

Order Management System



Phase 1: Onboard Form

The goal of phase one is to overhaul the current Onboard Form into a more user-friendly, intuitive solution that will reduce the frequency of resubmission requests by the Jumpstart team.

Key Features:

- Secure login using NAM
- Ability for users to save their work and complete at a later date
- Shared fulfillment information can be used across multiple products automatically
- Contextual help will guide users through the process while live help via chat or phone is available for more complex issues



Phase 2: Order Management System

The goal of phase two is to transform the Onboard Form into a complete Order Management System, adding the ability for users to view all of their clients in a centralized location.

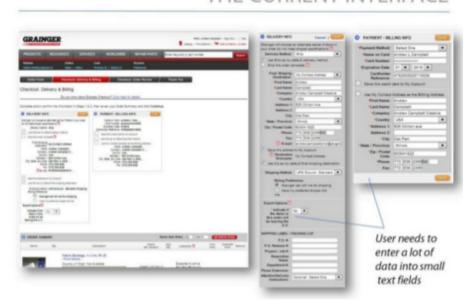
Key Features:

- Visualize workload and action items
- Consolidated view of all clients
- Managers can view team workload
- Managers can reassign users and assign due dates
- Notifications will inform users of expiring orders, due dates, and orders that need additional information

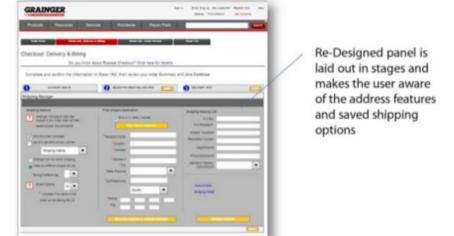


Complex vs. Simple UX Solution

THE CURRENT INTERFACE



THE SOLUTION







Project Timeline



Today

Tasks			
Duration	Start Date	End Date	Description
1	11/16/2015	11/16/2015	Project Kickoff
6	11/13/2015	11/18/2015	Initial Requirements Gathering
38	11/16/2015	12/23/2015	Phase 1: UX Design and Requirements Gathering
64	11/19/2015	01/21/2016	Phase 1: Development and QA
7	01/22/2016	01/28/2016	Phase 1: UAT
8	01/29/2016	02/05/2016	Phase 1: Release
25	12/28/2015	01/21/2016	Phase 2 UX Design and Requirements Gathering
28	01/22/2016	02/18/2016	Phase 2: Development and QA
7	02/19/2016	02/25/2016	Phase 2: UAT
1	02/26/2016	02/26/2016	Phase 2: Release

