

**User-Centered  
Interface Design**

**LUCID Methodology  
and UI Standards**

**Knowledge  
Management and  
Information  
Publishing**

**Consulting and  
Training**

# Lessons from the Novartis InfoWeb Creating a Successful Knowledge Management System

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# The InfoWeb project



- A global knowledge management system created in Lotus Notes for Novartis Consumer Health
- Sponsored by Search & Development - Werner Tschollar, SVP
- Project Manager - Maryam Olesen
- The InfoWeb team
  - NCH Global Data Management
  - Lotus Development, Geneva
  - Cognetics Corporation

# Lessons learned

1. Exploit opportunities
2. Learn from users
3. Start with a concept, envision the results and sell the impact
4. Distribute ownership
5. Create custom solutions
6. Meet design challenges
7. Document decisions
8. Make access easy
9. Take rollout seriously
10. It doesn't end at launch

# Lesson 1 - Exploit opportunities

- A changing business environment
  - Two large pharmaceutical companies merging
  - Consumer Health being separated from Pharma
  - Global projects and process being introduced
- A new technical environment
  - Lotus Notes adopted as corporate standard
  - New infrastructure being put in place
- The challenge
  - Create capabilities for collaboration among new colleagues
  - Look for the sparks of innovation that lead to new products

## Lesson 2 - Learn from users

- Followed a user-centered design process
  - Interviews with 30+ people
    - **What is their job, and how does it fit into the drug development process**
    - **What information do they produce and use**
  - Analyzed the interviews
    - **Overlaps and differences in information use**
    - **Exemplary or memorable quotes and stories**
    - **Tools that worked well**
  - Brainstorming
    - **Scenarios to illustrate new processes**
    - **Initial screen sketches for key ideas**
    - **Identification of problems InfoWeb could solve**

# Lesson 3 - Start with a concept...



- The InfoWeb concept included:
  - **Suite of tools, not monolithic database**
  - **Distributed control and ownership**
  - **Focus on both information and process**
- Users' expressed functional needs helped clarify the goals for the tools
  - **The six areas provide a strong picture of how the company worked**





# ...envision the results

**February 17th. 3:23 p.m. London, England:** Susan Bentley needs product information. She just received an inquiry from a pharmacist concerning a customer on vacation who lost his Fenistil allergy medication in San Francisco.

Sue uses the Product Encyclopedia to access the entire consumer product database. A search by product name, ingredient and country produces a total of three different options. She contacts the pharmacist and forwards the information.

- Scenarios helped people see how InfoWeb would help Novartis Consumer Health work smarter
  - **Situations drawn from user interviews**
  - **Tied existing tools and processes to new ones**
  - **Reflected the global nature of the company**



# ...and sell the impact

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My Schedule  
Personal Page

Novartis Project History

Current Personal I

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**Medical Matters**

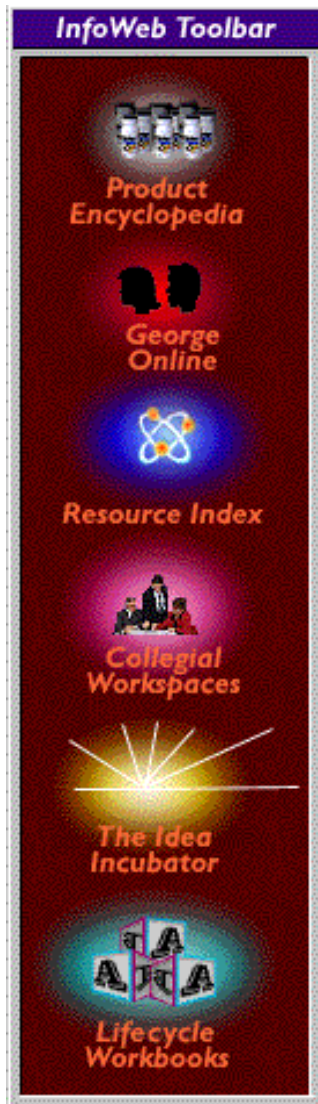
Discussions  
Reference Library  
Consumer Response Questions  
Training Material  
News Clippings  
Conference Room

• List of Members  
• Join  
• Discussions

- Presentation to the advisory board was also given to all staff
- Screen sketches illustrated a web-based presentation showing:
  - Concept
  - Benefits
  - Key features
- Links connected to supporting research and analysis material



# Lesson 4 - Distribute ownership



- No tool was approved without user sign-off
- User design participants would take ownership of completed work
- Users acted as evangelists to the community
- Departmental partners helped tools cross boundaries
- Communication and involvement were keys to acceptance

# Lesson 5 - Create custom solutions

People  
Projects  
Consumers  
Collaboration



Ideas  
Products  
Research

**InfoWeb**

Click Here to Open an InfoWeb Tool 

 <b>George Online</b>	Find information about people, departments, and sites	
 <b>Product Encyclopedia</b>	Access global and local product information	
 <b>Resource Index</b>	Find online library and periodical resources	
 <b>Idea Incubator</b>	Submit and discuss a new product idea	
 <b>Lifecycle Workbooks Portfolio</b>	Read Project Status and Summary Sheets, meeting agendas and minutes	
 <b>X-Plora</b>	Access global and local market research studies	
 <b>Collegial Workspaces</b>	<b>Database List</b> Collaborate in a global discussion group	

 Notes Basics  
 Learn About InfoWeb

- Knowledge management must meet the needs of each organization
  - **Fill information gaps**
  - **Create locus for cross-department work**
- The system must be open-ended and capable of change over time
  - **Be prepared for users to grow more sophisticated**
  - **Be prepared for new ideas**

# Lesson 6 - Meet design challenges



- A distinctive visual style for InfoWeb
  - Minimal graphics for rapid access
  - Color coding to identify different tools
- Meet interface expectations
  - Why can't it look like the web?
  - Extend Notes without 'breaking' it
- Create standards for common functions
  - Common library of action button icons
  - Consistent screen and navigator layout
- Use good document design principles
  - Standard header for critical information
  - Screens designed for rapid scanning

# Lesson 7 - Document decisions

- Style Guide
  - Includes guidelines, rationale, code samples and examples
  - Includes references to corporate guides and Notes Best Practices database
  - Living document with contribution from whole team and periodic formal releases
- Design 'Construction Kit'
  - Include all basic graphic elements
  - Encourage all projects to use the design standard
- Graphics library
  - Stores all images used for easy access



# Lesson 8 - Make access easy



- A “navigator” database creates a central access point
  - **Overviews and help for each tool are included**
  - **Users can be notified of updates with an email link**
  - **Leave room for expansion**



# Lesson 9 - Take rollout seriously



- Presentations and handouts
  - **Focused on the use and benefits, rather than technology**
  - **User team members participated in presentations**
- Individual tools rolled out to pilot groups first with training
  - **Database tools built incrementally, site by site**
  - **Lifecycle Workbooks rolled out to all project teams at once**
  - **Collegial Workspaces created as requested - over 20 were in use by the official rollout**

# Lesson 10 - It doesn't end at launch

- Encourage feedback
  - Every screen includes a feedback button
  - Keep in touch with user groups
  - Schedule periodic reviews to collect new ideas and problems
- Train new knowledge managers
  - Give interested users the support they need
  - Move processes into the appropriate departments (with training)
- Monitor system performance
  - Watch access speed carefully
  - Be sure ongoing processes are working

# Making InfoWeb a success

Success factors:

- Strong central team with broad-based participation
- Appropriate attention to corporate politics
- A concept that met the business needs of the company and the staff
- Created forum for content not available elsewhere
- Attractive, easy to use design
- Stable, tested releases

