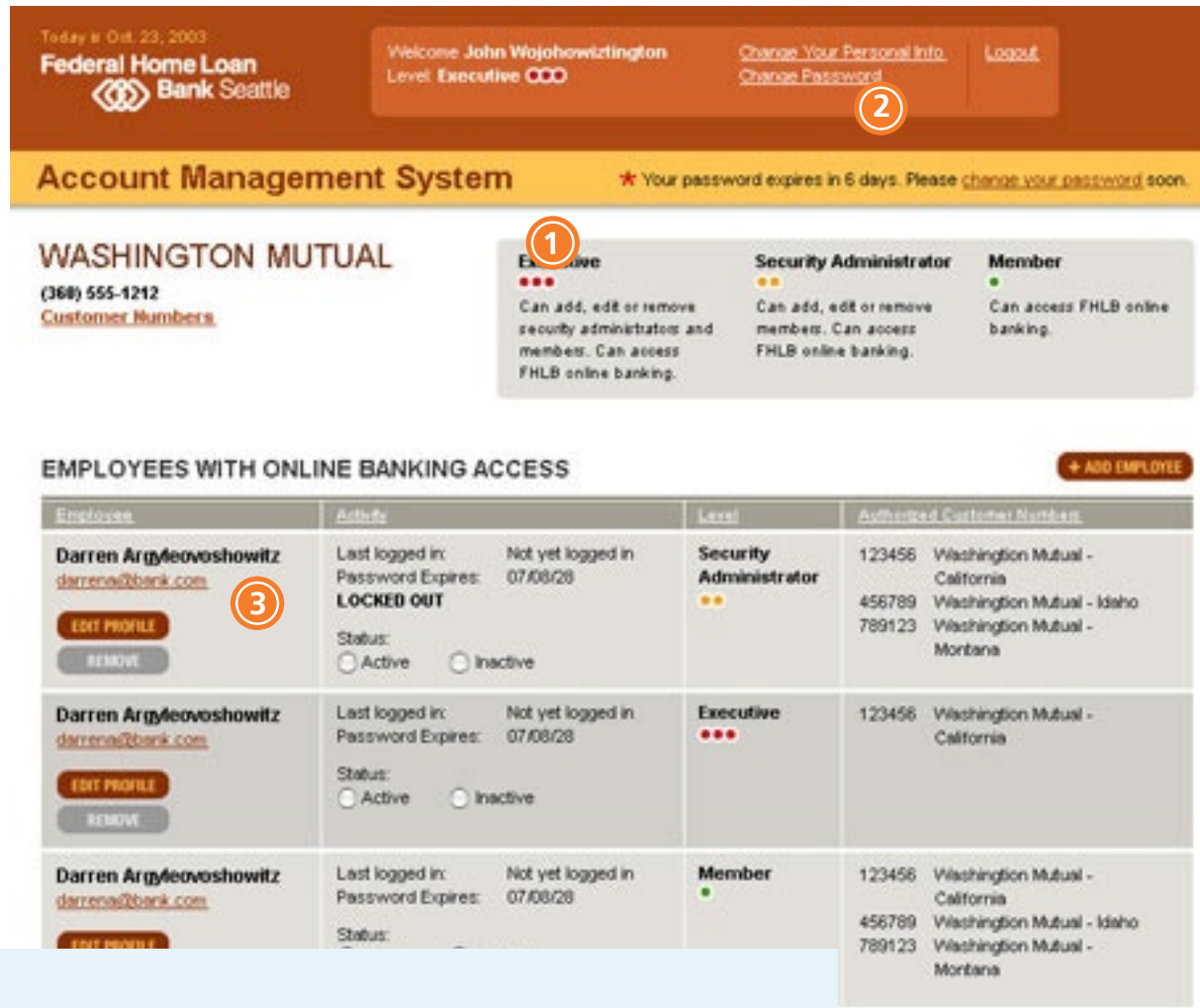


Federal Home Loan Bank/Account Management



Roles: Information Architect, Interaction Designer

Worked closely with: Art Director, Technical Director, Developer

- 1 Since frequency of dashboard use varies, the interface must provide usage reminders to infrequent users.*The text here reinforces concepts taught during orientation.
- 2 Account management tools are kept separate from primary functions (reviewing account activity, adding new accounts, managing existing accounts)
- 3 Account records are presented in the dashboard to facilitate easy browsing and the completion of frequently performed tasks.

The FHLB Account Management System empowers users across the organization to create, manage, and monitor system accounts. This dashboard enables users to view employee accounts at a glance.

Federal Home Loan Bank/Account Management Orientation

Today is Oct. 23, 2003
Federal Home Loan Bank Seattle

Welcome John Wojohowitzington
Level: Executive

Change Your Personal Info
Change Password
Logout

Account Management System

Welcome John Wojohowitzington
WASHINGTON MUTIAL
Level: Executive

SET UP YOUR ACCOUNT IN 4 EASY STEPS

- 1 CHANGE YOUR PASSWORD
- 2 REVIEW YOUR INFORMATION
- 3 REVIEW CUSTOMER NUMBERS
- 4 ADD EMPLOYEES

Add Employees

Enter information for each employee. You will be able to add more users and change this information later.

Enter Employee Info

All fields are required

FIRST NAME LAST NAME

PRIMARY PHONE Sample: (206) 555-5555

E-MAIL ADDRESS Sample: johndoe@bank.com

DEPARTMENT

Set Level

Executive Can add, edit or remove security administrators and members. Can access FHLB online banking.

Security Administrator Can add, edit or remove members. Can access FHLB online banking.

Member Can access FHLB online banking.

Authorize Customer Numbers

You can assign or unassign customer numbers by checking or unchecking the box next to each bank.

<input checked="" type="checkbox"/>	123456	Washington Mutual - California
<input type="checkbox"/>	456789	Washington Mutual - Idaho
<input type="checkbox"/>	789123	Washington Mutual - Montana
<input checked="" type="checkbox"/>	123456	Washington Mutual - California
<input checked="" type="checkbox"/>	456789	Washington Mutual - Idaho
<input checked="" type="checkbox"/>	789123	Washington Mutual - Montana

SAVE & ADD ANOTHER USER or SAVE & FINISH

Roles: Information Architect, Interaction Designer

Worked closely with: Art Director, Technical Director, Developer

- 1 Expectations for both time and functionality are clearly set through a four-step process.
- 2 Clear language to reduce confusion.
- 3 System concepts are reinforced throughout the process using both language and visual cues.
- 4 Users have multiple options for gracefully ending the process.
- 5 Examples are provided where necessary to clearly demonstrate expectation.

The orientation systems helps new users learn to use the Account Management System and accomplish repetitive set-up tasks in a predictable amount of time.