



Toyota Legal One

Expertise. Efficiency. Solutions.

USER ARCHETYPES

- **The Power-User**
- **The Day-to-Day User**
- **The Learner**
- **The IT Admin**

MEET KEITH

THE POWER USER

“We need a centralized location for all of our information with verifiable record of what is being stored.”

SR COUNCIL
7 years w/ company

“We need imposed control in an oftentimes disorderly process...A uniform process everyone can follow (common conventions for document fields/name).”

Description:

A power user uses advanced features of the document management system that are not used by the day-to-day User (average user). They typically use the system multiple times every day and are detail-oriented when creating new matters or documents. They find or create short cuts to master the system and are often known for teaching others.

Behavior:

- System advocate across practice and organization
- Supporter of new system features and upgrades
- Willing to help others learn the system
- A very active user of the system
- Willing to take time in the beginning to save time later
- Looks for other interesting content
- A detail-oriented and organized person
- Knows what they want
- Uses advanced search features
- Has worked with a DMS in the past

Pains:

- Frustrated with numerous systems that are not integrated
- Lack of search capabilities
- Issues with versioning and working with incorrect documents
- Misplaced documents
- Spends hours looking for documents
- Stores documents on hard drive or other storage drives

Gains:

- One central repository
- Wants multiple levels of functionality to organize, find and retrieve documents
- Optimized and fast performance
- Security and permission rights
- Opts for encryption techniques
- Collaboration with others
- Contextual search and advanced search with filtering
- Audit Trail: wants to know who did what and when

MEET KARRIE

THE DAY 2 DAY USER

“This will be a huge time saver for the group.”

DEPARTMENT HEAD
12 years w/ company

“I like the idea of paperless, it will be a big business gain and reduce clutter.”

Description:

This user type is anyone who uses the new DMS but is not a power user. This person would be an average user that wants to easily retrieve documents to reduce time spent looking for documents. This user may become a power user over time, however they use basic essentials to perform tasks. This user may rely on online help to complete a task but would prefer an intuitive experience.

Behavior:

- Medium use of the system
- Wants to save time with workload
- Has worked with legacy systems
- Aims to be more organized
- Uses quick search but has used advanced search
- Wants to be more efficient but is ok with getting by

Pains:

- Issues with versioning and working with incorrect documents
- Misplaced documents due to lack of process or organization
- Spends hours looking for documents
- Stores documents on hard drive or other storage drives
- Want to collaborate with colleagues and outside firms

Gains:

- Collaboration with others
- Optimized and fast performance
- Contextual search and advanced search with filtering
- Audit Trail: wants to know who did what and when

MEET KATE

THE LEARNER

"I'm new to company but used a DMS at my last firm."

LEGAL MANAGER
3 months w/ company

"Improved versioning will be a major business gain as a result of a successfully implemented DMS. "

Description:

This user type would be someone new to Document Management Systems or new to Toyota. It is also anyone with prior working knowledge of a Document Management System but unfamiliar to the proposed system. This user type is willing to learn but wants a short learning curve. The system should be simple so adoption is seamless.

Behavior:

- New to the system or new to the company
- Uses the essential features
- Wants to start out with a simple view
- Simple search and easy to find results
- Would need training and contextual help
- Getting started tutorials would be helpful
- Likes having active file folders near them

Pains:

- New to the company or department
- Does not know process or policies
- Needs help learning new processes and/or systems
- Overwhelmed with version control
- No time to learn something new

Gains:

- Removes issues with versioning and working with incorrect documents
- Paperless folders and easy access
- Online help feature
- Internal process training

MEET KEVIN

THE LEARNER

"I vaguely recall a system used in the past. I have not used a document management system extensively in previous positions."

LEAD COUNCIL
15 years w/ company

"I would like it to be more efficient... make it easy to learn. I don't have time for learning something new."

Description:

This user type would be someone new to Document Management Systems or new to Toyota. This also applies to anyone with prior working knowledge of a Document Management System but new to the proposed new system. This user type is willing to learn but wants a short learning curve. The system should be simple so adoption is seamless.

Behavior:

- Could be new to the system or new to the company
- Uses the essential features
- Wants to start out with a simple view
- Simple search and easy to find results
- Needs training and contextual help
- Likes having active file folders near them

Pains:

- New to document management system
- May not adapt to new process or policies
- Needs help learning a new process and/or system
- Overwhelmed with paper file folders
- No time to learn something new

Gains:

- Issues with versioning and working with incorrect documents
- Paperless folders and easy access
- Online help feature
- Internal process training

MEET KEN

IT ADMIN

“There are too many systems with no consistency...it’s not great but its all we have.”

IT LEADER
9 years w/ company

“A document management system will encourage the reuse of work product, be a centralized repository for documents, and make it easier to find information, leading to retention of institutional knowledge and ample time saved.”

Description:

The IT Admin is the TMS Technical resource with a more advanced working knowledge of the backend and user configuration. He or she will have some prior knowledge with standard TMS operating practices and platforms. The IT Admin would be responsible for maintaining all the training documents required for the system. This user type would also be responsible for assigning new users to system both internally and externally.

Behavior:

- Assigns rights to specific users for creating new documents/making revisions to the current documents
- Accepts/rejects uploads from the user
- Adds and removes Users and Groups (including Repository Administrators)
- Views the entire history of the system logs
- Configures Advanced Authentication
- Defines custom document profile attributes and uploads attribute values
- Removes a non-member from systems or workspaces
- Requests a Consolidated Activity Log
- Creates and deletes Department workspaces/cabinets
- Set a default List View for the Repository

Pains:

- Supports and manages a variety of internal systems
- Not enough time to manage
- No standards or consistent processes

Gains:

- One centralized system to manage
- Able to control user rights and permissions
- Ability to access user settings
- Ability to remove users within system or department groups