Card Sort

eBH: Profiles & Configurators

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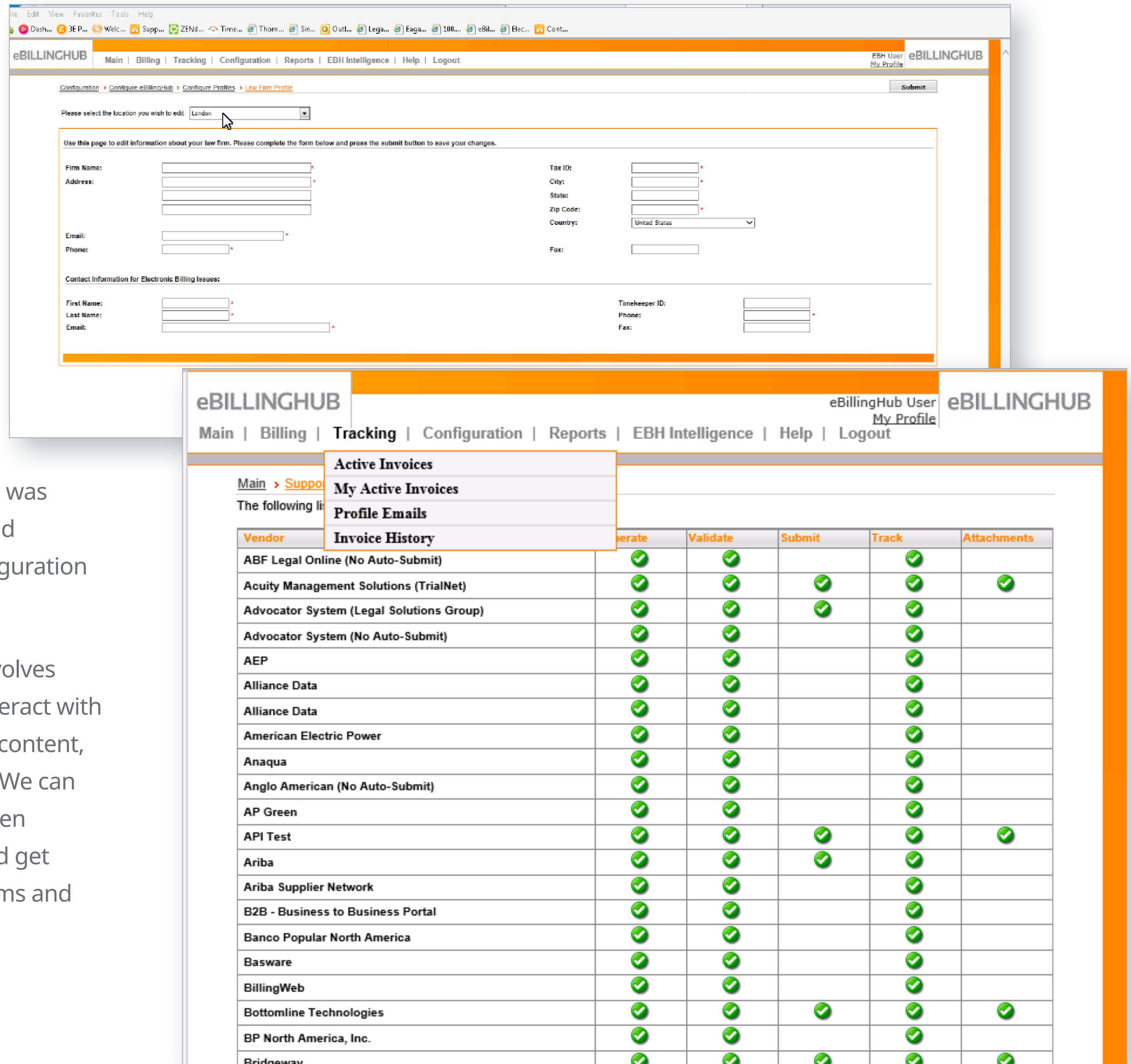
Introduction



The Goal

The goal of this card sorting exercise was to improve the labeling, grouping and organization of the Profile and Configuration features on the application.

Card sorting is a technique which involves users to organize content as they interact with the application or site's navigational content, either existing or proposed content. We can then observe their mental model when browsing through the navigation and get a glimpse of how they categorize items and interact with the navigation.

Objectives

Our Goals

The goal of this card sorting exercise was to improve the labeling, grouping and organization of the Profiles and Configurator information in the application.

This card sorting session was developed as a combination/hybrid of **open** and **closed** methodology. Upon entering the exercise, participants were instructed that there were 4 categories available to them:

1. User Profile
2. Law Firm Profile
3. Vendor Profile
4. Client Profile

Participants were instructed that they were free to rename them, or suggest or even delete categories if they felt the need.

This hybrid approach was offered as an alternative to the more rigid structure of a closed sort in order to
understand how users would group the existing content - and to determine if they would provide what they thought were more intuitive labels when empowered with that ability. Initially offering the existing navigation categories of a typical closed structure assisted in understanding if the users felt if the content belonged in the existing categories.

identify
labeling and organization
issues

Methodology

The Content

There were 33 cards delivered to the participants and we displayed to them the initial 4 categories, but instructed that they were free to delete, add additional categories or rename the categories offered.

What We Did

21 people participated in the exercise, but 5 abandoned it before completion. 16 Participants (61%) sorted all 33 cards on average into 6 groups.

- Lowest Observed Time overall: 6.28 minutes
- Highest Observed Time: 251.95 minutes
- 5 people abandoned the exercise completely

16 completed

33 cards

6 groupings on average

Demographics: all

What eBillingHub Team are you on?

Support	26.7%	4
Support - Implementation	13.3%	2
Professional Services	20%	3
Development 2.0	20%	3
Development - Livewire	20%	3
Other	0%	0

How long have you working on eBillingHub?

Less than a year	20%	3
More than a year, but less than 2 years	20%	3
More than 2 years, but less than 3 years	6.7%	1
More than 3 years, but less than 4 years	26.7%	4
More than 4 years, but less than 5 years	6.7%	1
5 years or more	13.3%	2

Perceptions

Participant's Insights

Participants were asked a number of questions based on their general knowledge and experience with their interactions of eBillingHub customers:

Do you frequently experience customers who have difficulties navigating through the application?

Yes, they frequently have problems: I experience this daily	20%	3
often, at least 2-3x's a week.	20%	3
Sometimes, 2-3's a month	26.7%	4
I never experience this issue with customers	0%	0
Does not apply to me: I don't have direct customer contact	33.3%	5

Perceptions *(cont.)*

Participant's Insights

Participants were asked a number of questions based on their general knowledge and experience with their interactions of eBillingHub customers:

7 *of the* **13** *Participants*

commented that users commonly had issues navigating through ***Configuration of a Client*** *as well as* ***Mapping of Clients.***

Which area(s) seems to be most problematic for clients to navigate through?

- "Map Clients" and "Configure Mapped Clients" causes a lot of confusion, especially over the phone. An easy fix would be to just change the latter to "Configure Clients".
- There's a lot of trouble understanding all the configurations. For example, all the UTBMS code configurations aren't together. People go to the Configure System page all the time and don't know some things exist, like Manage Timekeeper Titles. They also don't know what things do, because there's no description anywhere.

Perceptions *(cont.)*

Which area(s) seems to be most problematic for clients to navigate through?

- Configuration: Configure Billing Wizard and other global configurations.
- The client settings are scattered. For instance, **Global Settings** are under: Configuration, Configure eBillingHub, Configure System Configure, and Billing Wizard. **Client level settings** are under: Configuration, Configure eBillingHub, Client Setups, and Configure Mapped Clients. **Template level settings** are under: Configuration, Configure eBillingHub, Client Setups, and Configure eBill Recipients.
- Mostly the mapping clients and the vendor connectivity sections.
- Everything related to configuration.
- Configure Mapped Clients/ Configure eBill Recipients.

Although I do not interact with clients, I have 27 years of experience in the industry, and the eBh WAP is one of the most confusing UIs I have ever seen. There seems to be no rhyme or reason to the layout of links within the site, and no balloon-help to assist the end-user. They are left hanging in the wind.

Perceptions *(cont.)*

In your opinion, which areas of the application seem to be most problematic regarding navigation?

- It takes too many clicks required by the user to get to pages for their frequently-used activities.

- The main page is just one big ugly news feed. It's hard enough to read that no one ever seems to look at it unless there's something at the top in red.

- Organizing it *(the main page)* into something like alerts / vendor updates / EBH updates might help, and the rest of the main page could then display active invoices, recent submissions, etc - basically like the T360 and other big vendor front pages.

- The areas where configurations/settings are set.

Perceptions *(cont.)*

- The whole Admin site (if that applies). Various client/matter/code mappings in the main application.
    - The navigation buttons being on the far right hand side of the page. I always forget to save.
- Most features in the eBh WAP appear to be "bolted-on" and not thoroughly thought-out and integrated into the application in a seamless way that makes logical and intuitive sense. Some of the screens that require the end-user to first click an element before they can activate a verb on the page seems like black-magic and not intuitive in any way. The UI should be logical and guide the user without requiring the end-user to read a book prior to usage.

Although I do not interact with clients, I have 27 years of experience in the industry, and the eBh WAP is one of the most confusing UIs I have ever seen. There seems to be no rhyme or reason to the layout of links within the site, and no balloon-help to assist the end-user. They are left hanging in the wind.

Standardization *combined results*

Standardization Grid of Combined Teams

The standardization grid shows the distribution of cards across the categories that were predefined. Each table cell shows the number of times a card was sorted into the corresponding “standardized” category.

	Admin or Super ...	Client Profiles	Configuration	Customer Suppo...	Firm Admin	Law Firm > Profil...	Not Sure	Timekeeper Man...	User's Personal ...	Vendor Profiles
Billing configuration (setup)	1	1	4	1		8	1			
Configure 3rd Party Integration			4	1	1	6				3
Configure Codes and Expense	1	4	4	1		3	1			1
Configure eBill Recipient	1	6	2			3	1			1
Configure eBill Recipients		8	1			3				3
Configure Mapped Clients		11	2							1
Configure Tax Code Mapping	1	4	3	1		4				1
Contact Info		1	2		1	4			8	
Contfigure Billing Wizard	1	1	5	1		7				1
Email Change			1			1			14	
General Configuration	1	1	4	2	1	4			3	
Leave a Firm	2		2		1	4			6	
Manage Timekeeper's Titles		1	3	1		6		2		2
Manage Timekeepers		1	2	1		6	1	2		1
Manage Users	2		2		2	7			2	
Map Activity Codes		4	4	1		3				1

Standardization *combined results*

Standardization Grid of Combined Teams - *cont.*

	Admin or Super ...	Client Profiles	Configuration	Customer Suppo...	Firm Admin	Law Firm > Profil...	Not Sure	Timekeeper Man...	User's Personal ...	Vendor Profiles
Map Clients		9	2		1	2				
Map Codes and Expense		3	4	1		4	1			
Map Expense Codes		4	4	1		3				1
Map Matter Arrangement Types	1	2	3	2	1	5				
Map Tax Codes		3	4	1		4				1
Map Timekeeper's Rates			4	1		3	1	3		2
Map UTBMS Code Locations	1	2	4	2		5				
Matter Management		5	1			5	2			1
Name Change			2			4			10	
Password Reset			1						14	1
Request Firm Access	2		1		1	4			7	
System Role	2		2		1	3	1		6	
Theme/view			3						13	
Timekeeper Rate Validation		3	2	1		4		3		2
Vendor Management (Role based)			1		1	1	1			11
Vendor Search						2	2			11
Workstation Wizard	1		4	1		3			7	

Standardization *Support*

Standardization Grid of Support Team

The standardization grid shows the distribution of cards across the categories that were predefined as well as those that people created. Each table cell shows the number of times a card was sorted into the corresponding “standardized” category.

	Admin or Super ...	Client Profiles	Configuration	Customer Suppo...	Firm Admin	Law Firm > Profil...	Not Sure	Timekeeper Man...	User's Personal .
Billing configuration (setup)	1	1	1	1		5	1		
Configure 3rd Party Integration			1	1	1	5			
Configure Codes and Expense	1	3	2	1		2	1		
Configure eBill Recipient	1	5				2	1		
Configure eBill Recipients		7				2			
Configure Mapped Clients		8	1						
Configure Tax Code Mapping	1	3	1	1		2			
Contact Info			1		1	4			4
Contfigure Billing Wizard	1	1	2	1		5			
Email Change			1						9
General Configuration	1	1	2	2	1	2			1
Leave a Firm	2		1		1	2			4
Manage Timekeeper's Titles		1	2	1		3		2	
Manage Timekeepers		1	1	1		3	1	2	
Manage Users	2				2	5			1
Map Activity Codes		4	1	1		1			
Map Clients		7			1	1			
Map Codes and Expense		3	1	1		2	1		
Map Expense Codes		3	1	1		2			

Standardization *Support*

	Client Profiles	Law Firm Profiles	User's Personal ...	Vendor Profiles
Map Matter Arrangement Types	2	5		
Map Tax Codes	4	4		1
Map Timekeeper's Rates	1	4		2
Map UTBMS Code Locations	3	5		
Matter Management	5	4		1
Name Change		5	10	
Password Reset			14	1
Request Firm Access		5	7	
System Role		3	7	
Theme/view		1	13	
Timekeeper Rate Validation	3	4		3
Vendor Management (Role based)		1		12
Vendor Search		2		11
Workstation Wizard		3	8	

Standardization *Development*

Standardization Grid of Development Team

The standardization grid shows the distribution of cards across the categories that were predefined. Each table cell shows the number of times a card was sorted into the corresponding "standardized" category.

	Client Profiles	Law Firm Profiles	User's Personal ...	Vendor Profiles
Billing configuration (setup)	1	8		
Configure 3rd Party Integration		7		3
Configure Codes and Expense	5	2		1
Configure eBill Recipient	6	3		1
Configure eBill Recipients	8	2		3
Configure Mapped Clients	11			1
Configure Tax Code Mapping	5	3		1
Contact Info	1	5	8	
Contfigure Billing Wizard	1	6	1	1
Email Change		1	14	
General Configuration	1	3	4	
Leave a Firm		5	7	
Manage Timekeeper's Titles	2	5		2
Manage Timekeepers	1	5		2
Manage Users		8	2	
Map Activity Codes	5	3		1
Map Clients	8	3		
Map Codes and Expense	4	4		
Map Expense Codes	5	3		1

Standardization *Development*

	Client Profiles	Law Firm Profiles	User's Personal ...	Vendor Profiles
Map Matter Arrangement Types	2	5		
Map Tax Codes	4	4		1
Map Timekeeper's Rates	1	4		2
Map UTBMS Code Locations	3	5		
Matter Management	5	4		1
Name Change		5	10	
Password Reset			14	1
Request Firm Access		5	7	
System Role		3	7	
Theme/view		1	13	
Timekeeper Rate Validation	3	4		3
Vendor Management (Role based)		1		12
Vendor Search		2		11
Workstation Wizard		3	8	

Support *(how they categorized)*

Support Team Categorizations

In general, the Support Team created 8 additional categories beyond the four offered categories for a total of 12 categories.

Category Name:
Admin or Super User Profile

Agreement
0.65

Participants
2

I just added two new Categories:

Configuration and Mapping.

I feel the it (categorization)needs to be broken down a bit further.

Cards	Avg Pos	Frequency
General Configuration	1.0	1
Contfigure Billing Wizard	2.0	1
Configure Tax Code Mapping	3.0	1
Map UTBMS Code Locations	4.0	1
Map Matter Arrangement Types	5.0	1
Workstation Wizard	6.0	1
Leave a Firm	6.5	2
System Role	6.5	2
Billing configuration (setup)	7.0	1
Request Firm Access	7.5	2
Manage Users	7.5	2
Configure Codes and Expense	8.0	1
Configure eBill Recipient	9.0	1

Support *(how they categorized)*

Category Name:
Client Profiles

Agreement
0.35

Participants
9

*I made **Mapping** and **Configuration** menu available so that any user will know if it is related to mapping or configuration where they can find the menu.*

Cards	Avg Pos	Frequency
Manage Timekeeper's Titles	2.0	1
General Configuration	2.0	1
Configure Tax Code Mapping	3.3	3
Map Clients	3.7	7
Configure Mapped Clients	4.0	8
Map Expense Codes	4.3	3
Matter Management	5.0	4
Map Codes and Expense	5.0	3
Configure eBill Recipient	5.2	5
Timekeeper Rate Validation	5.5	2
Configure eBill Recipients	5.6	7
Map Tax Codes	5.7	3
Map Matter Arrangement Types	6.0	1
Manage Timekeepers	6.0	1
Map Activity Codes	6.8	4
Configure Codes and Expense	7.0	3
Map UTBMS Code Locations	8.0	2
Billing configuration (setup)	11.0	1
Contfigure Billing Wizard	13.0	1

Support *(how they categorized)*

Category Name:
Customer Support and Set Up

Agreement
0.39

Participants
3

I regrouped them entirely. Right now, we do not consider anything about offices. Recently, we have had to support multiple offices of firms – which are all over the world in some cases.

Cards	Avg Pos	Frequency
Workstation Wizard	1.0	1
Manage Timekeeper's Titles	1.0	1
Configure 3rd Party Integration	2.0	1
Map Expense Codes	2.0	1
Contfigure Billing Wizard	3.0	1
Billing configuration (setup)	4.0	1
General Configuration	4.5	2
Map UTBMS Code Locations	5.0	2
Map Tax Codes	5.0	1
Configure Codes and Expense	6.0	1
Map Matter Arrangement Types	8.0	2
Timekeeper Rate Validation	9.0	1
Manage Timekeepers	10.0	1
Map Codes and Expense	11.0	1
Configure Tax Code Mapping	13.0	1
Map Activity Codes	14.0	1
Map Timekeeper's Rates	15.0	1

Support *(how they categorized)*

Category Name:
Configuration

Agreement
1

Participants
1

Cards	Avg Pos	Frequency
Contfigure Billing Wizard	1.0	1
Configure 3rd Party Integration	2.0	1
Billing configuration (setup)	3.0	1
Configure Codes and Expense	4.0	1
Manage Timekeeper's Titles	5.0	1
Workstation Wizard	6.0	1
General Configuration	7.0	1

Category Name:
Firm Admin

Agreement
0.36

Participants
3

Cards	Avg Pos	Frequency
Contact Info	1.0	1
Request Firm Access	1.0	1
Manage Users	1.5	2
System Role	2.0	1
Leave a Firm	3.0	1
General Configuration	3.0	1
Vendor Management (Role based)	4.0	1
Map Clients	4.0	1
Map Matter Arrangement Types	5.0	1
Configure 3rd Party Integration	6.0	1

Support *(how they categorized)*

Category Name:
Mappings

Agreement	Participants
1	1

Things need to be able to be configured at the Matter level. I think it makes the most sense to group everything in layers.

Order of precedence:
*1) **Matter level configurations** (replica of client level just able to apply or adjust for particular matters) > 2) **Client level configurations** > vendor level configurations > firm office > global level configurations*
Timekeepers can vary by matter, client, or vendor.

Cards	Avg Pos	Frequency
Map UTBMS Code Locations	1.0	1
Manage Timekeepers	2.0	1
Map Expense Codes	3.0	1
Map Timekeeper's Rates	4.0	1
Configure eBill Recipient	5.0	1
Map Tax Codes	6.0	1
Configure Mapped Clients	7.0	1
Map Matter Arrangement Types	8.0	1
Map Clients	9.0	1
Map Activity Codes	10.0	1
Configure Tax Code Mapping	11.0	1
Map Codes and Expense	12.0	1
Matter Management	13.0	1

Support *(how they categorized)*

Category Name:
Firm Client Matter Override

Agreement
1

Participants
1

Cards	Avg Pos	Frequency
Map Expense Codes	1.0	1
Map Codes and Expense	2.0	1
Map Tax Codes	3.0	1
Map Activity Codes	4.0	1

Category Name:
Not Sure

Agreement
.60

Participants
2

Cards	Avg Pos	Frequency
Map Codes and Expense	1.0	1
Configure Codes and Expense	2.0	1
Matter Management	2.5	2
Vendor Search	2.5	2
Map Timekeeper's Rates	3.0	1
Manage Timekeepers	4.0	1
Configure eBill Recipient	5.0	1
System Role	6.0	1
Vendor Management (Role based)	7.0	1
Billing configuration (setup)	8.0	1

*All "**Mapping**" cards went straight to "**Law Firm**" group as it is law firms' responsibility to match their internal clients/matters/codes/clients to the already existing/known/standard-defined counterparts*

Support *(how they categorized)*

Category Name:
Law Firm Profiles and Configurations

Agreement 0.27

Participants 8

Cards	Avg Pos	Frequency
Billing configuration (setup)	6.0	4
Map UTBMS Code Locations	6.0	3
Configure Tax Code Mapping	6.0	2
Configure eBill Recipients	6.0	1
Leave a Firm	7.0	2
Configure eBill Recipient	7.0	1
Map Codes and Expense	7.5	2
Map Expense Codes	8.0	2
Matter Management	8.0	1
Request Firm Access	8.0	1
Map Timekeeper's Rates	8.0	1
Vendor Search	11.0	1

Cards	Avg Pos	Frequency
Vendor Management (Role based)	1.0	1
Name Change	1.3	3
General Configuration	2.0	2
Configure Codes and Expense	2.0	2
Manage Users	2.8	4
Workstation Wizard	4.0	2
Map Activity Codes	4.0	1
Contact Info	4.3	4
Contfigure Billing Wizard	4.4	5
Manage Timekeeper's Titles	5.0	3
Timekeeper Rate Validation	5.0	1
System Role	5.0	1
Map Matter Arrangement Types	5.3	3
Manage Timekeepers	5.3	3
Map Tax Codes	5.5	2
Configure 3rd Party Integration	5.8	4
Billing configuration (setup)	6.0	4

Support *(how they categorized)*

Category Name:
Timekeeper Management

Agreement .83 | Participants 3

Cards	Avg Pos	Frequency
Manage Timekeeper's Titles	2.0	2
Timekeeper Rate Validation	2.3	3
Map Timekeeper's Rates	2.3	3
Manage Timekeepers	2.5	2

Category Name:
User's Personal Profile

Agreement .55 | Participants 9

Cards	Avg Pos	Frequency
Name Change	1.7	6
System Role	2.3	4
Theme/view	3.2	9
Email Change	3.3	9
Password Reset	3.4	8
Contact Info	4.3	4
Leave a Firm	4.8	4
Manage Users	5.0	1
General Configuration	5.0	1
Request Firm Access	6.2	5
Workstation Wizard	6.3	4

I tried to keep certain subjects together, such as all things related to timekeeper in a single category.

Support *(how they categorized)*

Category Name:
Vendor Profiles

Agreement
0.25

Participants
8

The Results

The majority of the Support team that participated agreed on the following categories:

- User's Personal Profile (9 people)
- Client Profiles (9 people)
- Vendor Profiles (8 people)
- Law firm Profiles and Configurations (8 people)
- Firm Admin (3 people)
- Customer Support & Set Up (3 people)

Cards	Avg Pos	Frequency
Map Timekeeper's Rates	1.0	2
Vendor Search	1.5	6
Vendor Management (Role based)	1.8	6
Timekeeper Rate Validation	2.0	2
Configure 3rd Party Integration	2.0	2
Matter Management	3.0	1
Password Reset	3.0	1
Map Expense Codes	3.0	1
Manage Timekeeper's Titles	4.0	1
Map Tax Codes	4.0	1
Configure eBill Recipients	4.0	1
Configure Tax Code Mapping	5.0	1
Map Activity Codes	6.0	1

Support *(post-test comments)*

Were there any cards you felt could have been placed in multiple categories?

- Timekeepers can be configured at the matter level, client level, or vendor level.
- There should be a configuration/mapping option for Timekeeper titles, expense, activity, etc. at the Firm level which can be superseded by a vendor level, then superseded by a client level, and eventually superseded by a matter level.
- Many configurations would be best if they had a default, a vendor level override, a client level override, and a matter level override. Right now we don't really support vendor level overrides in general.

Were there any cards you had difficulties placing into a category? Why or why not?

- Yes, there were some cards that didn't seem applicable to the application.
- Not after creating the 5th category.
- System Role - what do you mean by this?

Development *(how they categorized)*

Category Name:
Law Firm Profiles and Admin

Agreement
0.45

Participants
6

Cards	Avg Pos	Frequency
Contact Info	1.0	1
Vendor Search	3.0	1
Request Firm Access	5.8	4
Map Codes and Expense	6.0	3
System Role	6.0	2
Configure eBill Recipients	6.0	2
Workstation Wizard	6.0	1
Matter Management	6.2	5
Leave a Firm	6.3	3
Map Clients	6.3	3
Map Expense Codes	6.5	2
Map UTBMS Code Locations	6.7	3

Cards	Avg Pos	Frequency
Map Matter Arrangement Types	7.3	3
Manage Timekeeper's Titles	8.3	4
Manage Users	8.3	4
Billing configuration (setup)	8.4	5
Name Change	8.5	2
Timekeeper Rate Validation	9.0	4
Manage Timekeepers	9.0	4
General Configuration	9.0	2
Map Activity Codes	9.3	3
Configure eBill Recipient	9.7	3
Email Change	10.0	1
Configure Tax Code Mapping	11.0	3
Configure Codes and Expense	11.0	2
Contfigure Billing Wizard	12.0	2
Theme/view	13.0	1
Map Tax Codes	14.0	3
Map Timekeeper's Rates	15.0	3
Configure 3rd Party Integration	15.3	3

Development *(how they categorized)*

Category Name:
System Setup

Agreement
1

Participants
1

Cards	Avg Pos	Frequency
Billing configuration (setup)	1.0	1
General Configuration	2.0	1
Configure Billing Wizard	3.0	1
Workstation Wizard	4.0	1

Category Name:
User's Personal Profile

Agreement
.53

Participants
7

Cards	Avg Pos	Frequency
Manage Users	1.0	1
Name Change	2.8	5
Workstation Wizard	3.0	4
Email Change	3.2	6
Contact Info	4.0	5
Password Reset	4.3	7
Theme/view	4.4	5
General Configuration	5.0	3
Request Firm Access	5.5	2
Leave a Firm	5.7	3
System Role	6.0	3
Configure Billing Wizard	7.0	1

*All "**Mapping**" cards went straight to "**Law Firm**" group as it is law firms' responsibility to match their internal clients/matters/codes/clients to the already existing/known/standard-defined counterparts*

Development *(how they categorized)*

Category Name:
System Administration

Agreement
1

Participants
1

Cards	Avg Pos	Frequency
General Configuration	1.0	1
Billing configuration (setup)	2.0	1
Contfigure Billing Wizard	3.0	1
Theme/view	4.0	1
Manage Users	5.0	1
System Role	6.0	1
Workstation Wizard	7.0	1
Configure 3rd Party Integration	8.0	1

Category Name:
Mapping

Agreement
1

Participants
1

Cards	Avg Pos	Frequency
Map Codes and Expense	1.0	1
Map Expense Codes	2.0	1
Map Activity Codes	3.0	1
Map Tax Codes	4.0	1
Map Clients	5.0	1
Map Matter Arrangement Types	6.0	1
Map UTBMS Code Locations	7.0	1
Map Timekeeper's Rates	8.0	1

I placed them where they seemed to make the most sense based on their functions.

Development *(how they categorized)*

Category Name:
Configuration

Agreement
1

Participants
1

Cards	Avg Pos	Frequency
Configure Billing Wizard	1.0	1
Configure Codes and Expense	2.0	1
Configure eBill Recipient	3.0	1
Configure Tax Code Mapping	4.0	1
Configure eBill Recipients	5.0	1
Configure Mapped Clients	6.0	1
Configure 3rd Party Integration	7.0	1

Category Name:
Law Firm - Mappings

Agreement
1

Participants
1

Cards	Avg Pos	Frequency
Map Codes and Expense	1.0	1
Map Expense Codes	2.0	1
Map Activity Codes	3.0	1
Map Tax Codes	4.0	1
Map Clients	5.0	1
Map Matter Arrangement Types	6.0	1
Map UTBMS Code Locations	7.0	1
Map Timekeeper's Rates	8.0	1

A law firm and a client are the same entity in my eyes.

Development *(how they categorized)*

Category Name:
Client Profiles

Agreement
0.35

Participants
4

I generally don't think of a client and a vendor in isolation. To me, they only have meaning as a tuple, like (client, vendor). For example, (Google, T360). This would describe the ultimate recipient of an in-voice. Just Google or T360 doesn't really tell me anything about where an invoice is going since Google could also use Datacert, or something like that.

Cards	Avg Pos	Frequency
Map Clients	1.5	2
Timekeeper Rate Validation	2.0	1
Map Matter Arrangement Types	3.0	1
Contact Info	3.0	1
Configure Mapped Clients	3.5	4
Map Expense Codes	3.5	2
Configure Tax Code Mapping	4.0	2
Configure Codes and Expense	4.0	2
Map Timekeeper's Rates	4.0	1
Matter Management	5.0	1
Manage Timekeeper's Titles	5.0	1
Map UTBMS Code Locations	6.0	1
Map Activity Codes	7.0	1
Configure eBill Recipient	8.0	1
Map Codes and Expense	8.0	1
Map Tax Codes	9.0	1
Configure eBill Recipients	9.0	1

Development *(how they categorized)*

Category Name:
Vendor Profile

Agreement
.33

Participants
6

Cards	Avg Pos	Frequency
Timekeeper Rate Validation	1.0	1
Vendor Search	1.4	5
Vendor Management (Role based)	2.0	6
Configure 3rd Party Integration	2.0	1
Manage Timekeepers	2.5	2
Contfigure Billing Wizard	3.0	1
Configure eBill Recipients	4.0	2
Configure eBill Recipient	4.0	1
Configure Mapped Clients	4.0	1
Configure Codes and Expense	4.0	1
Manage Timekeeper's Titles	5.0	1

The Results

A majority of the Development team seemed to agree on the following categories:

- Personal Profiles (7 people)
- Law Firm - Profile and Admin (6 people)
- Vendor Profiles (6 people)
- Client Profiles (4 people)

Development *post-test comments*

Were there any cards you had difficulties placing into a category? Why or why not?

- I was not sure what ‘Billing configuration’ was and how it was different from ‘Map Clients’ or ‘Configure Billing Wizard’.

- It was a bit hard to distribute cards between “Vendor” and “Client” categories. From my personal perspective, law firms perceive clients and vendors as parts of a single whole. They are only interested in clients. And do not actually care what vendor the client is using. And should not - as we are providing a single invoice submission point so that the law firms forget about the vendors altogether. So it’s hard to determine whether - for example - matters should be configured at client, vendor or even law firm level.

- UTBMS code locations. I think this is a concept that is specific to EBH, and could be better handled. I’ve never used any value other than the defaults here.

- I was not sure about Workstation wizard, I think so we don’t need that menu as it looks related to ActiveX control configuration.

Combined *post-test comments*

Were there any cards you felt should have actually been their own category?

- Law Firm Profile and User Profile should be separate.

- The workstation cards probably should be in a separate category.

- Yes; “Configure 3rd Party Integration”.

- Things should clearly fall into one of the following buckets:
  1.) Producer (Law Firm)
  2.) Provider
  3.) Application
  4.) Vendor
  5.) Corporate Client

Categorization *results compared*

The Results: Comparisons

The majority of the Support team that participated agreed on the following categories:

- User’s Personal Profile (9 people)
- Client Profiles (9 people)
- Vendor Profiles (8 people)
- Law firm Profiles and Configurations (8 people)
- Firm Admin (3 people)
- Customer Support & Set Up (3 people)

While the Development Team utilized less categories overall, the majority of the team seemed to agree on the following categories:

- Personal Profiles (7 people)
- Law Firm - Profile and Admin (6 people)
- Vendor Profiles (6 people)
- Client Profiles (4 people)

Categorization *combined results*

The Combined Results

In general, both groups had some differences in their categorization of the content, with the Development team categorizing the content into less categories than the Support team overall. Following is the set of categories that both teams appeared to agree upon:

- User's Personal Profile (15 people)
- Law Firm - Profile and Configurations (13 people)
- Vendor Profiles (13 people)
- Client Profiles (12 people)
- Configuration (6 people)
- Customer Support and Set Up (3 people)
- Firm Admin (3 people)
- Admin or Super User (2 people, which is very similar to Firm Admin)
- Timekeeper Management (3 people)

Support *similarity matrix*

Similarity Matrix

Theme/view																																
Email Change	100																															
Password Reset	88	88																														
Name Change	66	66	55																													
Workstation Wizard	44	44	33	55																												
Leave a Firm	44	44	33	44	66																											
System Role	44	44	33	22	44	77																										
Request Firm Access	55	55	44	44	66	66	66																									
Manage Users	11	11	11	11	33	66	55	33																								
Contact Info	44	44	44	55	44	44	22	33	55																							
Configure 3rd Party Integration	0	0	0	0	22	11	11	11	33	33																						
Billing configuration (setup)	0	0	0	0	33	22	33	22	33	22	44																					
Configure Billing Wizard	0	0	0	0	33	22	22	22	44	22	44	88																				
Map UTBMS Code Locations	0	0	0	0	11	11	11	11	22	11	33	66	66																			
Map Matter Arrangement Types	0	0	0	0	11	11	11	11	33	22	44	55	55	88																		
General Configuration	11	11	11	11	22	11	11	11	22	11	44	55	55	55	66																	
Configure Codes and Expense	0	0	0	0	22	11	22	11	22	11	22	66	55	55	44	33																
Configure Tax Code Mapping	0	0	0	0	11	11	11	11	22	11	11	44	44	66	55	22	77															
Map Tax Codes	0	0	0	0	0	0	0	0	11	11	11	33	33	55	44	11	66	88														
Map Codes and Expense	0	0	0	0	0	0	11	0	11	11	11	44	33	55	44	11	77	77	88													
Map Activity Codes	0	0	0	0	0	0	0	0	0	0	0	22	22	44	33	22	55	77	88	77												
Map Expense Codes	0	0	0	0	0	0	0	0	11	11	11	44	44	66	55	22	55	77	88	77	77											
Configure Mapped Clients	0	0	0	0	0	0	0	0	0	0	0	11	11	33	22	11	33	44	44	44	55	44										
Map Clients	0	0	0	0	0	0	0	0	11	11	11	0	0	22	33	22	22	33	33	33	44	33	88									
Configure eBill Recipient	0	0	0	0	11	11	22	11	11	0	0	33	22	44	33	22	66	66	55	66	66	44	66	55								
Configure eBill Recipients	0	0	0	0	0	0	0	0	0	0	11	11	11	22	11	11	44	44	44	44	55	33	66	55	66							
Matter Management	0	0	0	0	0	0	11	0	0	0	0	22	11	22	11	11	33	33	33	44	44	22	55	44	66	44						
Map Timekeeper's Rates	0	0	0	0	0	0	0	0	11	11	11	22	22	33	33	11	22	44	44	33	33	44	11	11	11	0	33					
Timekeeper Rate Validation	0	0	0	0	0	0	0	0	0	0	11	22	22	22	22	33	11	22	22	11	33	22	11	11	11	22	22	66				
Manage Timekeeper's Titles	0	0	0	0	11	0	0	0	22	11	22	44	55	33	33	33	44	33	33	33	22	44	11	11	11	11	11	55	44			
Manage Timekeepers	0	0	0	0	11	11	11	11	22	11	11	33	44	33	33	33	11	22	22	22	33	33	22	22	22	11	33	55	44	55		
Vendor Search	0	0	11	0	11	11	22	11	11	11	33	22	11	0	0	0	11	0	0	11	0	0	0	0	11	11	22	11	0	0	22	
Vendor Management (Role based)	0	0	11	0	11	22	33	11	22	11	33	22	11	0	0	0	11	0	0	11	0	0	0	0	11	11	11	0	0	0	11	88

The similarity matrix shows the percentage of participants who agree with each card pairing. The algorithm attempts to cluster similar cards along the right edge of the matrix.

The similarity matrix is a representation of pair combinations, intended to give quick insight into the cards the participants paired together in the same group the most often. The darker the blue where two cards intersect, the more often they were paired together.

It also clusters related pair combinations together: the strongest pair is grouped next to the second-strongest pair that either of the first cards have, and so on. The algorithm attempts to cluster the similar cards down the right edge. Clusters are presented in the same shade of blue.

Combined *similarity matrix*

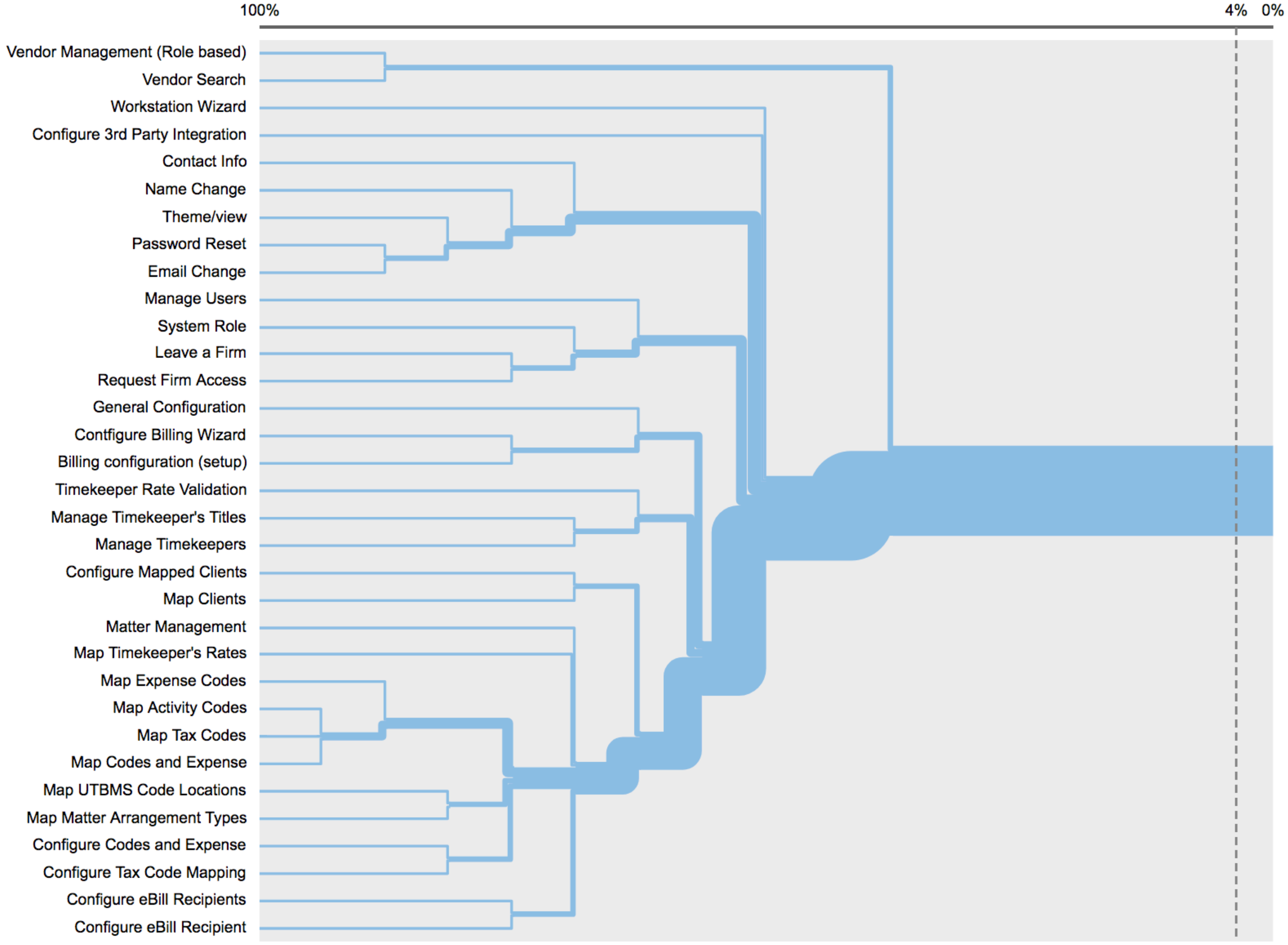
Similarity Matrix

Map Tax Codes																																
Map Codes and Expense	93																															
Map Activity Codes	93	86																														
Map Expense Codes	86	80	80																													
Map UTBMS Code Locations	73	73	66	73																												
Map Matter Arrangement Types	53	53	46	66	80																											
Configure Tax Code Mapping	73	66	66	73	60	53																										
Configure Codes and Expense	53	60	46	53	46	40	80																									
Configure eBill Recipient	46	53	53	46	40	46	66	60																								
Configure eBill Recipients	33	33	40	33	20	26	46	40	73																							
Configure Mapped Clients	33	33	40	40	26	20	46	40	53	60																						
Map Clients	40	40	46	46	33	53	40	26	60	53	66																					
Matter Management	33	40	40	33	26	33	46	40	66	46	40	53																				
Billing configuration (setup)	40	46	33	40	60	53	40	46	40	20	6	20	40																			
Contfigure Billing Wizard	33	33	26	33	53	40	40	40	26	26	20	6	13	75																		
General Configuration	20	20	26	20	46	46	20	20	20	13	6	20	13	56	62																	
System Role	13	20	13	6	20	13	13	13	20	6	0	6	13	40	40	46																
Leave a Firm	13	13	13	6	20	13	13	13	13	0	0	6	6	26	26	26	66															
Request Firm Access	13	13	13	6	20	20	13	13	20	6	0	13	13	33	20	20	53	73														
Theme/view	6	6	6	6	6	6	6	6	6	0	0	6	6	12	12	25	46	53	53													
Email Change	6	6	6	6	6	6	6	0	6	6	0	6	6	6	12	31	53	40	40	81												
Password Reset	0	0	0	0	0	0	0	0	0	0	0	0	0	0	6	25	40	40	40	81	87											
Name Change	13	13	13	13	13	13	13	6	13	6	0	13	13	12	12	25	33	46	40	68	75	62										
Contact Info	13	13	6	13	13	20	13	13	6	0	6	13	6	18	18	18	26	46	33	56	56	56	68									
Manage Users	26	26	20	20	33	40	26	20	26	13	0	26	20	53	46	40	60	60	46	26	20	13	26	46								
Configure 3rd Party Integration	20	20	13	20	33	46	26	26	26	26	6	26	20	53	46	40	20	13	20	13	6	0	13	26	46							
Vendor Search	0	6	0	0	0	6	0	13	20	26	6	6	20	20	13	0	13	6	13	0	0	6	0	6	13	33						
Vendor Management (Role based)	0	6	0	0	0	0	0	13	13	20	6	0	6	13	13	0	20	13	6	0	0	6	0	6	13	26	86					
Manage Timekeepers	26	26	33	26	33	26	26	26	20	6	13	20	40	40	33	26	13	20	20	6	0	0	6	13	26	13	20	20				
Manage Timekeeper's Titles	40	40	33	40	40	26	40	53	13	6	13	13	26	46	40	26	6	13	13	6	0	0	6	13	26	20	6	6	66			
Map Timekeeper's Rates	66	60	60	60	60	46	46	26	20	6	13	26	33	33	26	20	13	13	13	6	6	0	13	13	26	20	6	0	46	53		
Timekeeper Rate Validation	26	20	33	20	26	20	26	20	13	13	13	13	33	33	20	26	6	13	13	6	0	0	6	13	13	13	0	6	60	53	53	
Workstation Wizard	0	0	0	0	6	6	6	13	6	0	0	0	6	37	37	37	46	53	46	50	43	43	43	37	26	20	6	6	13	13	0	6

Support *dendograms*

Dendogram - Best Merge Method

The Best Merge Method often performs better than the Actual Agreement Method when a study has fewer participants. It makes assumptions about larger clusters based on individual pair relationships.



Support *dendogram results*

Card	Category	Percent of Agreement	Category	%	Category	%	Category	%	Category	%
Vendor Management	Vendor Profile	88%								
Vendor Search	Vendor Profile	88%								
Workstation wizard	Client Profiles	50%	User's Personal Profile	50%						
Configure 3rd Party Integration	Client Profiles	50%	User's Personal Profile	50%						
Contact Info	User's Personal Profile		Configuration		Profiles and Configurators	69%				
Name Change	User's Personal Profile		Configuration	75%						
Theme/View	User's Personal Profile		Configuration	8!%						
Password Reset	User's Personal Profile	88%	Configuration							
Email Change	User's Personal Profile	88%	Configuration							
Manage Users	User's Personal Profile		Law Firm Profile		Profiles and Configurators		Admin or Super User Profile	63%		
Ssytem Role	User's Personal Profile		Configuration		Profiles and Configurators	69%	Admin or Super User Profile	63%		
Leave a Firm	User's Personal Profile		Law Firm Profile	75%	Profiles and Configurators		Admin or Super User Profile	75%		
Request firm Access	User's Personal Profile		Law Firm Profile	75%	Profiles and Configurators		Admin or Super User Profile	75%		
General Configuration			Profiles and Configurators		Admin or Super User Profile	63%				
Configure billing wizard			Profiles and Configurators	75%	Admin or Super User Profile	63%				
Billing Configuration (setup)	Law Firm Profile		Profiles and Configurators	75%	Admin or Super User Profile	63%				
Timekeeper Rate Validation	Law Firm Profile		Profiles and Configurators		Timekeeper Management		Client Profiles	63%		
ManageTimekeeper's Titles	Law Firm Profile		Profiles and Configurators		Timekeeper Management	69%				
ManageTimekeepers	Law Firm Profile		Profiles and Configurators		Timekeeper Management	69%				
Configure Mapped Clients	Client Profiles		Mappings							
Map Clients	Client Profiles		Mappings	69%						
Matter Management	Law Firm Profile		Client Profiles		Profile and Configurators	69%			Admin or SuperUser	69%
Map TimeKeeper's Rates	Law Firm Profile		Client Profiles		Profile and Configurators				Admin or SuperUser	
Map Expense Codes			Profile and Configurators	88%					Admin or SuperUser	69%
Map Activity Codes	Configuration - Law Firm	94%							Admin or SuperUser	69%
Map Tax Codes	Configuration - Law Firm								Admin or SuperUser	69%
Map Codes and Expenses	Configuration - Law Firm								Admin or SuperUser	69%
Map UTBMS Code Locations	Law Firm Profile		Configuration - Law Firm	75%	Customer Support and Setup	82%	Profiles and Configurators	75%	Admin or SuperUser	69%
Map Matter Arrangement Types	Law Firm Profile		Configuration - Law Firm	75%	Customer Support and Setup		Profiles and Configurators		Admin or SuperUser	69%
Configure Codes and Expense	Law Firm Profile		Configuration - Law Firm	75%			Profiles and Configurators	81%	Admin or SuperUser	69%
Configure Tax Codes Mapping	Law Firm Profile		Configuration - Law Firm	75%			Profiles and Configurators	81%	Admin or SuperUser	69%
Configure eBill Recipients	Law Firm Profile		Configuration - Law Firm	75%			Profiles and Configurators	75%	Admin or SuperUser	69%
Configure eBill Recipient	Law Firm Profile		Configuration - Law Firm	75%			Profiles and Configurators		Admin or SuperUser	69%

Conclusions

The Results

Most participants grouped and labeled things very differently from one another, with the exception of placing Profile specific items into one of the four previously offered categories:

1. User Profile
2. Law Firm Profile
3. Vendor Profile
4. Client Profile

Each group acknowledged that there was also a need for an Admin section that should be divided into additional profiles:

5. Law Firm admin
6. Customer Support Admin

Conclusions

Results/Analysis

While there appeared to be a general consensus by the group in regards to the Profile categories and mostly the grouped content organized under those, the results for Configurators varied widely and no discernible pattern could be detected.

While there didn't appear to have a defined conclusion for configurators based on this exercise, a number of items were identified as problematic for Users utilizing the application:

- Client settings are scattered throughout the application, making it confusing for Users to navigate and make changes for that particular function.
- There are too many clicks and/or layers to access frequently used activities or functions.
- The main page of the application does not provide Users with a good overall resource and is organized poorly.
- Multiple navigational issues were identified, such as issues with confusing pattern and/or navigation for certain functions and/or features.

Original Site Map

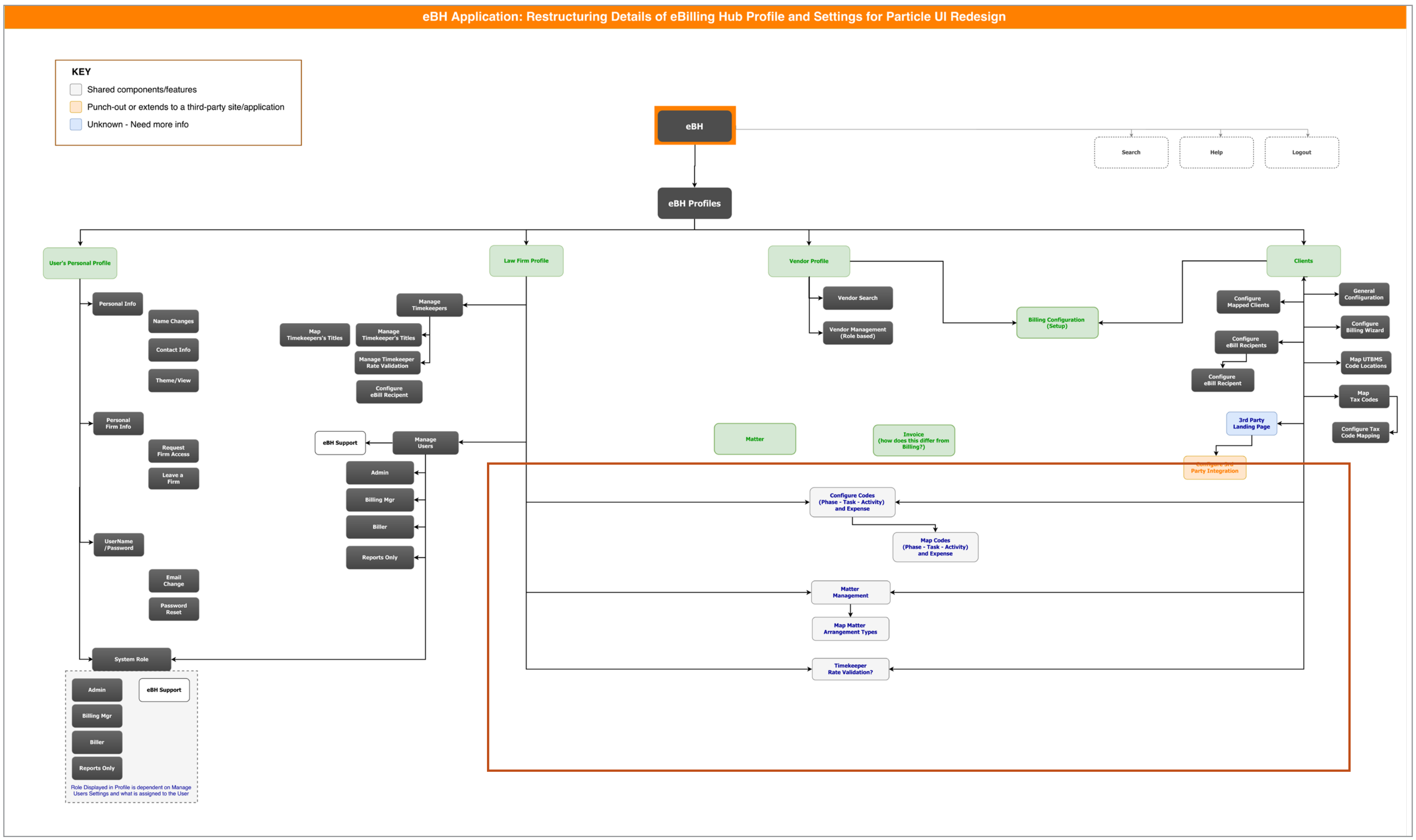
eBillingHub 2.0 Site Map

- Main
  - Home
  - Supported Formats
  - Supported Vendors
- Billing
  - Billing Wizard
  - Validation Only Wizard
  - Quick Invoice
  - Multi-Invoice
  - Multipayor
- Tracking
  - Active Invoices
  - Active Invoices eBilled
  - Active Invoices rejected
  - Active Invoices hold
  - Active Invoices received
  - Active Invoices forwarded
  - Active Invoices session
  - Active Invoices user
  - Profile Emails
  - Invoice History
- Configuration
  - Configure eBillingHub
    - Client Setups
      - Map Clients
      - Configure Mapped Clients
      - Configure eBill Recipients
        - Configure eBill Recipient
    - Configure System
      - General Configuration
      - Configure Billing Wizard
      - Manange Timekeeper Titles
        - Map Timekeeper Titles
      - Map Matter Arrangement Types
      - Map UTBMS Code Locations
      - Map Activity Codes
        - Configure Activity Code Mapping
      - Map Expense Codes
        - Configure Expense Code Mapping
      - Manage Timekeeper Rate Validations
      - Map Tax Codes
        - Configure Tax Code Mapping
      - Map Task Codes
        - Configure Task Code Mapping
      - Configure 3rd Party Integration
    - Configure Profiles
      - Law Firm Profile
      - User Profile
      - Manage Users
  - Configure eBilling Vendor Connectivity
    - Configure Connectivity to Advocator
    - Configure Connectivity to Allegient Systems
    - Configure Connectivity to Bridgeway
    - Configure Connectivity to Claim Intelligence
    - Configure Connectivity to Corp LSS
    - Configure Connectivity to Counsel Direct (e.CaseTrack)
    - Configure Connectivity to CSC Matter Management
    - Configure Connectivity to CT Tymetrix
    - Configure Connectivity to CT Tymetrix 360
    - Configure Connectivity to Datacert
    - Configure Connectivity to DirectInvoice (CT Tymetrix)
    - Configure Connectivity to doeLEGAL
    - Configure Connectivity to IQNavigator
    - Configure Connectivity to LawTrac
    - Configure Connectivity to Legal Bill
    - Configure Connectivity to Legal Bill Review (LBR)
    - Configure Connectivity to Legal Cost Control (SIMS)
    - Configure Connectivity to Legal eXchange (Bottomline Technologies)
    - Configure Connectivity to LegalPrecision (LexisNexis Examen)
    - Configure Connectivity to LexisNexis CounselLink
    - Configure Connectivity to Litigation Advisor (Legal Solutions Suite)
    - Configure Connectivity to Mitratech Collaborati
    - PDF Invoicing Terms of Use
    - Configure Connectivity to Resolve Star
    - Configure Connectivity to Stuart Maue
    - Configure Connectivity to TrialNet (Acuity Management Solutions)
    - Configure Connectivity to Visibility (Bottomline Technologies)
    - Configure Connectivity to Vendor
  - Downloads
- Reports
  - Reports / Dashboards
    - Billing
      - Unposted Prebills
      - Invoice History
      - Invoice Lookup By Reference Id
      - Invoice Status Change
      - Active Invoices Summary
      - Active Invoices Summary By Client
      - Active Invoices Summary By Status
      - Active Invoices Summary By User
      - Activity Transactions
      - Period Reconciliation By Invoice Date
      - Invoices 30 days or older and not updated
    - Collections
      - Aging A/R Invoices
      - Average Days To Pay
      - Collection Status
      - Active Invoices Summary
      - Active Invoices Summary By Client
      - Active Invoices Summary By Status
      - Active Invoices Summary By User
      - Activity Transactions
      - Period Reconciliation By Invoice Date
    - Management
      - Deleted Invoices
      - Clients Listing
      - Vendors Listing
      - Top Clients Invoiced
      - Value of Aging Invoices
      - Billing Activity
      - Rejection Levels
      - Monthly Statement
      - Monthly Statement By Client
      - Yearly Statement
      - Usage History
      - Billing Progress
      - Timekeeper Rates
- Help
  - Online Help
  - Resources
    - Frequently Asked Questions (PDF)
    - Troubleshooting Guide (PDF)
    - eBillingHub Users Manual (PDF)
    - Admin Configuration Manual (PDF)
    - eBillingHub Vendor Manual (PDF)
    - Dashboard and Reports Manual (PDF)
    - Status Descriptions
  - Customer Support
    - Request Client Setup
    - Submit Invoice Problem
    - Contact Customer Support
  - Site Map
- Logout

Continued to the second image

Refined Site Map

As illustrated by the site map created from the cardsort results, (outlined in red) there appears to be discrepancies on where certain items should fall within the site map:



Recommendations

Recommendations for Profiles

Based on the feedback from the cardsort exercise, it is recommended to organize Profile information into the following categories:

1. User profile (Individual)
2. Law Firm Profile
3. Vendor Profile
4. Client Profile
5. Administrator

The Admin section should be broken down into 2 additional sub-categories that have accessibility based on role permissions:

1. Customer Service Support Team
2. Law Firm Admin

General Recommendations

It is recommended to do some group workshops with the Support/Implementation Teams as well as PSPMs in order to refine and gather more feedback. It is necessary to know how Users interact with them in regards to the Configurators, ass well as the struggles they have experienced in past interactions. This will help us understand how these areas could be organized better for Support to guide user's through these sections more effortlessly.

One suggestion is to do another card sort in the hybrid method: instead of offering the current top navigation as the categories, offer categories that are labeled according to usage application and what the current cardsort participants created. Analysis of this type of card sort should illustrate less confusion regarding the product's workflow as well as labeling issues some participants struggled with.

Another suggestion is to create group exercises utilizing such methods as Affinity Diagramming and/or Dot Voting exercises in order to get a general group consensus of how these areas should be organized.

While it is recognized that individuals, as well as firms, utilize the configuration content in various ways and organize it differently, it is advised to create a starting point based on the Support and PSPM team's feedback on organization. This initial exercise to get a general consensus from these teams will create the baseline navigation to start another round of tests with actual Users from the law firms.