

Nuance® Equitrac®

UX Training

Session 3
July 13, 2017

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

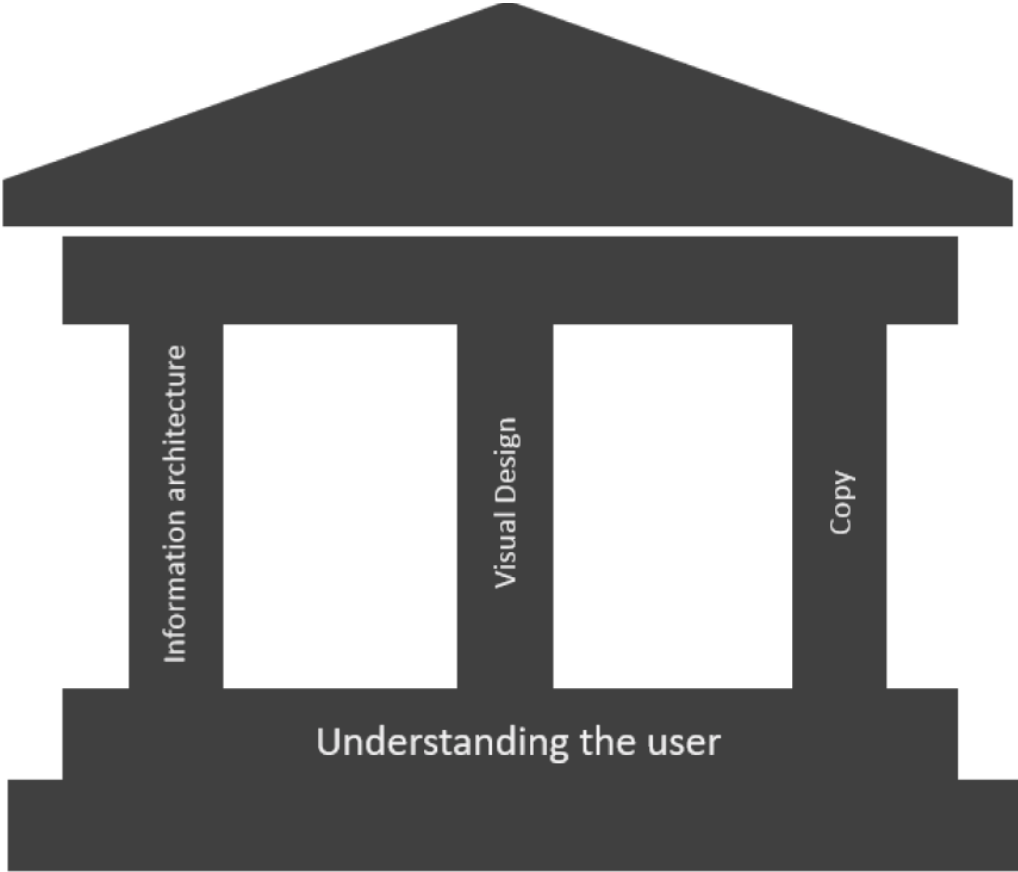
Bad story

=

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

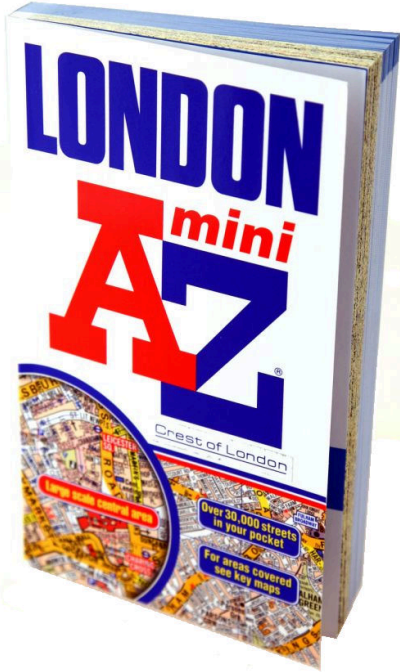
- Application Hierarchy (Site/Product Map)
- Navigation Model (Navigation structure)
- Category Labels
- Wireframes

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?

< June 2017 >

M	T	W	Th	F	S	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

- Appointments
- Appointment Calendar**
- Client List
- Reports
- Import/Export

- Client's Scheduling Page
- Business Settings

Well, well, well. Look at the biceps on this new feature:

Like Limit the total number of appointments you accept each week, along with each day, so you can be more flexible with your hours and still make sure you don't get overbooked. Set this under [your calendar settings](#) by setting a max number of appointments per day/week instead of accept "appointments until fully booked".

[\(hide this message\)](#) Like

Today Week Month Calendars Appointment Block Search...

Today's Appointments

0 appointments

Time	Jana's Calendar	Nadine's calendar
8am		
9am		
10am		
11am	<p>travel (Google Calendar) Unavailable Wednesday, June 28, 2017 11:00am - 11:30am</p> <p>Jana and Tracy meet up! (Google Calendar) Unavailable Wednesday, June 28, 2017 11:30am - 12:30pm</p>	
Noon	<p>travel (Google Calendar) Unavailable Wednesday, June 28, 2017 12:30pm - 1:00pm</p>	
1pm	<p>Jana and JTCA (Google Calendar) Unavailable Wednesday, June 28, 2017 1:00pm - 1:30pm</p>	
2pm	<p>jana and nadine (Google Calendar) Unavailable Wednesday, June 28, 2017 2:00pm - 2:30pm</p>	<p>jana and nadine (Google Calendar) Unavailable Wednesday, June 28, 2017 2:00pm - 2:30pm</p>
3pm		

Why this doesn't work...

< June 2017 >

M	T	W	Th	F	S	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

Appointments

Client's Scheduling Page

Business Settings

Availability & Calendars

- Appointment Types
- Intake Form Questions
- Packages & Gift Certificates
- Manage Users
- Integrations
- Sync with Other Calendars
- Payment Settings
- E-mail Settings

Calendars

Pants on Fire! Help!

Search...



Calendars

Scheduling Limits

Rooms/Resources

+ Add New Calendar

Preview

Use Calendars to set hours of availability for your staff or different locations you work from.

Jana's Calendar

Availability

Settings

Direct Scheduling Link

Nadine's calendar

Availability

Settings

Direct Scheduling Link

- 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.

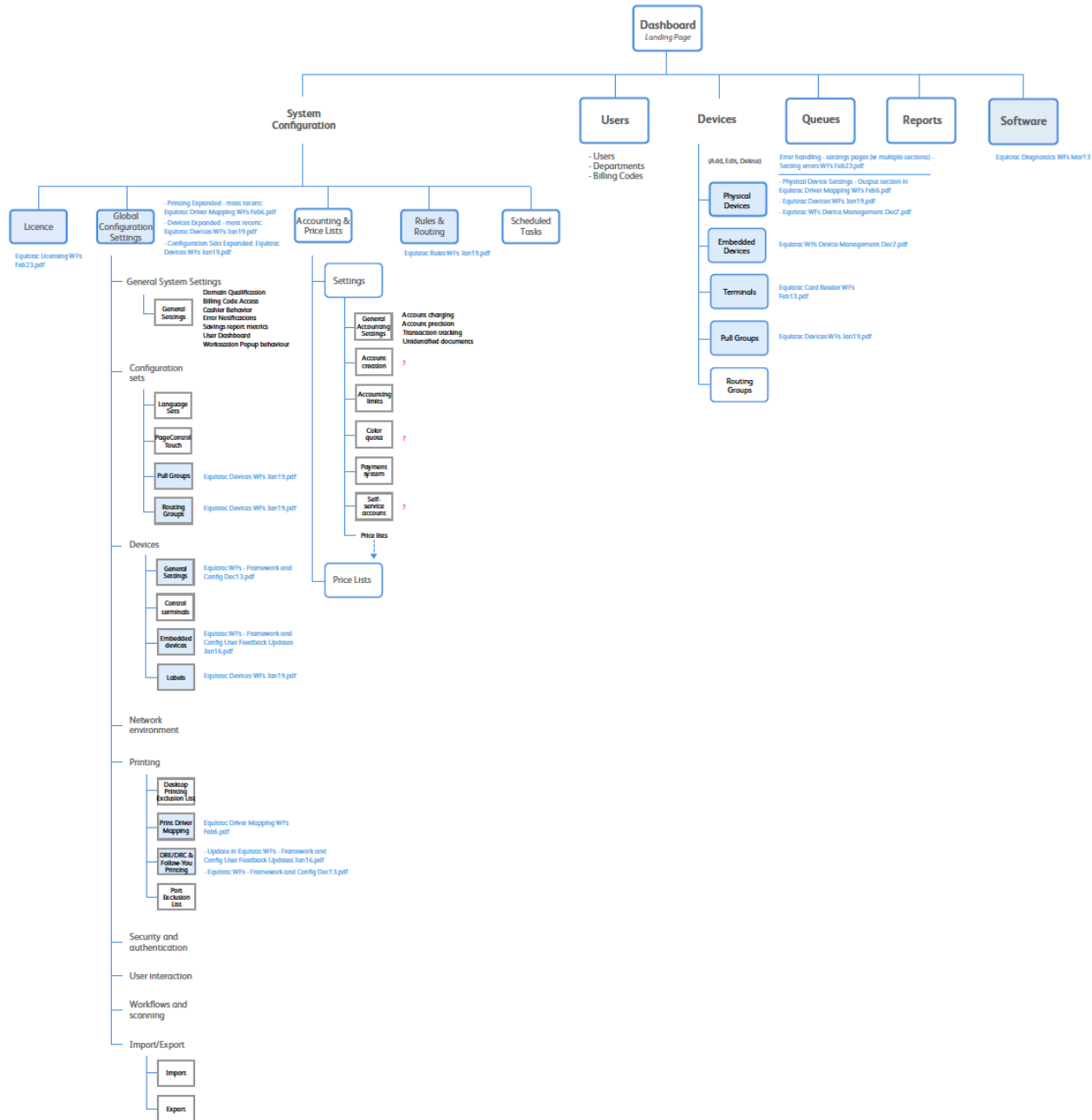
Figure out which navigation model supports the structure

EQUITRAC SYSTEM MANAGER PRODUCT MAP - Future State

February 17, 2017

Admin focused (Manage System)

End User focused



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...

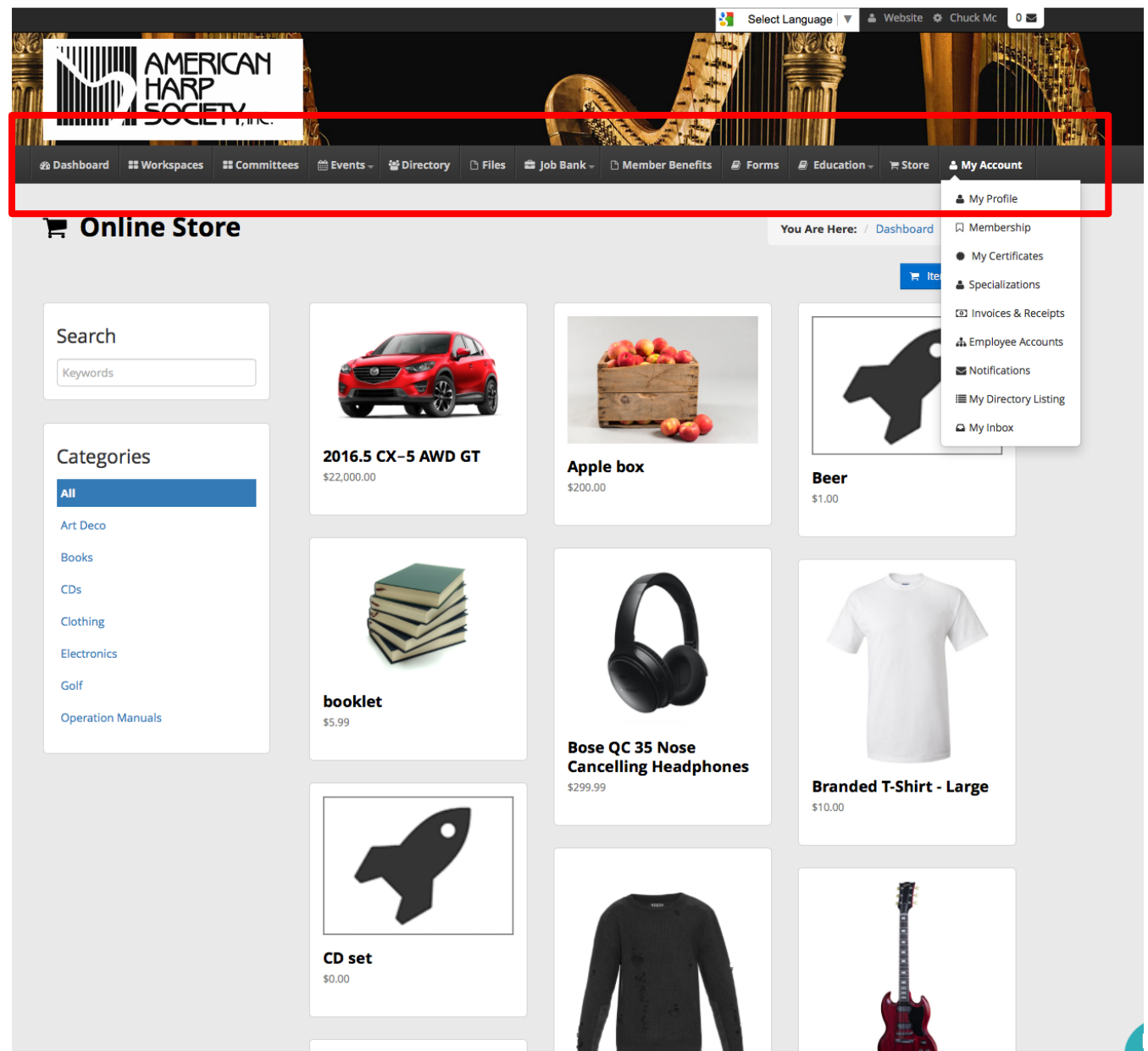
- How the user finds things
- How they flow through the different tasks/screens
- The different page types

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



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

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

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

Shawn's Engagement Aggregate

Score Actions

Jun 13th Jun 14th Jun 15th Jun 16th Jun 17th Jun 18th Jun 19th Jun 20th Jun 21st Jun 22nd Jun 23rd Jun 24th Jun 25th Jun 26th Jun 27th

Member365 Search Contacts Options Refer a Friend Shawn Fogarty

Dashboard Contacts Modules Lists Email Marketing Events Support Financial Reports

View Contact Details

Individuals View Contacts

Organizations Add Contact Delete Contact

Brian Corry
br@email.co.uk

Additional Information

- 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

Navigation

The screenshot shows the website's navigation menu at the top with items like Dashboard, Workspaces, Committees, Events, Directory, Files, Job Bank, Member Benefits, Forms, Education, Store, and My Account. The 'My Inbox' section is highlighted with a green box. Below it is a 'Compose New Email' button. The inbox table shows two messages from 'Khalidoun Almarzouk'. To the right, there is an 'Inbox Settings' panel with a toggle switch for 'If you would like to stop receiving inbox messages, turn it off here:'.

✓	To	Subject	Sent
<input type="checkbox"/>	Khalidoun Almarzouk	Hi there	2017-03-07 12:17:35
<input type="checkbox"/>	Khalidoun Almarzouk	Hello	2017-01-20 11:32:50



- 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

The screenshot shows the website for the American Harp Society, Inc. The top navigation bar includes links for Dashboard, Workspaces, Committees, Events, Directory, Files, Job Bank, Member Benefits, Forms, Education, Store, and My Account. Below this, the breadcrumb trail reads: You Are Here: / Dashboard / Workspaces / Board of Directors. The main content area features a sidebar with navigation options like Dashboard Bookmark, Workspace Directory, Files, Discussion Forum, and Workspace History. The main content displays a definition of a board of directors, a 'Workspace Discussions' table, and an 'Event Calendar' table.

Topic	Views	Last Reply
Board Meetings	6 Views	Last Reply: 2017-04-18

Event Title	Location	Date	Status
test event	New Mexico, United States	April 27 - 29, 2017	Register
NAFC Symposium	Colorado, United States	October 1 - 3, 2017	Register



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

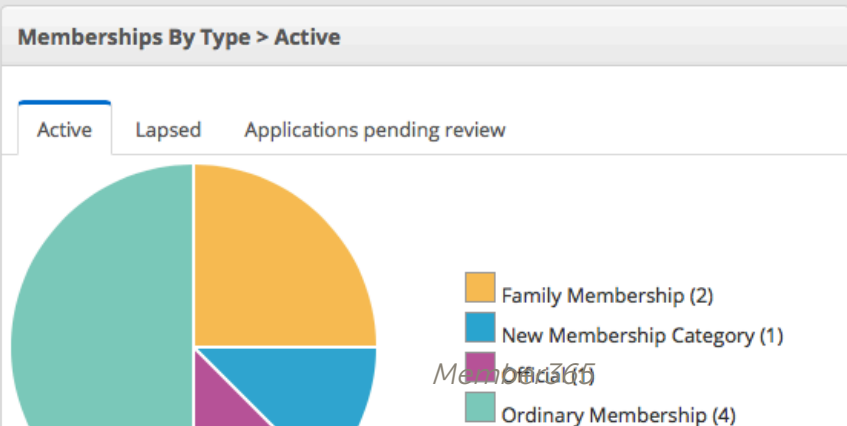
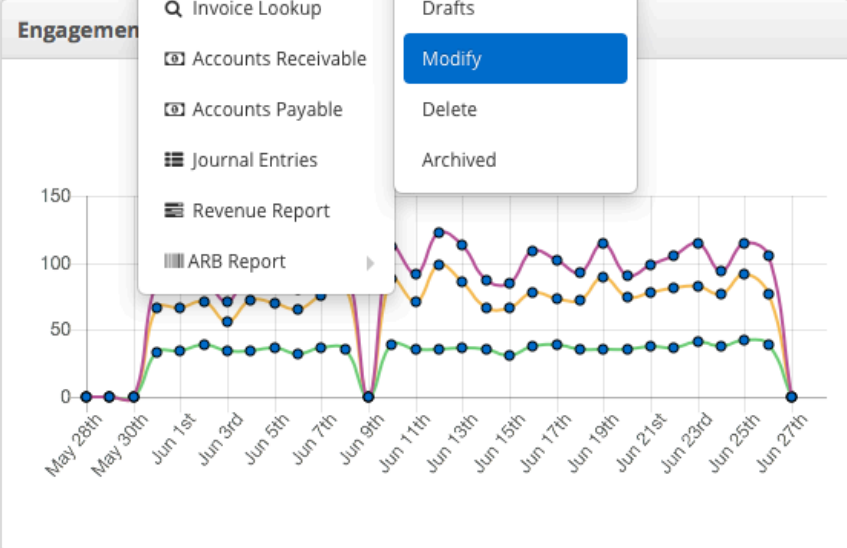
Other

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

Navigation - Actions

Alerts

7	Online store orders pending processing
3	Contact records without email addresses
1	Contact Record Duplicate(s)
1	Draft Invoices Pending Completion
1	Approved Pre-Accreditation Activity Mailouts Not Sent
6	Approved Activities Pending Mailout
11	Recently Assigned Activities
2	Tests Pending Review



Navigation - Actions

Member365 Search Contacts Options Refer a Friend Shawn Fogarty

Dashboard Contacts Modules Lists Email Marketing Events Support Financial Reports

Modify Invoices

You Are Here: / Dashboard / Financial / Modify Invoices

Invoice #	Contact	Created	Status	Viewed
WEB-2017-60	Shawn Fogarty	2017-06-13	Pending Payment	<input checked="" type="checkbox"/>
WEB-2017-57	Joe	2017-06-12	Draft	<input type="checkbox"/>
WEB-2017-56		2017-06-12	Draft	<input type="checkbox"/>
WEB-2017-55	Shawn Fogarty	2017-05-28	Pending Payment	<input checked="" type="checkbox"/>
WEB-2017-54	Richard Potter	2017-05-22	Paid	<input type="checkbox"/>
WEB-2017-52	Shawn Fogarty	2017-04-18	Pending Payment	<input checked="" type="checkbox"/>



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)

Member365 Search Contacts Options Refer a Friend Shawn Fogarty

Dashboard Contacts Modules Lists Email Marketing Events Support Financial Reports

Delete Invoices

You Are Here: / Dashboard / Financial / Delete Invoices

Invoice #	Contact	Created	Status
<input type="checkbox"/> WEB-2017-60	Shawn Fogarty	2017-06-13	Pending Payment
<input type="checkbox"/> WEB-2017-57	Joe	2017-06-12	Draft
<input type="checkbox"/> WEB-2017-56		2017-06-12	Draft
<input type="checkbox"/> WEB-2017-55	Shawn Fogarty	2017-05-28	Pending Payment
<input type="checkbox"/> WEB-2017-54	Richard Potter	2017-05-22	Paid
<input type="checkbox"/> WEB-2017-52	Shawn Fogarty	2017-04-18	Pending Payment
<input type="checkbox"/> WEB-2017-48		2017-04-11	Draft
<input type="checkbox"/> WEB-2017-47	Jefri Adnan Abdul Manan	2017-03-24	Draft
<input type="checkbox"/> WEB-2017-46	Jefri Adnan Abdul Manan	2017-03-24	Draft
<input type="checkbox"/> WEB-2017-44	Shawn Fogarty	2017-03-17	Paid
<input type="checkbox"/> WEB-2017-41	Richard Potter	2017-02-12	Paid
<input type="checkbox"/> WEB-2017-40		2017-02-03	Paid
<input type="checkbox"/> WEB-2017-36	Shawn Fogarty	2017-01-27	Pending Payment
<input type="checkbox"/> WEB-2017-34	Shawn Fogarty	2017-01-23	Paid
<input type="checkbox"/> WEB-2016-29	Richard Potter	2017-06-12	Pending Payment

Side Tab Navigation

The top screenshot shows the EquitracUX dashboard. The sidebar on the left contains navigation items: Dashboard, Users, Site, Transactions, Emails, COURSES, and Equitrac UX training. The main content area features a 'New Signups' line chart for the period June 12, 2017, to June 28, 2017. The chart shows a peak in signups around June 15. To the right of the chart is a 'Live feed' with several entries: 'Gwen Read logged in. 8 days ago' (repeated five times) and 'Gwen Read enrolled in Equitrac UX training for free. 8 days ago'. An orange button 'View Your School' is in the top right corner.

The bottom screenshot shows the 'Theme' settings page. The sidebar on the left lists: SITE, Theme, Domains, Navigation, Authors, Pages, Custom Text, Code Snippets, and Power Editor. The main content area is titled 'Logo & Background' and includes instructions: 'Add a custom logo and/or favicon, and adjust your homepage background image.' Below this are two sections: 'Site Logo' and 'Favicon'. Each section has a 'Replace Image' button and a 'Reset' button. The 'Site Logo' section shows the 'authentic insight' logo.



- 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

Side Tab Navigation



EquitracUX

- Dashboard
- Users
- Site
- Transactions
- Emails
- COURSES
- Equitrac UX training

EquitracUX

- SITE
- Theme
- Domains
- Navigation
- Authors
- Pages
- Custom Text
- Code Snippets
- Power Editor



June 2017

M	T	W	Th	F	S	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

- Appointments
- Client's Scheduling Page
- Business Settings
- Availability & Calendars**
- Appointment Types
- Intake Form Questions
- Packages & Gift Certificates
- Manage Users
- Integrations
- Sync with Other Calendars
- Payment Settings
- E-mail Settings



- 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

Side Tab Navigation

Name	Modified	Members
Components_WIP	--	Authentic Insight
customer interviews	--	Authentic Insight
Design	--	Authentic Insight
Equitrac Demos	--	Authentic Insight
Equitrac_NuanceShare	--	Authentic Insight
PreviousDTS research	--	Authentic Insight
Project Management	--	Authentic Insight
Provided by Client	--	Authentic Insight
Reports	--	Authentic Insight
stakeholderInterviews	--	Authentic Insight
User feedback interviews	--	Authentic Insight
UX Training	--	Authentic Insight



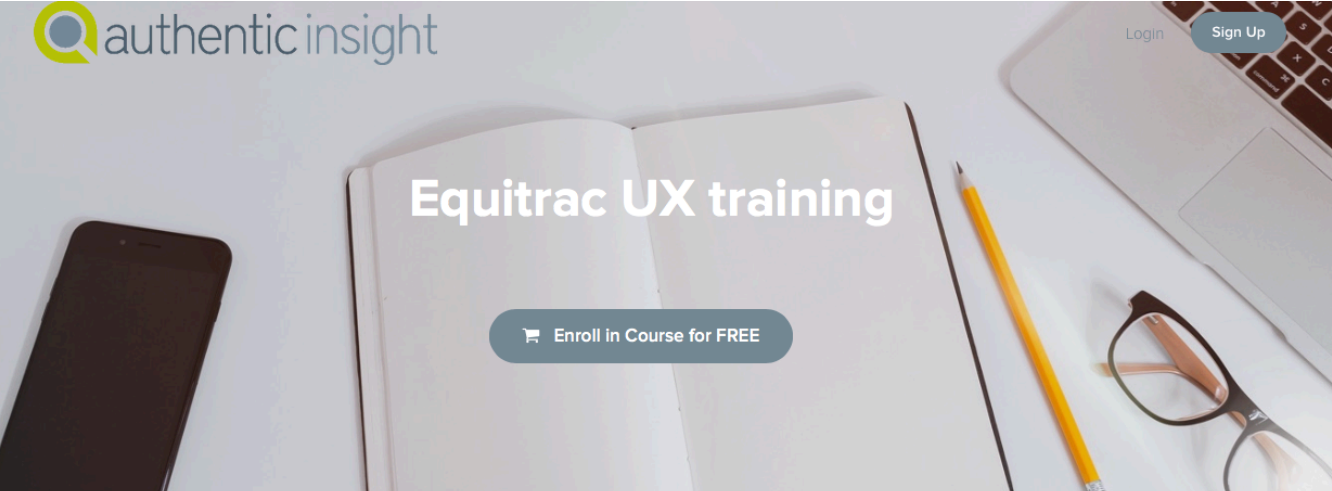
Example where icons not used in primary nav – want to accentuate other items, reduce screen clutter.

Apparent where user is in the application.

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

- Authentic Insight Team Folder
- Authentic Insight

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".

Class Curriculum

Equitrac UX Training	
Pattern Guide: Session 1	Preview
Pattern Guide: Session 2	Start
Foundations of User Experience: Information Architecture Deep Dive	Start

Your Instructors



Nadine Fox is the design lead for the Equitrac web client redesign and will be delivering most of the content for this course. She worked with the development team for many months to hammer out the key feature sets and workflows. The Equitrac Pattern Guide and all the wireframes were developed by Nadine.

Nadine has been redesigning complex software for over 15 years for

Hub & Spoke Navigation – Interior Page

The screenshot illustrates a hub and spoke navigation pattern. The top navigation bar, highlighted with a green box, includes a back button, a settings gear, a 'Previous Lecture' button, and a 'Complete and continue' button. The left sidebar, titled 'Equitrac UX training', lists three items: 'Pattern Guide: Session 1', 'Pattern Guide: Session 2', and 'Foundations of User Experience: Information Architecture Deep Dive'. The main content area shows a video player for 'Pattern Guide: Session 1' with a play button overlay. Below the video player is a 'Download' button. At the bottom, a PDF viewer shows the first page of a document titled 'UX Training'.



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

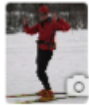
Help

JS



Nadine Fox

[Edit](#) [Delete](#)



[Follow Up](#)

[Send a Card](#)



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: [\[Redacted\]](tel:) (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](#)

Jana Sedivy > Nadine Fox
jana@authenticinsight.com Jun 23

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

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

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

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

Buckets

[C list](#)

[Edit Buckets](#)

Team

Who knows Nadine?



Assigned team member

None

Documents

[+ Drag and drop files here or click to upload](#)

Connections

[+ Add Connection](#)

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



Mr. Shawn Fogarty

DONOR

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

Save View All

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

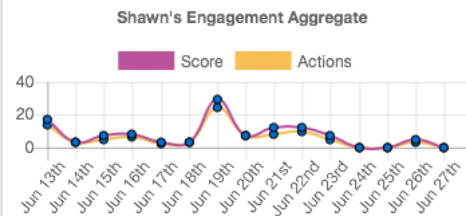
Membership/Subscription Summary

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

Page Level Information Hierarchy

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

Nadine Fox

Follow Up Send a Card

Jana Sedivy 7 days ago 483 times 7 days
LAST TEAM CONTACT TOTAL CONTACTED LAST FOLLOW-UP

Company: Consultant Address: (Work)
Title: User Experience Design Professional
Email: nadinefox@gmail.com nadine@authenticinsight.com Website: http://www.google.com/profiles/10899181334... (Profile)
Phone: (Mobile)

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

- Jana Sedivy > Nadine Fox
jana@authenticinsight.com Jun 23
- Nadine Fox > Jana Sedivy 12/08/16
Equitrac UX redesign - wireframes and product map reviewed today
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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

Related Contacts



- 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

Page Level Information Hierarchy

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

Mr. Shawn Fogarty *DONOR*
 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
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Show Actions

Engagement Score 1,238

Shawn's Engagement Aggregate

Score Actions

Jun 13th Jun 14th Jun 15th Jun 16th Jun 17th Jun 18th Jun 19th Jun 20th Jun 21st Jun 22nd Jun 23rd Jun 24th Jun 25th Jun 26th Jun 27th

Contact Demographics

Tags

Committees

Consent Settings

Segmentation

Additional Information



- Don't really know where 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 Accordion components (demographics, tags..)
- Visually look like tile headers, but act differently
- Not associated, or tied to anything. Seem to be "floating"

Page Level Information Hierarchy

Inquiries Files

Outcome ▾ Notes ▾
View

Inception Date 2017-05-23
Show Actions

Engagement Score 1,238

Shawn's Engagement Aggregate

Score Actions

Jun 1 12th Jun 1 14th Jun 1 15th Jun 1 16th Jun 1 17th Jun 1 18th Jun 1 19th Jun 1 20th Jun 1 21st Jun 1 22nd Jun 1 23rd Jun 1 24th Jun 1 25th Jun 1 26th Jun 1 27th

Contact Demographics

Tags

Committees

Consent Settings

Segmentation

Additional Information

Membership Enrollment

Contact Demographics

Tags

Write a new tag

My Tags Shared Tags

Committees

Consent Settings

Segmentation

Additional Information



Disclosure (accordion) used to drill down into further information



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

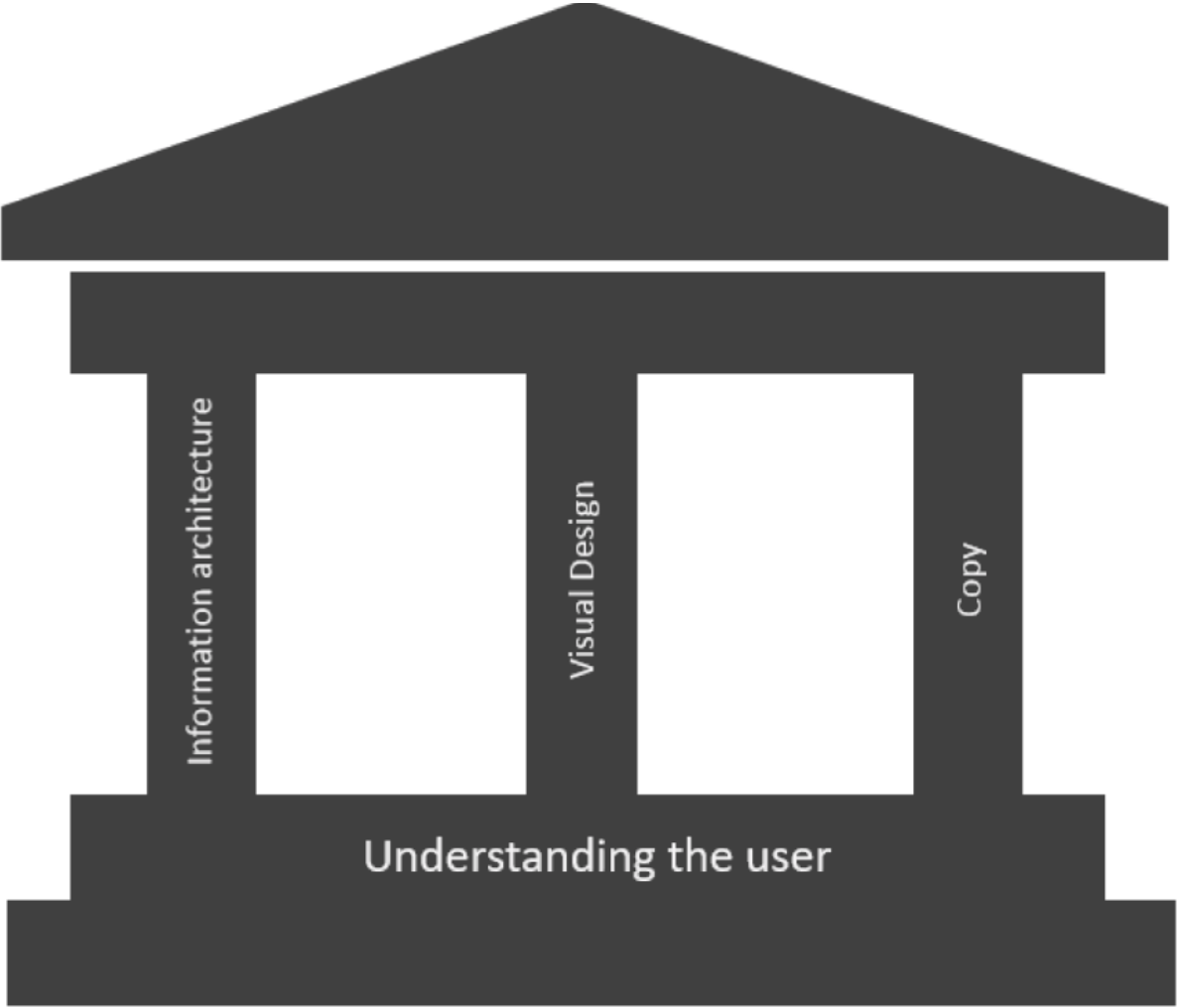
Page Level Information Hierarchy

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