● CASE STUDY · 2026 · ENTERPRISE HEALTHCARE SAAS

Clinical
Assessment Platform

Redesigning clinical research record discovery through clearer information architecture, contextual metadata, and connected workflows.

ROLE	TIMELINE	INDUSTRY	PLATFORM	TOOLS
Senior Product Designer	**6 – 8 Weeks**	**Healthcare SaaS**	**Desktop Web**	**Figma · FigJam · Miro**

01

CHAPTER 01

Project Overview

A senior design engagement focused on modernizing how clinical research records are found, understood, and connected.

INDUSTRY
Enterprise Healthcare SaaS
Clinical research information platform

PLATFORM
Desktop Web
Clinical research record discovery

ROLE
Senior Product Designer
Discovery workflow and interface design

RESPONSIBILITIES
Research · UX Audit · IA · Hi-Fi UI
Wireframing · Prototype · Dev handoff

DELIVERABLES
Workflow map · IA model
Component-level Figma library

TEAM
1 PM · 1 Eng Lead · 4 Engineers
1 QA · 1 Clinical SME

02

CHAPTER 02

Understanding the Problem

The visible interface problem pointed to a deeper record-discovery and context problem.

PROBLEM STATEMENT

01
Requested UI Refresh
Initial brief

02
Research
Workshops · Interviews · Audit

03
Discovery Gaps Defined
Structure · Context · Relationships

04
Product Redesign
Record-discovery approach

03

CHAPTER 03

Discovery

A structured path from the legacy experience to a focused record-discovery direction.

01 **Stakeholder Workshop** Align scope
02 **Legacy Workflow Review** Map as-is
03 **User Input** Needs synthesis
04 **Task Analysis** Discovery paths
05 **UX Audit** Heuristic + flow
06 **Affinity Mapping** Cluster signals
07 **Insights** Re-frame brief
08 **Opportunity** Workflow redesign

Re-framed scope: from visual modernization to record discovery.

The redesign focused on separating record types, exposing useful metadata, and making the Concept → Instruction → Endpoint relationship explicit before moving into high-fidelity screens.

04

CHAPTER 04

Core User Needs

The redesign centers on three needs demonstrated by the final record-discovery screens.

● NEED 01

Find the right record

Discover without scanning mixed record types

LEGACY FRICTION

- × Concepts, instructions, and endpoints shared one table
- × Filtering depended on three dropdowns
- × Record hierarchy was not visible in the list

DESIGN RESPONSE

- ✓ Dedicated Concepts, Instructions, and Endpoints libraries
- ✓ Search by record-specific names and identifiers
- ✓ Classification and status filters visible in context

VISIBLE IN THE FINAL DESIGN

Searchable, scoped lists replace the mixed-record discovery table.

● NEED 02

Understand record context

Evaluate metadata without losing the list

LEGACY FRICTION

- × Metadata was compressed into generic table columns
- × No contextual detail panel supported selection
- × Parent and related records were not explained

DESIGN RESPONSE

- ✓ Selected-record detail panel beside each list
- ✓ Type, version, review date, category, and status metadata
- ✓ Parent context retained as users move deeper

VISIBLE IN THE FINAL DESIGN

Lists and contextual panels present summary and detail in the same view.

● NEED 03

Trace relationships

See how selected records connect

LEGACY FRICTION

- × Mixed rows did not communicate record hierarchy
- × Connections were not visible from the discovery table
- × Following related records required interpreting IDs and modules

DESIGN RESPONSE

- ✓ Guided Concept → Instruction → Endpoint progression
- ✓ Related-record counts and parent context
- ✓ Relationship Explorer with three connected columns

VISIBLE IN THE FINAL DESIGN

The selected concept, related instructions, and associated endpoints remain visible together.

CHAPTER 05

05 Experience Audit

Four limitations visible in the supplied legacy Record Discovery screen and documented IA.

01
Record types were mixed together.

Concepts, instructions, and endpoints appeared in one dense table, making the hierarchy between record types difficult to interpret.

02
Discovery controls were limited.

Module, Therapeutic Area, and Status dropdowns could narrow the table, but the supplied screen offered no dedicated text search or record-specific browsing path.

03
Navigation was system-oriented.

The documented platform IA foregrounded a broad collection of modules instead of clearer task entry points. The proposed IA addresses this at a high level.

04
Context and relationships were hidden.

The table exposed summary fields, but it did not explain parent records, related-record counts, detailed metadata, or how a concept connects to instructions and endpoints.

06

CHAPTER 06

Design Strategy

Five screen-supported decisions tied directly to the legacy record-discovery limitations.

01
Dedicated Libraries

PROBLEM
Three record types shared one table.

DECISION
Separate Concepts, Instructions, and Endpoints into focused libraries.

REASON
Each record type can use relevant labels and metadata.

DESIGN EFFECT
Record type and position in the discovery flow are explicit.

02
Scoped Search & Filters

PROBLEM
Discovery relied on three generic dropdowns.

DECISION
Add text search, classification filters, sorting, and scoped results.

REASON
Controls reflect the record type and selected parent.

DESIGN EFFECT
Users have clearer paths for narrowing visible records.

03
Contextual Details

PROBLEM
The list provided limited record explanation.

DECISION
Pair each list with a selected-record detail panel.

REASON
Metadata stays visible without replacing the list context.

DESIGN EFFECT
Classification, status, version, and relationship data are easier to inspect.

04
Guided Discovery Path

PROBLEM
Record hierarchy was not explained.

DECISION
Carry selected context from Concept → Instruction → Endpoint.

REASON
Breadcrumbs, counts, and parent labels make each transition legible.

DESIGN EFFECT
The relationship between successive record levels is visible.

05
Relationship Explorer

PROBLEM
Connected records had no unified view.

DECISION
Show concept, related instructions, and associated endpoints in three columns.

REASON
The selected path can be understood as one connected model.

DESIGN EFFECT
Record relationships remain visible while users inspect each level.

PROJECT DELIVERABLE

Material component foundation

Design artifact

The component-level Figma library documented the reusable visual patterns applied across the delivered discovery screens, rather than treating each screen as an isolated composition.

Material foundations	Discovery controls	Record patterns	Context surfaces
Roboto, semantic color, elevation, and large-radius surfaces	Search fields, filters, sorting, and selected states	Metadata rows, classifications, statuses, and counts	Detail panels, breadcrumbs, and relationship columns

07

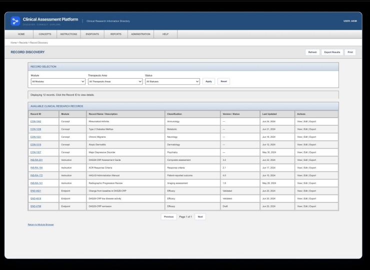
CHAPTER 07

Before vs After

Six supplied screens document the shift from one mixed-record table to dedicated libraries, contextual details, and a connected relationship view.

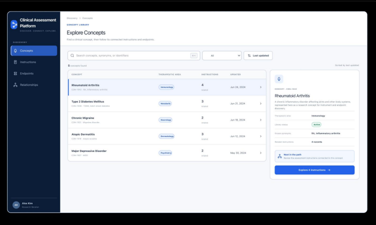
COMPARISON 01 **Record Discovery & List View**

Before — Legacy Record Discovery
Module + therapeutic area + status dropdowns. Dense mixed-type table.



- Dropdown-only filtering
- No dedicated search
- Mixed record types in one table
- No record hierarchy visible
- Concepts, instructions and endpoints undifferentiated
- No contextual details panel

After — Explore Concepts
Searchable concept library. Therapeutic-area classification. Contextual details



Explore Concepts

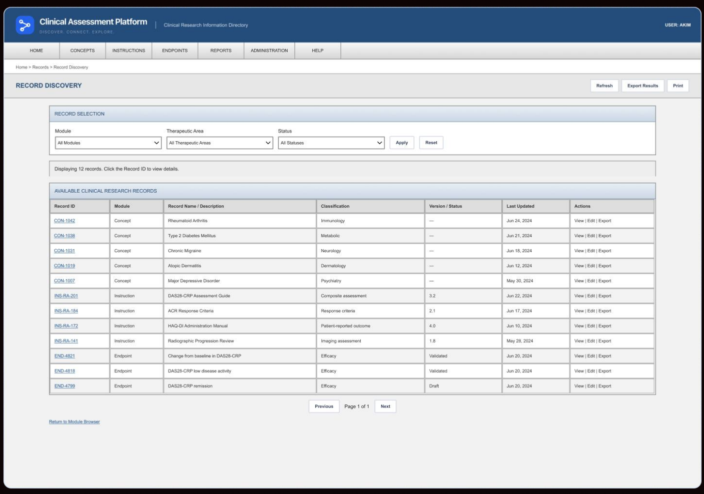
CONCEPT	THERAPEUTIC AREA	INSTRUCTIONS	UPDATED
Rheumatoid Arthritis	Immunology	4	Jun 24, 2024
Type 2 Diabetes Mellitus	Metabolic	3	Jun 21, 2024
Chronic Migraine	Neurology	2	Jun 18, 2024
Atopic Dermatitis	Dermatology	3	Jun 12, 2024
Major Depressive Disorder	Psychiatry	2	May 30, 2024

Rheumatoid Arthritis

- Concepts separated into dedicated library
- Search by name, synonym or identifier
- Therapeutic-area chip classification
- Related-instruction count per row
- Contextual details panel on selection
- Clear path to next level of discovery

COMPARISON 02 **Search & Filter Experience**

Before — Reference Baseline (same screen)
The supplied legacy Record Discovery screen uses three dropdowns—Module, Therapeutic Area, and Status—to filter the sam



Home > Records > Record Discovery

RECORD DISCOVERY

RECORD SELECTION

Module: All Modules
Therapeutic Area: All Therapeutic Areas
Status: All Statuses

Displaying 12 records. Click the Record ID to view details.

AVAILABLE CLINICAL RESEARCH RECORDS

Record ID	Module	Record Name / Description	Classification	Version / Status	Last Updated	Actions
CON-1042	Concept	Rheumatoid Arthritis	Immunology	—	Jun 24, 2024	View | Edit | Export
CON-1038	Concept	Type 2 Diabetes Mellitus	Metabolic	—	Jun 21, 2024	View | Edit | Export
CON-1031	Concept	Chronic Migraine	Neurology	—	Jun 18, 2024	View | Edit | Export
CON-1019	Concept	Atopic Dermatitis	Dermatology	—	Jun 12, 2024	View | Edit | Export
CON-1007	Concept	Major Depressive Disorder	Psychiatry	—	May 30, 2024	View | Edit | Export
INS-RA-201	Instruction	DAS28-CRP Assessment Guide	Composite assessment	3.2	Jun 22, 2024	View | Edit | Export
INS-RA-184	Instruction	ACR Response Criteria	Response criteria	2.1	Jun 17, 2024	View | Edit | Export
INS-RA-172	Instruction	HAQ-DI Administration Manual	Patient-reported outcome	4.0	Jun 10, 2024	View | Edit | Export
INS-RA-141	Instruction	Radiographic Progression Review	Imaging assessment	1.8	May 28, 2024	View | Edit | Export
END-4821	Endpoint	Change from baseline in DAS28-CRP	Efficacy	Validated	Jun 20, 2024	View | Edit | Export
END-4818	Endpoint	DAS28-CRP low disease activity	Efficacy	Validated	Jun 20, 2024	View | Edit | Export
END-4799	Endpoint	DAS28-CRP remission	Efficacy	Draft	Jun 20, 2024	View | Edit | Export

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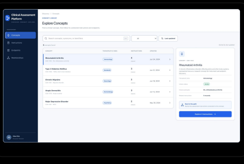
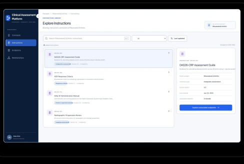
After — Context-aware Discovery Sequence
Each layer is searchable and scoped to the selected parent — from concepts through instructions to endpoints.

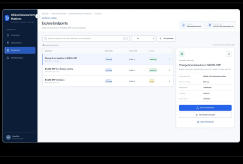
STEP 1 **Explore Concepts**



STEP 2 **Explore Instructions**



STEP 3 **Explore Endpoints**



- Search by name, synonym or ID
- Therapeutic-area chip filter
- Related-instruction count visible
- Contextual panel shows library status and synonyms

- Scoped to selected concept
- Search within concept scope
- Instruction type tag per row
- Version and last-reviewed date
- Associated-endpoint count visible

- Scoped to selected instruction
- Category, timepoint and status columns
- Parent instruction shown as breadcrumb context
- Detail panel: measure type, timepoint, library status
- View connections, download metadata or open full details

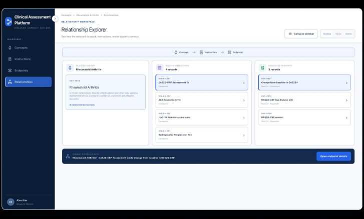
COMPARISON 03

Relationship Explorer & Contextual Details

The Relationship Explorer brings the selected concept, its related instructions, and associated endpoints into one connected view. The two supplied screens show the same workspace with expanded and collapsed navigation.

Relationship Explorer — Expanded Sidebar

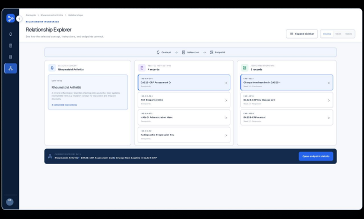
Left nav shows labelled items. Three-column workspace with full concept, instruction and endpoint panels.



- Labelled navigation rail
- Three-column relationship workspace
- Selected concept panel (left)
- Related instructions panel (centre)
- Associated endpoints panel (right)
- Current discovery path in footer bar

Relationship Explorer — Collapsed Sidebar

Nav rail collapses to icon-only. Three columns gain more horizontal space. Same discovery path persists.



- Icon-only collapsed rail
- Workspace columns gain width
- Same three-column structure
- Selection state and context preserved
- Discovery path footer persists
- Expand sidebar restores labels

08

CHAPTER 08

Clinical Record Discovery Architecture

Restructuring how clinical records are discovered, explored, and connected within the platform.

Original Discovery Structure

The legacy experience presented Concepts, Instructions, and Endpoints within a shared record-discovery table.

Assessment System

- Mixed record types in one table
- Module, Therapeutic Area, and Status dropdowns
- No explicit progression between related record types
- Relationships were difficult to identify

Redesigned Discovery Structure

The redesigned experience organizes clinical record discovery into dedicated, connected layers.

Clinical Record Discovery

- Concepts → Instructions → Endpoints → Relationships
- Dedicated libraries
- Search and filters
- Contextual details
- Guided progression
- Connected view through the Relationship Explorer

Rationale for the proposed direction

The redesign transforms clinical record discovery from a mixed-table experience into a structured, relationship-driven model. Dedicated libraries help users find specific record types, while contextual details preserve relevant information throughout exploration. The Concept → Instruction → Endpoint progression clarifies clinical hierarchy, and the Relationship Explorer brings connected records into a unified view.

IMPLEMENTED EXPERIENCE SHOWN IN THE REDESIGN

Screen-supported

Clinical research discovery structure

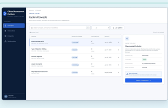
The supplied screens demonstrate a specific discovery path: users move from a selected concept to its related instructions and associated endpoints. Contextual panels expose record metadata at each level, while Relationships provides a connected view of the same selected records.

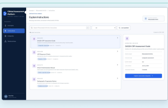
01
Concepts
Select a clinical concept

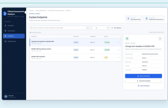
02
Instructions
Review related instructions

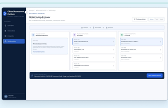
03
Endpoints
Find associated endpoints

CONNECTED VIEW
Relationships
See records in context


Explore Concepts


Explore Instructions


Explore Endpoints


Relationships

09

CHAPTER 09

Outcome

Implemented design improvements, documented directions, and intended benefits—separated by the evidence available.

IMPLEMENTED DESIGN
Improved discoverability
Dedicated searchable libraries combine record-specific filters, visible metadata, and contextual details.

IMPLEMENTED DESIGN
Clearer discovery flow
Concepts lead to related instructions, which lead to associated endpoints, with parent context retained.

DOCUMENTED IA DIRECTION
Task-oriented navigation
The proposed IA reframes twelve system modules as eight task-oriented entries; this is a structural proposal, not a measured result.

IMPLEMENTED DESIGN
Richer record context
Lists and detail panels expose classifications, statuses, versions, review dates, timepoints, and related-record counts.

PROJECT ARTIFACT
Reusable design foundation
The component-level Figma library and delivered screens use consistent Material color, type, spacing, surface, and status patterns.

INTENDED TEAM BENEFIT
Shared implementation reference
A reusable component foundation is intended to give design and engineering a consistent reference for extending the experience.

DESIGN INTENTION
Extensible content model
Separated libraries and an explicit relationship model are designed to accommodate additional records without returning to one mixed table.

Reflection

"Good enterprise UX is rarely about creating beautiful screens. It's about making complex work feel simple."

The interface was only part of the problem. The stronger design response came from making the content model visible: separate the record types, preserve context as users move deeper, and show relationships instead of asking people to infer them from a table.

Thank you.

Clinical Assessment Platform

Senior Product Designer · Case Study · 2026

AVAILABLE FOR
Senior / Principal Product Design roles
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DESIGN SYSTEM
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