

# User Experience Evaluation

VEERA 5 – RAPID INSIGHT

RPS INTERACTIVE

APRIL 19<sup>TH</sup>, 2017

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## OVERVIEW

The purpose of this review is to identify areas that contribute to poor usability of the Veera 5 desktop application. The goals are to provide an organized list of issues, their relative severity as it pertains to user experience, and to identify recommended mitigation strategies. The approach taken by the reviewer is that of a new user. The limited domain knowledge of the reviewer will have a potential impact on the awareness of business case requirements and specific use cases which may leverage more complex workflows, use of Nodes, and advanced features.

## TERMINOLOGY USED

The following terminology is used to identify risks to the user experience and recommended mitigation.

**Finding** That which has been identified by reviewer of the product interface to have a potential impact on usability.

**Severity** A determination of the level of impact on the user experience. There are three levels of severity used: Minor, Moderate, and Major which are defined in this table.

**Minor** The lowest level of severity. Criteria as it relates to the impact on the user experience is as follows:

- Does not prevent the user from completing the task
- Does not obscure valuable information from the user
- Does not mislead the user

**Moderate** This is the mid-level class of severity. Criteria as it relates to the impact on the user experience is as follows:

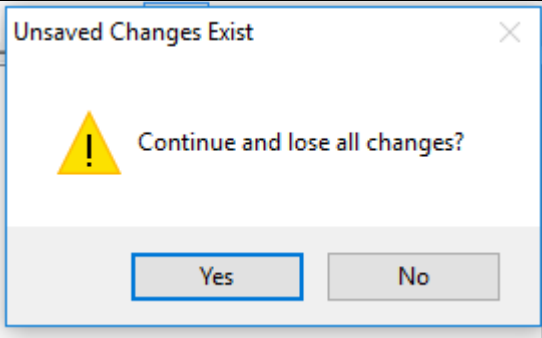
- Does not prevent the user from completing the task, and / or
- Obscures valuable information from the user, and / or
- Misleads the user

**Major** This is the highest level of severity. Criteria as it relates to the impact on the user experience is as follows:

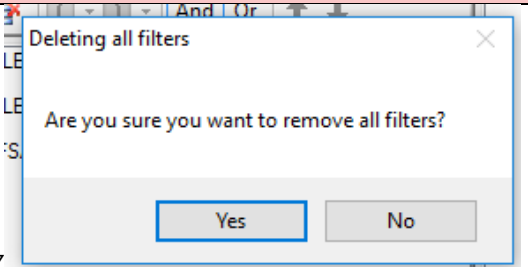
- Presents a high risk of preventing the user from completing the task, and / or
- Obscures valuable information from the user, and / or
- Misleads the user

**Recommendation** One or more corrective actions which could be taken to mitigate the risk identified in the Finding.

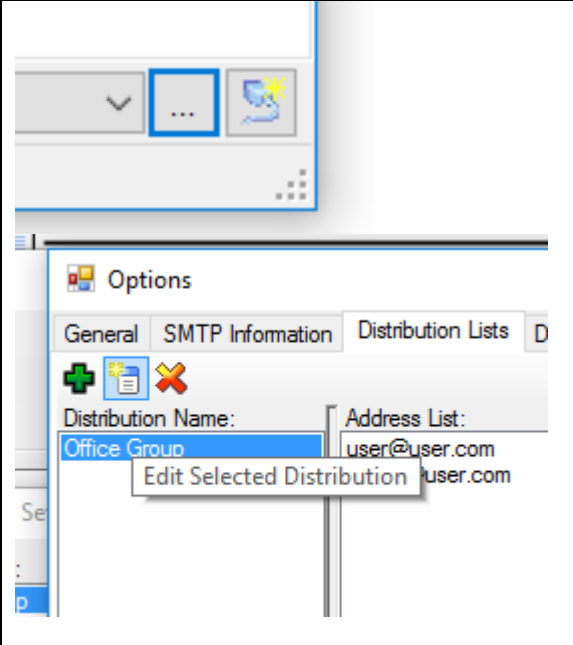
UNSAVED CHANGES WARNING

	<p><b>Location</b> Unsaved Changes Warning modal</p>
<p><b>Finding</b> The modal design requires the user to answer a stated question to decide how to proceed. Yes/No are ambiguous and not self-evident as to their outcome without proper comprehension of the preceding question. This requirement adds cognitive load to the user's working memory and can increase the risk of incorrect selection.</p>	
<p><b>Severity</b> <b>Moderate</b></p>	
<p><b>Recommendation</b> Title and Action buttons should clearly state the condition and their result through contextual labels. Title: "Discard Unsaved Changes?" Message: "There are unsaved changes that will be lost". Option A: "Discard" or "Continue", Option B: "Cancel". Placement of the primary or desired Call to Action button should be on the right. Typically, the affirmative action to continue with user intent is positioned on the right. However, there are situations where critical safety is paramount (i.e. medical) in which the safest option is placed on the right.</p>	
<p><b>JIRA ID</b></p>	

WARNING MODAL MESSAGING FORMATTING

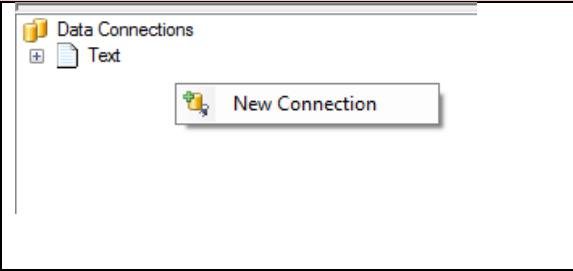
	<p><b>Location</b> All Modal Messages</p>
<p><b>Finding</b> There is no variance in font styling. The modal title is the same weight and size as the message body. This does not attract attention to the key information and introduces risk that the user will misunderstand the message.</p>	
<p><b>Severity</b> <b>Minor</b></p>	
<p><b>Recommendation</b> The title should be slightly larger size and have bolded text to stand out in identifying the purpose of the message.</p>	
<p><b>JIRA ID</b></p>	

EDIT ICON

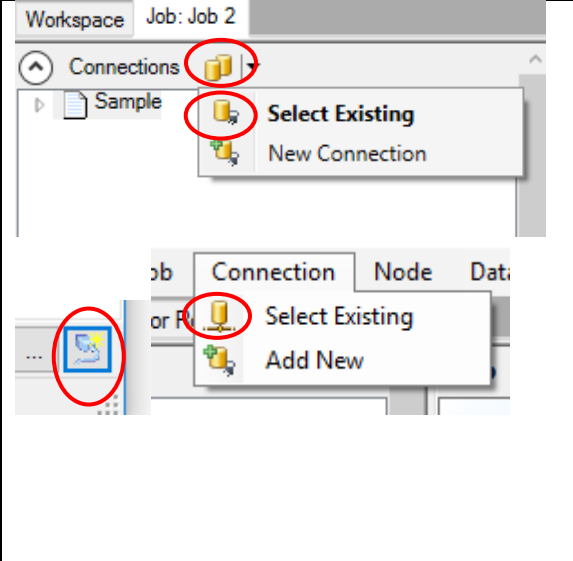
	<table border="1"> <tr> <td data-bbox="760 245 1035 280"><b>Location</b></td> <td data-bbox="1035 245 1906 280">Various locations</td> </tr> <tr> <td data-bbox="760 280 1035 540"><b>Finding</b></td> <td data-bbox="1035 280 1906 540">The icon used to indicate 'edit' of an output connection is an ellipsis in some locations and a different 'edit' icon was found in the Distribution Options for distribution lists. These are inconsistent and are not commonly associated for this feature by users. Additionally, this is used to select a file folder location for output of a data connection. Users need consistency to reinforce mental models of interactive behavior to be efficient and confident.</td> </tr> <tr> <td data-bbox="760 540 1035 576"><b>Severity</b></td> <td data-bbox="1035 540 1906 576"><b>Major</b></td> </tr> <tr> <td data-bbox="760 576 1035 641"><b>Recommendation</b></td> <td data-bbox="1035 576 1906 641">Use a more commonly used icon such as the pencil for edit consistently in all locations.</td> </tr> <tr> <td data-bbox="760 641 1035 886"><b>JIRA ID</b></td> <td data-bbox="1035 641 1906 886"></td> </tr> </table>	<b>Location</b>	Various locations	<b>Finding</b>	The icon used to indicate 'edit' of an output connection is an ellipsis in some locations and a different 'edit' icon was found in the Distribution Options for distribution lists. These are inconsistent and are not commonly associated for this feature by users. Additionally, this is used to select a file folder location for output of a data connection. Users need consistency to reinforce mental models of interactive behavior to be efficient and confident.	<b>Severity</b>	<b>Major</b>	<b>Recommendation</b>	Use a more commonly used icon such as the pencil for edit consistently in all locations.	<b>JIRA ID</b>	
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<b>JIRA ID</b>											

**DATA CONNECTIONS FINDINGS**

**DATA CONNECTIONS CONTEXT MENU**

	<b>Location</b>	Workspace tab, connections panel
	<b>Finding</b>	Creating a new data connection requires opening a context menu (right click). This is a hidden function that requires education or discovery and memory to retain.
	<b>Severity</b>	<b>Major</b>
	<b>Recommendation</b>	Provide a toolbar option for Data Connections when viewing that tab.
	<b>JIRA ID</b>	

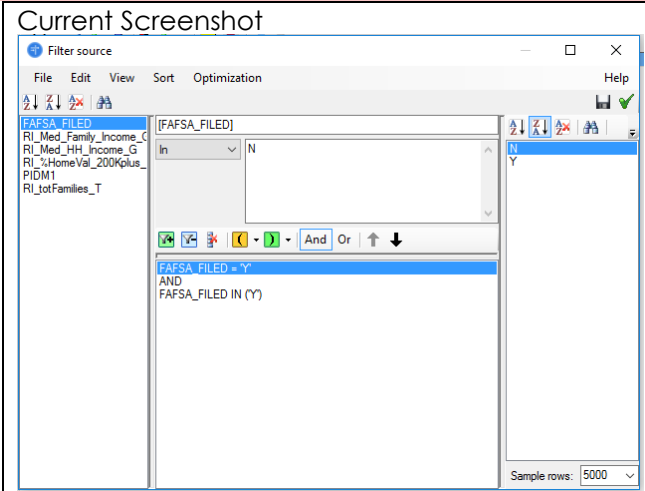
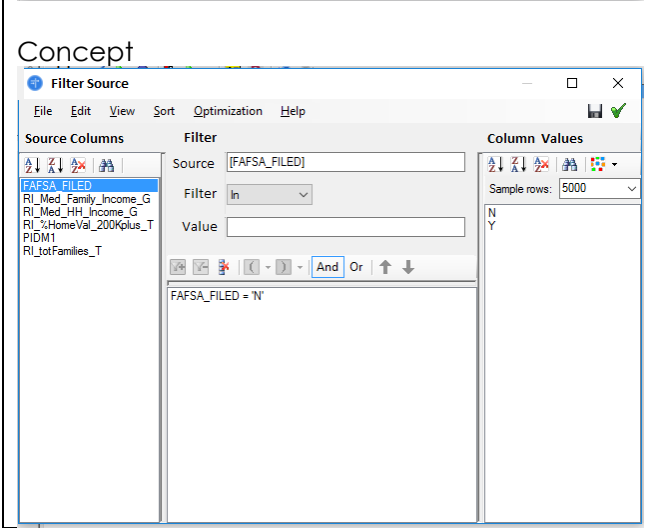
**DATA CONNECTIONS INCONSISTENT ICONOGRAPHY**

	<b>Location</b>	Job Connections panel (2), Job Toolbar, Output Node modal
	<b>Finding</b>	There are 4 icons used for the same action of selecting an existing data connection - the Job Toolbar menu, Job Connections panel icon, and the Job Connections panel drop list option icon. This inconsistency prevents users from creating a quick and reliable association with the action / icon relationship. In addition, the redundancy of having two Select Existing options in the Job Connections panel is a problem. Users need consistency to reinforce mental models of interactive behavior to be efficient and confident.
	<b>Severity</b>	<b>Major</b>
	<b>Recommendation</b>	For the Job Connections panel, display the two options as icons side by side or as options in a drop list but not both. Use one icon for the Select Existing Connection action. Update the tooltip for that icon to match the title of the modal. Make sure that tooltips on the icons match the titles of the corresponding modal views.
	<b>JIRA ID</b>	

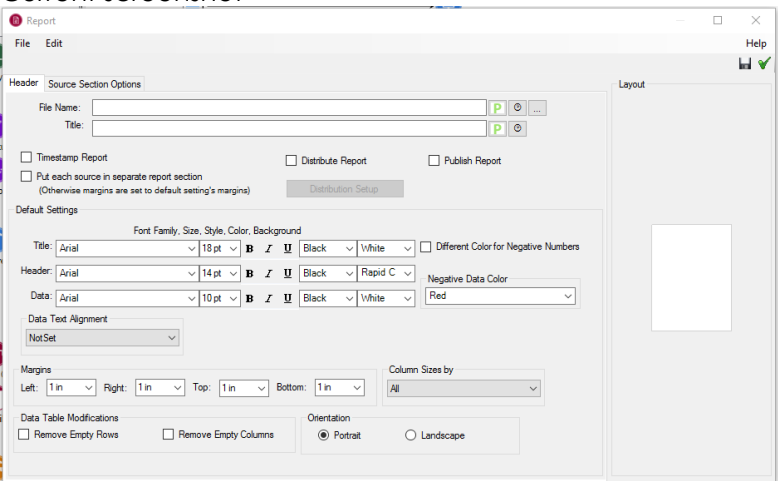
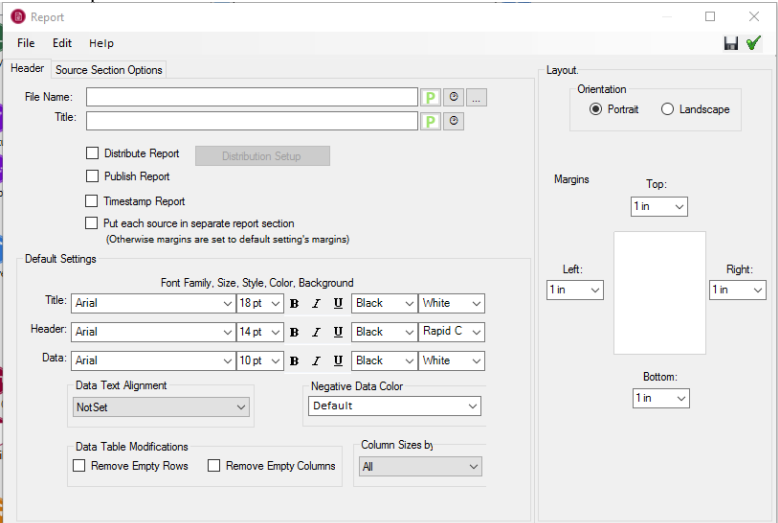


PROCESS NODES FINDINGS

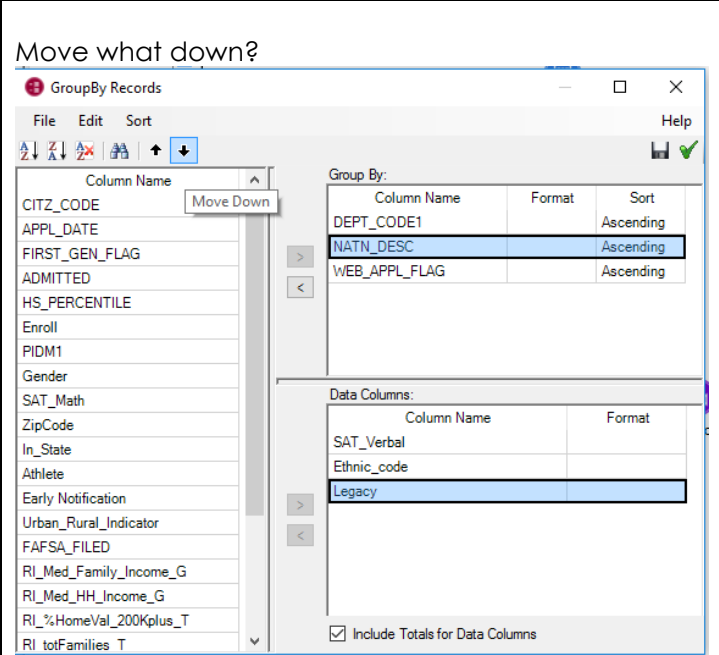
FILTER NODE LAYOUT

	<p><b>Location Finding</b></p>	<p><b>Filter Settings</b></p> <p>The tools for the Values list are not at the same level as the Source Columns list. While this can be related to hierarchy, each list has an equal relevance to contributing to the filter being built in the center of the modal. The Sample Rows value contributes to the values list but it's at the bottom of the list making it seem like an afterthought.</p> <p>Lists and filter section are not labeled leaving the user to discover their purpose (lists). The Filter section does not label the element options for the filter and the order of the options does not support a smooth flow.</p>
	<p><b>Severity Recommendation</b></p>	<p><b>Moderate</b></p> <p>Moving the Help, Save, and Save &amp; Exit options will support better positioning of the values list tools. The Sample Rows value should be at the top of the values list which it affects as a driving input to the list contents. Labeling the lists and filter sections will add clarity. Labeling and repositioning the elements of the filter section will support better flow and more efficient use.</p>

REPORT NODE HEADER SETTINGS

<p><b>Current screenshot</b></p> 	<p><b>Location</b></p> <p>Report Node Settings – Header tab</p>
<p><b>Concept</b></p> 	<p><b>Finding</b></p> <p>Data text formatting should be grouped together. Checkbox for negative number color is next to the Title formatting and uses the label 'number while the selection of a specific color uses the term "data". There isn't a good flow to the options.</p> <p><b>Severity</b></p> <p>Minor</p> <p><b>Recommendation</b></p> <p>Position the "Different Color for Negative Numbers" checkbox on the same line as and to the left of the color selection drop list. They would be positioned under the data text font, size, color etc.... and disable the option to select a color when checkbox is false.</p> <p><b>JIRA ID</b></p>

**GROUP BY NODE REORDER TOOLS**

 <p>Move what down?</p> <p>GroupBy Records</p> <p>File Edit Sort Help</p> <p>Column Name</p> <p>CITZ_CODE APPL_DATE FIRST_GEN_FLAG ADMITTED HS_PERCENTILE Enroll PIDM1 Gender SAT_Math ZipCode In_State Athlete Early Notification Urban_Rural_Indicator FAFSA_FILED RI_Med_Family_Income_G RI_Med_HH_Income_G RI_%HomeVal_200Kplus_T RI_totFamilies T</p> <p>Group By:</p> <table border="1"> <thead> <tr> <th>Column Name</th> <th>Format</th> <th>Sort</th> </tr> </thead> <tbody> <tr> <td>DEPT_CODE1</td> <td></td> <td>Ascending</td> </tr> <tr> <td>NATN_DESC</td> <td></td> <td>Ascending</td> </tr> <tr> <td>WEB_APPL_FLAG</td> <td></td> <td>Ascending</td> </tr> </tbody> </table> <p>Data Columns:</p> <table border="1"> <thead> <tr> <th>Column Name</th> <th>Format</th> </tr> </thead> <tbody> <tr> <td>SAT_Verbal</td> <td></td> </tr> <tr> <td>Ethnic_code</td> <td></td> </tr> <tr> <td>Legacy</td> <td></td> </tr> </tbody> </table> <p><input checked="" type="checkbox"/> Include Totals for Data Columns</p>	Column Name	Format	Sort	DEPT_CODE1		Ascending	NATN_DESC		Ascending	WEB_APPL_FLAG		Ascending	Column Name	Format	SAT_Verbal		Ethnic_code		Legacy		<p><b>Location Finding</b></p> <p>Group By Node settings</p> <p>The Reorder arrows are not positioned over the lists they manipulate. Controls should clearly indicate what object they affect when there is more than one possibility. This can be supported through labeling and proximity. Otherwise, this can require discovery and introduce risk of having an undesirable affect before the behavior is observed and learned. The tooltip is ambiguous. The reorder can affect two different lists based on which has a selected item but the visual indication for selected state of a list item is not good as two objects can look selected at the same time.</p>
	Column Name	Format	Sort																		
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NATN_DESC		Ascending																			
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Ethnic_code																					
Legacy																					
<p><b>Severity</b></p> <p><b>Moderate</b></p>	<p><b>Recommendation</b></p> <p>When there is more than one list, all controls that manipulate a list should be located near that list. Update tooltips to indicate what is being manipulated and selected state should be exclusive to the one object that is to be affected.</p>																				
<p><b>JIRA ID</b></p>																					