FIRST AMERICAN CNITE

IGNITE

Escrow Desktop Application (Angular)

Role: UXD Lead

Ignite is First American's flagship escrow application. There are 4 personas that use Ignite: Real Estate Buyers, Real Estate Sellers, Real Estate Agents, and Escrow Officers. The goal of Ignite is to facilitate the process of transferring funds from the home buyer to the home seller. Before Ignite, the closing process was done through a series of emails. This less than secure method of communication posed great risks to the buyer. Risks that the buyer was completely unaware of. That risk is fraud.

ELIMINATE FRAUD



My Approach



Enterprise Design Analysis



Heuristic Evaluation



Stakeholder Interviews



Design Thinking Workshops



Qualitative User Testing



Feature Refinement

FEATURES

- Fully Customizable Dashboard
- Clean and intuitive file structure
- Access to all files
 at all times
- All appointments in one place
- Secure messaging between agent, buyer, and seller
- Reports and historical archives

nite	All	 Search fi 	le numbers, addresse	es, parties Q	My Files	→	4 🔮
Today	This Week Next Week	This Month	;			1	Manage Widgets
Files Closing	4				1 filter ①	Overview	
File Number	Property Address	Phase	Close Date	Seller/Buyer	Escrow Agent	Recently Viewed 10	
2384902	5498 Hemlock Terrace	Closing	9/1/2020	Branch/Shimada	Adam Smith		
2383902	8497 Simonds Ct, Apt 6	Closing	9/1/2020	Plata/Lee	Joe Kim	7 Today's Tasks 12	-
2300349	756 NW 24th St, Apt 120	Closing	9/1/2020	Ontari/Reshamvala	Drake Ontario	Appointments 26	
2930041	311 Teri Ct	Closing	9/1/2020	Maas/Knaap	Christopher Millens	New Files this Month	2 -
						Files Closing this Week	(II) -
						Saved Files	:
Files Open	3	1 filter ⑦ ∠7 :	Tasks Due	3	2 filters 💿 💋 🗄	Waiting on Commitment	12 files —
File Number	Property Address	Open Date	File Number	Task	Due Date	Waiting on Lender Docs	5 files -
2384902	5498 Hemlock Terrace	9/1/2020	2384902	OTC Commitment Recei	9/1/2020	Docs for Recording	3 files
2383902	8497 Simonds Ct, Apt 6	9/1/2020	2383902	Follow Up with OTC	9/1/2020	•	
2300349	756 NW 24th St, Apt 120	9/1/2020	2300349	Earnest Money	9/1/2020	Shortcuts	:

MY FILES

Users can quickly navigate to their pre-selected regional filters

4

Dast

	com				н 🗢 🚺 🗹	n 🖸 🗃 🚮 者 t 🞯 🖲 O 🖪 🛪	-4
ite	All	▼ Search file	numbers, addresse	es, parties Q	My Files	▼ 2 ⁵ 4 ⁵	(
Today	This Week Next Week	This Month			All Southern California	Manage	Widg
	_				CA San Diego		
Files Closing	4				CA San Diego - Alicia Johnsor	Overview	
File Number	Property Address	Phase	Close Date	Seller/Buyer	Es Tommy Cheng	Recently Viewed	
2384902	5498 Hemlock Terrace	Closing	9/1/2020	Branch/Shimada	Ad Manage global filters	G Today's Tasks 12	
2383902	8497 Simonds Ct, Apt 6	Closing	9/1/2020		Jol		
2300349 2930041	756 NW 24th St, Apt 120	Closing	9/1/2020	Ontari/Reshamvala	Drake Ontario	Appointments 26	
						Saved Files Waiting on Commitment 12	2 file
Files Open	3	1 filter ⑦	Tasks Due	3	2 filters 🕐 📝 🗄		
File Number	Property Address	Open Date	File Number	Task	Due Date	Waiting on Lender Docs	5 files
	5498 Hemlock Terrace	9/1/2020	2384902	OTC Commitment Recei.	9/1/2020	Docs for Recording	3 files
2384902	8497 Simonds Ct, Apt 6	9/1/2020	2383902	Follow Up with OTC	9/1/2020		
2384902 2383902		9/1/2020	2300349	Earnest Money	9/1/2020	Shortcuts	
	756 NW 24th St, Apt 120	0/1/2020				Recently Viewed All Closed	File

IL

T

Î

1

AL

EDIT TIMEFRAMES

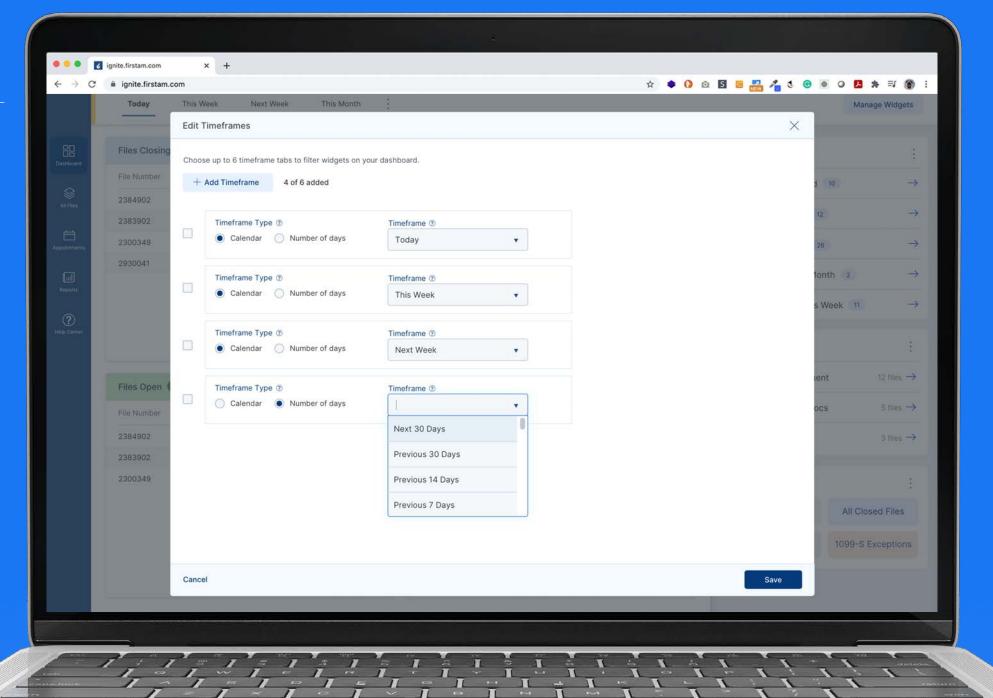
Users can customize the dates that are shown at the top level of their Dashboard

nite	All	 Search file 	numbers, addresse	es, parties Q	My Files	▼	4 🚱
Today	This Week Next Week	This Month					Manage Widge
Files Closing	4		🖉 Edit Timefran	nes	1 filter 💿 🗄	Overview	
File Number	Property Address	Phase	Close Date	Seller/Buyer	Escrow Agent	(L) Recently Viewed 10	14
2384902	5498 Hemlock Terrace	Closing	9/1/2020	Branch/Shimada	Adam Smith	C Recently viewed to	
2383902	8497 Simonds Ct, Apt 6	Closing	9/1/2020	Plata/Lee	Joe Kim	Groday's Tasks 12	
2300349	756 NW 24th St, Apt 120	Closing	9/1/2020	Ontari/Reshamvala	Drake Ontario	Appointments 26	
2930041	311 Teri Ct	Closing	9/1/2020	Maas/Knaap	Christopher Millens	New Files this Month	2
						Files Closing this Week	n ·
						Saved Files	
Files Open	3	1 filter 🗊 🖉 🗄	Tasks Due	3	2 filters 10 🖉 🗄	Waiting on Commitment	12 files -
File Number	Property Address	Open Date	File Number	r Task	Due Date	Waiting on Lender Docs	5 files -
2384902	5498 Hemlock Terrace	9/1/2020	2384902	OTC Commitment Recei	9/1/2020	Docs for Recording	3 files -
2383902	8497 Simonds Ct, Apt 6	9/1/2020	2383902	Follow Up with OTC	9/1/2020		
2300349	756 NW 24th St, Apt 120	9/1/2020	2300349	Earnest Money	9/1/2020	Shortcuts	
						Recently Viewed	All Closed Files
						and a second second second second	

T

EDIT TIMEFRAMES

In the default setup the user can see Today, This Week, Next Week, and this Month. This feature allows them to add the Previous 7 Days



EDIT TIMEFRAMES

Once added, the system alerts the user to the completion of the task by way of a confirmation toast and Previous 7 Days is now visible within the timeframe

ignite.firstam.com					☆ 🍨 🚺	0 5 5 🚮 🐴 3 📀 1	0 🖪 🛪 🗐 🌒
lgnite	All	▼ Search f	ile numbers, addresse	s, parties Q	My Files	 E	छ द । 😧
Previous	7 Days Today 📈		Adde	d Timeframe Tabs		Undo	Manage Widgets
Files Closi	ng 💶				1 filter 💿 :	Overview	(1
File Number	Property Address	Phase	Close Date	Seller/Buyer	Escrow Agent	C Recently Viewed	10
2384902	5498 Hemlock Terrace	Closing	9/1/2020	Branch/Shimada	Adam Smith		
2383902	8497 Simonds Ct, Apt 6	Closing	9/1/2020	Plata/Lee	Joe Kim	Foday's Tasks 12	-
2300349	756 NW 24th St, Apt 120	Closing	9/1/2020	Ontari/Reshamvala	Drake Ontario	Appointments 26)
2930041	311 Teri Ct	Closing	9/1/2020	Maas/Knaap	Christopher Millens	C New Files this Mor	ath 2
						Files Closing this V	Veek 11 -
						Saved Files	Ē
Files Open	3	1 filter 💿 🛃 🗄	Tasks Due	3	2 filters 💿 🖉 🗄	Waiting on Commitmen	t 12 files →
File Number	Property Address	Open Date	File Number	Task	Due Date	Waiting on Lender Doc	s 5 files →
2384902	5498 Hemlock Terrace	9/1/2020	2384902	OTC Commitment Recei	9/1/2020	Docs for Recording	3 files →
2383902	8497 Simonds Ct, Apt 6	9/1/2020	2383902	Follow Up with OTC	9/1/2020		
2300349	756 NW 24th St, Apt 120	9/1/2020	2300349	Earnest Money	9/1/2020	Shortcuts	. 1
						Recently Viewed	All Closed Files
						Top Customers	1099-S Exceptions

MANAGE WIDGETS

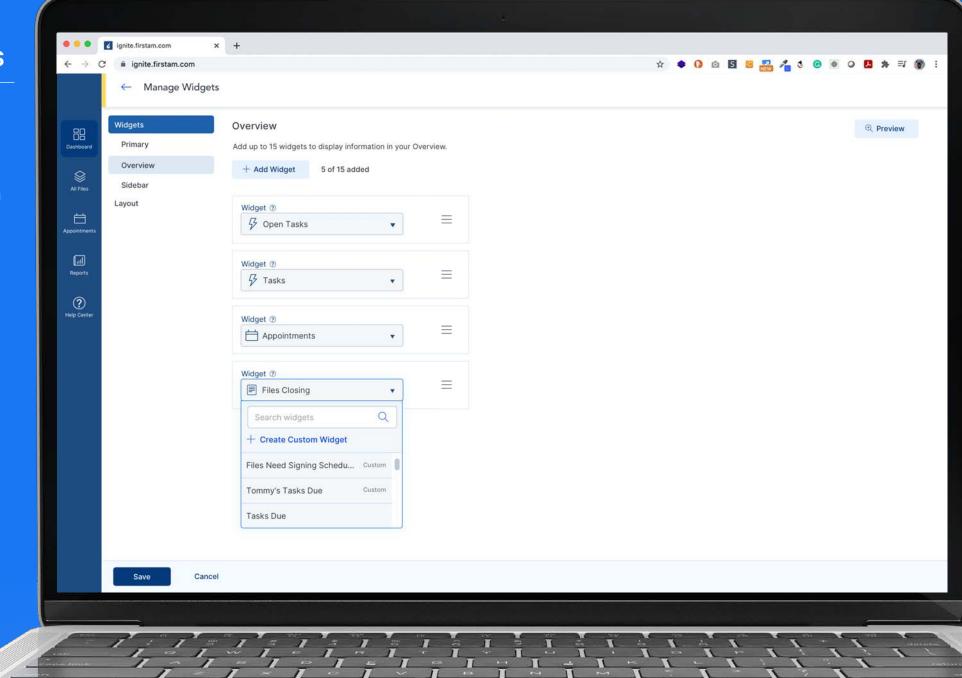
Complete control and customization of Dashboard widgets

88	Widgets	Primary Widgets		Show Added Widgets + Create Custom Wi	dget
JO hboard	Primary	Add up to 4 primary widgets to your	dashboard.		
Files	Overview Sidebar	Library 12 Custom Widgets	2		
∃ tments	Layout	File Number Property Address 2384002 5408 Hemiock Terrace	Files Closing :	File Number Property Address Ope 2384902 5498 Hemicox Terrace 8/2/	:
orts		2383902 8487 Simonds Ct, Apt 6 2300349 756 NW 24th 5t, Apt 120 2930041 311 Terl Ch 3493028 1200 Main St, Unit A	3 filters 🕐	22383902 84497 Simonds Ct, April 6 8/2/ 2300349 756 NM2 24th St, April 20 8/2/ 2930041 3111 Teri Ct 8/4/ 34830208 3111 Teri Ct 8/4/ 34830208 100 Main St2, Unit A 8/4/ 32699003 416 Remond Ct, April 20 8/4/	
Center		3240903 416 Raymond CL, Apt 2124 2384802 1865 Baker PF	Tasks Due	2384002 1665 Baker Pl B/4/ Overdue Tasks	:
		File Number Task Name Sele 2384602 Earnest Money Brar 3392068 OTC Commitment Recei Plus 3420089 Follow Up with OTC Ontu	Shows all tasks that are due	File Number Task Name Selit 2384902 Earnest Money Brar 3392088 OTC Conventment Recei. Plat 3420099 Follow Up with OTC Onto	
		3342902 Payoff - Bank of America Mae 2232145 Payoff - Wells Fargo Crait 2233029 Commitment Sent to Bu Plipt 3449202 Tax Certificate Sent to Jam	2 filters ⑦ Widget Added Remove	3342902 Payoff - Bank of Annerica Mail 2 filters Image: Construction of the second of t	

T

MANAGE WIDGETS

The user can control how many widgets they want in their Dashboard in addition to selecting which widgets are shown



MANAGE SIDEBAR

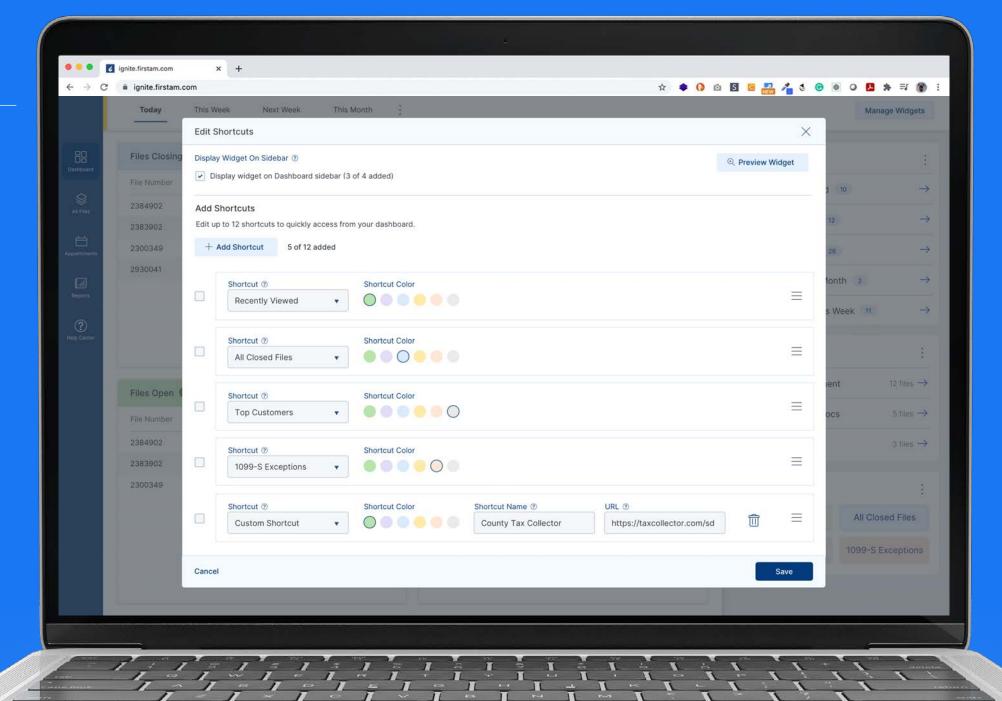
The user also has complete control over the data that is shown within the sidebar

Teday This Week This Month Manage Widget Flies Closing Iffier 0:: Iffier 0:: Iffier 0:: Iffier 0:: Recently Viewed No 2383902 5498 Humiock Terrace Closing 91/2020 Branch/Shimada Adam Smith. Iffier 0:: Iffier 0:: <t< th=""><th>x 🗢 🗘 🗅 🖬 🚟 💑 🕹 😌 🖲</th><th>o 🖪 🛪 🗊 🕯</th></t<>	x 🗢 🗘 🗅 🖬 🚟 💑 🕹 😌 🖲	o 🖪 🛪 🗊 🕯
File Number Property Address Phase Close Date Seller/Buyer Escrow Agent 2384902 5498 Hemiock Terrace Closing 9/1/2020 Branch/Shimada Adam Smith 230349 756 NW 24th St, Apt 120 Closing 9/1/2020 Ontari/Reshamvala Drake Ontario 2303041 311 Terl Ct Closing 9/1/2020 Ontari/Reshamvala Drake Ontario 2303041 311 Terl Ct Closing 9/1/2020 Mass/Knasp Christopher Millens Files Open 1 Files Open 1 Iffiler O 2 ² :: File Number Property Address Open Date 238902 3498 Hemiock Terrace 9/1/2020 230349 756 NW 24th St, Apt 120 9/1/2020		
2384902 5498 Hemiock Terrace Closing 9/1/2020 Branch/Shimada Adam Smith 2383902 8497 Simonds CI, Apt 6 Closing 9/1/2020 Plata/Lee Joe Kim 2300349 756 NW 24th St, Apt 120 Closing 9/1/2020 Ontari/Reshamvala Drake Ontario 2390041 311 Teri Ct Closing 9/1/2020 Maas/Knaap Christopher Millens Files Open 3 1/filter 0 2 Files Open 3 1/filter 0 2 1 File Number Property Address Open Date 2384902 OTC Commitment Recei	1 filter 1 filter	
2384902 5498 Hemiock Terrace Closing 9/1/2020 Plata/Lee Joe Kim 2300349 756 NW 24th St, Apt 120 Closing 9/1/2020 Ontari/Reshamvala Drake Ontario 2930041 311 Teri Ct Closing 9/1/2020 Maas/Knaap Christopher Millens Files Open 3 1 filter 0 2 I Tasks Due 2 filters 2 I Files Open 3 1 filter 0 2 I Tasks Due 2 filters I Waiting on Commitment 12 files 2383902 8487 Simonds Ct, Apt 6 9/1/2020 OTC Commitment Recei 9/1/2020 9/1/2020 3 files I Files Number Property Address Open Date 9/1/2020 2383902 Follow Up with OTC 9/1/2020 9/1/2020 3 files I 2383902 Follow Up with OTC 9/1/2020 9/1/2020 2 files Money 9/1/2020 Shortcuts I I 2300349 756 NW 24th St, Apt 120 9/1/2020 9/1/2020 9/1/2020 9/1/2020 9/1/2020 I I I II 2300349 Zafor Polow Up	Escrow Agent (L) Recently Viewed 10	1
238.9902 say simonds Ct, Apt 6 Closing 9/1/2020 Ontari/Reshamvala Drake Ontario 2300349 756 NW 24th St, Apt 120 Closing 9/1/2020 Maas/Knaap Christopher Millens 2930041 311 Teri Ct Closing 9/1/2020 Maas/Knaap Christopher Millens Files Open 3 1 filter © 2 Ifiler © 2 Ifiler © 2 Ifiles Dee Date 2384902 5498 Hemilock Terrace 9/1/2020 OTC commitment Recei 9/1/2020 Waiting on Commitment 12 files 2383902 8497 Simonds Ct, Apt 6 9/1/2020 2383902 Follow Up with OTC 9/1/2020 Shortcuts 2300349 756 NW 24th St, Apt 120 9/1/2020 2300349 Earnest Money 9/1/2020 Shortcuts	Adam Smith	
2930041 311 Teri Ct Closing 9//2020 Maas/Knaap Christopher Millens Files Open ③ 1 Filter ① 2 Ifter ② Ifter ② Ifter ③ Ifter ④ Ifter ⊕	Joe Kim	
Files Open 3 1 filter 0 2 7 :: Files Open 3 2 filters 0 2 ?: :: Saved Files :: Saved Files :: :	Drake Ontario	9
Files Open ③ 1 filter ② 1 File Number Property Address Open Date 2384902 5498 Hemlock Terrace 9/1/2020 2383902 8497 Simonds Ct, Apt 6 9/1/2020 230349 756 NW 24th St, Apt 120 9/1/2020 230349 756 NW 24th St, Apt 120 9/1/2020 Follow Up with OTC 9/1/2020 Simonds Ct, Apt 6 9/1/2020 Tor Commitment Receil 9/1/2020 Follow Up with OTC 9/1/2020 Tor Commitment Receil Pilot Recently Viewed Edit Share Tor Customers Replace		2
Files Open (1) Tasks Due (2) Zifter ((11
File Number Property Address Open Date File Number Task Due Date Waiting on Lender Docs 5 files 2384902 5498 Hemlock Terrace 9/1/2020 OTC Commitment Recei 9/1/2020 Docs for Recording 3 files 230349 756 NW 24th 5t, Apt 120 9/1/2020 230349 Earnest Money 9/1/2020 Shortcuts Recently Viewed	Waiting on Commitment	12 files
2383902 8497 Simonds Ct, Apt 6 9/1/2020 2383902 Follow Up with OTC 9/1/2020 2300349 756 NW 24th St, Apt 120 9/1/2020 2300349 Earnest Money 9/1/2020 Shortcuts V	Waiting on Lender Docs	5 files -
2383902 8497 Simonds Ct, Apt 6 9/1/2020 2383902 Follow Up with OTC 9/1/2020 2300349 756 NW 24th St, Apt 120 9/1/2020 2300349 Earnest Money 9/1/2020 Shortcuts V	ment Recei 9/1/2020 Docs for Recording	3 files
2300349 756 NW 24th St, Apt 120 9/1/2020 2300349 Earnest Money 9/1/2020 9/1/2020	bots for neodrang	0 1103
Recently Viewed 2 Share Top Customers 2 Replace	ey 9/1/2020 Shortcuts	
	Recently Viewed	
	Top Customers	Replace
(8) Remove		Remove

11

MANAGE SIDEBAR

In this example, the user is adding a fifth shortcut called County Tax Collector



MANAGE SIDEBAR

Once added, the system alerts the user to the completion of the custom shortcut

•• •	ignite.firstam.com	× +					
→ C	â ignite.firstam.co	m				x 🗣 🚺 🖸	S 😸 💑 者 S 💿 💿 O 🖪 🛪 🗊 🔞 :
	Today	This Week N		Update	ed Shortcuts Widget	Undo	Manage Widgets
8	Files Closing	4				1 filter ③	Overview :
board	File Number	Property Address	Phase	Close Date	Seller/Buyer	Escrow Agent	\bigcirc Recently Viewed 10 \rightarrow
) iles	2384902	5498 Hemlock Terrace	Closing	9/1/2020	Branch/Shimada	Adam Smith	
	2383902	8497 Simonds Ct, Apt 6	Closing	9/1/2020	Plata/Lee	Joe Kim	√ Today's Tasks 12
∃ ments	2300349	756 NW 24th St, Apt 120	Closing	9/1/2020	Ontari/Reshamvala	Drake Ontario	Appointments 26 →
] orts	2930041	311 Teri Ct	Closing	9/1/2020	Maas/Knaap	Christopher Millens	$\widehat{\ }$ New Files this Month $\ _{2}$ $\qquad \rightarrow$
							Files Closing this Week 11 \rightarrow
eriter -							Saved Files
	Files Open	9	1 filter 💿 🖉 🗄	Tasks Due	3	2 filters 🗇 📝 🗄	Waiting on Commitment 12 files →
	File Number	Property Address	Open Date	File Number	Task	Due Date	Waiting on Lender Docs 5 files \rightarrow
	2384902	5498 Hemlock Terrace	9/1/2020	2384902	OTC Commitment Rece	21 9/1/2020	Docs for Recording 3 files \rightarrow
	2383902	8497 Simonds Ct, Apt 6	9/1/2020	2383902	Follow Up with OTC	9/1/2020	
	2300349	756 NW 24th St, Apt 120	9/1/2020	2300349	Earnest Money	9/1/2020	Shortcuts
							Recently Viewed All Closed Files
							Top Customers 1099-S Exceptions
							County Tax Collector
	-						

AT .

SMART SEARCH

Quickly find any and every file by searching the API powered file archive

	ignite.firstam.com	× -	F							
$\leftarrow \ \rightarrow $	C 🔒 ignite.firstam.com	m						* * 0 🛙	9 19 18 🚟 者 3 💿 🔍 🛛	* = 6 :
	Ignite]	All 🔻	442	Q		My Files		· C C	
	Today	This Week	Next Week This	 Apply default filters Category 	Search Suggestions				М	anage Widgets
				Property Address	442 Simonds Ct, San Diego, CA					
Dashboard	Upcoming App	ointments	5	File Number	442 6737	Ţ		:	Overview 74 changes since yesterday	:
\$	← Apr	Santiago/F 5730 E 8th	Reshamvala	File Number	442 3721		we, Ste 200		夕 1 Overdue File	\rightarrow
All Files	← 6	Starts in 30		File Number	442 3886			\rightarrow		
Ħ				File Number	442 3890				52 Open Files	\rightarrow
Appointments	Files Closing	13		File Number	442 3891			÷	75 New Files	\rightarrow
Reports	File Number Fil	le Status	Property Address	File Number	4424000		c	lose Date	6 Files Closing This Week	\rightarrow
0	4423678	Overdue	800 Keaton Pl	File Number	442 4129	t/	Pre, + 5	/22/2020		_
? Help Center	2293044	Overdue	8497 Simonds Ct, Apt 6	File Number	442 4287		4	/12/2020	Saved Files 20 saved files in 3 folders	ŧ
	2339940	At Risk	756 NW 24th St, Apt 120	Invoice Number	442 2018312		+ 4	/14/2020		
	3992018	At Risk	5498 Hemlock Terrace	Eq. Advanced Search	\rightarrow	٠	4	/14/2020	Waiting on Commitment	12 files →
	3449320	At Risk	311 Teri Ct	Crabtree/Noggle	12 Record, Disbursement, -	+	4	/14/2020	Waiting on Lender Docs	5 files \rightarrow
	4439201	At Risk	416 Raymond Ct, Apt 2124	Pippen/Briggs	7 Loan Documents, Recor	rd, +	4	/14/2020		1
	3392102	At Risk	1865 Baker Pl	Jamacaru/Ly	4 Disbursement, Policy		4	/15/2020	Docs for Recording	3 files →
	2129330	At Risk	7788 Eagle Rd	Clark/Nunez	2 Pre-Closing, Closing Do	cume	nts 4	/15/2020		
	2233822	On Track	525 Terrace St, Unit A	Samarel/Fatima	9 Survey: Affidavit T-47		4	/17/2020	Shortcuts	:
	2239034	On Track	120 Park Skyline Rd	Mitchell/Baker	12 Disbursement		4	/17/2020	Recently Viewed All C	losed Files
	4439202	On Track	42 Upland	Hirahara/Young	9 Buyer CD		4	/18/2020	All of the second secon	00001100
	4443920	On Track	1324 Prescidio PI	Thomson/Hampshire	0 Ready for Closing		4	/19/2020	T 0.11	2 Furentine

APPOINTMENTS

Today view includes the user's calendar to streamline efficiency

ignite.firstar	1					X 🗢 🚺		
jnite		2					0 5 8 🚟 🔏 3 6 0	
		All	 Search file numbers, add 	resses,	, parties Q My Files			4 🔮
Today	This Week	Next Week	This Month					Manage Widge
Upcoming	Appointments	6				:	Overview 74 changes since yesterday	
	pr Santiago/ 5730 E 8th	/Reshamvala Ave	Apr 6 Bruun/Yuzer 8500 Von Karman Ave. #	#600	Apr 6 Huang/Kim 1011 Western Ave, Ste 200	\rightarrow	√ Changes since yesterday √ 1 Overdue File	
	Starts in 30) minutes	11:00 AM		11:00 AM		52 Open Files	15
Files Closir	ng (13)					÷	🖓 15 New Files	1
File Number	File Status	Property Address	Seller/Buyer	Outs	Istanding Tasks	Close Date	6 Files Closing This W	/eek
4423678	Overdue	800 Keaton PI	Pamell/Lovelo	9	Earnest Money, Commitment/Pre, +	5/22/2020		
2293044	Overdue	8497 Simonds Ct, Apt 6	6 Plata/Lee	6	Loan Documents, Records, +	4/12/2020	20 saved files in 3 folders	
2339940	At Risk	756 NW 24th St, Apt 12	20 Ontari/Reshamvala	8	Closing Documents, Record, +	4/14/2020		
3992018	At Risk	5498 Hemlock Terrace	Maas/Knapp	9	Curative, Loan Documents, +	4/14/2020	Waiting on Commitment	12 files
3449320	At Risk	311 Teri Ct	Crabtree/Noggle	12	Record, Disbursement, +	4/14/2020	Waiting on Lender Docs	5 files
4439201	At Risk	416 Raymond Ct, Apt 2	124 Pippen/Briggs	7	Loan Documents, Record, +	4/14/2020		
3392102	At Risk	1865 Baker Pl	Jamacaru/Ly	4	Disbursement, Policy	4/15/2020	Docs for Recording	3 files
2129330	At Risk	7788 Eagle Rd	Clark/Nunez	2	Pre-Closing, Closing Documents	4/15/2020		
2233822	On Track	525 Terrace St, Unit A	Samarel/Fatima	9	Survey: Affidavit T-47	4/17/2020	Shortcuts	
2239034	On Track	120 Park Skyline Rd	Mitchell/Baker	12	Disbursement	4/17/2020	Recently Viewed	All Closed Files
4439202	On Track	42 Upland	Hirahara/Young	9	Buyer CD	4/18/2020	necently viewed	111 010000 11105
	On Track	1324 Prescidio PI						

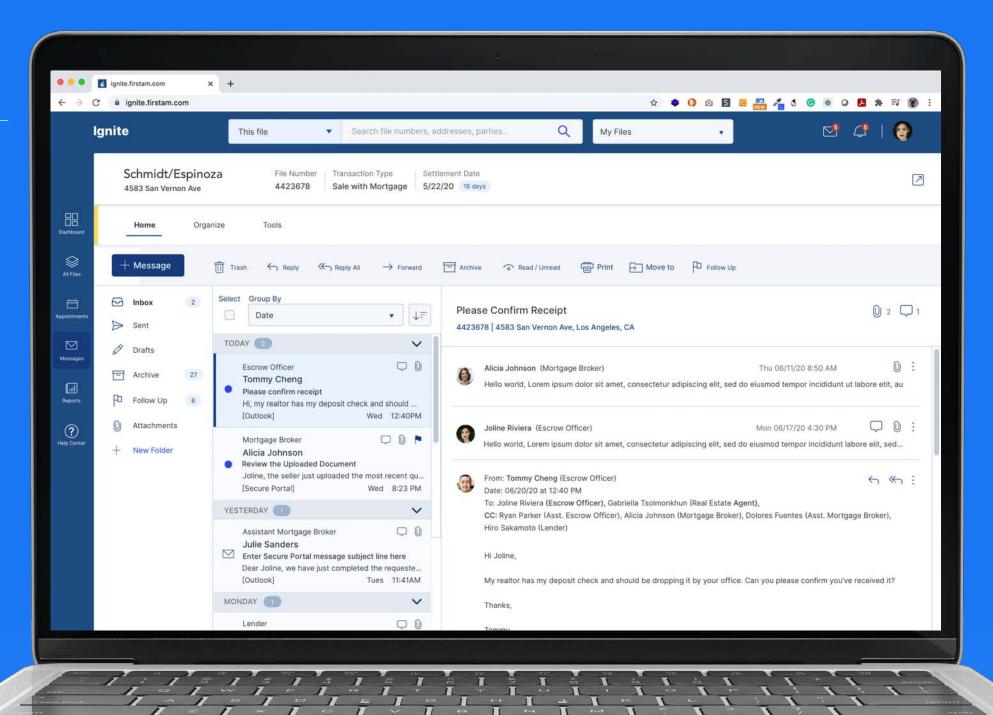
APPOINTMENTS

Today view includes the user's calendar to streamline efficiency

			_		x 🗢 🕜	o S 🛚		1 0	•		* 11
Ignite	All	Search file numbers,	addresses, pa	rties Q	My Files	¥			⊵ ⁵	45	1 🤅
Today 5	This Week 9	Next Week 17 This Month	36							+ Ap	pointm
- Today	→ April 6, 20	20				< s	м	A T	pril 202 W	20 T	F
Transaction Type						27	28	29		1	
All Types	* 8:00 AM					4	5	6	30 7		2 9
Business Source								-		8 15	
All Sources	* 8:30 AM					11	12	13	14		16
Calendars	+ 9:00 AM	Santiago/Reshamvala #223940	11			18 25	19 26	20 27	21 28	22 29	23 30
Calendar 1		5730 E 8th Ave, Irvine, CA 92603				0	(0		- 1 4000	0044	
Calendar 2	9:30 AM	 Appointment Location 8500 Von Karman Ave. #600 	& Parties Attend		ller) \rightarrow			shamval e, Irvine,			
Calendar 3		Irvine, CA 92603	Anthony Steve					Karman A	ve. #600)	9:0
Calendar 4	10:00 AM					Irv	ine, CA 9	92603			
								oinoza #			
	10:30 AM							non Ave,	Irvine, C	A 92603	
							Main Av ine, CA 9				11:0
	11:00 AM	Schmidt/Espinoza #4423678 4583 San Vernon Ave, Irvine, CA 9260	3	Huang/Kim #223940 1011 Western Ave, Ste 200				#44223 Ave, Ste 2			
				Appointment Location		10111	vestern	Ave, sie .	200		

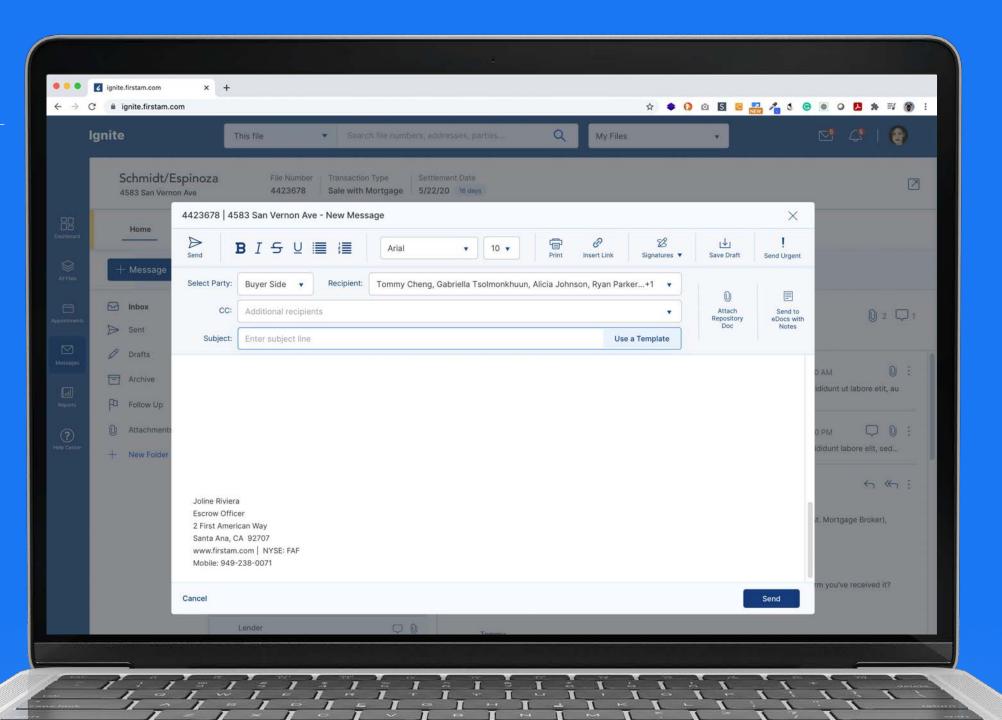
MESSAGE CENTER

Secure end-to-end encrypted messaging platform to prevent malicious interception



MESSAGE CENTER

Messaging utilizes Two Factor Authentication



94 Additional resources available at SealSpace.com 2021 All rights reserved.

OBJECTIVES

Objectives



Understand the difference between consumer and enterprise design so we can best leverage the existing work done for FA Portal.



Identify key opportunities and interaction patterns within dashboard experiences.

)23

Focus on experiences and features that will increase efficiency and ease of use.

FIRST AMERICAN / IGNITE / ENTERPRISE ANALYSIS

KEY DIFFERENCES



Focusing on the organization vs. focusing on the individual

Consumer technology is aimed at serving individuals, while enterprise software needs to accommodate large organizations with complex processes.

Designing for workflows vs. designing for a specific need

Designing enterprise applications means designing a system of many interconnected workflows. Conversely, consumer apps often focus on addressing a targeted problem or undermet user need.

- 11

Trading off engagement for efficiency

Consumer applications need to be easily accessible and understandable to retain users. Employees will use enterprise applications day in and day out, so some tradeoffs, like sacrificing some learnability to increase efficiency, might be made.

FIRST AMERICAN / IGNITE / ENTERPRISE ANALYSIS

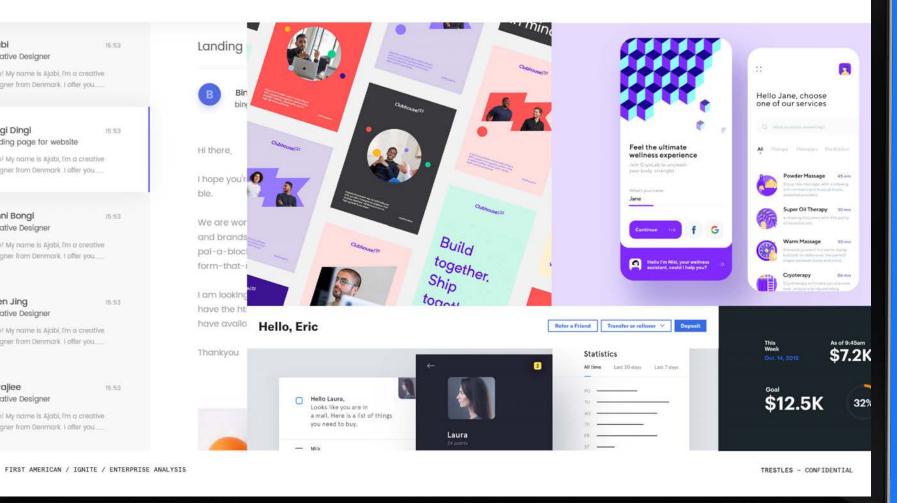
CONSUMER DESIGN

Consumer

Ajabi

Creative Designer

Human Friendly Accessible Intuitive Legible Minimal



10

Bingi Dingi 15:53 Landing page for website

Hello! My name is Ajabi, i'm a creative Designer from Denmark. I offer you

15:53

Hello! My name is Ajabi, îm a creative Designer from Denmark 1 offer you.....

Dinni Bongi 15:53 Creative Designer

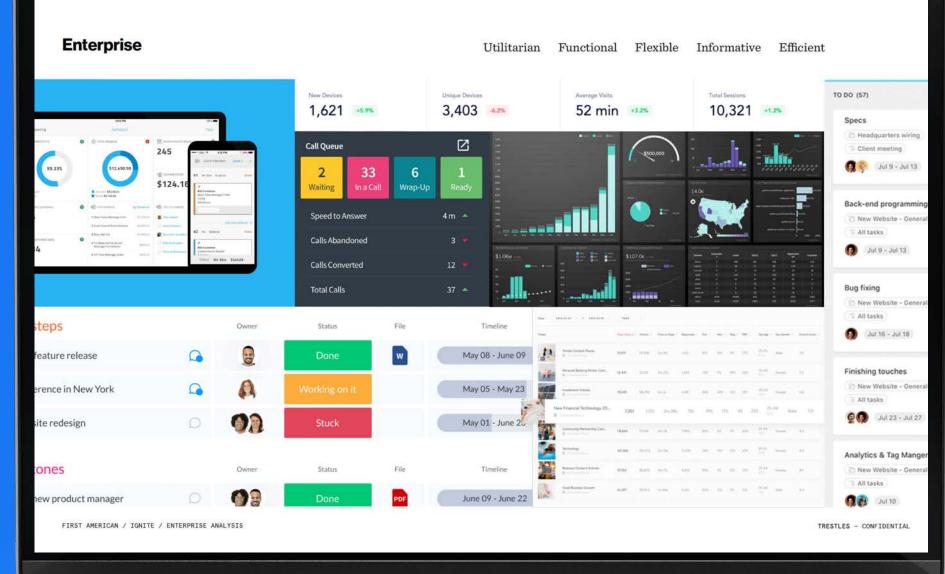
Hello! My name is Ajabi, îm a creative Designer from Denmark I offer you

Eeen Jing 15:53 Creative Designer Helio! My name is Ajabi, (m a creative Designer from Denmark 1 offer you....

Farajiee 15:53 Creative Designer

Hello! My name is Ajabi, rm a creative Designer from Denmark 1 offer you

ENTERPRISE DESIGN



SPACING

ENTERPRISE VS. CONSUMER DESIGN

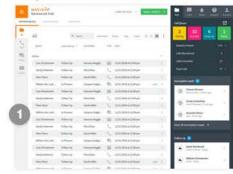
Spacing

- Enterprise tools typically have greater scope and are more complex than consumer applications, so information is usually more dense. Spacing in enterprise tools is tighter than that of consumer tools, but smart use of visual hierarchy can help keep information legible.
- Generous spacing and judicious use of color/type can help consumer applications feel instantly accessible, as it is clear which elements the user should focus on first. Spacing is not as tight to increase ease of use and legibility in consumer apps, where there is usually less data to process.

Enterprise Grow BI



Enterprise Navis



Consumer eBay Seller Portal



101

11

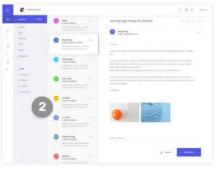
· ·

- 16

T

16

Consumer Email app mockup

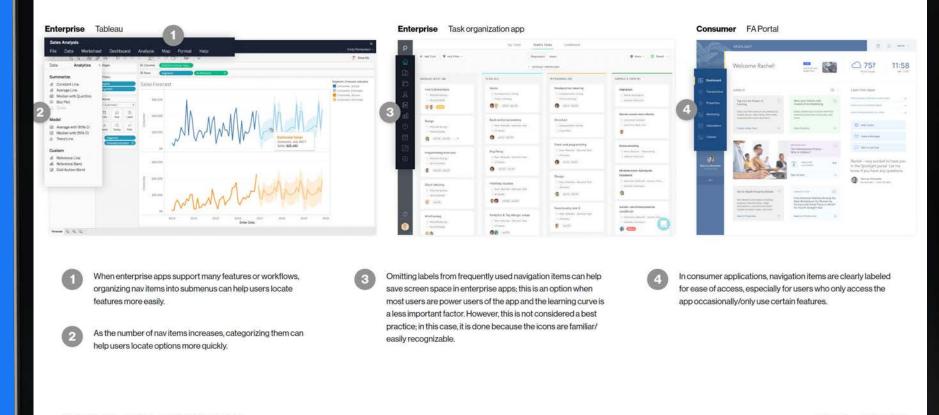


FIRST AMERICAN / IGNITE / ENTERPRISE ANALYSIS

NAVIGATION



Navigation



~ T

FIRST AMERICAN / IGNITE / ENTERPRISE ANALYSIS

COLOR

ENTERPRISE VS. CONSUMER DESIGN

Color

- In enterprise dashboards, color is an important tool for calling out system status and differentiating dense modules of information. Color is also used to call out system status in consumer products, but to a lesser extent as there is typically less data to communicate.
- In consumer apps, color is used primarily for calls to action and elements that add delight to the experience (for example, illustrations).
- Using key brand colors in important page elements like the primary nav and calls to action helps to create a more cohesive brand experience.

Enterprise Monday



Consumer Betterment

Hello, Eric

0

- 11

AN HOR OF

Rabbi sud your Enersity plan

asked in maning and real hours

Consumer FA Portal

Ante a Frank State in allow 10 December

Bethermord Services

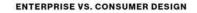
2

824,590.83

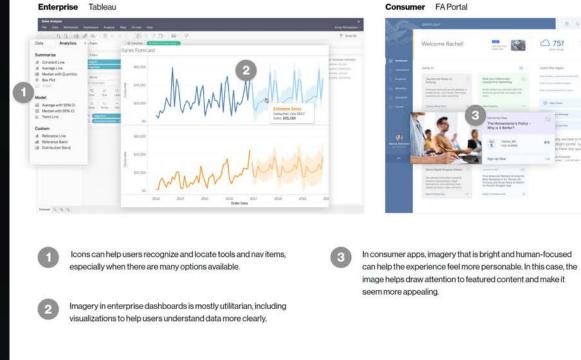
41.0014 (0010) 600205 Enterprise Navis

FIRST AMERICAN / IGNITE / ENTERPRISE ANALYSIS

IMAGERY



Imagery



~ 1

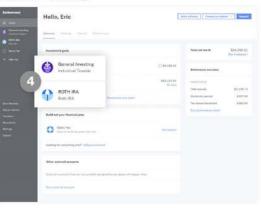
T



Consumer Betterment

4

R



Illustrations can also help a consumer experience feel more friendly when there isn't a need for a vast library of icons.

FIRST AMERICAN / IGNITE / ENTERPRISE ANALYSIS

TYPE

ENTERPRISE VS. CONSUMER DESIGN

Type

In enterprise tools, headlines are generally used to inform the user of their current place in the app.

In consumer apps, bold headlines with friendly copy help the experience feel more human-centered and are not necessarily functional.

Enterprise apps generally will have a larger selection of type styles (a larger type ramp) in order to maintain visual hierarchy in an information-dense screen.

0		1000			O
			-		Dylen Bayfelge
Legijet Dathe	÷				
a second			-		Data Mercana Mineter (March 1975) 14 (19
		-			Int. Buildingstoren
			weat 1	10	0000
Autor 1	-	-	-		Mark & Restored
O Inteller	-				Second Second
Ø	-	-	* (m)		And States
2 texteer	-	-	á inner		in the bound terminal of
O testadar	(many)				
A haches	-	-			
•			-		
Particular	and a				

Enterprice Employee management platform

Enterprise Navis R hard random hard hard Secondary III International Pulling Lin merel and tripping pairs O Tarmer Stream - III MARRIAN COMPA O Deres Underbies 1 mmmether O Amenda Peters IN ADDRESS 1. IIIIIII. IIII here high \$1 1111111 + O'fly A State Mandreak -Inferring Terroritigh III MUMINISTRATION Andrew Lip. A. Minima take · Wiler Cristeror Amerikan Autority Generation C. International

Consumer Betterment

Hello, Eric Advertised Transference - Avenue and house house before Total set worth \$24,390.93 bearmound goats Garand Funding TO 10,100 TO Rentsconert manual A ALTER \$10,101.30 11.135.74 Total samed Destance opened 1297.41 But not up with prove that \$5 peer Sciences life. Providelan you good The Income Surgerships 5363.01 Build and your financial pla O Salary Nat Linking for language and the protocol

Consumer FA Portal



FIRST AMERICAN / IGNITE / ENTERPRISE ANALYSIS

CONTENT

ENTERPRISE VS. CONSUMER DESIGN

Content

- Enterprise dashboards are usually more information dense as users need to manage simultaneous tasks/workflows/data sets. In this case, exposing more information at once is beneficial for experienced users because they don't have to dig for advanced details.
- Consumer tools tend to expose only the most relevant data in 2 an easy-to-digest, at-a-glance format. More detailed data is usually tucked away in a separate screen or modal.
- In consumer tools, aesthetic appeal can be prioritized over 3 efficiency of use. Keeping the main dashboard minimalistic, readable, and modern-looking takes priority over being able to quickly manage detailed stats and information.

Enterprise Amazon QuickSight



Enterprise Navis NAVIS HAROwcast Hub 10020-015 contractory. All 0.0.00 12/12/2018 # 12/18 1. · · · 12/11/2018 at 12:08 ar LURI/ROB of STREET Tarmer Stimmer 12/10/2018 or 12/18/0 12/10/2014 in 12/00 (r 0 1. 1010/2011 at 12:00 per Taroni Miller 10/11/2014 at 12:08 p

Consumer Activity logging app



-

11

16

T

Consumer eBay Seller Portal



FIRST AMERICAN / IGNITE / ENTERPRISE ANALYSIS

TONE

ENTERPRISE VS. CONSUMER DESIGN

Tone

2

In enterprise tools, the tone is simple and concise as the interface takes a backseat to functionality and productivity.

In consumer apps, a friendly, helpful, and welcoming tone has become the standard. The copywriting and page layouts are set up in such a way that user is easily siphoned through the tool's main flows.

0		a parter			
			-		Dylan Baylidge
Ecoply and Dirach				4	
			-		terier internetienen die r
	1.000	-			0000
Autor 1	-	Sec. Name			-
() ======	-	100001-000		11 14	and the second second
0	-	-			-
2 textere	100	-			in the
@	(men)		•		the first of
M taches	-	-	•		
	-	-	-		
P there to det	-				

Enterprise Employee management platform

Enterprise Navis No. of Concession, Name Read and and the set I I 0104. Date II management merel and tripping pairs O Tarmer Stream - III MARINA MAR O Dereis Underbieje a month at the We included at the start O Amenda Peters IN OCCUPATION. 1. unmaster ----- VAD. 💼 home light. We hitself the to Prove the Interity Tenartigh an Although Didge. · interiorate Andrew Lip. minimati. · Wiler Cristeror feerine falsety bearing C could a coupe

Consumer Betterment

Hello, Eric Advertised Transferences - August and house house before Total and worth \$24,390.93 bearmound goats Garand Funding Q 10.298.20 Rentsconert manufact -\$10.101.30 11.135.74 Total samed Destance served 1297.41 But not up with prove that \$5 peer Scienced life. Providelan you good The Income Surgerships 5363.01 Build and your financial pla O Salary Nat Linking for language and the protocol

Consumer FA Portal



FIRST AMERICAN / IGNITE / ENTERPRISE ANALYSIS

HEURISTIC EVALUATION

106 Additional resources available at SealSpace.com 2021 All rights reserved.

HEURISTIC EVALUATION

OBJECTIVES

Objectives



Better understand the requirements of the Ignite experience.



Identify obstacles and opportunities within the Ignite experience.



Collect findings that will inform workshop activities and initial design directions.

FIRST AMERICAN / IGNITE / UX EVALUATION

HEURISTIC EVALUATION

EVALUATION SCALE

Evaluation Scale

The following evaluation scale was used when reviewing the current FAST and Ignite experiences:



Good Experience

Tasks are easily accomplished. Terminology/labels are understandable and consistent. The application uses common UI patterns.

Average Experience

The application is at an industry-standard or average level. Tasks are somewhat easy to accomplish but require some user effort. Terminology/labels can be confusing and inconsistent.



Bad Experience

Tasks are problematic or confusing for users. Terminology/labels are difficult to understand and inconsistent. The application uses unusual UI patterns.

FIRST AMERICAN / IGNITE / UX EVALUATION

HEURISTIC ONE

Visibility of System Status

HIGH-LEVEL OVERVIEW

5

4

Visibility of System Status

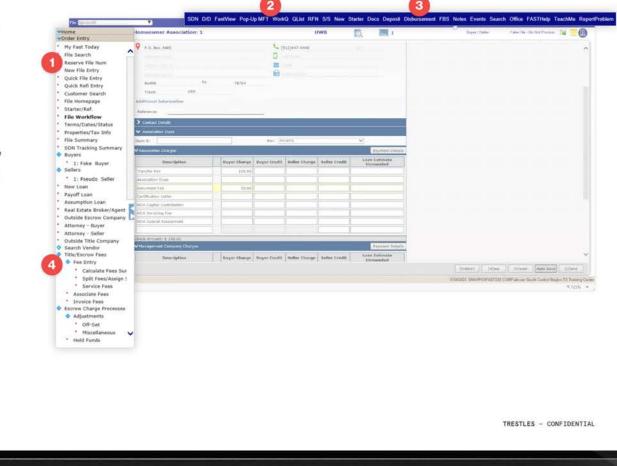
FIRST AMERICAN / IGNITE / UX EVALUATION

There is no visible indication of progress for a given file, and it is not clear which entry forms are relevant without prior training.

2 The top nav contains many disorganized, competing options, making each one difficult to locate.

When the user enters charges, there is no indication that the corresponding Disbursement form has changed.

Many entries in the side nav are occluded, and there is no visible search function to locate specific entries. The user needs to either dig for the desired option or have outside documentation open.



T

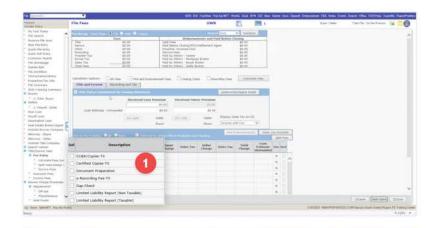
HEURISTIC TWO

Match Between the System and the Real World

HIGH-LEVEL OVERVIEW

Match Between the System and the Real World

FAST often labels entry fields and templates using codes and acronyms, with little to no description. This results in a significant learning curve for users unfamiliar with the system.



	Document Repository	UWB	10,		Saw hile Fa	The Date Darry of
*	fill Decements Terry	ate Spanije				
Trada -	any kitest?	O' Las para de las comos				
u territychy active turbale fault hagtist	Structure designs to date in Original Surgistion	(a	trend 1			2 the base
(riber	and the second sec	Valuet				
	the second second	a simplement finari, fastur-				
alaureas Diliure arey Las Dileti	+ (termit	The Assessment searched to transment.				
elar-	Template Name	Description Last report taxy over y in taxi	-			Jac
To and serviced	FY1M21000	0021-7ax Info Authorization-Buyer-2018		a Type 1	Source	
	frmJ1508	8821-Tax Info Authoritation-Seller-2018	1000	ADDE OF	Source	•
inter E	ACCRECACHT	Accentredulters Recording Agent Real Prop.		FMIT:	10121917 Dagentin Regist	
equit in his raw	DRAC13	Accounting: Chick Action Required		Farm COLPAR Coloran logal		
Aprild Racoppi ed	ACTESSIOFRM	Accounting: Onborsement Form	-	His Dense Internet	OCC2480 Dates are logical	
Antine Industry of the	ACCENCERTOPRA	Accounting: Exchant Respond Form	-	Mill Come Smithal	STOCKET Company Instant	
	ACTIBACVST	Accounting: FAThurt B5A Transaction Approval		Mig Laries Immunet	COUNCY Execution Fraging	
Adaria Gambary	IBASA/2008	Antimethology TBA Savangs Actionant Forth (Baryor)		412m	CONTRACTOR AND ADDRESS	
a Declasora	IDASAV085	Accounting: IDA Sanshga Account Form (Salier)		Piere-	trantor i espren inger	
Settlement Second	A/ES11v11mE1	Mindavit - Estate fact More Than \$1508-CA	-	Figure .	COCINER Coursely Ingen	
	ASANCH	Alldavit - Name for Same /W		Lips Successive Har-	(14)424 Largeron togen	
Instant Repeating Infiliating Lag Instance ment Result	Artegers	Affective - compared panel		Logic Involutions (11)	1242423 Capitan Angen	
	APCODEXTX	Alldavit Concerning Sale by Independent Executor-		1 (gal Recollecto Terr Lago Recollecto Terr	SCHOOL SUBJECT OF STREET	
- V						

FIRST AMERICAN / IGNITE / UX EVALUATION

- 1

- 1

HEURISTIC THREE

User Control and Freedom

HIGH-LEVEL OVERVIEW

1

User Control and Freedom

FIRST AMERICAN / IGNITE / UX EVALUATION

The Order Entry list does not indicate which forms have been previously edited, and it is unclear whether there is a function to quickly return to previously accessed forms.

If the user fills out the wrong entry form, there is no easy way to undo or transfer the data entry.

L Peling Sold L Paudio Sold L Daulio Sold L Daul	Homeowner Association: 1	100.00		2)447-4695		Exyment Det Unrounded		byer (Soler	Från Fila - Da her Process	• <u>-</u> @
Lean Vican Vi	Aasten tin k Aasten in y Aasten Visa Aasten Visa Aasten Visa Aasten Visa Aasten tin k Aasten tin k Aasten tin k Aasten Over Deer Si Occord Ordals Aasten Charges Description Tranvier Fee Concord Fee	Buyer Charge 100.00	Pat: MO	ан П	Seller Credit 1	Exyment Det				
off Loah emotion Loan Estate Encourt/Agent dia Sizoro Company mery - Buyer mery - Buyer mery - Buyer mery - Buyer - Colculator Supporty - Colculator Sum - Sum - - Colculator Sum -	Aasten tin k Aasten in y Aasten Visa Aasten Visa Aasten Visa Aasten Visa Aasten tin k Aasten tin k Aasten tin k Aasten Over Deer Si Occord Ordals Aasten Charges Description Tranvier Fee Concord Fee	Buyer Charge 100.00	Pat: MO	ан П	Sober Croit I	Exyment Det				
Extra Environ/Agent adds Estron Company miny - Sufer adds Estron Company miny - Sufer adds Title Company civiliate adds Title Company civiliate adds Title Company civiliate cancilate News faile fore Entry · Cancilate News faile fore Samp fore Samp fore Samp fore	Austin Turo y Austin Turo y Austin Turo y Austin Turo y Additional Information Faference:	Buyer Charge 100.00	Aer: 100	ан ан	Seller Credit	Exyment Det				
uide Estore Company miny - Buger State - State State - State State - State State - State State - State State - States States S	Assessment ten of Austric TX Tavie UTA Additional Information Faferance:	Buyer Charge 100.00	Per: MO	αH	Seller Crofit	Exyment Det				
viney - Super viney - Safe vine - Safe (Viscon Yeek) viscon Yeek - Safe - S	Aaster PX Travis USA Additional Internation Fadremotic Scatter Outals Association Dues Deer El Deschiften Charges Deschiften Travive Fie Conception Travive Fie Conception Conc	Buyer Charge 100.00	Per: MO	πH	Selier Credit	Exyment Det				
arrey - Selivi Jab Title Company Liston Free Entry - Catulate New Sec - Catulate New Sec - Selivito Free - Second Free - Second Free - Second Second - Miscelander - Miscelander	Travis USA Additional Information Reference:	Buyer Charge 100.00			Seller Credit.	Exyment Det				
Cick Vandor (Ukscon Feek Fee Entry - Catcular hem Sise - Sparko Feek Associate Feek Associate Feek Mericke Feek Associate Feek Mericke Feek - Off-Sart - Off-Sart - Off-Sart - Off-Sart - Miscalizaneos Homes Variaday - Peek - Septic - Sophic Lower Miscelaneosu Diblous Miscelaneosu Diblous Miscelaneosu Diblous Miscelaneosu	Additional Information Feferance:	100.00			Seller Crodit.	Exyment Det				
V(Iscow Fees Fee Intry * Catcular News Ser 5 gart fees/aduary fees 8 sercical Fees Norder Fees Norder Fees Miscalansour Miscalansour Homes Warandy Indexton Repair * Miscalansour Homes Warandy Indexton Repair * Septic * Othe Septic * Othe Macalansour Homes Warandy Inspection Repair * Septic * Othe Macalansour Macalansour Norder Sector Macalansour Norder Sector Macalansour Norder Sector Macalansour Norder Sector Macalansour Norder Sector Macalansour Norder Sector Macalansour Norder Sector Norder Sector	Feference:	100.00			Seller Credit	Exyment Det				
Fee Entry	Feference:	100.00			Seller Credit	Exyment Det				
Gpt Feel Associate Service Feel Associate Feel Involve Feel Involve Feel Microbio Feel Micr	Contact Outails Association Dues Does E Description Transfer Fee Conception Transfer Fee Container Fee Contribution Letter HOA Capital Contribution inG. Servicing Fee HOA Spacial Assessment	100.00			Seller Crudit	Exyment Det				
 Sarciolar Fees Associatar Fees Involote Fees Olf-Sait Olf-Sait Olf-Sait Miscalizansouri told Flandi Home Warraffyi Feesti Seglici Othes Insurance Leave Miscalizansou Kank Miscalizansou Kenk 	✓ Association Dues Does 1:	100.00			Selfer Credit.	Exyment Det				
Service Tree Service Trees Involor Trees Majustiments - Off-Set - Off-Set - Off-Set - Mission Regular - Mass - Mass - Past - Seglic - Other Insurance Leave Macelahoolog Disburs Progenty Tax Chock Progenty Tax Chock	✓ Association Dues Does 1:	100.00			Seller Credit.	Exyment Det				
Invector tens mic Charge Processors Adjustments • Off-Sait • Miscalianneous Intel Fundi Homes Wartaffah Homes Wartaffah • Peat • Seglic • Other Insurance Leave Miscalianneous Diaburs Miscalianneous Diaburs Miscalianneous Procesh Miscalianneous Evenk Miscalianneous • Tax	Dever 6: Conscription Charges Conscription Association Duat Document File Cestification Letter InOA Capital Association InOA Special Associations InOA Special Associations	100.00			Seller Credit.	Exyment Det				
Mic Charge Processes Adjustments • Off-Set • Mic Clansoc • Mic Clansoc • Mic Clansoc • Mic Clansoc • Mic Clansoc • Pest • Septic • Other Imurance Imurance Imurance Imurance Imurance Imurance • Other • Mic Clansoc Mic Clansoc • Tax	Association Charges Description Transfer Fee Association Duais Document Fee Centification Letter HOA Capital Contribution HOA Spacial Association	100.00			Seller Credit.	Exyment Det				
Off-Sel Micolansor Mico	Description Trunder Fee Association Data Document Fee Continuation Letter eXA Capital Contribution etical Serviciting Fee NAA Spacial Associated	100.00	Buyer Credit	Seller Charge	Seller Credit	the second se				
Miscalianocui Minimum Associa Monimum Associa Mon	Transfer Fee Association Data Document Fee Certification Letter HOA Capital Contribution HOA Servicing Fee HOA Spacial Associated	100.00	Buyer Credit	Seller Charge	Selier Credit	Loan Estimate Unrounded				
Held Funds Homeware Associa Norme Warraffel Homeware Associa * Peet * Septic * Other Impurance Leave Micelianeous Diaburs Property Tax Cherk Proration * Tax	Transfer Fee Association Data Document Fee Certification Letter HOA Capital Contribution HOA Servicing Fee HOA Spacial Associated	100.00	Bayer Credit	Seller Charge	Seller Credit	Unrosoded				
Homeewner Associe C Home Warrafty Inspection Repair * Pest * Septic * Other Insurance Leave Miccellaneous Disburs Property Tax Check Propertion * Tax	Association Duas Document Fee Certification Letter HOA Capital Contribution HOA Servicing Fee HOA Special Assessment									
Home Warranty Ar Pest - Septic - Other - Insurance - Miscellaneous Disburs Property Tax Check Prontion - Tax	Document Fiel 2 Centification Letter eVAA Septial Contribution HVAA Servicing Free IndA Spotial Assessment	58.00								
* Pest * Septic * Other Impurance Lease Miscellaneous Diaburs Property Tax Check Property Tax	Certification Letter HGA Capital Contribution HGA Servicing Fee HGA Special Assessment	50.00								
* Septic * Other Insurance Exame Miscellaneous Disburs Property Tax Check Progration * Tax	HOA Capital Contribution HOA Servicing Fee IrOA Special Assessment									
* Other Insurance Leave Miscellaneous Disburs Property Tax Check Proration * Tax	HOA Capital Contribution HOA Servicing Fee IrOA Special Assessment									
Leane Miscellaneous Disburs Property Tax Check Proration * Tax	HGA Servicing Fee HGA Special Assessment									
Miscellaneous Disburs Property Tax Check Proration * Tax	HÓA Spocial Assessment			_	t t					
Property Tax Check Proration * Tax				-	l.					
Proration * Tax		(
* Tax	and and a second second second				LL		_			
 Bank 	Check Amount: \$ 350.00									
	VHanagement Company Charges					Wayment Det	(alls			
* Miscellaneous Survey	Description	Burner Charge	Buyer Credit	faller (barro	Rolling County	Loan Estimate				
ubicy	Description	Buyer Charge	under Credit	seller Charge	seller Credit	Unrounded				_
row Closing								(Delota) (N)aw	Risort Auto Save	[D]ona
and Ealth MIT Ban in Water								HALDONS CHAUDIGEAUTOSS	CODU alucers Reach Carebal Dealers T	W Texaster F
and shares in the second								Addition prover sur Additions		* 125%
										19.86279
								TRES	TLES - CONFIDENTI	IAL
re	w Closing	e Self WT Precis Weld	w Closing	w Closing	w Closing	w Closing	w Chiling	m Cosing	e Self MT Peolo Wek0	We Chaining Dealers Molese Molese Autor Saver # Spit MPT Pape by WerkQ 1/3/2020 SNAVPRISFASTI20 CORPutationan South Canetar Region 7 1/3/2020 SNAVPRISFASTI20 CORPutationan South Canetar Region 7

HEURISTIC FOUR

Consistency and Standards

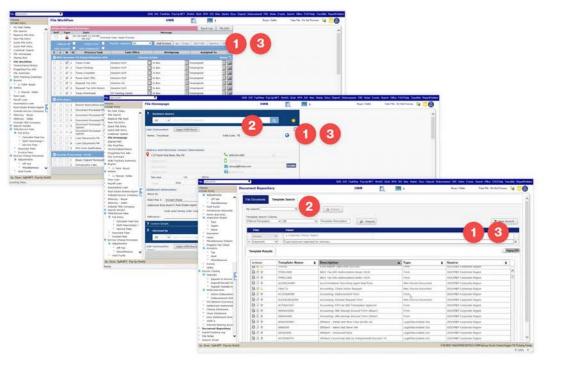
HIGH-LEVEL OVERVIEW

5

3

Consistency and Standards

- Forms do not have a consistent structure. When looking for a particular feature, the user cannot rely on page structure to quickly locate it.
- 2 The styling of the search function differs between the File Homepage and the Document Repository. This makes search more difficult to find and can result in confusion and frustration.
 - Visual styles such as color and iconography are applied inconsistently across different screens, resulting in a disjointed experience.



FIRST AMERICAN / IGNITE / UX EVALUATION

HEURISTIC SIX

Recognition Rather Than Recall

HIGH-LEVEL OVERVIEW

2

Recognition Rather Than Recall

The number of occluded options in the Order Entry list requires the user to recall the location of a form each time they need to access it.

The icons and labels in the top navigation are uninformative. Their functions are unclear unless the user has previously accessed them, which increases cognitive load because it forces the user to rely on recall rather than recognition.

FIRST AMERICAN / IGNITE / UX EVALUATION

rocess 🔯 📃
2
×.
Here Indana
Report TR Transing Ours
9,1255 -
CONFIDENTIA
T
No. of Concession, Name

HEURISTIC EIGHT

Aesthetic and Minimalist Design

HIGH-LEVEL OVERVIEW

5

Aesthetic and Minimalist Design

Workflows are not tailored to specific roles. Many options are exposed to the user at once, and there is no clearly defined flow between FAST features.

The use of color in the design is not purposeful, particularly in the iconography. Arbitrary variations in color can pull attention away from the tool's more important features.

Page content is not responsive to window sizing.

Aprox aprox and	*					NO DELLE REN STS New	Sumer Docs Deprise t				and an other the state of the s	
Home Onler Entry	Homeowner Association: 1				IWB	🔯 🔚 1		Buyer (S	offer	Fake File - D	e Net Frecess	14
* 1: Pseudo Seller	P.O. Rex 3485		£.,	12)447-4495								2
* Payoff Loan	· · · · · · · · · · · · · · · · · · ·			Teles. ana								
* Assumption Loan												
Real Estate Broker/Agent	Add and the Sum		2 8									
Dutside Escrow Company Attorney - Buyer	Additional Advances of		- D									
Attorney - Seller	Austin TX	78764										
Outside Title Company	Travis USA											
Search Vendor Title/Escrow Fees	Additional Information											
Fee Entry												
* Calculate Pees Sur	Keference:											
 Split Fees/Assign 1 Service Fees 	> contact Cotalis						13					
Associate Fees	V Association Dues											
* Involce Fees * Escrow Charge Processes	Duet \$1		Part 19	ONTH-		~						
 Adjustments 	Association Charges		100			Exyment Deta	ila -					
* Off-Set. * Miscellaneous	Description	Buyer Charge	Buyer Credit	Seller Charge	Seller Credit	Loan Estimate						
* Hold Funda	Transfer Fee	100.00	and a second		1	Unrounded						
* Home Warranty	Association Dues											
Inspection Repair Pest	Document Fee	50.00										
* Septic	Certification Letter		1		í							
* Other	HOA Capital Contribution	1										
* Insurance * Leave	HOA Servicing Fee	1	1	1	í (1					
Miscellaneous Disburs	HOA Special Assessment	1.1	1	1	1							
Property Tax Check												
 Proration Tax 	Check Amount: \$ 350.00						-					
* Rent	Vitanagement Company Charges					Vayment Ceta	10.					
 Miscellaneous Survey 	Description			Seiler Charge		Loon Estimate						
* utility	Description	Buyer Charge	Duyer Credit	sever charge	Scher Great	Unrounded				-	-	_
Escrow Closing								[Delots]	(N)aw	IR]oost	Auto Save	[D]onn
								to be because the second second	COLUMN A DEPARTMENT	Carlos in Contract and	A 10 1 1 10 11	THE REAL PROPERTY.
Up Down Split NFT Pep-Up Well	0							1/36/2029 (SNAVP)	for nothing set	Ronatina Do	uts central riege	* 125

FIRST AMERICAN / IGNITE / UX EVALUATION

HEURISTIC TEN

Help and Documentation

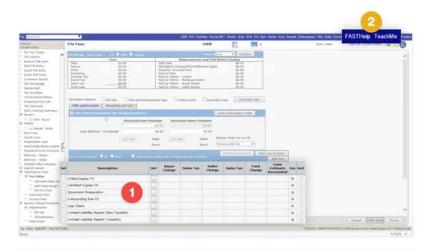


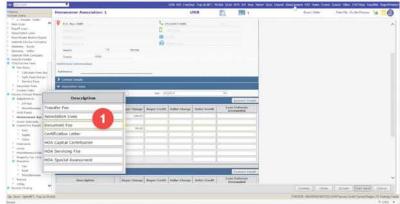
5

Help and Documentation

FAST does not provide descriptions or contextual help for the fields that the user is expected to fill out.

The link to access FASTHelp is difficult to locate among the other top-nav options, and the distinction between FASTHelp and TeachMe is unclear without prior knowledge.





L

- I - I

IL

IL

11

FIRST AMERICAN / IGNITE / UX EVALUATION

HEURISTIC EVALUATION

KEY TAKEAWAYS



Dashboard doesn't present information effectively

The dashboard could benefit from more informative visuals and a clearer information hierarchy to allow users to quickly digest their workload.

File checklist doesn't assist users through transactions

Ignite is a step up from FAST in terms of being able to visualize a file but still requires a lot of system knowledge to operate efficiently. Make help and supplementary info more readily available and automate where possible.

1711

Visuals and interactions are inconsistent

Visuals and interactions need a polish pass to meet contemporary UI standards and to create a cohesive experience.

FIRST AMERICAN / IGNITE / UX EVALUATION

STAKEHOLDER INTERVIEWS

STAKEHOLDER INTERVIEWS



Overview

We conducted 10 interviews with stakeholders across the organization.

Stakeholder interviews are designed to provide Trestles with the overall business context for the consulting engagement and ensure a shared vision across the First American team. These interviews help Trestles understand business goals and user needs, and they can highlight issues that need additional consideration due to their strategic importance to the business.

Information collected during stakeholder interviews will be used to inform the project approach, research, and strategy for the Ignite engagement.

Interviews lasted 60 minutes each and took place between February 3 and February 14, 2020.

sequence. The resourcher will follow up with the part details and electropical mission to the study charches	
Upon arrival	
1 stodutors	
1 Bage oder recording	
Session Introduction (5 minutes)	
We have minted you to provide textbalk on FAST3g	
experience and how you'd want it to be improved. We	
spreis could take line in the future, we ditave to get ye these takes, if want to assume you that we are not hell	
well typite could work for you and others like you.	
Throughout our time together, I would like you to give	
might have. This can be either positive or negative. If	
rel work for First American so you can't get me in the	
designed to be an initiable as possible for you and e	
Today a session is expediate to be anound 50 minutes	
Co you have any questions before we get started?	
I also want to tell you those that Timpolog to record de for internal purposes any Also. El te typing recess de	
an operation by brances out ware to be titled onne of	
It we get to any part that poulare showing any califie	
linde and helf put up a black sureen to cover 6 up as	
Background Interview (\$ Minutes)	
These allow quantoms to get to know you hits	
1. Could you mitteduar yourself briefly, whermail	
a Hite long have you teen a (ment the	
 What are your main responsibilities.) 	
 Briss when did you start using FABT1 	
3. Do you also use ignite? If as now long?	
4 As a (reef ther als the) needs you takenly use	FASTA
 How would you summarize your experience 	ewit FA

Study Description

This shop arms to relation of ART optice economic rates the set from the John product and the decision of the interview of the set of the as to decise the set of t

Pacifies as well as negative appetits of the current FASTAprile expension and how participants with the spip to be therewell will be decurrented and and analyzed. Treaties will report research findings and economic for deep incomentation.

Research Questions

Background Questions:

 Here do users currently important their work? Here do they decide what's meet important to work and

Deshiboard:
 Unit a jocpasis do same want 4 destrictions for same in try sine?
 Water sine of internation/satives do same same is agreed to be an the alternational
 Water sources and the destribution for found with
 Water actions do same requires the data states inside the later takent
 Water at the test methods and any the data states. and them?
 Water at the test methods and any the data states. and them?

File Organization:

Incol. Just react to be differently us to interfly a significant processing the term of the second processing of the second processing to the interfly and processing the term of the second processing the term of the second processing of the second processing

Concepts:

Name - No. Annual of Article - Annual - Annual - Papel

ssion Script and Participan! The work is a parts. The work is mean to be prevent composes and types of questions, we will be backet and participant. The actual provide with not receivantly tables the

a. Would they add anything t

whether the property will believe their private

easion Introduction (5 minutes) ackgroond interview (5 minutes)

he goal of this section is to (1) warm up to ghow a factback on their surverse expenation about their ideal expenience (15) in the goal of this section is to gutter their to factback the factback of the concepts (25 m

y Meesures and Metrics

spurt will experience the same study

work on fastis to that the mode dive standpoort, in addition, dar

enal massures such as "most." "some," surter specific tasues or common being millording the poope of an issue is not

Stakeholder Interview Guide

= 11

FIRST AMERICAN / IGNITE / WORKSHOP / DAY ONE

12

STAKEHOLDER INTERVIEWS



Objectives



Gain insight into user wants, needs, and assumptions, as well as how they vary between roles.



Identify opportunities for improving tools and processes.



Collect findings that will inform process development and recommendations.



13

Better understand the business needs for the Ignite experience.

05

Better understand user wants, needs, and assumptions, as well as how they vary between products.



Collect findings that will inform project strategy and explorations moving forward.

FIRST AMERICAN / IGNITE / WORKSHOP / DAY ONE

DESIGN THINKING WORKSHOPS

WORKSHOP GOALS

Due in large part to the history of being an engineering-driven organization, the stakeholders were not familiar with the process of participating in workshops to align on design exploration as it pertains to business objectives. We set out on a mission of cocreation by inviting the business to build the product with us.

Chrome File Edit View History Bookmarks People Tab Window Help

🔶 🔰 🐉 🌜 🚳 🖆 🖪 🕻 🧑 🕥 🚸 🔽 🛜 🕪 100% 🚳 Tue 3:32 PM makearney 🔍 🚍

💿 🗈 🖪 📇 🔏 🐧 💿 💿 🛛 😫 🗯 🗊 🗄

🧢 🔍 🤹 Design Team Meeting2_23.pp 🛛 🗙 🕂

firstam.sharepoint.com/:p:/r/sites/TheTrestlesExperiment/_layouts/15/Doc.aspx?sourcedoc=%7B1E326C36-8766-43D0-91BC-B14405C2785F%7...

Today's Goals

01

Recap key opportunities and design principles, then review enterprise design analysis.

02

Collaboratively brainstorm and prioritize potential solutions based on key opportunities.



☆

Align on next steps and action items moving into planning and strategy.

FAVORITE QUOTE

Once our initial stakeholder interviews had concluded we were able to better understand the challenges the business and engineering team had faced with this product for nearly two decades. This quote refers to building atop a live product that is responsible for 80% of our revenue.

Chrome File Edit View History Bookmarks People Tab Window Help

🕹 Design Team Meeting2_23.ppt 🗙 🕂

+ 🕕 🤧 🚳 🖶 🖪 🕻 🎭 🕥 🖶 🔽 奈 🌒 100% த Tue 3:32 PM makearney Q 😑

"We are driving a car while trying to change the engine. There's just inherent danger in that."

🔒 firstam.sharepoint.com/:p:/r/sites/TheTrestlesExperiment/_layouts/15/Doc.aspx?sourcedoc=%7B1E326C36-8766-43D0-91BC-B14405C2785F%7... 🏠 🔹 📴 🖸 📓 🚟 🔏 🔮 💿 🥥 🖪 🌞 🦈 🎫 🚳

What You Are Worried About Stakeholder 3

FIRST AMERICAN / IGNITE / WORKSHOP / DAY ONE



124 Additional resources available at SealSpace.com 2021 All rights reserved.

DASHBOARD

gnite		All files 🔹	Search for file numbers,	addresse	s Q My File	95	×	🕼 Carla 🔨
Today	This Week	Next Week This M	onth				Rearrange Widgets	Add Widgets
Upcomi	n Timeframe tal due to their po	222				:	Overview 74 changes since yesterda	у
~	users; specific how this featu	cally related to Apr are allows them 6	8500 Von Karman Ave. #	600	Apr 6 Huang/Kim 1011 Western Ave, Ste 20	∘ →	• 1 Overdue File	3 files
	to gauge work	kload over time.	11:00 AM		11:00 AM		• 52 Open Files	3 file:
Files Clo	osing 🕕 🗸					:	• 15 New Files	3 files
File Num	per File Status	Property Address	Seller/Buyer	Outsta	anding Tasks	Close Date	• 6 Files Closing This	Week 3 files
2406737	Overdue	4235 Main St, Unit A	Branch/Shimada	2	Disbursement, Policy	4/12/2020		
2293044	Overdue	8497 Simonds Ct, Apt 6	Plata/Lee	6	Loan Documents, Records, +	4/12/2020	Saved Files 20 saved files in 3 folders	
2339940	At Risk	756 NW 24th St, Apt 120	Ontari/Reshamvala	8	Closing Documents, Record, +	4/14/2020		
3992018	At Risk	5498 Hemlock Terrace	Maas/Knapp	9	Curative, Loan Documents, +	4/14/2020	Waiting on Commitme	nt 12 file
3449320	At Risk	311 Teri Ct	Crabtree/Noggle	12	Record, Disbursement, +	4/14/2020	Waiting on Lender Doo	s 5 files
4439201	At Risk	416 Raymond Ct, Apt 2124	Pippen/Briggs	7	Loan Documents, Record, +	4/14/2020		
3392102	At Risk	1865 Baker PI	Jamacaru/Ly	4	Disbursement, Policy	4/15/2020	Docs for Recording	3 file
2129330	At Risk	7788 Eagle Rd	Clark/Nunez	2	Pre-Closing, Closing Documents	4/15/2020		
2233822	On Track	525 Terrace St, Unit A	Samarel/Fatima	9	Survey: Affidavit T-47	4/17/2020	Shortcuts	
2239034	On Track	120 Park Skyline Rd	Mitchell/Baker	12	Disbursement	4/17/2020	Recently Viewed	All Closed File
4439202	On Track	42 Upland	Hirahara/Young	9	Buyer CD	4/18/2020	notenity viewed	Fill Globed Tile
4443920	On Track	1324 Prescidio Pl	Thomson/Hampshire	0	Ready for Closing	4/19/2020		
3433210	On Track	730 Park Pl	Hirahara/Young	0	Ready for Closing	4/19/2020	Top Customers	1099-S Exceptio

ALL FILES

					ŝ.				
lg	nite	All files	Search for file r	numbers, addresses.		Q My Files			Carla 🗸
	All Files 132	New Files 24 C	Open Files 96 Clo	osed Files 1000+	÷				
,	Close Date	File Status Transact	ion Type Saved To	File Owner	Busin	ess Source			
items :	Select Date 🛗	All Statuses 🔹 All Typ	es 🔹 All Bins	All Owne	ers 🔻 🖌 All :	Sources 🔻 Sa	ve View +	20 saved files in 3 folders	i
≥ Ties	File Numbe	er Property Address	Seller/Buyer	Phase	<u>م</u>			1 Closing File with Overdue Tasks	-)
-	2406737	4235 Main St, Unit A	Branch/Shimada	Opening	4	Source was added in All Files (it was	м	6 Files Closing this Week	-
ntmenta -	2356032 2406243	8497 Simonds Ct, Apt 6 756 NW 24th St, Apt 120	Plata/Lee Ontari/Reshamvala	Opening	4 the only fi	ilter identified as luring round two).	AM :00 AM	15 Loan Docs Received	\rightarrow
eta	2176337	5498 Hemlock Terrace	Maas/Knapp	Disbursement	4/13/2020	☆ Yesterday a		7 Waiting for Insurance	-
	2406700	311 Teri Ct	Crabtree/Noggle	Disbursement	4/20/2020	☆ 4/3/2020 at			
) enter	2405932	416 Raymond Ct, Apt 2124	Pippen/Briggs	Disbursement	4/24/2020	☆ 4/2/2020 at		32 Files Opened this Month	-
	2489102	1865 Baker Pl	Jamacaru/Ly	Disbursement	4/24/2020	☆ 4/1/2020 at		24 Open Refinances	-
	2483028	7788 Eagle Rd	Clark/Nunez	Pre-Closing	4/23/2020	☆ 4/1/2020 at			
	2459489	525 Terrace St, Unit A	Samarel/Fatima	Pre-Closing	4/23/2020	★ 4/2/2020 at		3 Settlement Date Overdue	-
	2348392	120 Park Skyline Rd	Mitchell/Baker	Pre-Closing	4/20/2020	☆ 4/2/2020 at	11:00 AM	Caulad Films	
	2939108	42 Upland	Hirahara/Young	Pre-Closing	4/20/2020	☆ 4/4/2020 at	11:00 AM	20 saved files in 3 folders	:
	2839402	1324 Prescidio Pl	Thomson/Hampshire	Closing	4/14/2020	☆ 4/5/2020 at	11:00 AM		
	2488390	730 Park Pl	Hirahara/Young	Closing	4/14/2020	☆ 4/5/2020 at	11:00 AM	Waiting on Commitment	12 files →
	2454830	416 Raymond Ct, Apt 2124	Pippen/Briggs	Disbursement	4/20/2020	☆ 4/5/2020 at	11:00 AM	Waiting on Lender Docs	5 files →
	2444439	1865 Baker PI	Jamacaru/Ly	Disbursement	4/19/2020	☆ 4/5/2020 at	11:00 AM	Docs for Recording	3 files →
	2432802	7788 Eagle Rd	Clark/Nunez	Pre-Closing	4/19/2020	合 4/5/2020 at	11:00 AM		
	2934802	525 Terrace St, Unit A	Samarel/Fatima	Pre-Closing	4/20/2020	★ 4/5/2020 at	11:00 AM		
	2384893	120 Park Skyline Rd	Mitchell/Baker	Pre-Closing	4/20/2020	☆ 4/5/2020 at	11:00 AM		

APPOINTMENTS

Ignite		Appointments Search fo	or file numbers, addresses.	. Q	My Files	*		4	9	Carla	~
-	oday 5 This Week 9	9 Next Week 17	This Month 36								
Gran items	Today → Apri	1 6, 2020			Appointment +	<		April 20			>
Transa	ction Type		0			S I	T N	W	Т	F	S
All Files All Ty	rpes 👻	Added additional functionality				27 2	8 29	30	1	2	3
Busines		to allow users to filter by relevant parameters and work				4	5 6	7	8	9	10
and the second		across multiple calendars.				11 1	2 13	14	15	16	17
Calen						18 1	9 20	21	22	23	24
Reports Calend	fars + 9:00	0 AM Santiago/Reshamvala	#2239401			25 2	6 27	28	29	30	31
Help Center Ca	lendar 3	0 AM	92603			5730 E 8ti	/ Reshamv h Ave, Irvine, /on Karman CA 92603	CA 92603	01	9:00	0 AM
							uzer #223				
	10:30	0 AM					Karman Ave.	#600, Irvir	ne, CA 92		
						② 24 Mai Irvine,	n Ave. CA 92603			11:0	00 AM
		0 AM Bruun/Yuzer #22394 8500 Von Karman Ave. #6		Huang/Kim #223940 1011 Western Ave, Ste 200			im #4422 ern Ave, Ste				
	11:30	0 AM					Providence CA 92603	Rd.		11:0	MA 00
	12:00	0 PM					n/Cunning Unit 159, Irv				
	12:30	0 PM				4451 1	imberland	Dr.		4:30	0 PM

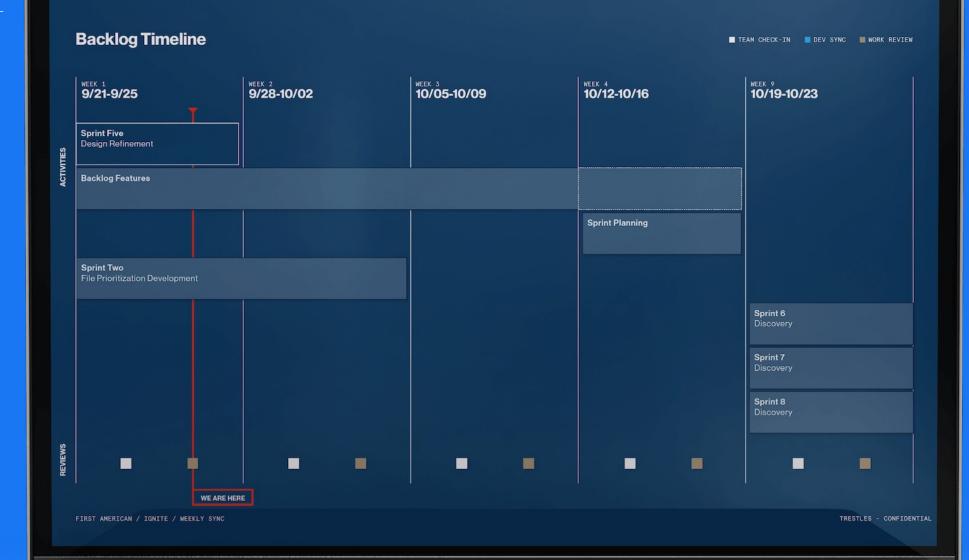
-

FILE/TASK VIEW

ļ	gnite	This file Search for file numbers, addresses	Moved the documents tab to		•	🕼 Carla 🗸
	← Branch/Shimada 4235 Main St, Unit A	File Number Agents Close Date 4423678 Smith/McKissack 4/31/20	the left to allow quicker access to more frequently used items.	F	i Activity	Chat Messages Doc
	Tasks Appointments			:	Disbursement This file	has been active for 29 days Parties
• 3	Filter by Status All statuses ▼ ↓= Task +	Payoff (Bank of America) Last updated: 3/2/2020 at 12:01 PM	Status Due Date Overdue ▼ 4/31/2020		General Info	
inta	Earnest Money Deposit Overdue Due 4/31/2020	Payoff Information			Full Address	4235 Main St, Unit A Irvine, CA 92332
	OTC Commitment Ordered Completed Due 4/31/2020	Due Date Is Heloc 4/2/2020 Yes			Escrow Officer Escrow Assistants	Jenny Day Michael Moore John Crohn
er	Follow Up with OTC Completed Due 4/31/2020	Seller SSN/TIN John Appleseed 132 55 8924	Actions		Business Segment	Residential
5	Payoff (Bank of America)	Greg Smithsonian 123 46 7890	Ø		Transaction Type	Sale with Mortgage January 21, 2020
1	Overdue Due 4/31/2020 🗒 2 🔮 2	Document Upload			Est. Settlement Date	March 30, 2020
	Payoff (Wells Fargo) In Progress Due 4/31/2020	Borrower's Authorization	Settlement Date	TBD		
	Commitment Sent to Buyer, Seller, and Agents	[↑] Upload from device			Sale Price First New Loan	\$400,000 \$200,000
	Not Started Due 4/31/2020	or drag files here			Second New Loan	\$100,000
	Tax Certificate Sent to Buyer, Seller, and Agents				Business Programs	XYZ Program
	Not Started Due 4/31/2020	Task Notes	15m		Short Legal	Lot: XXXX, Track: XXXX, Unit: XXXX

1

BACKLOG TIMELINE



T

T

TOP LINE REPORT

FILE/TASK VIEW

Next Steps

Sprint 2 - In Development

Sprint 5 - Approvals (9/24)

Sprint 4 & 5 - Hand off to Dev (10/1)

Continue Feature Backlog Work

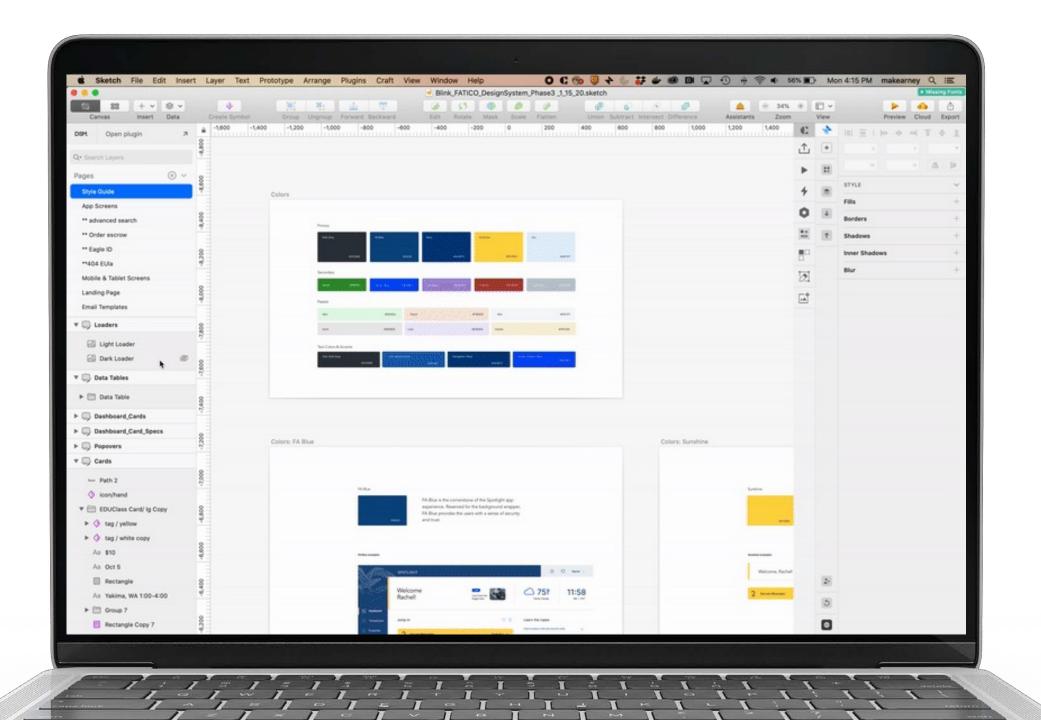
Sprint Planning

FIRST AMERICAN / IGNITE / WEEKLY SYNC

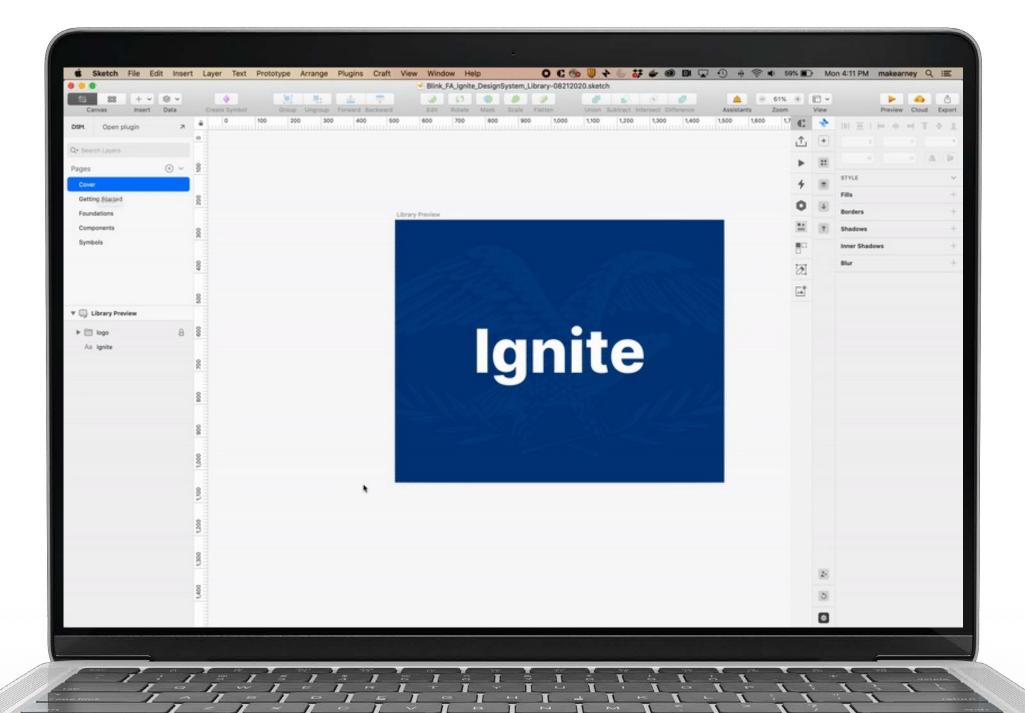
DESIGN SYSTEMS

131 Additional resources available at SealSpace.com 2021 All rights reserved.

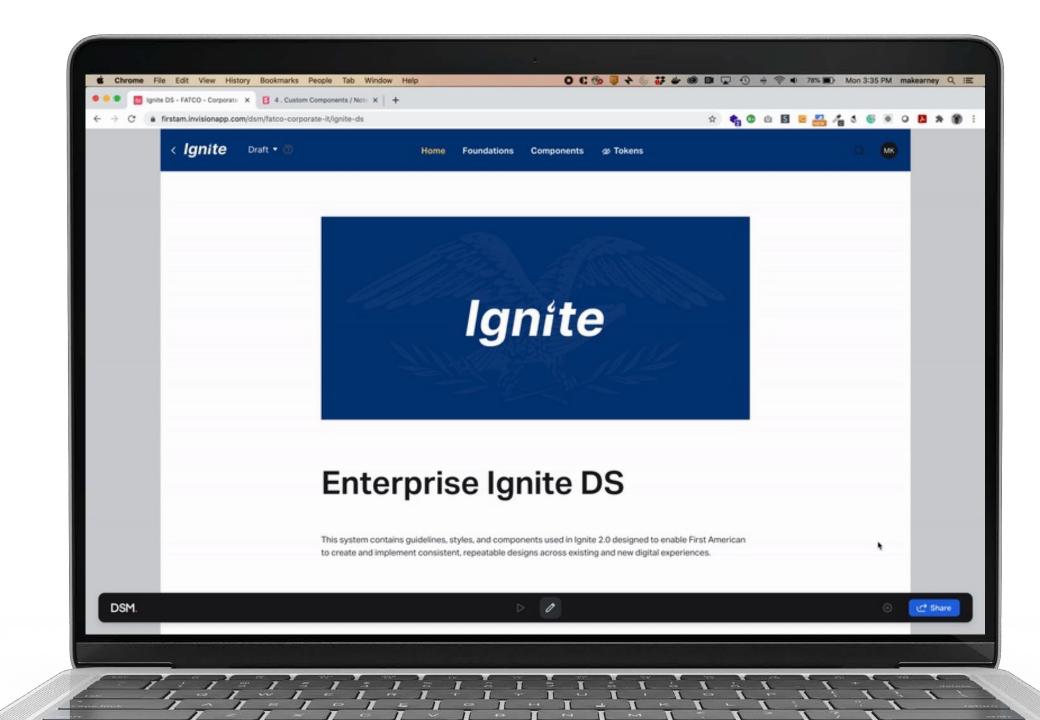
UI DESIGN











Storybook

		🖸 🕻 🍈 🤴 🕇 🍈 🐉 🍻 🎯 🖾 😨 🕥 🦂 🔅 🕸 77% 配 Mon 3:36 PM makearney	y Q
	1. Intro / Welcome - Page - Stu X +		
C	ore.windows.net/?path=/docs/1-intro-welcomepage	* 🍖 3 0 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	* @
e Storybook 💮			
ess "/" to search	Introduction		
TRO	Midness to the locks 5.5 III Vit and Gamman at Lines. This perfection	a section a collection of solder as could assessments and hold sectors in parts	
lcome		n contains a collection of guides, re-usable components, and built screens to assist	
	First American product and engineering teams.	integrated into Ignite application. The intended audiences for this application are	
DESIGN GUIDES	First American product and engineering teams.		
plor Palette	Contents		
pacing Units	Design Guides		
ypography	The dealers middle folder sectors in the sector of the		
	The design guides folder contains information design and coding guidelin	ines that provide direction when creating new components.	
DEVELOPMENT	Deveopment Guides		
IDES .			
ISS Developemnt	The development guides folder contains instructions on how to contribute	ute to this component library, how to use it, and coding guidelines.	
Jetting Started	1		
TML Development	Custom Components		
CUSTOM	The Custom Components folder contains UI components that have been	n created from ground up as Angular Library Components and are published to the	
MPONENTS	Ignite NPM repository hosted in Azure Devops.		
ppointment Card			
adge	Angular Material Components		
alendar	The Annular Material Components folder contains III components that ha	save been created using the Angular Material library with custom styling applied by	
hip List	using CSS overrides. Link to Library	are deen created doing the wingdat material locary with custom styling appred by	
ate Navigator	dailing or an order to the control of		
rag & Drop Lists			
Robal Nav			
nfo Card			
Loader			
Aessage Card			
Assage Menu			
lotes Card			
lotifications Menu			
Iverview Card, Saved Iles, Saved Views			
lage Header			
age Template			
agination			
Parties Card			

