Nuance® Equitrac®

UX Training

Session 3
July 13, 2017

authentic insight

UX Training Session Topics

- First 2 sessions – focus on Pattern Guide
- **Session3: Foundations of User Experience/Information Architecture deep dive**
- Session4: Visual Design/Copy (writing)
- Session5: General Best Practices
- URL access: training.authenticinsight.com
  Sign up!

Pattern Guide Sessions 1-2

Reviewed Equitrac Pattern Guide

- Web application STRUCTURE
- The CONTEXT of the application “features”
- Navigation Model (primary, secondary, page level navigation)
- Page types
- Controls, components, interactions that go on a page

User Experience

UX

The way a person feels when interacting with an application.

Encompasses all aspects of a user's interaction with an application (website, product, or service) which when combined results in the overall experience.

UX of Movies

Good actors

Good production

\+

Bad writing

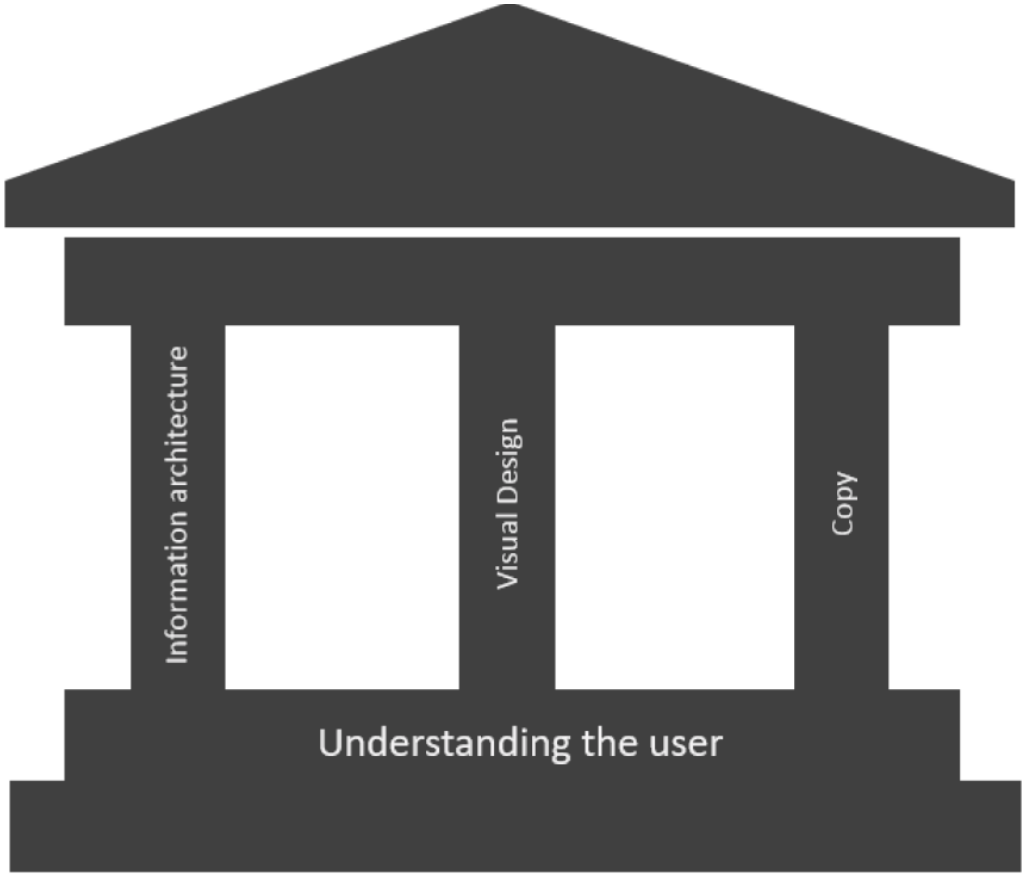
Bad story

=

Bad Experience

All the pieces have to be good

UX: Foundation & Components



Foundation: Understanding the User

- What tasks do users want to do?
- What information do users need?
- The priority and relationship between content/tasks
- How things make sense to users

UX Pillars

- Information Architecture

  Creating the "wayfinding" experience for content, features and tasks

- Visual Design

  Using images, colors, fonts, and other elements to enhance a design or interaction, and engage users

- Copy

  All the bits of text that get displayed to the user. E.g. information text, error messages, calls-to-action

None of these things matter if you don't understand your users!

Information Architecture

IA – A Discipline

- The Information Architecture Institute - a non profit organization
- IASummit – annual conference

IA Design Outputs

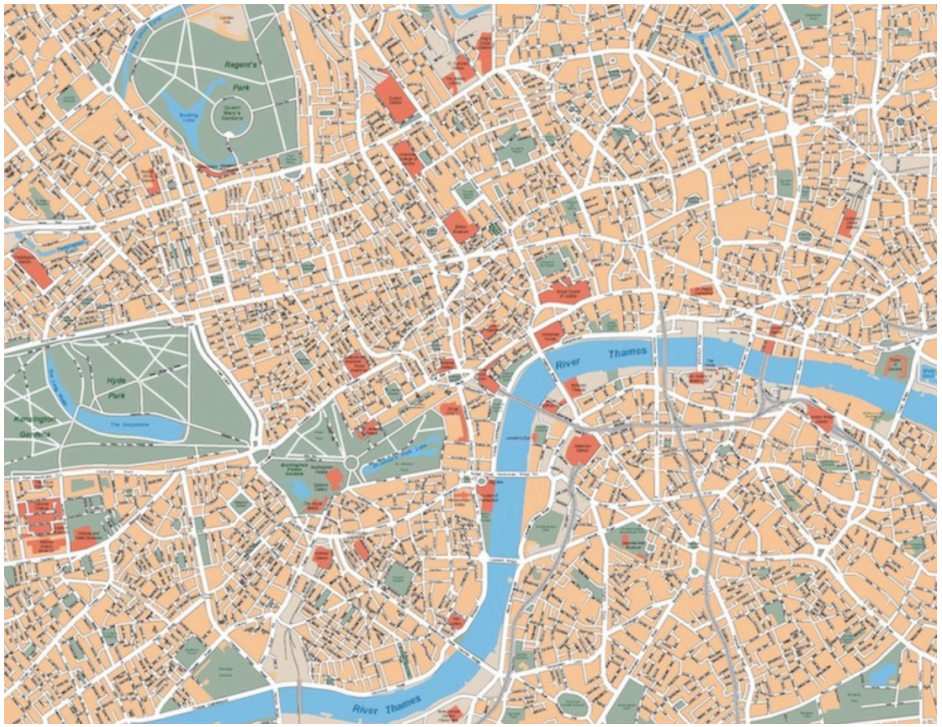
- Application Hierarchy (Site/Product Map)
- Navigation Model (Navigation structure)
- Category Labels
- Wireframes

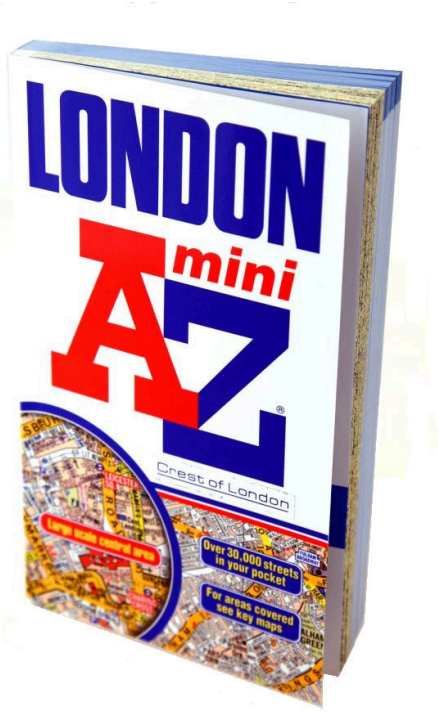
IA = Wayfinding

Creating the "wayfinding" experience …

- About helping people understand their surroundings and find what they're looking for, in the real world as well as online
- Started with Websites/content and moved to online application experiences. "Content" = Features & Tasks
- Focuses on the organization and structure of content in a way which a user can navigate through it – find things, do tasks…

Difficult Information Architecture





Getting around London you need an A to Z manual (= customer support)

Good Information Architecture

NY Manhattan is intuitive on it’s own (as long as you know where you are)

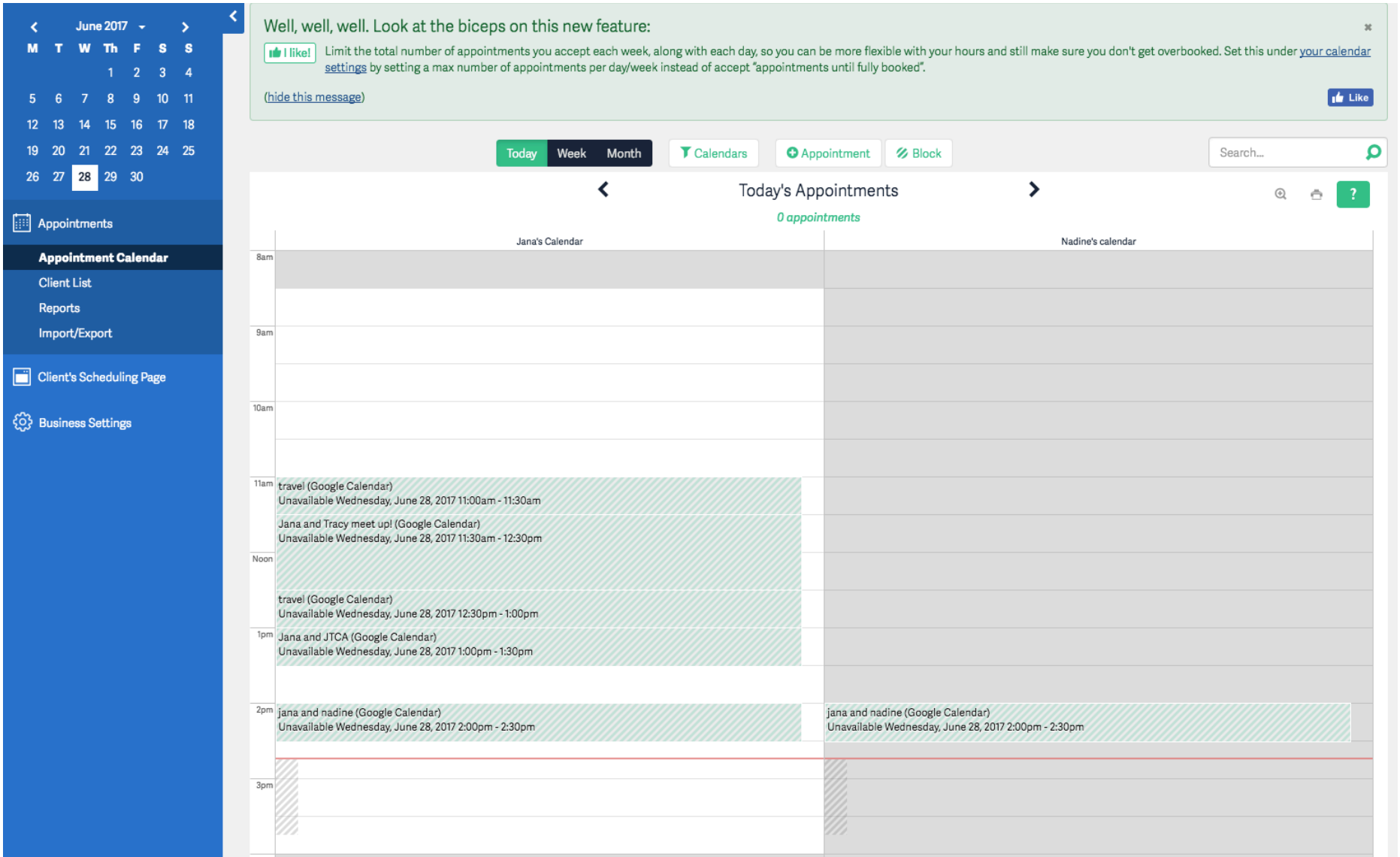
IA

- Good IA is absolutely critical for business productivity/ enterprise apps
- Best thing to “fix” in order to lower customer support calls
- Success = user’s desired task is easy find & use
- User spends minimal time in app - less time spent the better
- Consumer apps – often the more time spent in app the better (suck people in and make them stay there for marketing purposes)

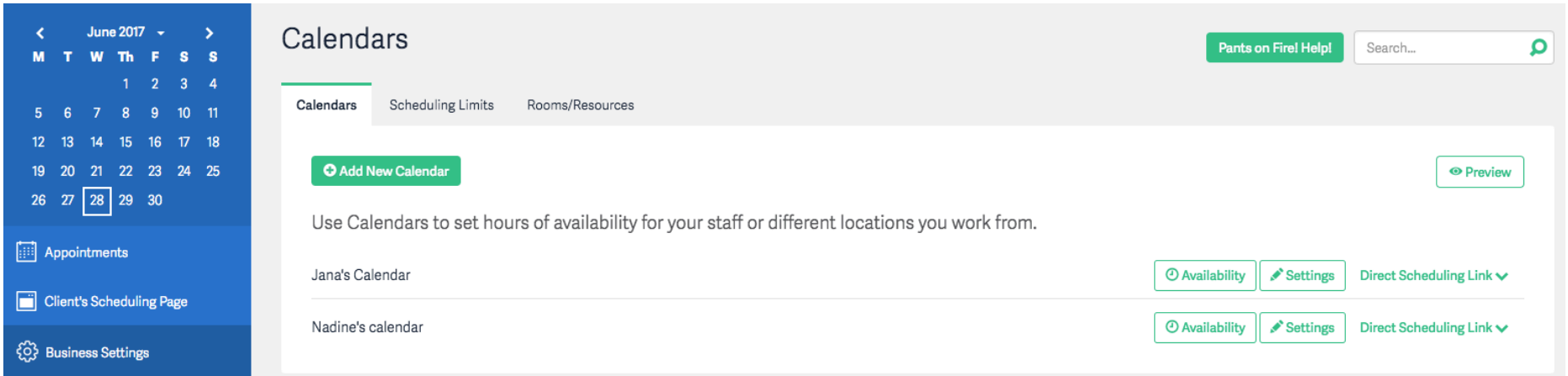
An example of how poor IA leads to confusion...

How does a user think about getting to what they want to do?

I'm a manager and direct reports can schedule half hour 1 on 1's. How would I create a half hour 1 on 1 meeting category?...Where would I go?



Why this doesn't work...



- Doesn't have a " Home" (most apps should have a "Home")
- Grouping (buckets) & Labels - not apparent what features they contain

  E.g. Business Settings category:
  - Very broad - could mean anything.
  - Too many sub-items
  - Wrong categories/labels
  - Too few at highest level. Too many at lower level
  - Takes too long, and too much effort, to find things
- Very easy to go down wrong path (would look for feature in appointments)

“But once they use it a couple of times, they’ll get used to it... right?”

"But once they use it a couple of times, they'll get used to it... right?"

Navigation & Hierarchy

Hierarchy & Categories

How do I achieve good Information Architecture?

Hierarchy & Categories

Step 1.

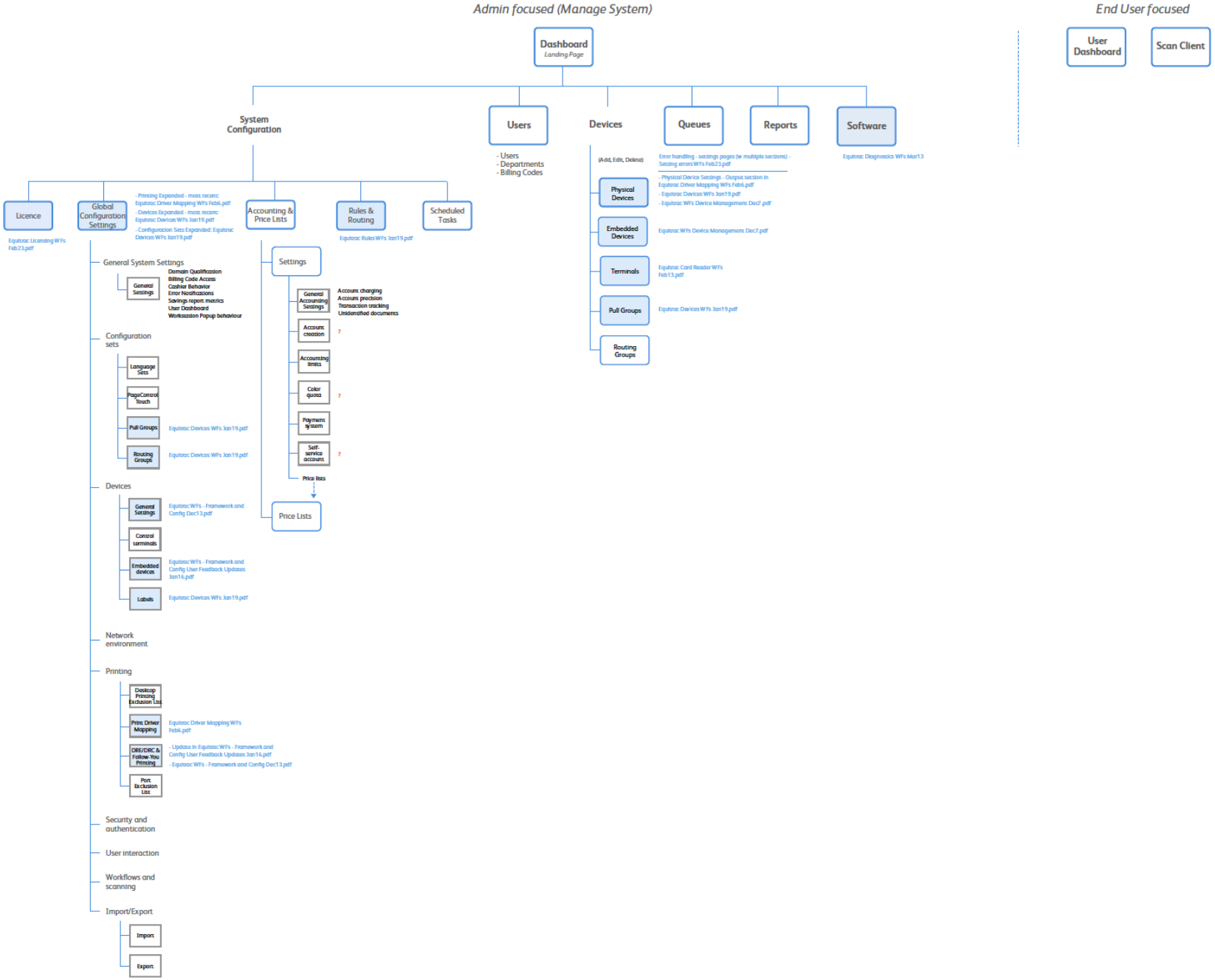
Figure out application structure/map

Step 2.

Figure out which navigation model supports the structure

EQUITRAC SYSTEM MANAGER PRODUCT MAP - Future State

February 17, 2017



Considerations for App Structure

- Have a “Home”/Dashboard?
- Limit number of categories at primary navigation levels – max 5-7
- Use category labels that make sense to users
- Where to “Drill down” to more detailed information
- Need a sectional Landing Pages? (section mini-home pages)

Navigation Model

Navigation model brings the application structure to life.

It is...

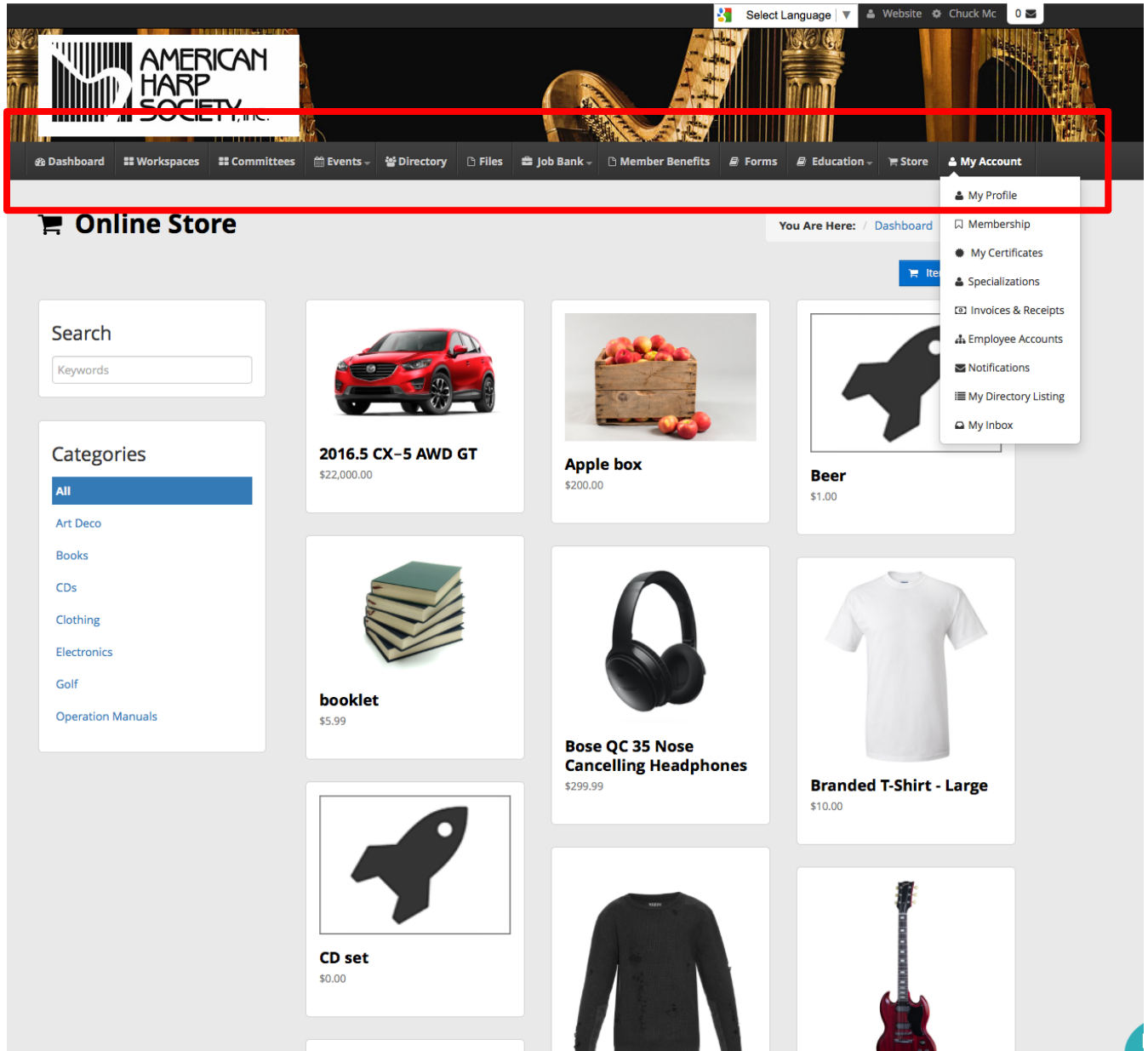
- How the user finds things
- How they flow through the different tasks/screens
- The different page types

To be successful, there needs to be some kind of templated system that is followed consistently throughout the application.

Navigation Model

and here are some examples...

Top Tab Navigation

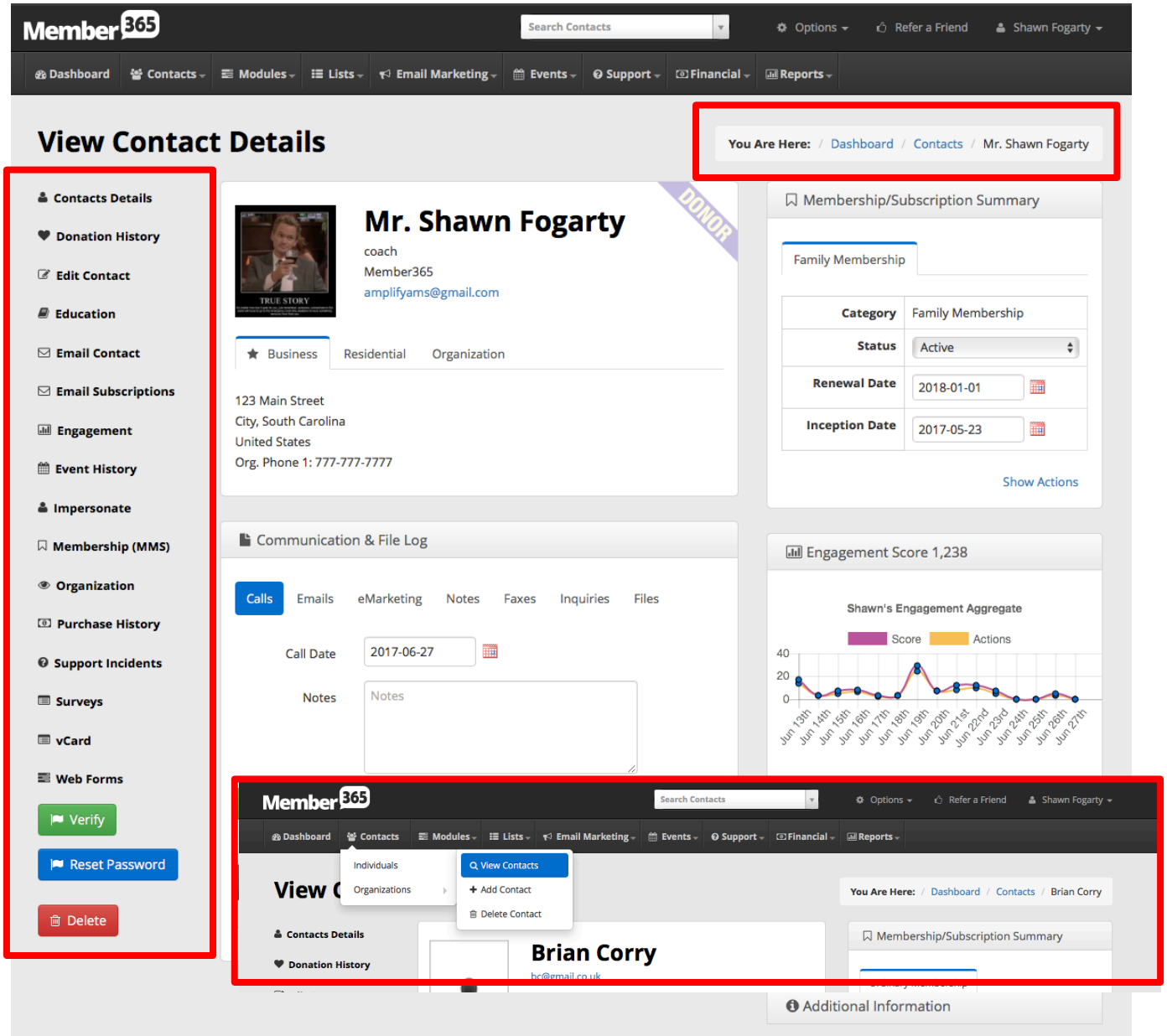


Select or hover on top nav reveals secondary nav.

No landing page, in this example, for primary sections (except the Dashboard).

- Too many navigation items at both primary and secondary levels
- Needs better grouping of categories

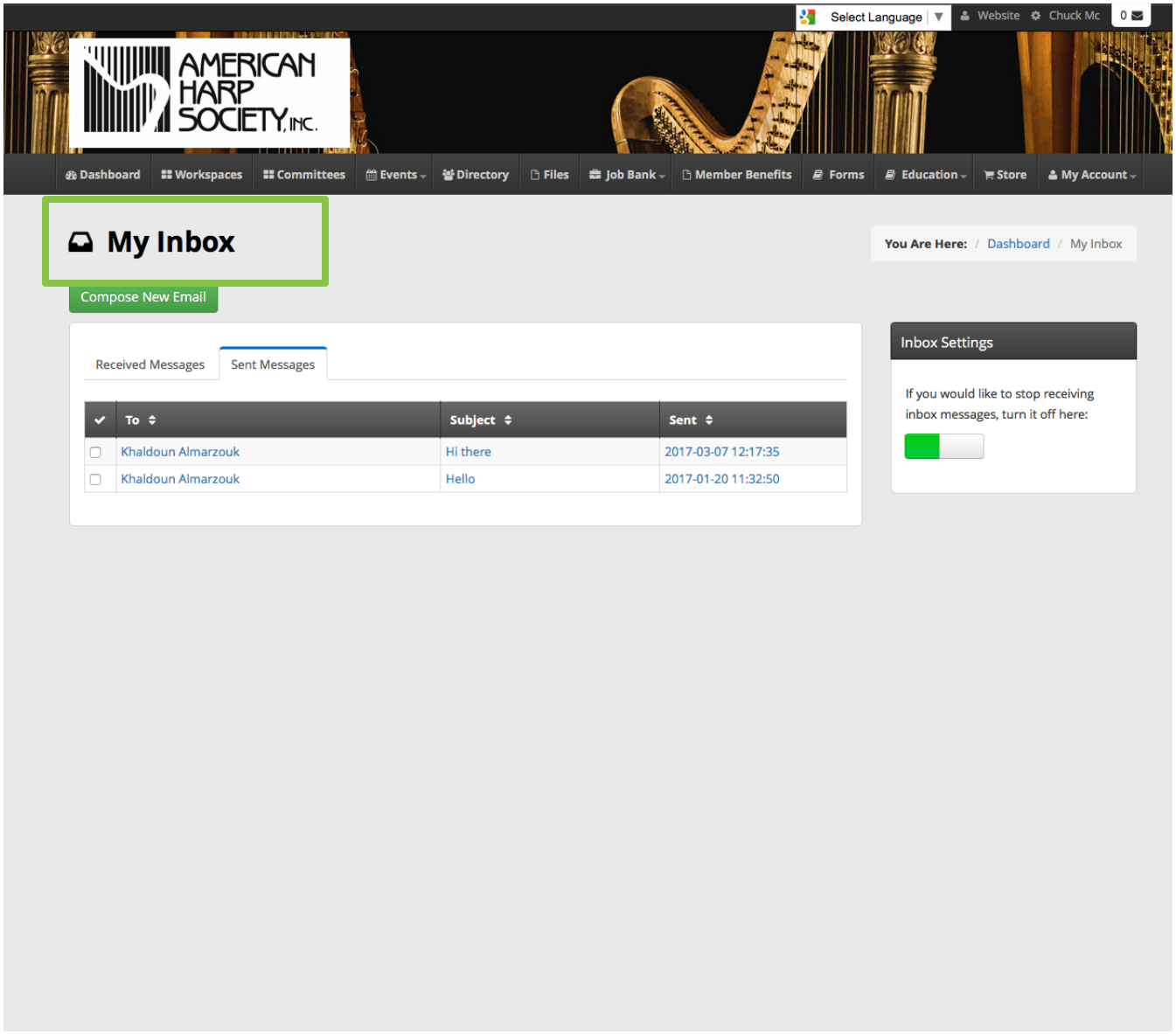
Navigation



- Page title should be Contact Details (no verb)
- Sections for Contacts in primary nav & Contact Details in side nav should be highlighted – provide association so user knows where they are
- Secondary nav context is lost entirely
- Breadcrumb doesn't match how user got here, or how application nav is structured
- Too many sidebar nav items
- Actions (buttons) too prominent

Member365

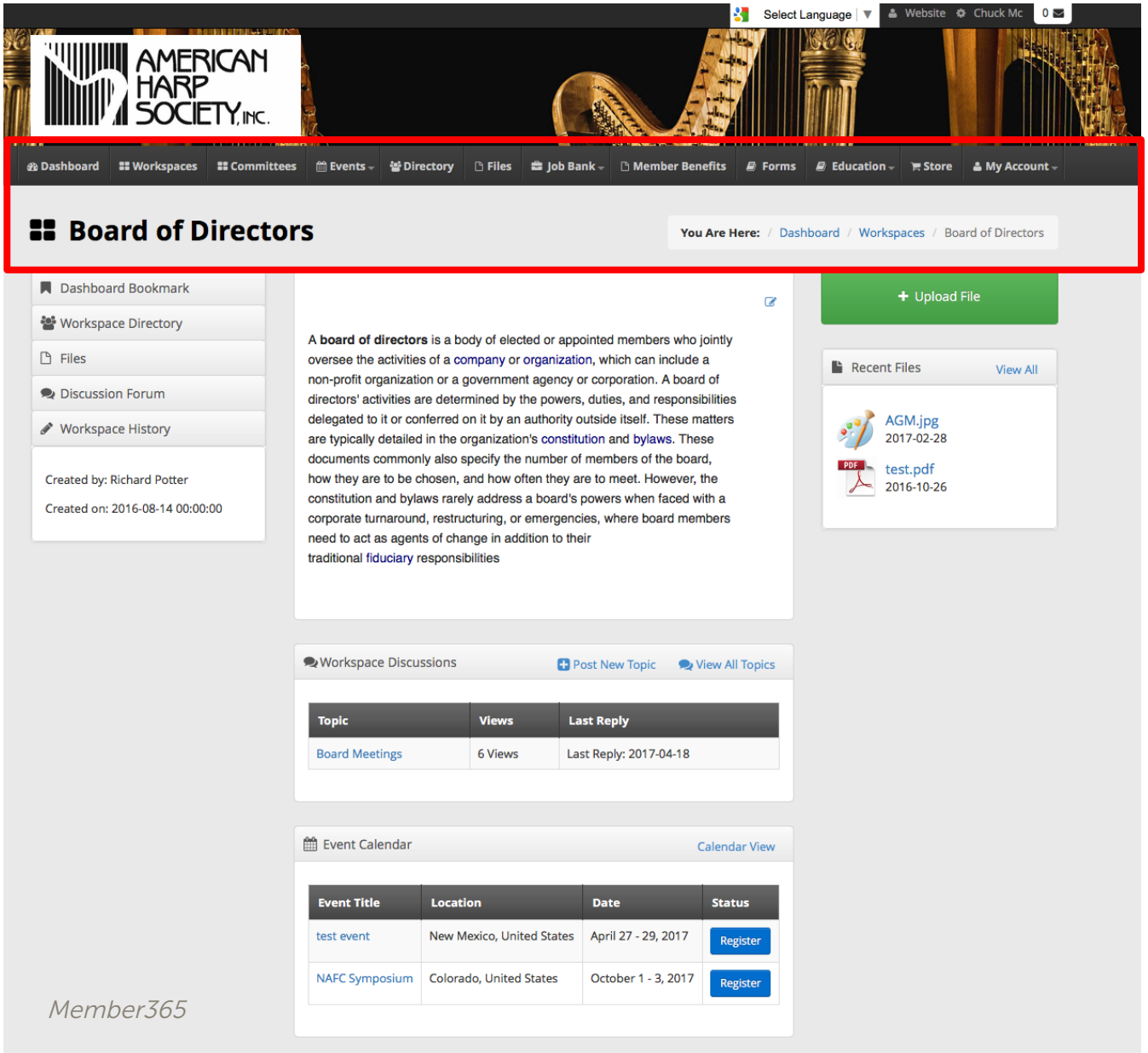
Navigation



- Page title: User knows where they are – My Inbox

- How easy is My Inbox to find again…only available from Dashboard?
- Actually no…top right indicator and not accessed from Dashboard at all

Navigation



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Breadcrumb

- Placement should be above the page title. Doesn't follow hierarchy
- Always includes "Dashboard", but it is structural and Workspaces is the associated primary nav category

Other

"Upload File" button stands out …Is the primary action really to upload a file in this context?

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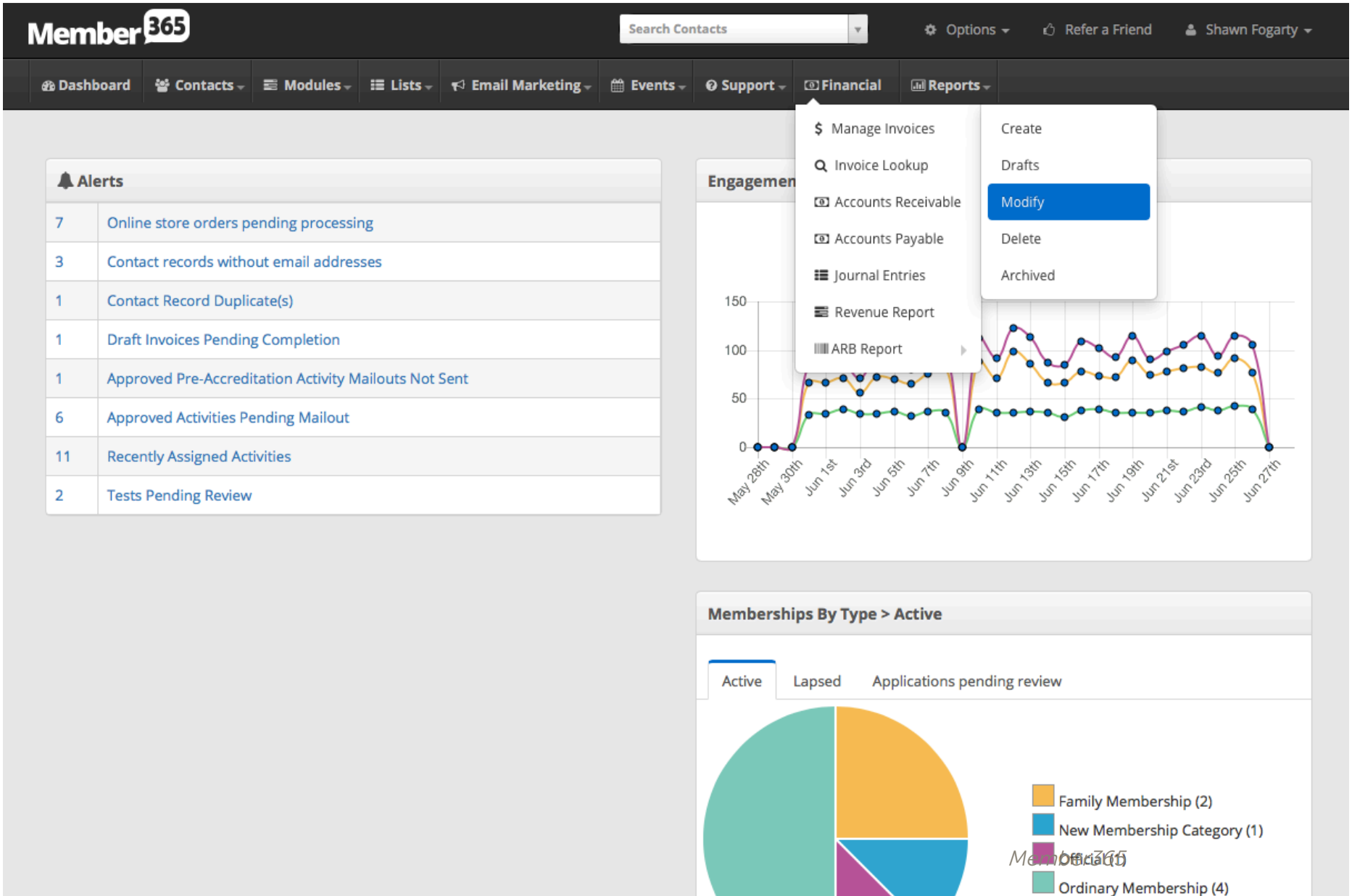
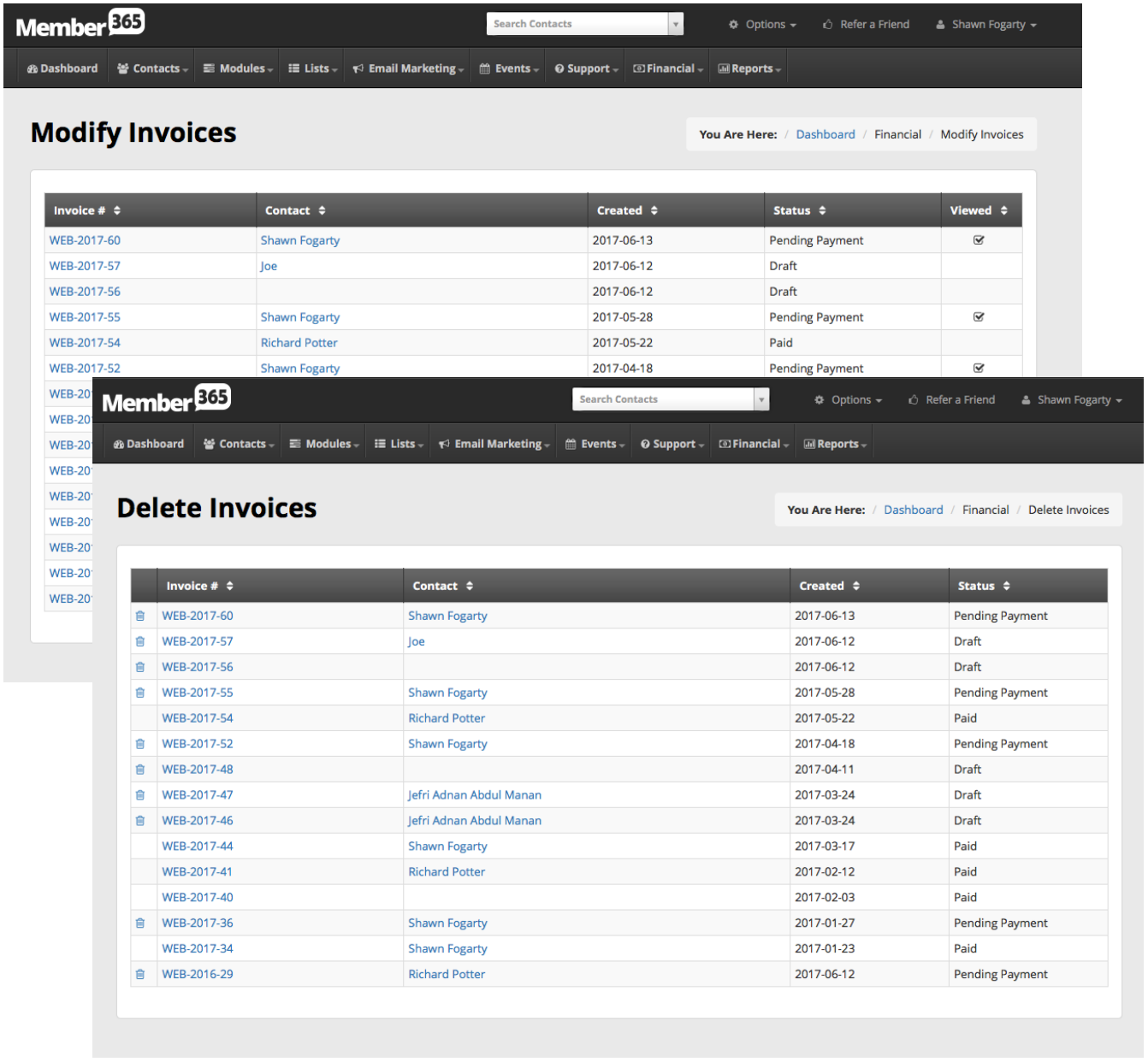
Navigation - Actions



Navigation - Actions



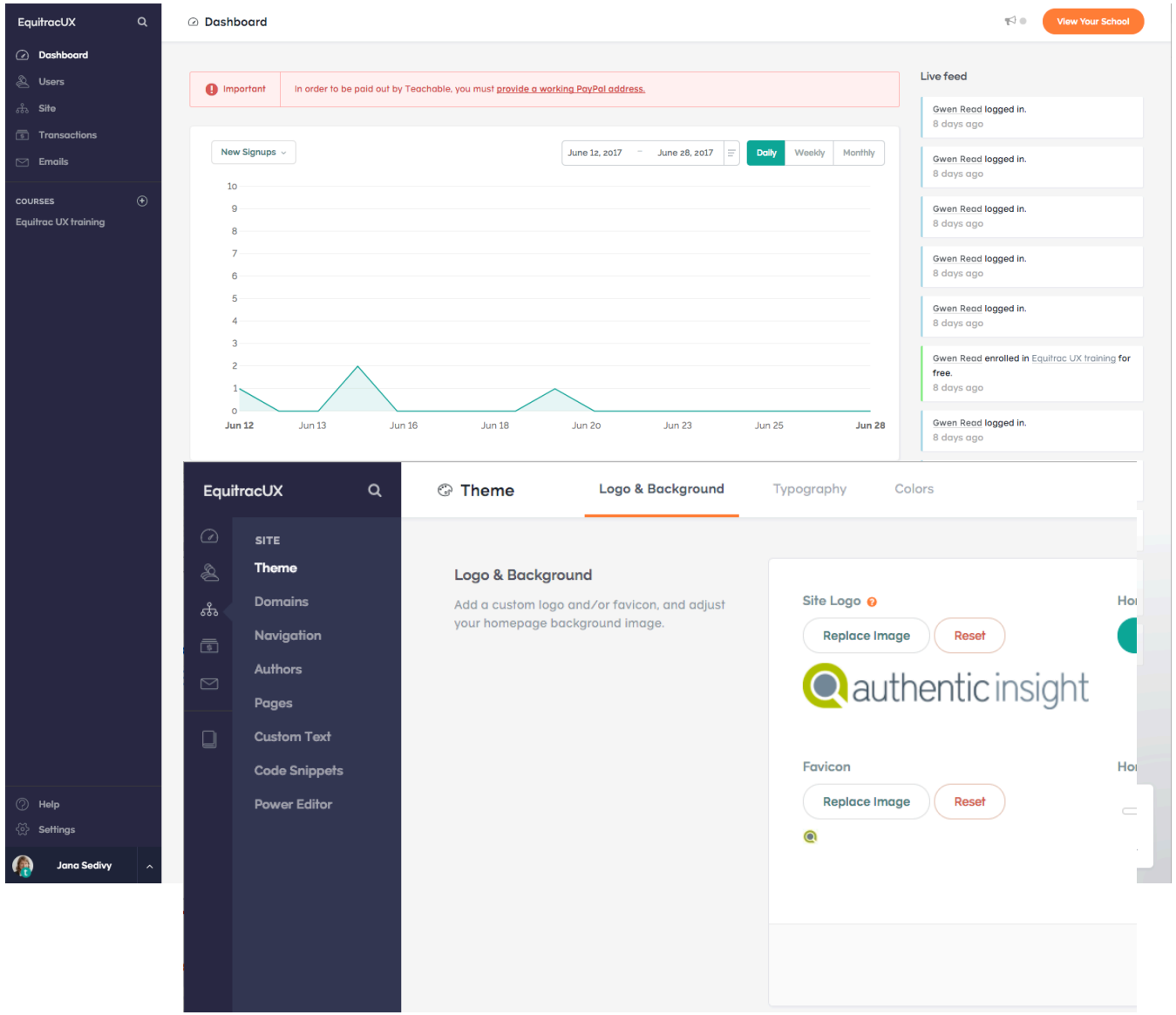
No visual tie back to top navigation to let user know where they are.

Breadcrumbs should be links (except for page where user is)!

Odd to have actions in navigation.

Best Practice:
Select object -> select action (on object)

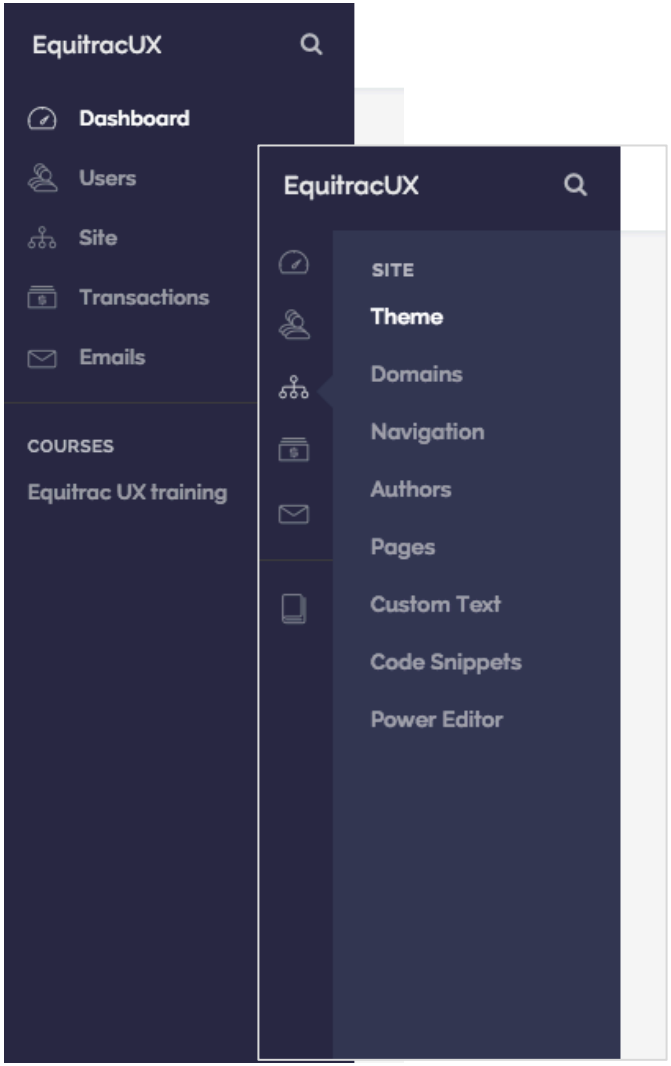
Side Tab Navigation

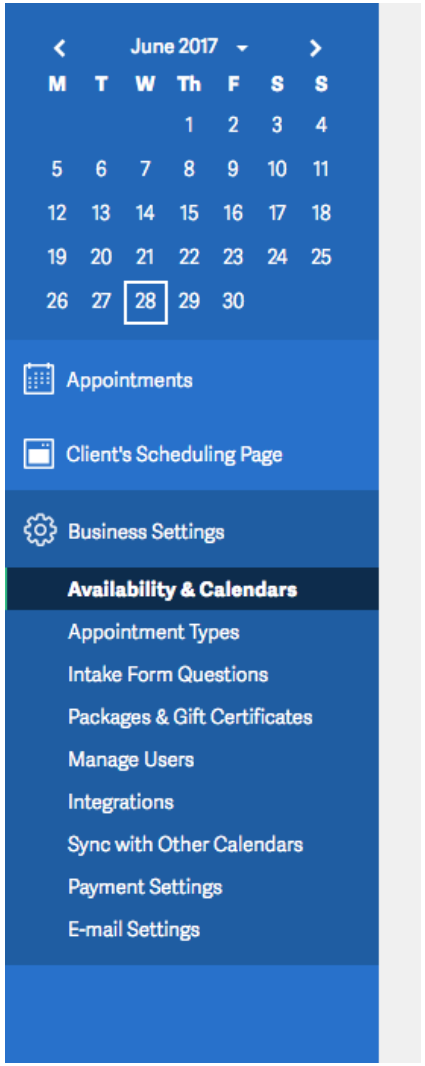


- Used frequently in Biz apps
- Allows for more items within screen size constraint
- 1st level of nav can collapse (to icons only) to allow for more screen real estate
- Almost always icons used with primary categories

Teachable

Side Tab Navigation



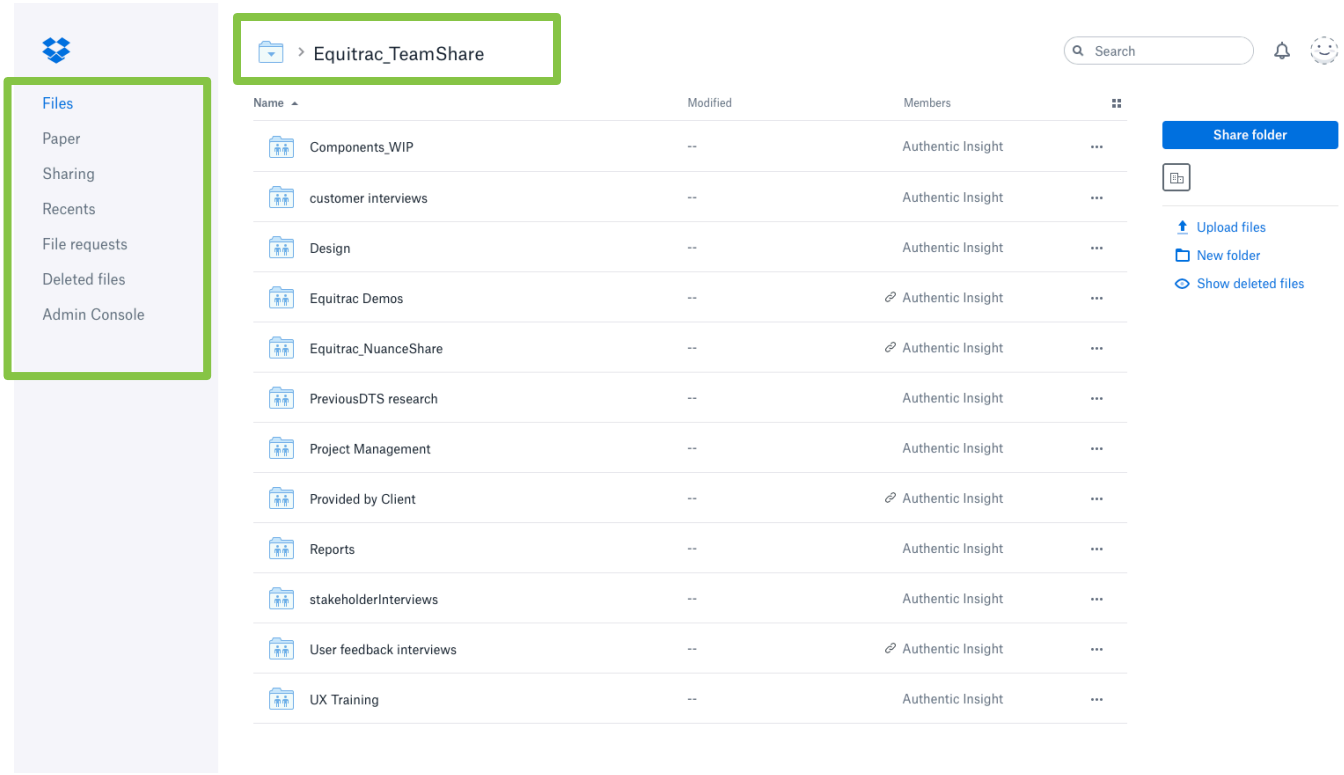


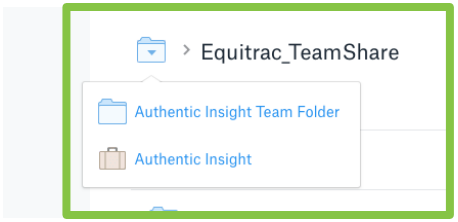
- Clear categories for 1st and 2nd level on nav
- Meaningful icons, don't compete with labels

- Unclear categories for 1st and 2nd level on nav
- Titles are too long – makes user think too much
- Icons not meaningful (especially Client Scheduling)
- Icons will actually act as disservice if not meaningful - adds to screen clutter

Teachable & Acuity

Side Tab Navigation





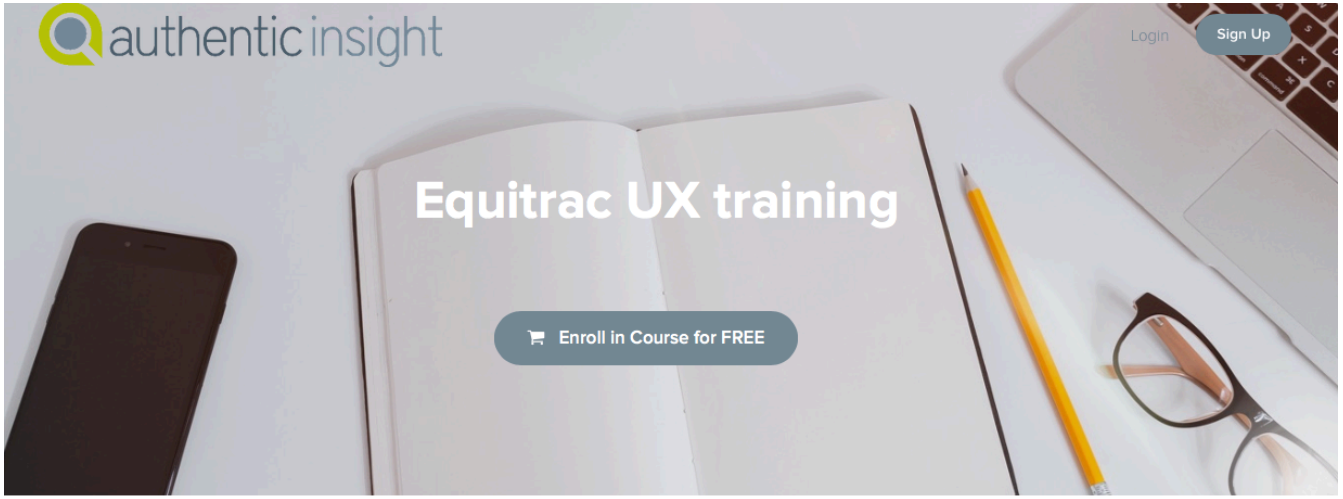
Example where icons not used in primary nav – want to accentuate other items, reduce screen clutter.

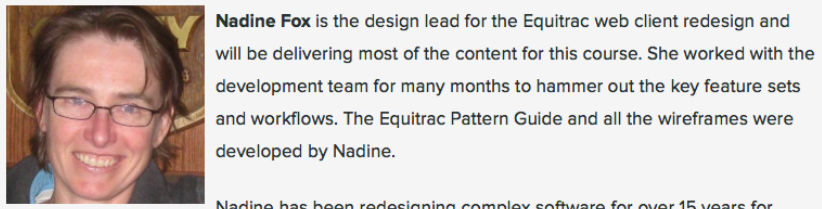
Apparent where user is in the application.

User can access other file folders easily when in a selected folder.

Dropbox

Hub & Spoke Navigation – Landing Page





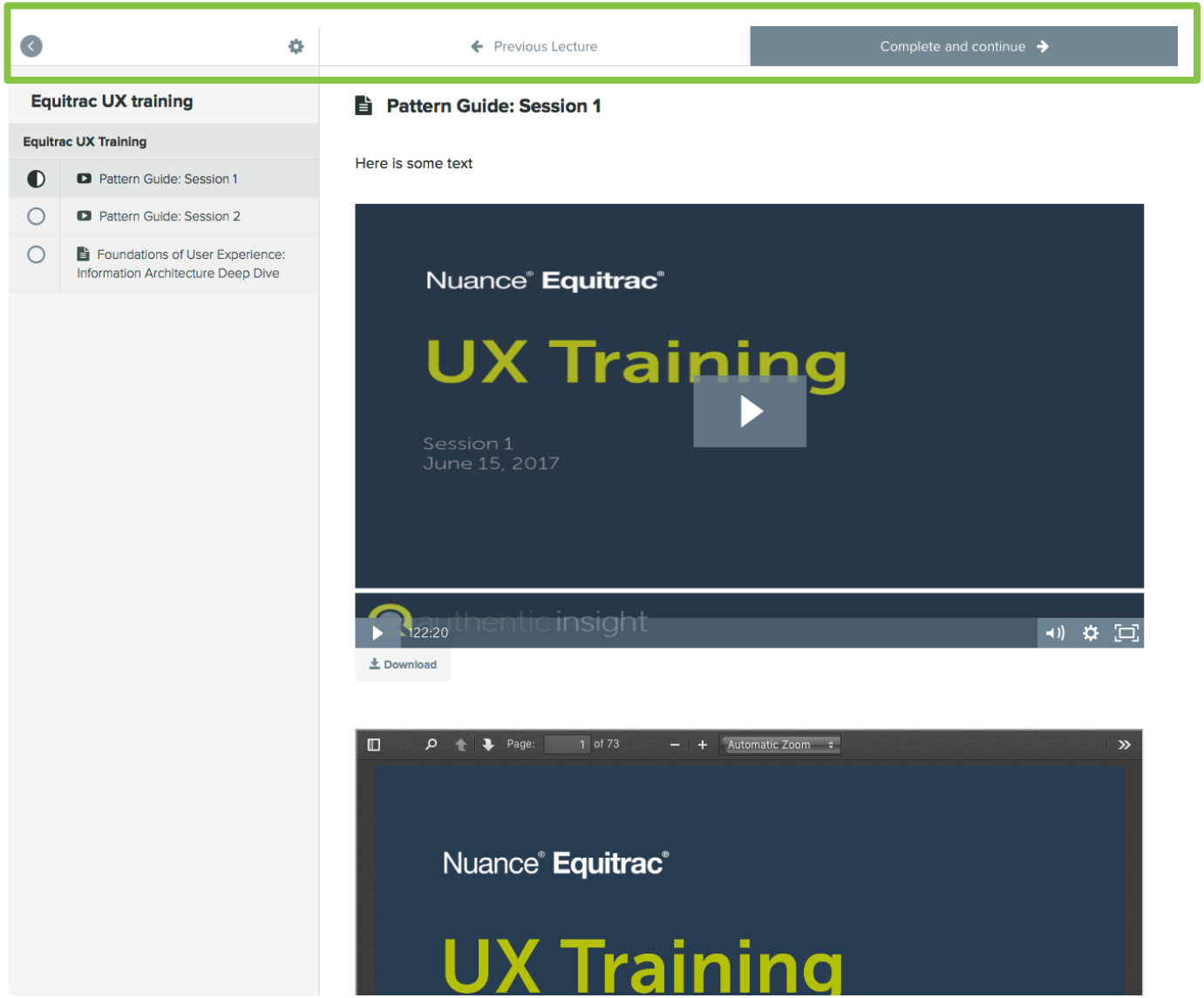
Hub and Spoke model - No Primary Nav.

Application's Home Page is the the "Hub" - central index from which user navigates.

Individual lectures (in this case) are the "Spokes".

Teachable

Hub & Spoke Navigation – Interior Page



Back button used to get back Home to the Hub.

In some scenarios, no navigation between spokes but must return to the Hub, instead (e.g. iphone/ipad "home").

Use When
"Spoke" subsections have their own distinct navigation and purpose.

Note: For Equitrac we use a hybrid nav model – side tabbed nav for first and second levels then hub and spoke (to get back to nav context)

Navigation Model

- Navigation model = application structure
- Primary (& secondary) navigation model – really important
  - Top Tab
  - Side Tab
  - Hub & spoke
- Once primary nav model is set up don't mess with it
- Consistency is important!

- Sets pattern templates for the application going forward: for user interface yes, but also influences database design & system architecture

Navigation Design Details

Details very important

- Primary nav - Limit number of categories (max 5-7)
- Secondary nav – can have more than 7 categories
- Appropriate & simple category titles
  - use single word if possible
  - not a lot of similar words
- Drill down to more specific groupings/content, & don't show actions in nav (general rule)
- Use visual highlights to associate where user is in the nav structure
- Breadcrumb is not a replacement for bad navigation structure

Page/Screen Hierarchy

Page Level Information Hierarchy

Visual design & page layout reinforces information architecture and hierarchy

Make clear to the user where they are in the application

- Use page titles
- Highlight navigation context
- Can use icons to help with visual association

Page Level Information Hierarchy

- Be very clear about what's important (and what isn't)
- Reduce screen clutter – don't display what the user doesn't need (right now)
- Provide further information on a need to know basis

Which one makes you feel better?

Search contacts... | Dashboard | Contacts | Buckets | Programs | Pipelines | Templates | 3 | Help | JS

Nadine Fox

Edit | Delete

Follow Up | Send a Card

JS Jana Sedivy
7 days ago
LAST TEAM CONTACT

483 times
TOTAL CONTACTED

7 days
LAST FOLLOW-UP

Company: Consultant
Title: User Experience Design Professional
Email: nadinefox@gmail.com
nadine@authenticinsight.com
Phone: [redacted] (Mobile)

Address: (Work)
[redacted]

Website: http://www.google.com/profiles/10899181334...
(Profile)

Interaction | Note

Log an interaction...

Date: 07/05/2017 12:01 pm
Type: Phone Call
Save

All | Calendar | Call | Email | Note | Text | In Person | Other
Not shared

JS Jana Sedivy > Nadine Fox — Jun 23
jana@authenticInsight.com

Nadine Fox > Jana Sedivy — 12/08/16
Equitrac UX redesign - wireframes and product map reviewed today

Nadine Fox > Jana Sedivy — 12/05/16
Equitrac UX redesign - updated wireframes (dec5)

Nadine Fox > Jana Sedivy (3) — 12/05/16
Re: Agenda for the 9:00am meeting with Nuance

Nadine Fox > Jana Sedivy (2) — 12/04/16
Re: Authentic Insight Deliverables Update

Buckets

C list
Edit Buckets

Team

Who knows Nadine?

JS

Assigned team member

None

Documents

Drag and drop files here or click to upload

Connections

Add Connection

Contactually

Member365 | Search Contacts | Options | Refer a Friend | Shawn Fogarty

Dashboard | Contacts | Modules | Lists | Email Marketing | Events | Support | Financial | Reports

View Contact Details

You Are Here: / Dashboard / Contacts / Mr. Shawn Fogarty

- Contacts Details
- Donation History
- Edit Contact
- Education
- Email Contact
- Email Subscriptions
- Engagement
- Event History
- Impersonate
- Membership (MMS)
- Organization
- Purchase History
- Support Incidents
- Surveys
- vCard
- Web Forms

Verify

Reset Password

Delete

DONOR

Mr. Shawn Fogarty

coach
Member365
amplifyams@gmail.com

Business | Residential | Organization

123 Main Street
City, South Carolina
United States
Org. Phone 1: 777-777-7777

Communication & File Log

Calls | Emails | eMarketing | Notes | Faxes | Inquiries | Files

Call Date: 2017-06-27

Notes: Notes

Save | View All

	Name	Call Date	Outcome	Notes
	Fogarty, Shawn	2017-03-14		View

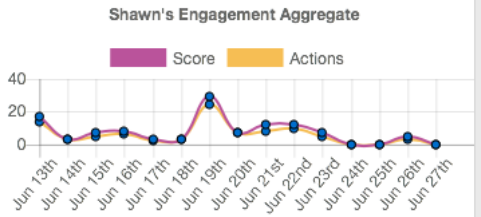
Membership/Subscription Summary

Family Membership

Category	Family Membership
Status	Active
Renewal Date	2018-01-01
Inception Date	2017-05-23

Show Actions

Engagement Score 1,238



- Contact Demographics
- Tags
- Committees
- Consent Settings
- Segmentation

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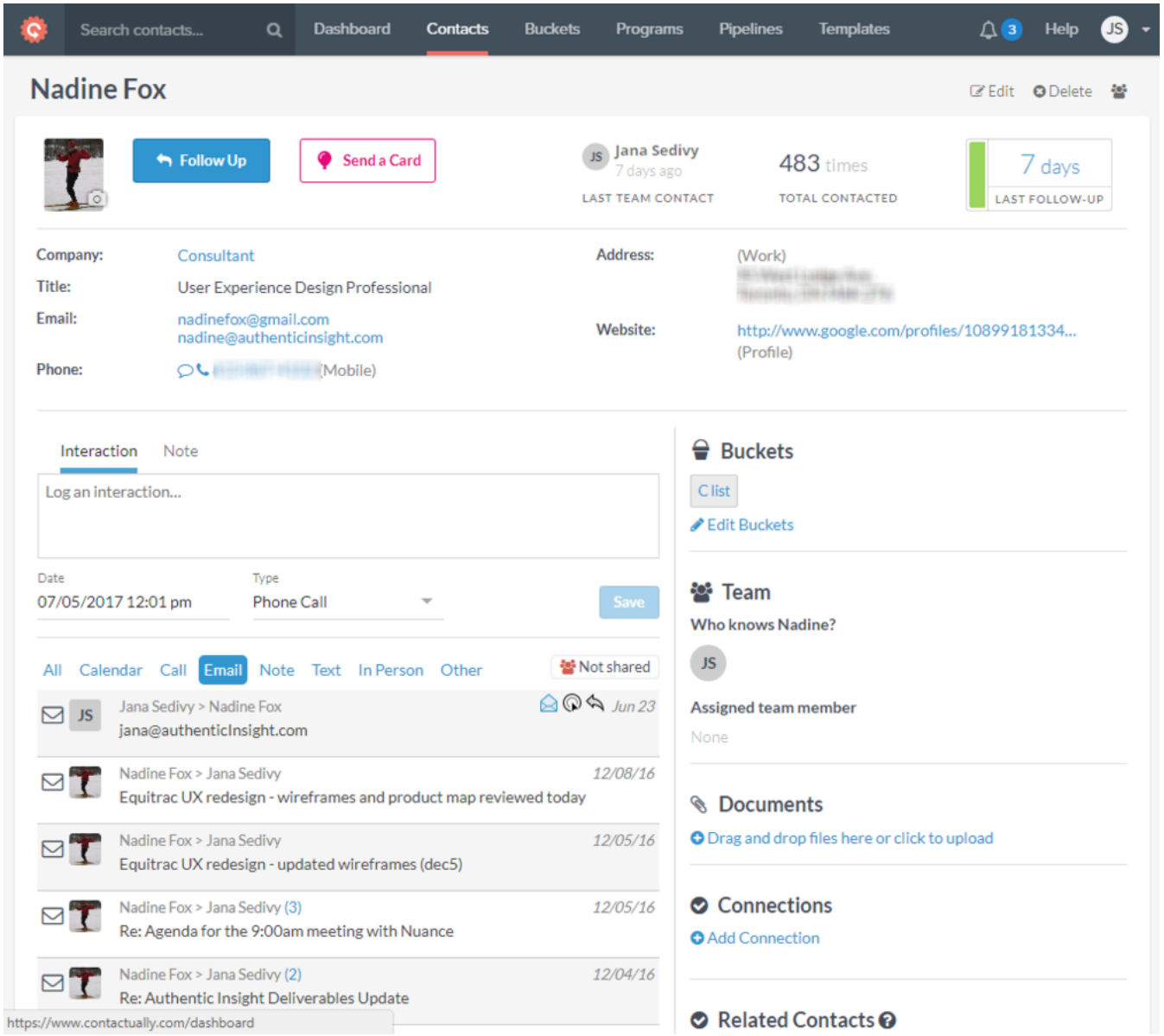
Page Level Information Hierarchy



- You know where you are
- Clear information hierarchy on the page
- Distinct page sections
- Know primary action
- Other actions available in context of info
- Limited color palette
- Good contrast – titles on the page
- Lots of white space

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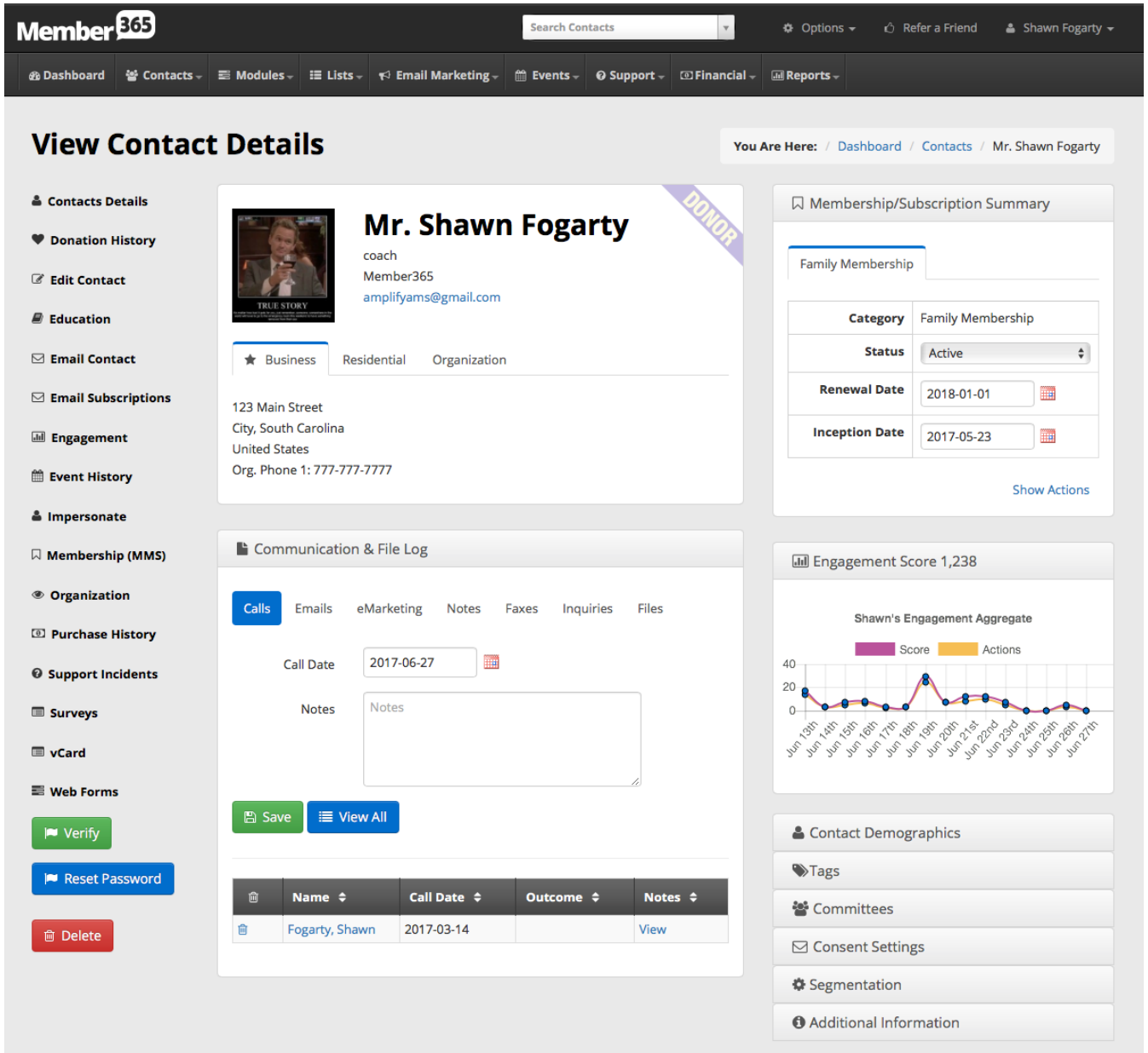
Page Level Information Hierarchy



- Don't really know were you are
- Not so clear hierarchy on the page – where should you be focussing
- Breadcrumb Location
- Button colors – too many…what is the primary action?
- No clear relationship between content & actions
- Page section vs Accordian components (demographics, tags..)
  - Visually look like tile headers, but act differently
  - Not associated, or tied to anything. Seem to be "floating"

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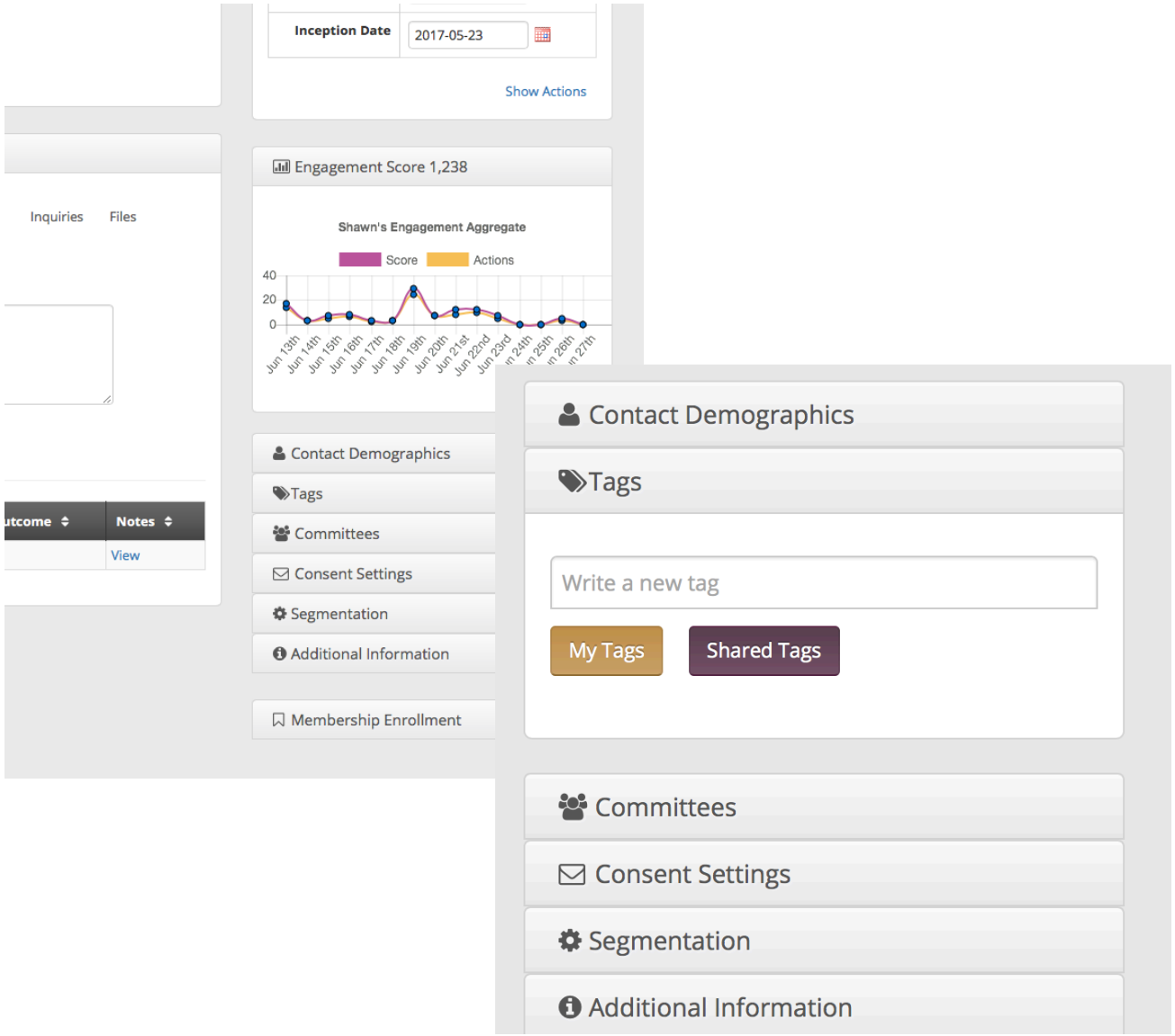
Page Level Information Hierarchy



Disclosure (accordian) used to drill down into further information

Yet more button colors! Page hierarchy (and button hierarchy/consistency) is further compromised

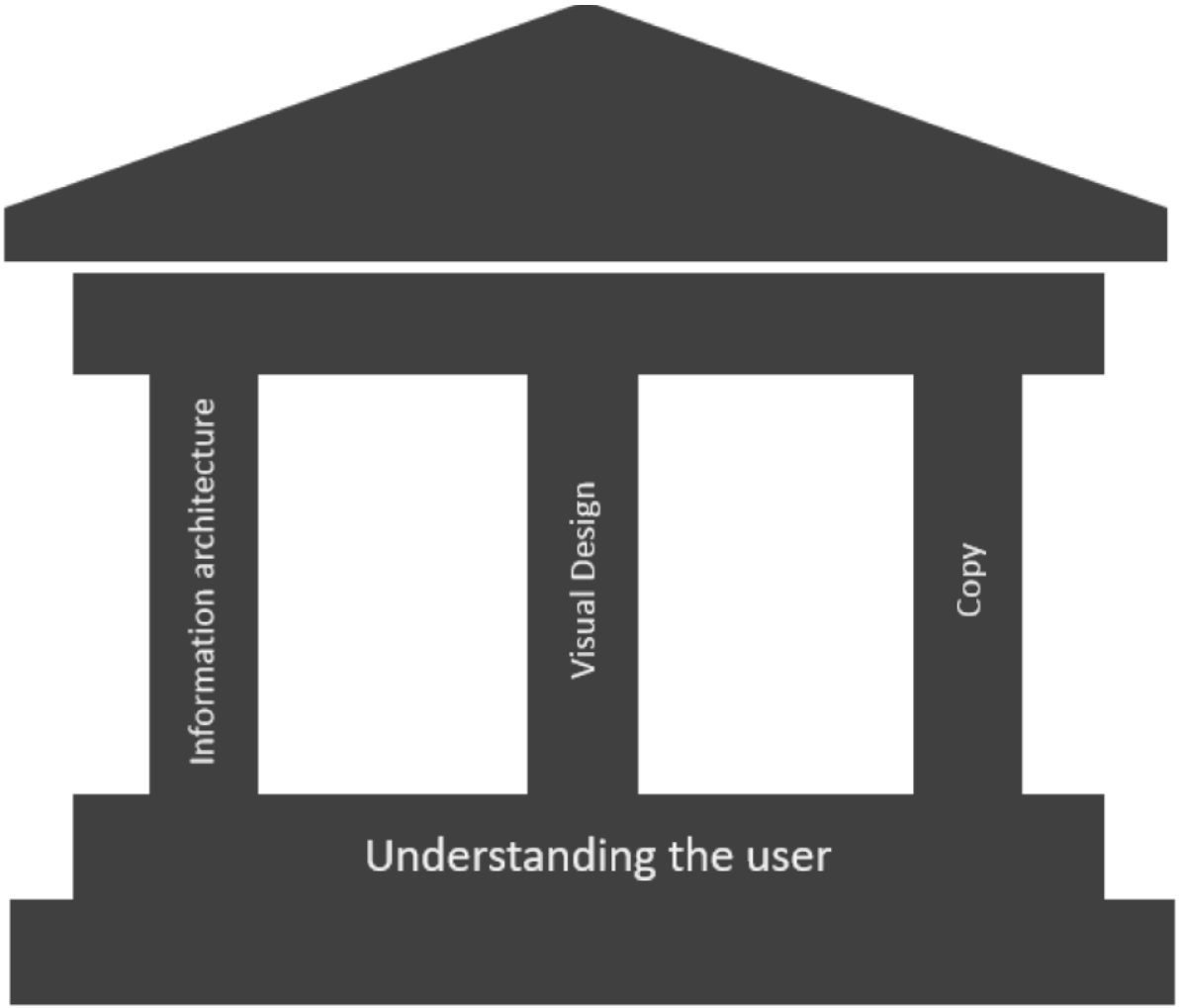
Page Level Information Hierarchy

Use:

- Contrast
- Simplicity
- Whitespace
- Disclosure
- Consistency (of visual elements)

Today's Recap

UX: Foundation & Components



Today's Recap

- Good User Experience needs to get all the elements right
- Good Information Architecture is the best way to reduce your customer support burden
- Information Architecture:
  - Application structure / Navigation Model
  - Page level navigation and hierarchy
  - Interaction and layout "templates"
  - Categories and labels
  - Wireframes

Today's Recap

- Looked at some examples of good and bad information architecture

- Some best practices:
  - Have consistent ways of getting around the application and consistent page types
  - Limit your top level navigation to 5-7 items (rule of thumb)
  - Category organization and labels are important! Take the time to think them through (user research if not sure)
  - Use disclosure to reduce screen clutter

UX Training Sessions Are Posted

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Next Session

Session4:

Visual Design/Copy (writing)

July 20, 2017