be enhanced to deliver device specific navigation, and potentially device specific task level navigation once identified.

This identification process should be more focused on device specific use cases to determine if there is good business justification in including functionality that is in need of remediation, and sufficient usage justification for refactoring based on device.

The example to the left shows a possible re-skinning based on the iPhone device, where the main navigation is moved to the bottom and the main content area remains the same, but scrolls horizontally.

Usability Considerations

- Before considering repurposing or refactoring PCS for use on mobile devices it would be prudent to perform usability evaluations of the current product with the agents that use it. This highlights the functionality that is most in demand within a mobile space, and allow New York Life to make informed decisions that make the most business sense.
- As part of the UI modifications currently underway for the PCS proof of concept based on the Accenture design. We should sit down with Agency subject matter experts and craft the entire UI ribbon set making the best business and user experience decisions to develop an optimum ribbon.

Once the ribbon is fully designed, user tests with Agents should be scheduled to verify the business choices and the ribbon modified to reflect this data. Once released additional testing should be done on the application based on the entire Agent population.

Agency has shown an openness to this type of approach.

Code Observations

- Current code can be enhanced to provide Agency requested UI ribbon and other UI improvements. NY Life usability has provided similar activities for VSC and IAD applications. Once the ribbon design and user testing has completed UI enhancements could be coded and unit tested in 6 weeks.
- The current PCS code is reasonably efficient utilizing stylesheets effectively.
- The code is broken into 1121 JSP files which provide flexibility since the application was a vendor product that serviced many companies.
- The file structure while efficient to service many purposes may be better simplified and tailored to New York Life's needs, increasing response time and simplifying future code changes.
- The PCS code utilizes iFrames to present some functionality. This diffusion layer solved some UI display issues but may make it more difficult to mix and match functionality in the future.