Persona Platform

May 22, 2018

Digital Innovation

Persona Platform Documentation

The Goal of this document is to provide a definition and design guidelines for the Persona Platform which enables users to perform tasks across multiple applications depending on their role, location and type of work.

Part 1 Overview

What is a Persona, Mode and Context

Part 2 Scenario

An example of how the platform enables Personas

Part 3 Core Elements

Design specification of the platform UI

Persona Platform
Part 1: Overview

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What is the Persona Platform

The Persona Platform enables users to perform tasks across multiple applications depending on their role, location and type of work.

PERSONA

MODE

CONTEXT

Applications must be designed and built to recognize a **Persona**, the **Mode** in which they are working and the **Context** of their environment.

Understanding these three components are key to supporting user's needs, enabling focus on a task and efficiently completing work.

What is a Persona

PERSONA

EXAMPLES

Operator

Field Service Engineer

Plant Manager

Director of Service

A Persona is representative of a user role and the access privileges that user has within the system. But it goes further to include persona-specific needs, behaviors, goals and motivations.

These characteristics of a persona contribute directly to the work being performed and how we design digital tools to support that work.

What is a Mode

MODE

EXAMPLES

Analysis

Problem solving

Reporting

As a user approaches a task, a mode is the mindset or behavior they embody. Any given persona will be in multiple modes throughout a work day. Sometimes they are analyzing data, sometimes actively fixing a problem, and often times they are moving between modes seemlessy. Our platform must support this behavior to enable efficient and productive work.

What is Context

CONTEXT

Persona-focused design takes into consideration the work tasks the persona is trying to accomplish as well as their context. Context is a combination of Organization, Site, Location and Channel of information.

EXAMPLES

Assembly Plant

Customer Site

Healthcare Business

Aviation Supply Chain

- An Organization could be a business unit like Aviation, Healthcare or even a sub-business
- A Site could be an assembly shop or a customer outage site
- A Location could be a manufacturing line or a office space where an asset is located
- A Channel could be a mobile device or a large-format touch enabled display

Persona Enablement Scenario

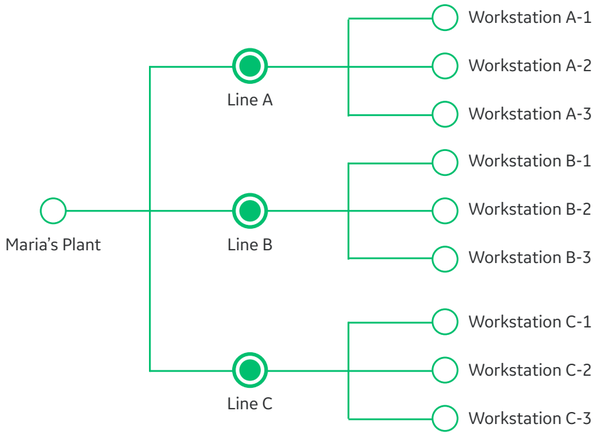
MARIA PRODUCTION MANAGER SCENARIO

Mode

- ○ Planning
- ○ Monitoring
- ○ Problem Solving
- ◉ **Analysis**
- ○ Reporting

Context

Maria's context spans her entire plant, in this scenario, she needs to see an aggregate view of her lines (A - C).



Goal

To understand how current production output for Lines A-C correlates to financial forecasts.

Painpoint

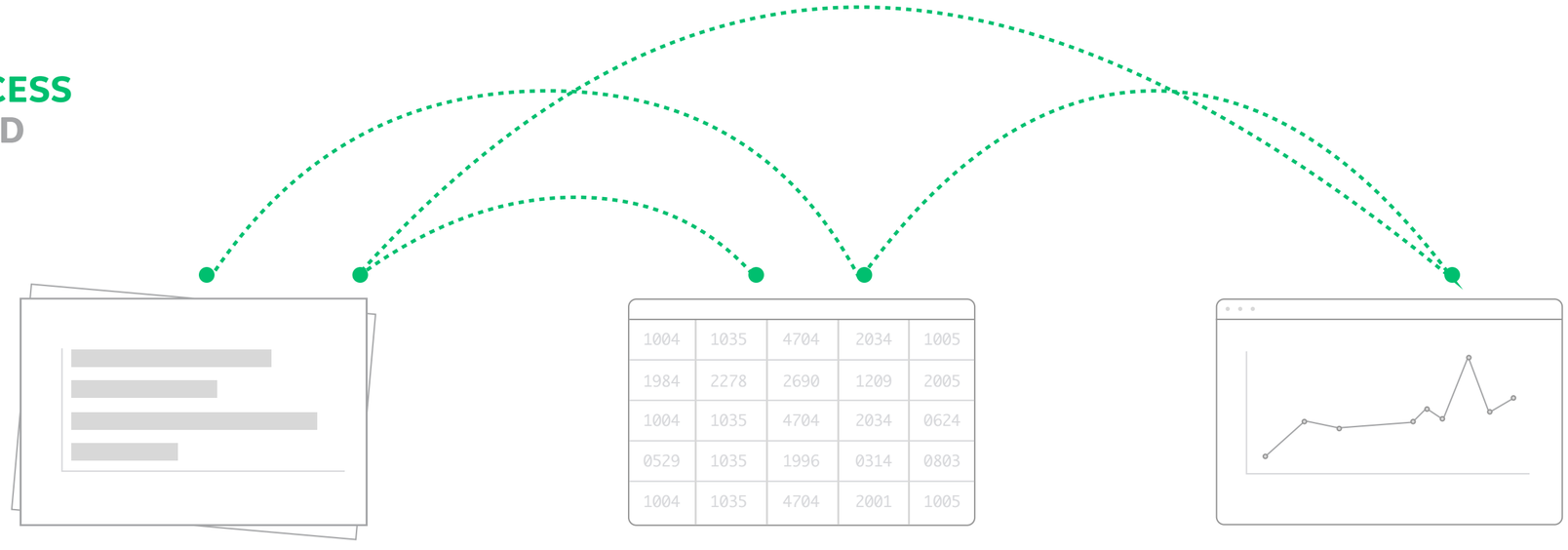
Spending too much time gathering and consolidating data from multiple sources to make decisions.

NEED

More Integration between the different systems and access to real-time data for decision making.

CURRENT PROCESS
DECENTRALIZED

MARIA



Production Reports
Custom tool generates daily reports generated for each line based on MES data.

Financial Spreadsheets
Historical finance data in manual entry spreadsheets.

Business Intelligence Tool
Licensed software runs canned reports based on MES data.

ISSUES

User authentication and management is redundant. Costs for maintaining siloed application, data and analytics

Data is locally stored and managed without access to organization. Analytics are user-specified and lack governance.

Licensing costs are unnecessary and any configuration is slow and reliant on vendor services.

PERSONA IMPACT

Maria is currently spending too much time gathering and consolidating data from multiple sources to make decisions.

PERSONA PLATFORM
CENTRALIZED VIEW

Navigation
Maria can access applications and views into her data based on her context (Lines A-C). She can quickly move between her different lines as well as across different modes of work.

Universal Settings
Maria can access and manage all of her settings in one place. As an admin for her site she can manage users, set up views and access notification subscriptions.

Data & Core Services
Business data remains decentralized and is piped into the platform through services and APIs.

Are created based on Maria's needs, and configured for her current context. Applications can also live within the platform

SOLUTION

Maria can now access the data she needs in a single view. The system understands her context and presents the relevant information for her to make decisions.

Persona Platform
Core Elements

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Platform

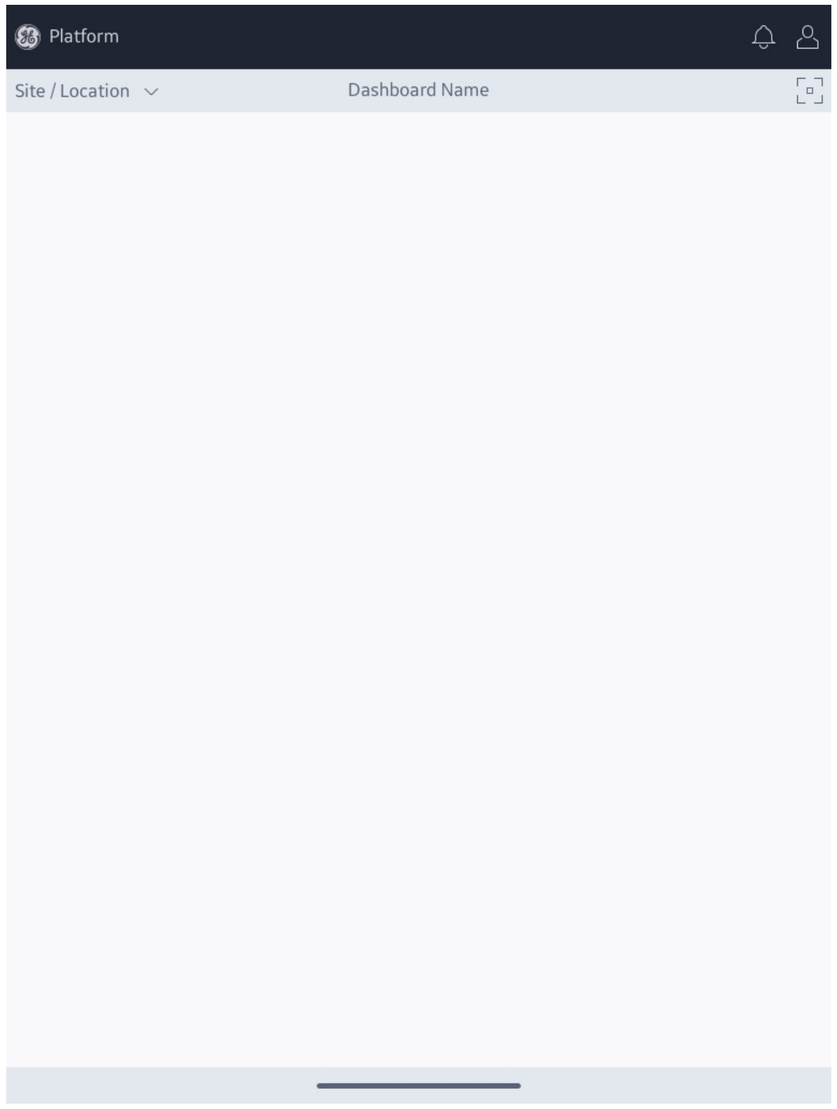
The Platform is divided into four areas of interaction:

Universal Header
View Controller
Stage Area
Action Drawer

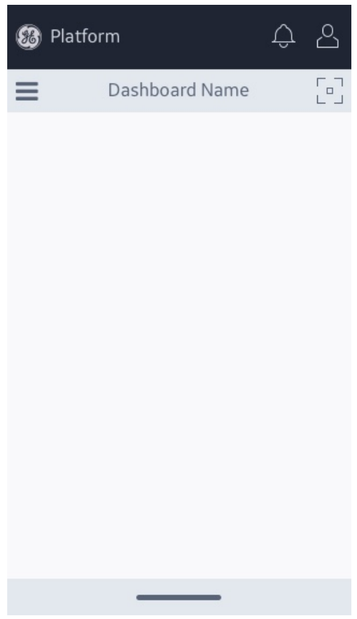
Responsive

The Platform is designed with responsiveness in mind. It should be able to be viewed on a tablet and mobile phone without issue, and should scale accordingly.

TABLET

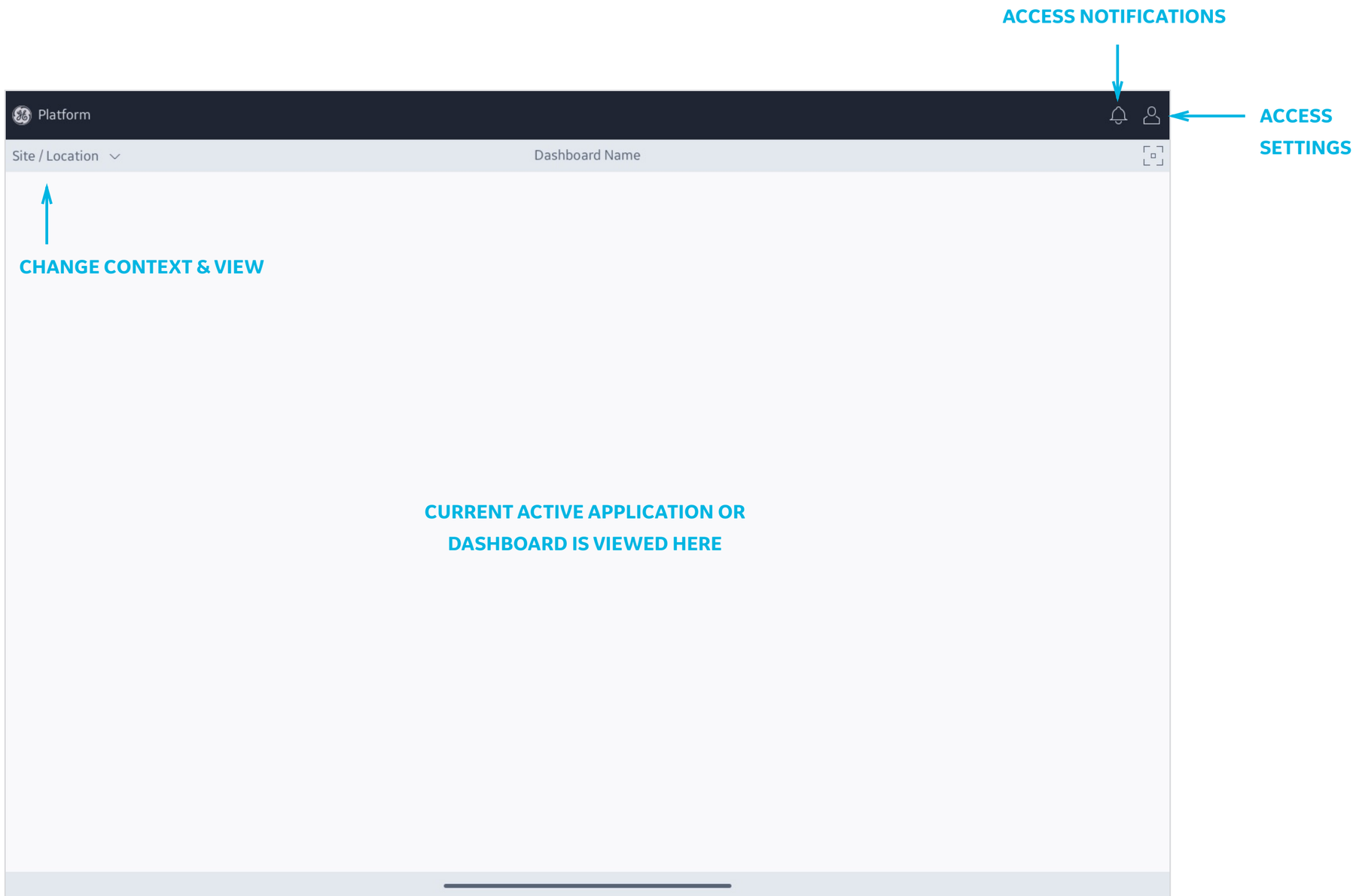


MOBILE



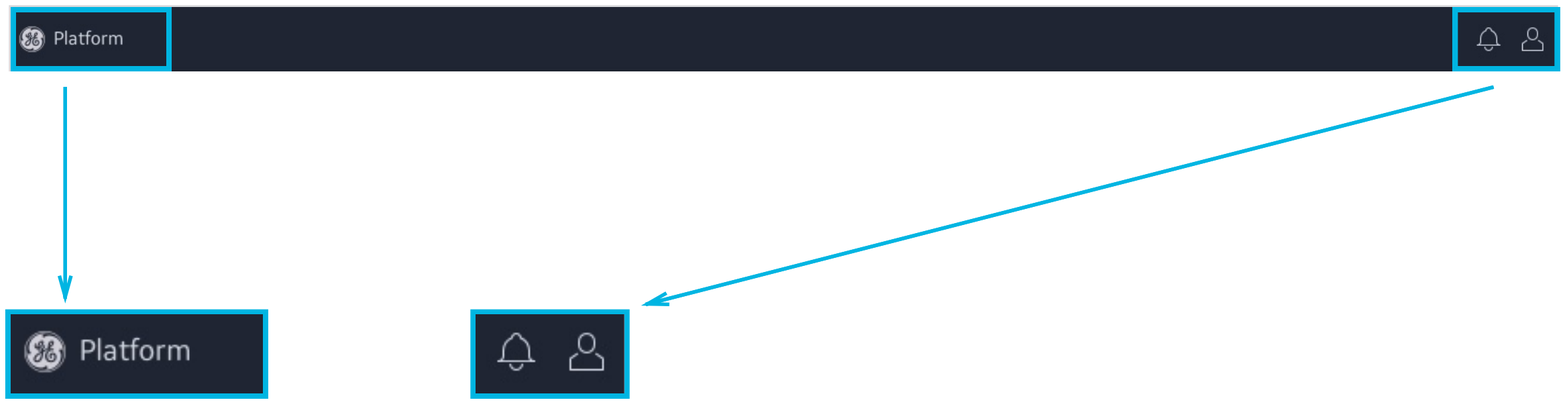
Navigation

Navigation allows users to intuitively move between contexts, dashboards and micro-apps. The proposed structure (illustrated below) will support mode switching and moving between multiple apps and dashboards quickly to complete multiple tasks. Notifications, and Settings can also be accessed from one universal set of controls.



Universal Header

The header houses all of the universal options



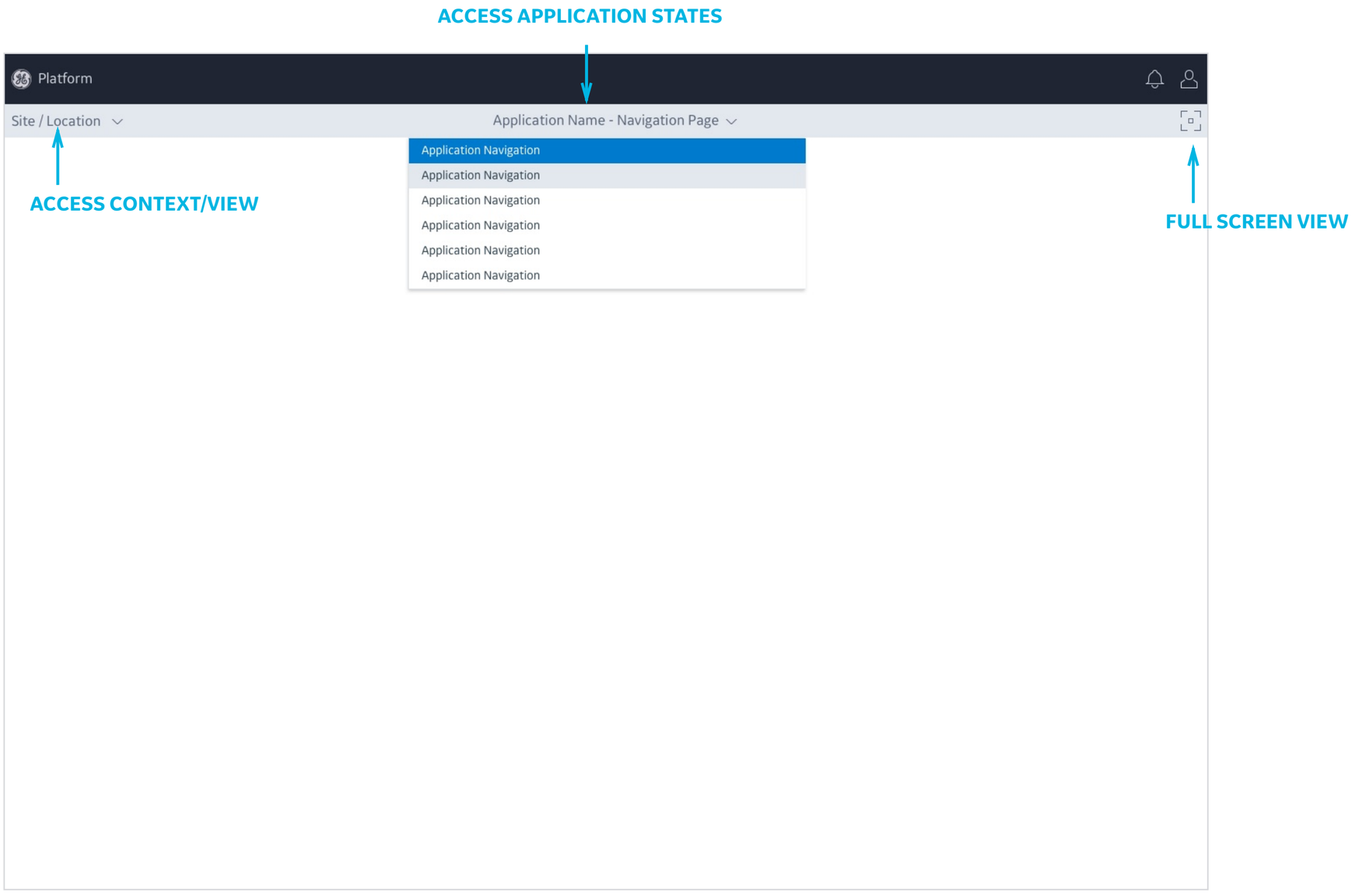
The GE Monogram
Name of Platform

Notifications Icon
Settings Icon

The settings icon will hold a dropdown menu that shows selectable options for settings, feedback and logging out of the platform.

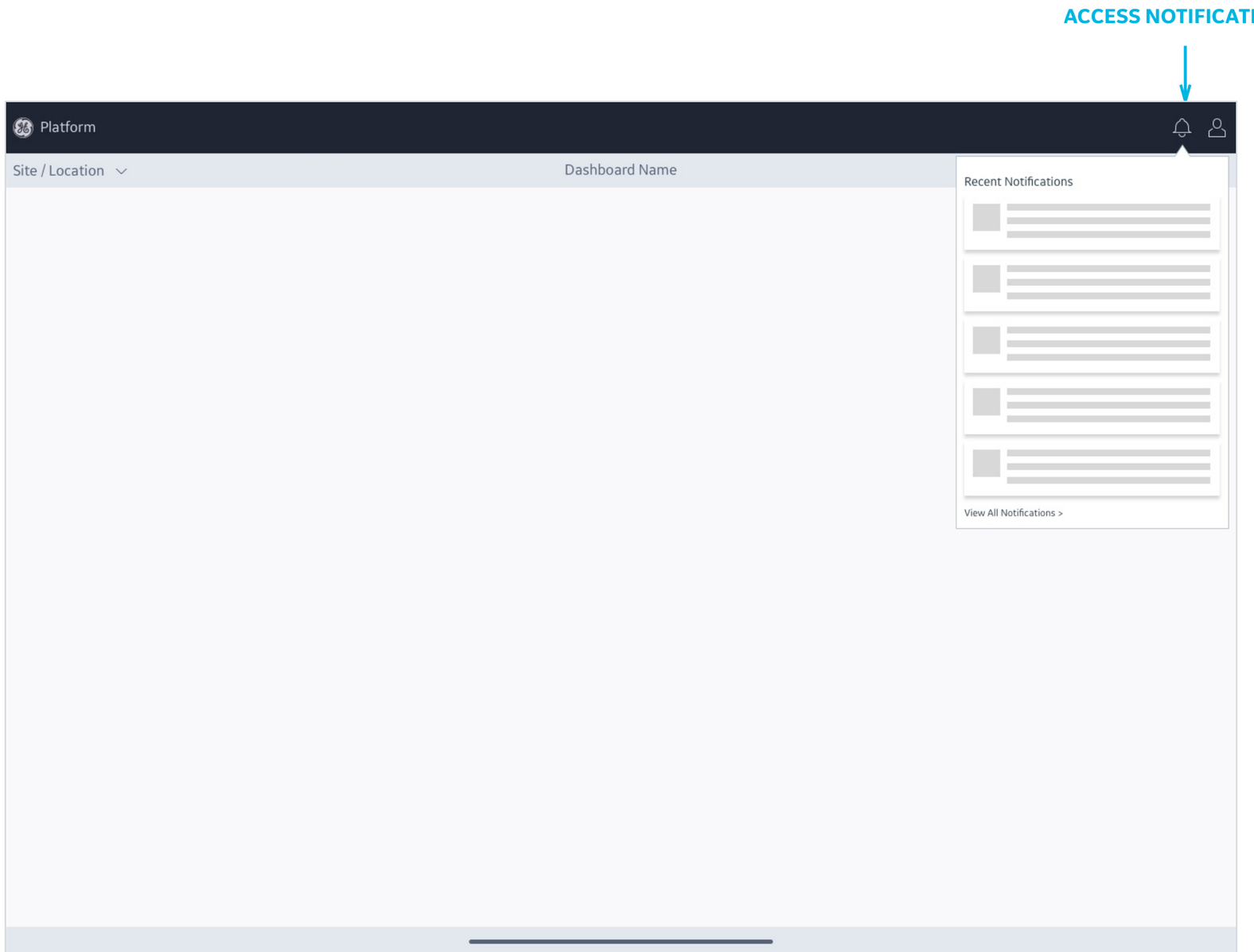
View Controller

The view controller houses all options directly associated with the stage and action drawer areas. The view controller contains the contextual navigation, and the title area for dashboard name or application navigation view states.



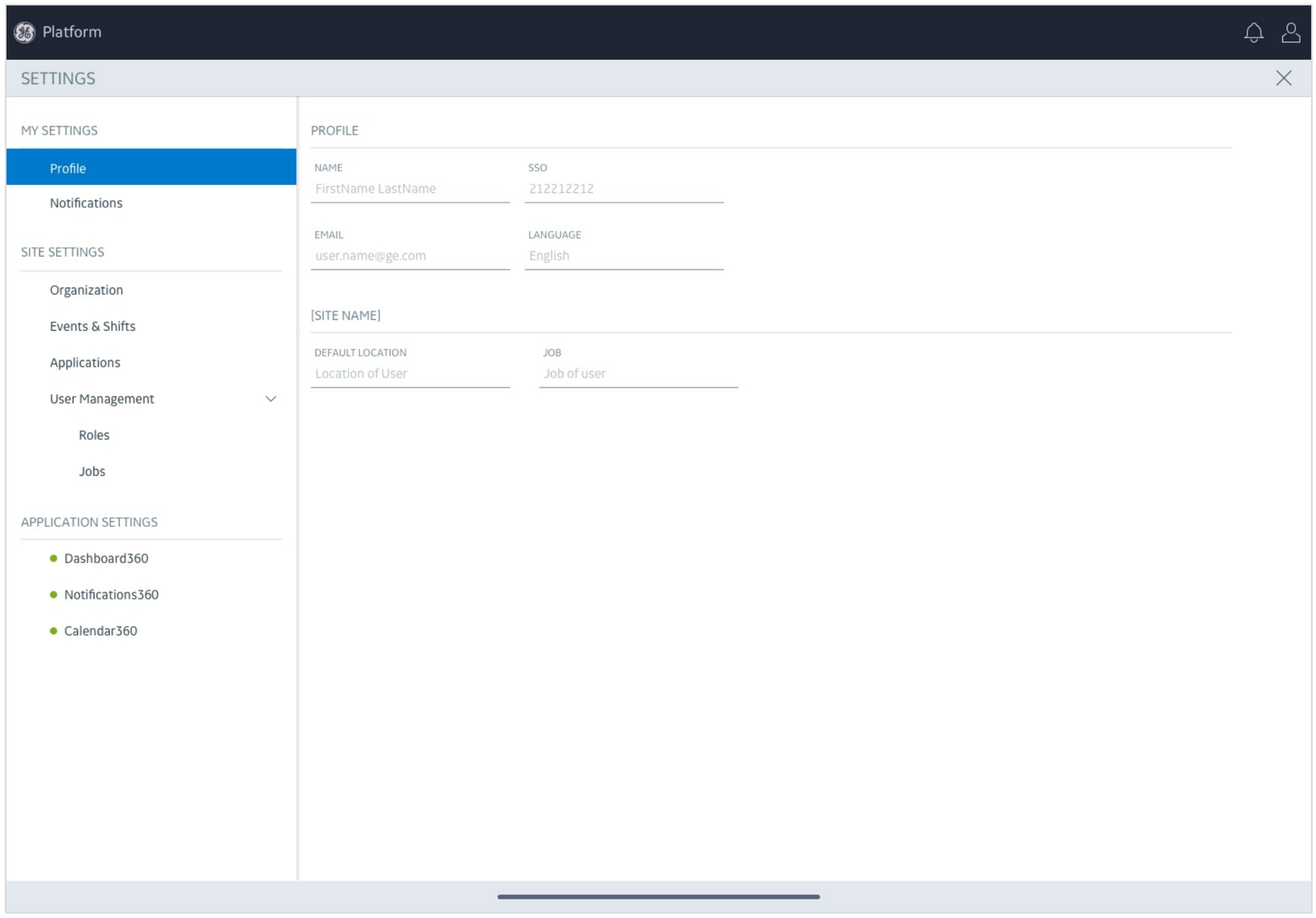
Notifications

By centralizing notifications the Platform will provide a single place to view and manage notifications from any micro-apps housed within the platform. By including access to notifications at a prominent location within the Platform users will be able to quickly recognize, access and take action on notifications.



Settings

Each Persona that will interact within the Platform will have different universal settings. Settings help the Platform determine what the Persona needs to have access to and their Context (site and location).



ACCESS SETTINGS

Context/View Navigation

The context/view navigation enables users to quickly find the microapps and dashboards that are available within a certain context. The context structure on the left reveals the available views on the right.

This context structure is determined by the administrator and can be configured based on the access permissions for the user.