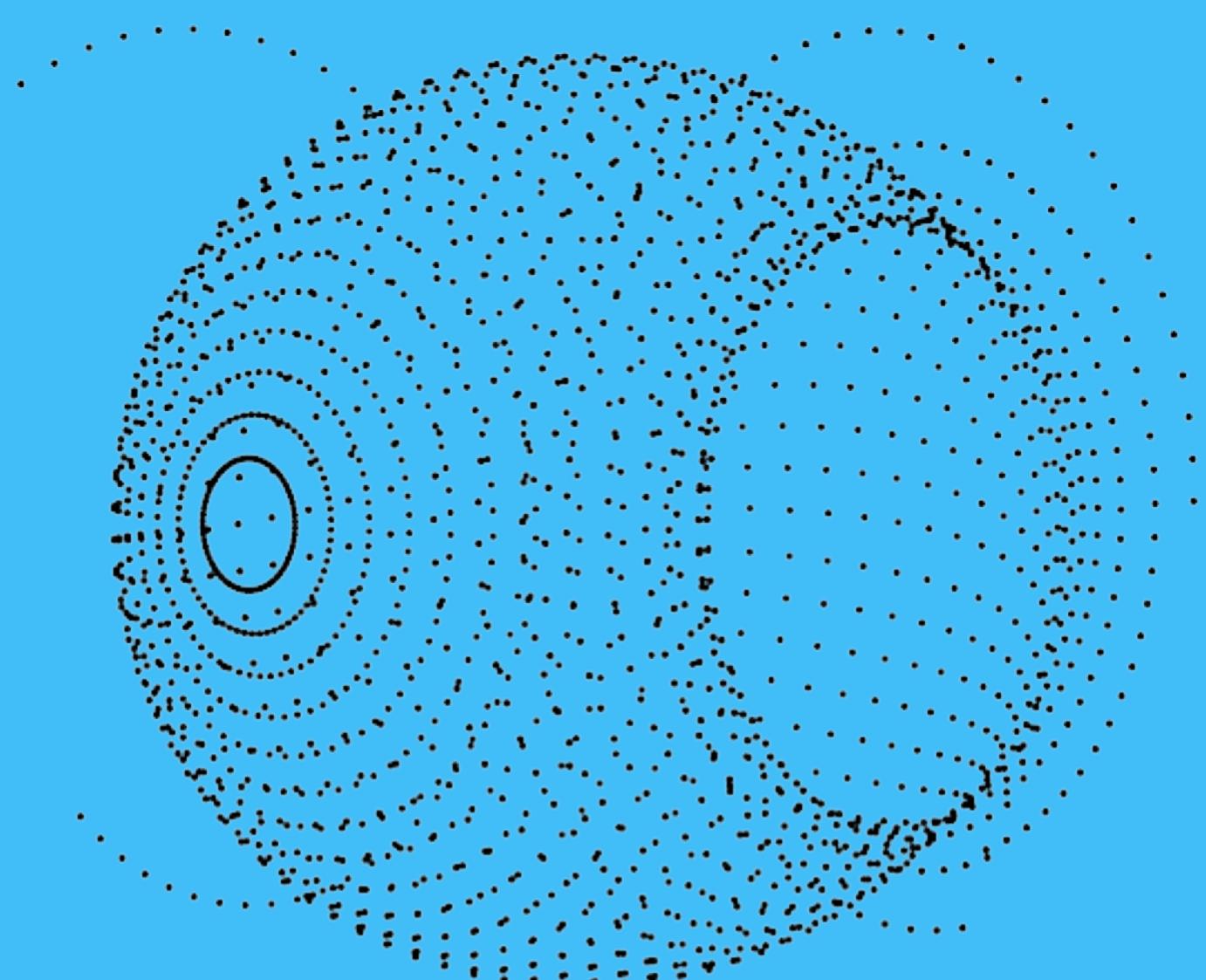


OCEAN

Coupa Sourcing Optimization

Ocean + Coupa.



Upcoming work

New Features

We are working on two new features — **Charting** and implementation of the new **Auction Dashboard**. These are in different stages where the charting work focuses on sketching & prototyping and the Auction Dashboard work consists of supporting the CSO team with iteration & refinement.

Collecting Feedback

We are continuously collecting feedback from our users in order to improve the service. Right now we are doing iterative work on **Sheets**, the **Support** section and **Messaging** inside CSO.

Better Bids

Next year — for CSO to reach its full potential — we are planning to put more effort into redesigning the Suppliers Platform from the ground up. By enhancing the suppliers interaction with the systems, we can ease the workload on CSO's clients and **increase the quality of bids**.

Integration

A big part of the design work ahead of us is the continued integration between Trade Extensions and Coupa.

Already on our way

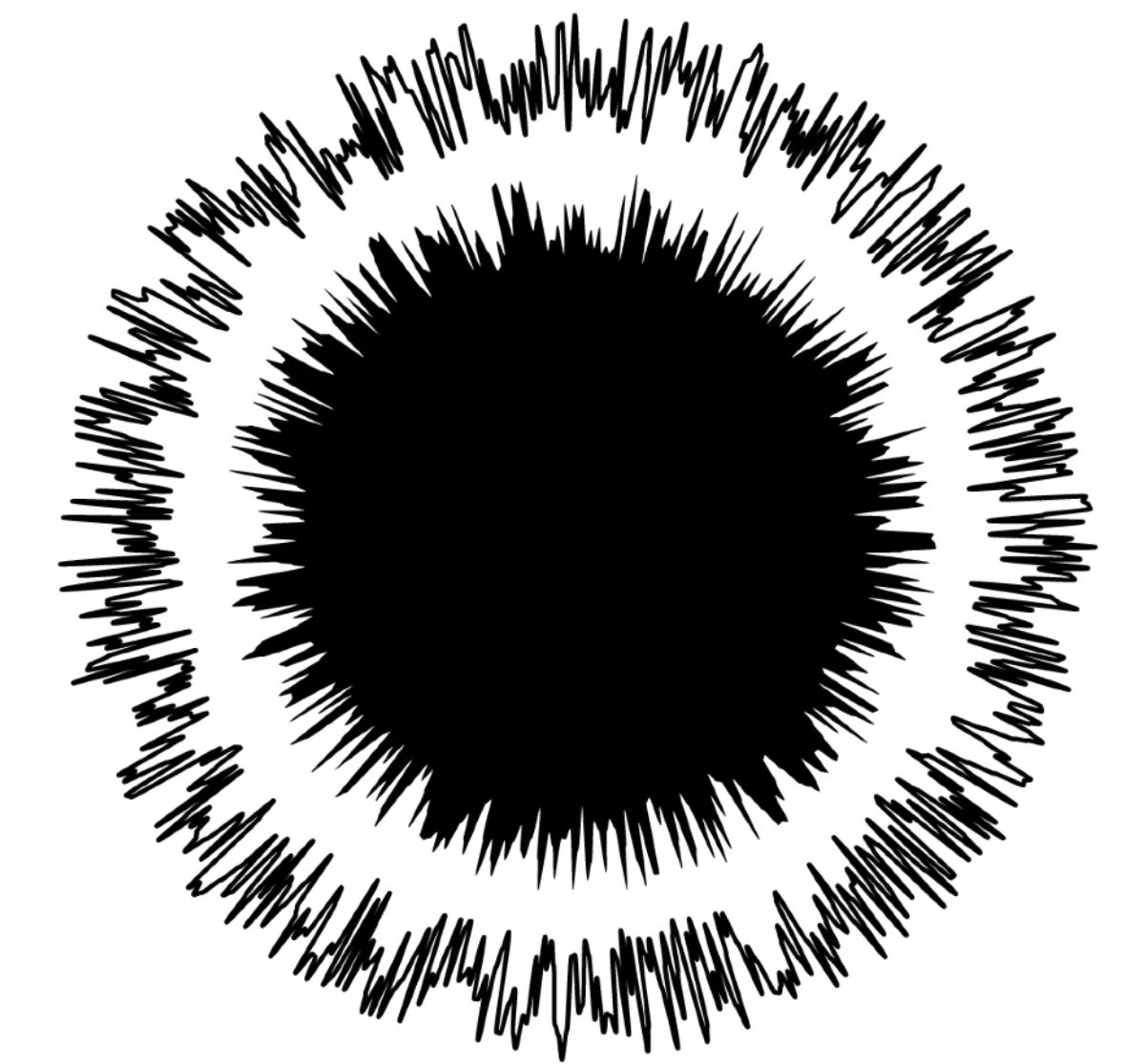
There's potential to combine the best aspects of each of the platforms with the domain knowledge and user insights we have to create something great. We have already adapted the colors and typography to fit with the Coupa guidelines.

We are also working on documenting the existing CSO Design System. It is important that anyone in the organisation benefit from all the design work that has been put into CSO. They should be able to understand it, get inspired by it and build upon it when creating new interactions, designs and features.

An opportunity

There's a big opportunity for both services (and UX teams) to learn from each other. By working closely with Coupa's existing user base we can adapt and tweak CSO's more advanced features so that **all users can access, use and benefit from them.**

In the integration process, regardless of which path it takes, it will be very important to keep both Coupas and CSO's users needs and behaviour in mind to **maximise customer satisfaction.**



The team



Adam Gardefjord

Interaction Designer



Tor Bruce

Interaction Designer



Marcus Andersson

Graphic Designer



Kajsa Sundeson

Design Strategist

Helping organisations to make what matters

What

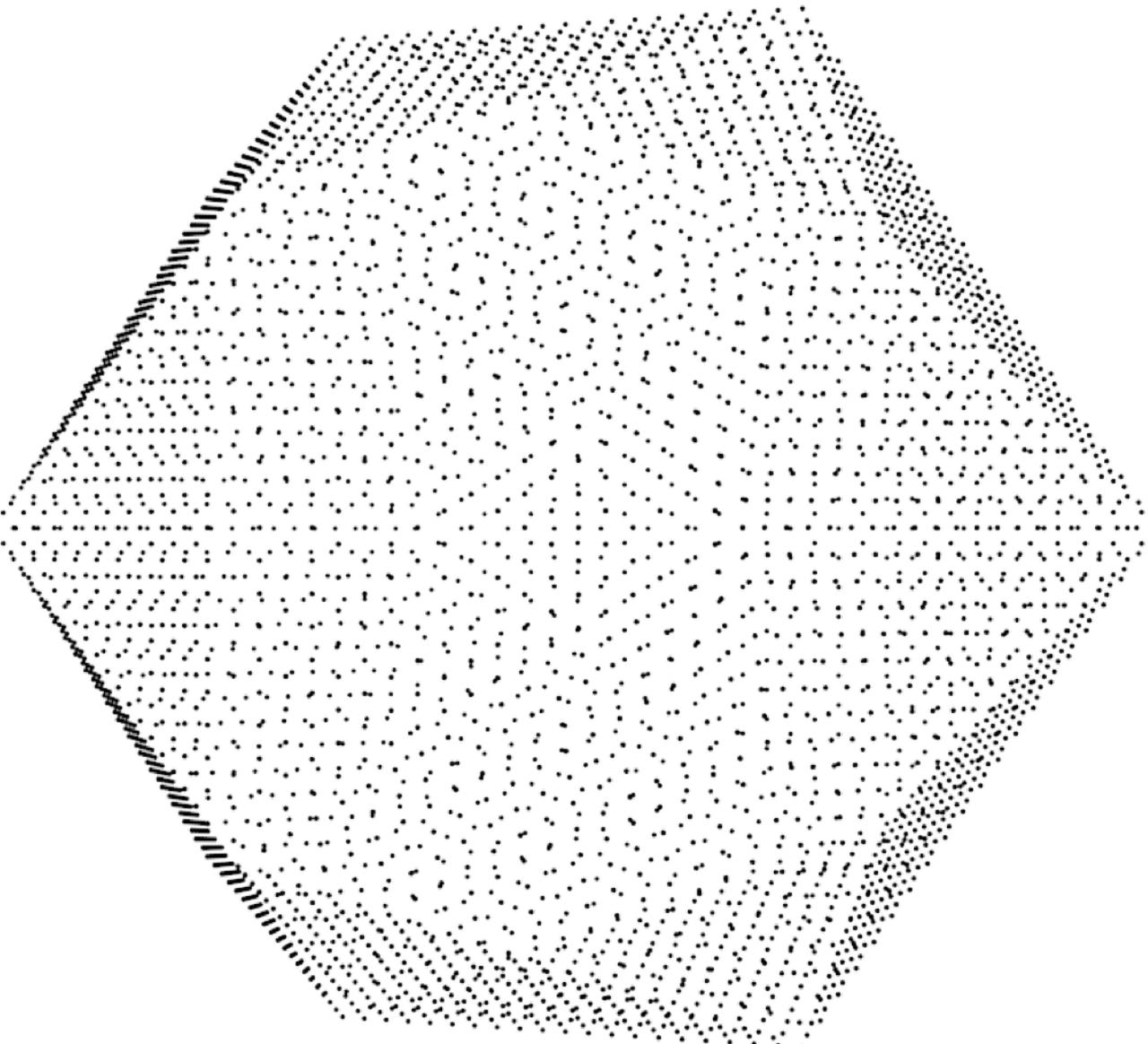
Together with you we create services around digital components, strategic insights and human needs - services that people want and need, that get results.

How

Through insight-driven innovation in cross-disciplinary teams. We work in collaboration with you and your customers to integrate real digital innovation into your organisation and services.

Why

Our surrounding is constantly changing, driven partly by digitalisation and by higher expectations from users. There are too many silo-ed, failed digital initiatives, we exist to change that; delivering holistic, insight-driven and measurable impact.



Working with Coupa

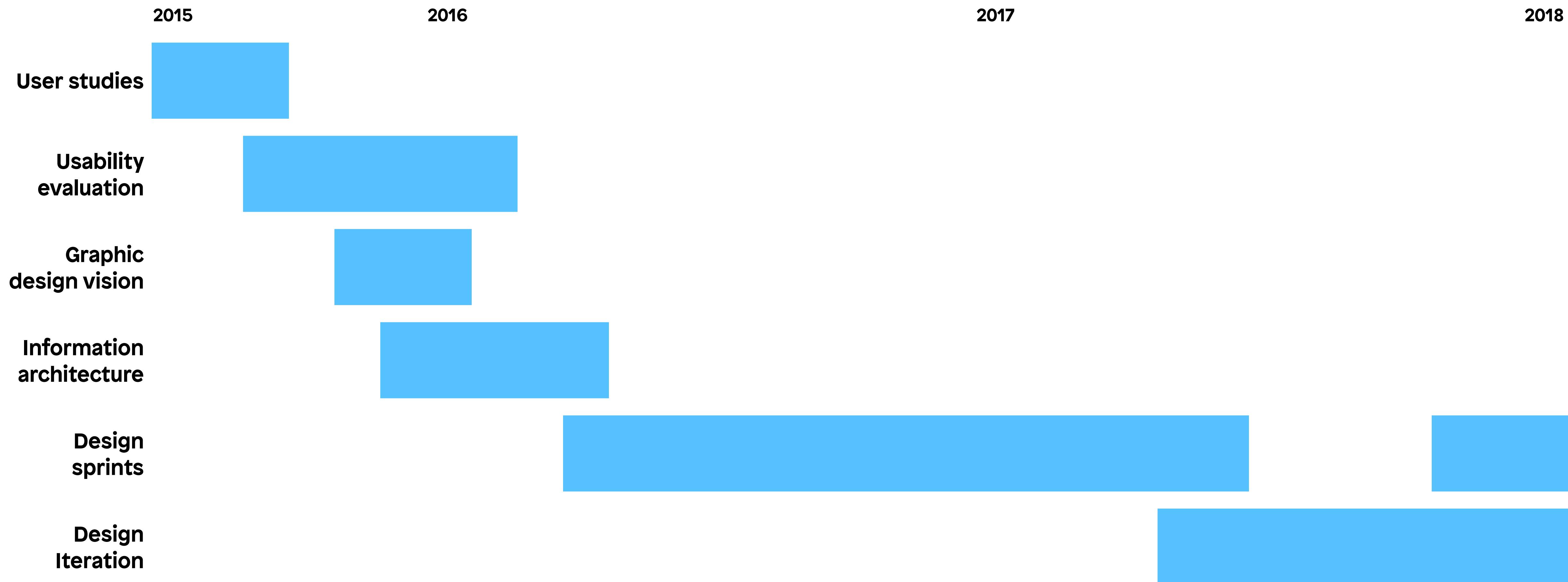
The goal was to **get more users to use the product**, by focusing on usability and consistency, streamlining the information architecture, and modernizing the design and general aesthetics of the product.

To achieve this, we have worked together with users to understand how the platform fits into their everyday work. This has allowed us to identify the most urgent usability issues, find opportunities to simplify the product, while making sure we don't lose the power and flexibility that comes with some of the complexity.

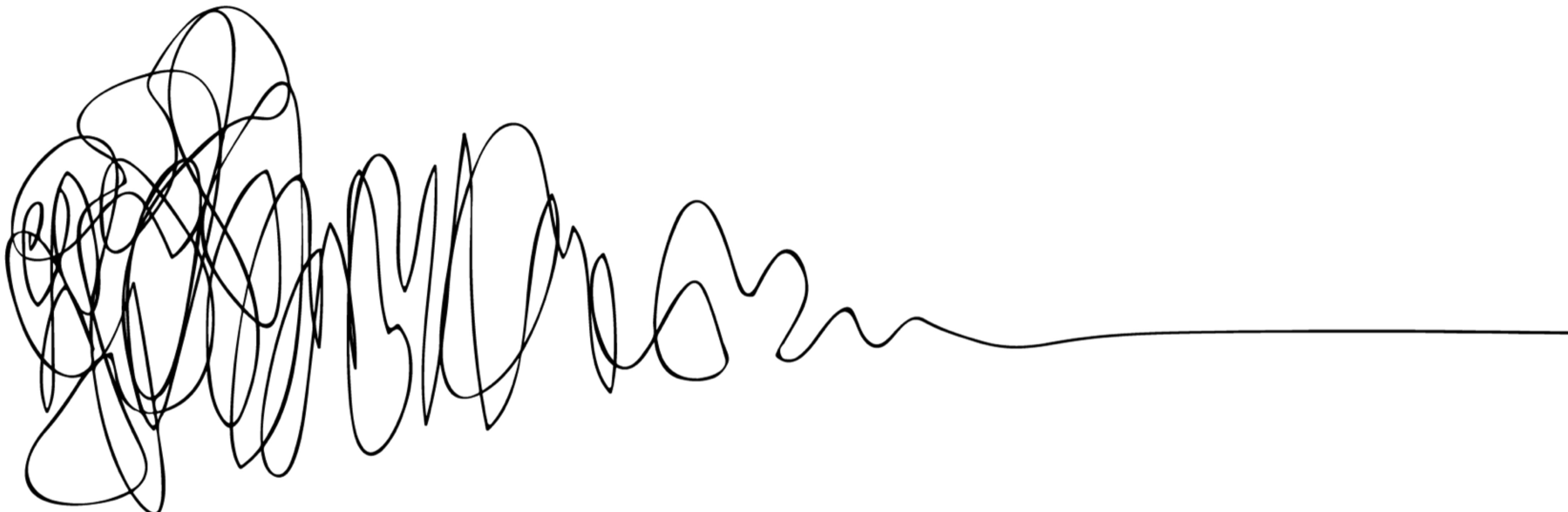
The redesign of CSO has been a close collaboration between the designers and usability experts at Ocean in Stockholm, the CSO development team in Uppsala, and the many analysts and sourcing experts around the world who were already using the platform.



The road to CSO



Design Sprint: A better navigation



Research & interviews

Collaborative ideation

Sketching & prototyping

User testing

Iteration & refinement

CSO design in numbers

40+

design sprints

50+

prototypes

165+

graphic design mockups

120+

icons

30

workshops with
users and team
members

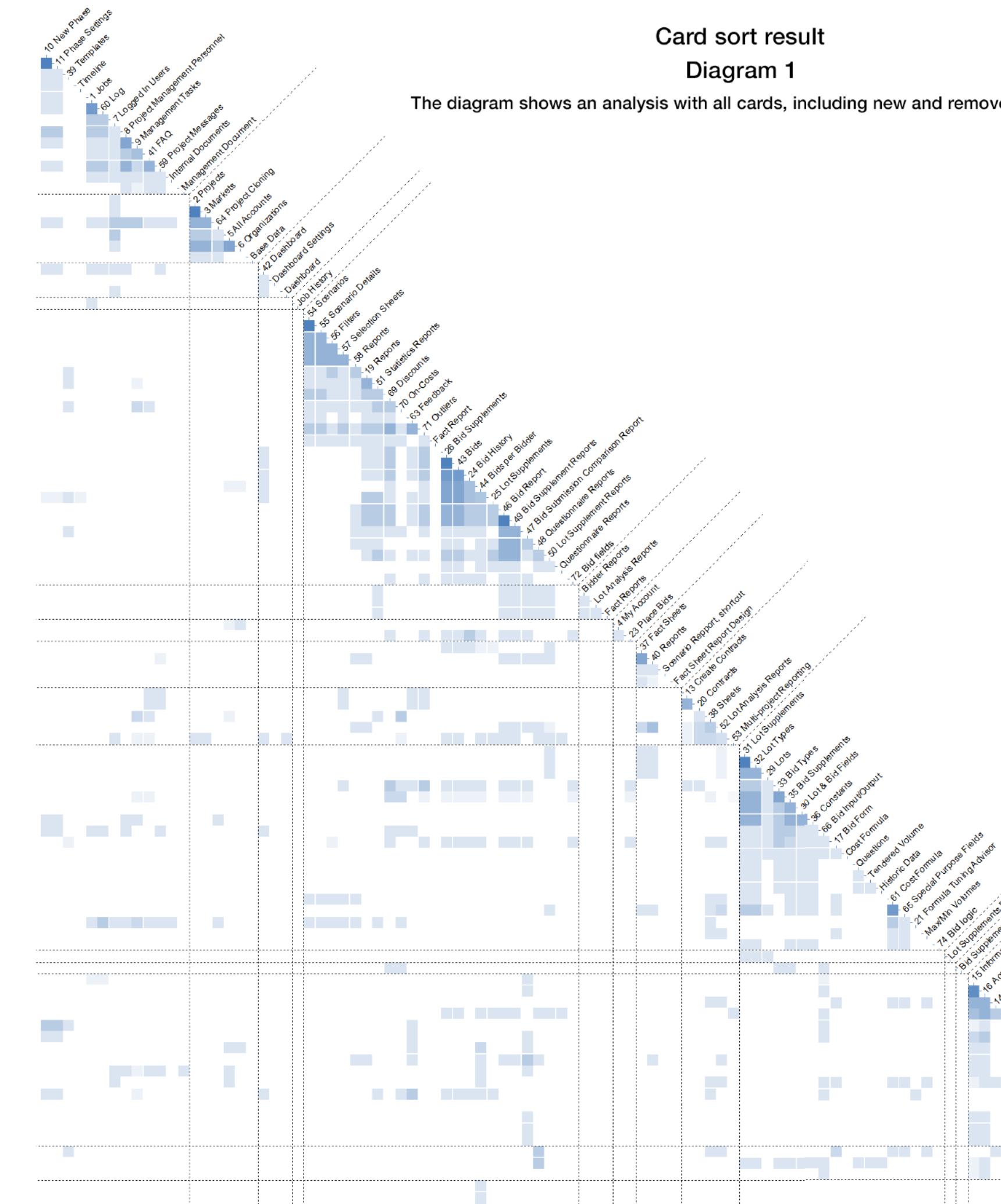
65

user tests and
interview with
users

Design Sprint: A better navigation

Research & interviews

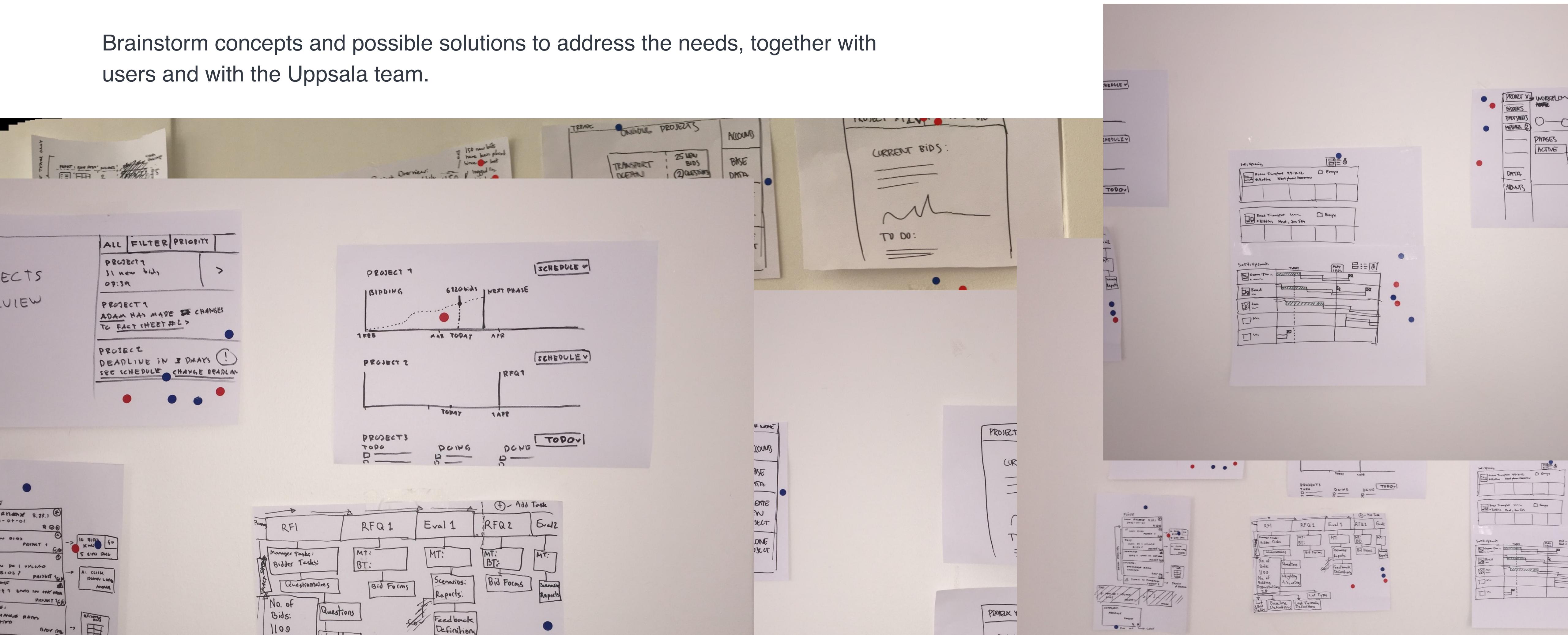
Get insights about user needs, understand the most important opportunities for improvement.



Design Sprint: A better navigation

Collaborative ideation

Brainstorm concepts and possible solutions to address the needs, together with users and with the Uppsala team.



Sketching & prototyping

Work out more details of the concepts, in sketches and interactive prototypes of varying fidelity.

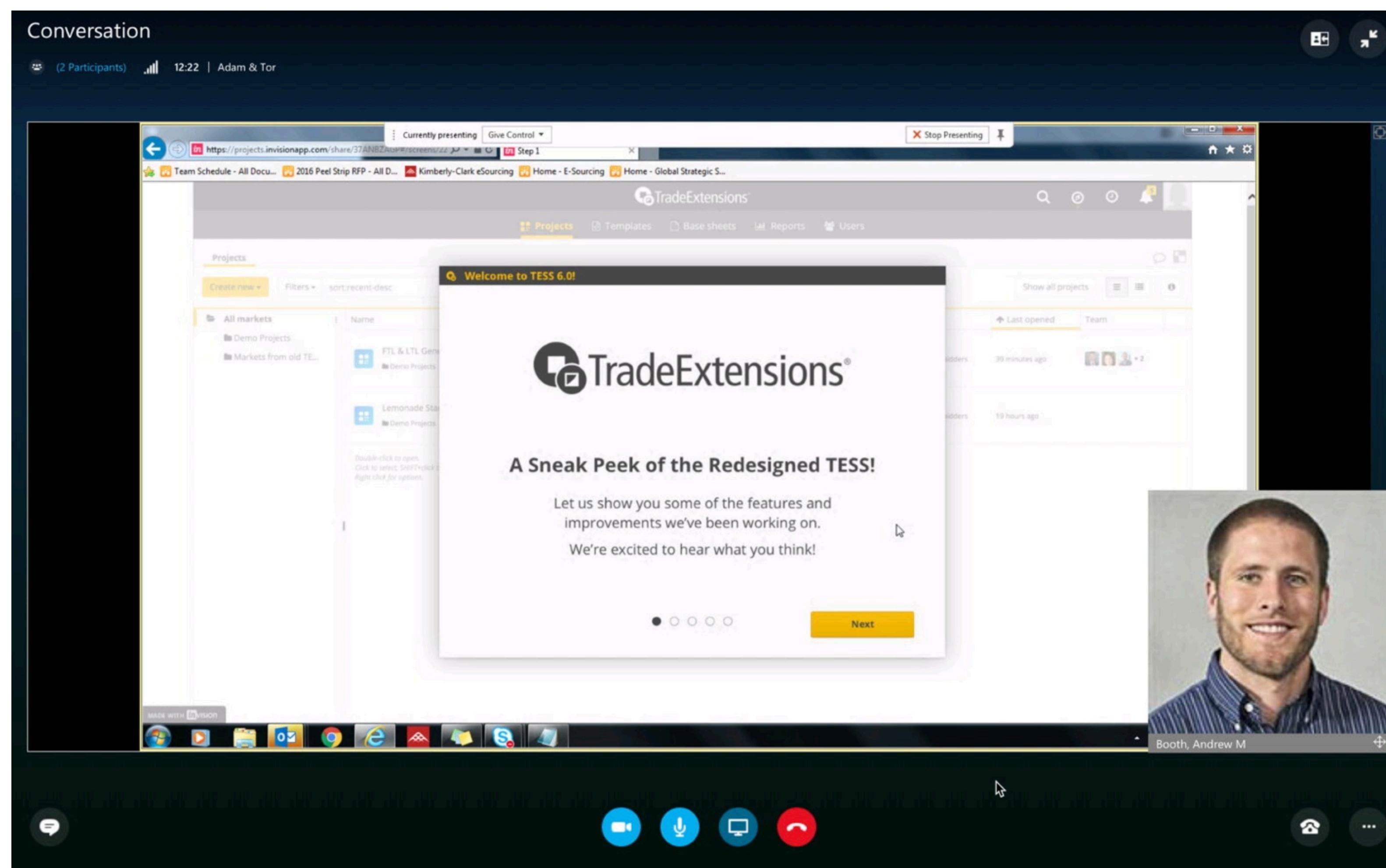
The image displays two wireframe prototypes of a software application interface, likely for a procurement or supply chain management system.

Left Prototype: This prototype shows a top navigation bar with 'LOGO' and 'Top Overview'. Below it is a secondary navigation bar with 'Project MikesDataForOcean' and tabs for 'Data', 'Documents', 'Phases', 'Sourcing Setup', 'Messages', 'Bidders', 'Bids & Submissions', 'Analysis', and 'Reports'. On the left, a sidebar has sections for 'Fact Sheets' (with 'Constants') and 'Data' (with 'Fact Sheets' and 'Records and lines'). The main area shows a 'Fact Sheets' section with a table for 'POline' and 'Porecord', and a 'Selected Base Sheets' section with tables for 'Goodsreceipt', 'Exchange Rate', and 'Parts'. A 'Messages' sidebar on the right lists 'Inbox', 'Write', 'Templates', 'Drafts', and 'Sent'.

Right Prototype: This prototype features a similar top navigation bar with 'TradeExtensions' logo and 'Project: MikesDataForOcean'. It includes a 'Data / Fact Sheets' tab and a 'Fact Sheets' section. The sidebar on the left is identical to the left prototype's 'Data' section. The main area contains sections for 'Records and lines' (listing 'POline' and 'Porecord'), 'Base Sheets' (listing 'Goodsreceipt', 'Exchange Rate', 'Parts', and 'Taxrates'), and a 'Create new Fact Sheet' button.

User testing

We observe when users try the new design, to see how it works for them, how it makes them behave, and how the design can be further improved.



Iteration & refinement

More rounds of ideation, sketching, and testing, until we have a refined design that meet user needs.

We work with the team to solve practical issues that come up during development.

As the work progresses, we revisit previous design sprints to consistently apply the concepts and design patterns that have emerged.

The screenshot shows the TradeExtensions interface for managing data and fact sheets. On the left, a sidebar navigation includes: Dashboard, Plan, Bidders, Data (with sub-options: Constants, Documents, Fact Sheets), RFx, Reports, Optimization, Contracts, and Advanced. The main area is titled "Data / Fact Sheets" and shows a list of fact sheets under the project "MikesDataForOcean". The list includes: Poline (1 minute ago), Porecord (15 minutes ago), and Receiptline (2 hours ago). Each item has a status bar indicating connections found and possible discrepancies. A context menu is open over the Poline entry, listing options: Duplicate sheet, Delete sheet, Change name, Correct the data in this sheet..., and Enrich with data from other sheet... Below the list is a "New Fact Sheet" button and a "New Category" button. At the bottom of the sidebar, there's a "OCEAN" logo.

The screenshot displays two views of the TradeExtensions application. On the left, the "Inbox" view is shown, featuring a sidebar with links for Projects, Data, Documents, Phases, Sourcing Setup, **Messages**, Bidders, Bids & Submissions, Analysis, and Reports. The main area lists 4 open messages, each with a subject and a snippet. On the right, the "Dashboard" view is displayed, which includes sections for "Recently updated" (Payment, Scenario Overview, Selection Sheets, Filters, Historic Cost, Scenario Settings, Savings For Each Scenario, Number of Winners), "Scenarios" (Goodsreceipt, Exchange Rate, Parts, Taxrates), and "Reports" (This Project, This Page - Inbox, Other). A search bar at the top right allows users to search across the platform.

A better navigation

Even new users are able to quickly find their way around

Before:

- Hard to remember where to find things
- Difficult to find related things
- Many nested levels
- Hard to understand where you are
- Fallback sitemap used as main navigation

After:

- Logical hierarchy
- All the options are laid out in front of you
- Related things are grouped
- Easy to know where you are
- Search to quickly find things

Old TESS

The screenshot shows a desktop application window titled "TradeExtensions" with a blue header bar. The menu bar includes "Pages", "Carl", "Lots", "Lot & Bid Fields", "Lot Supplements", "Lot Types", "Bid Types", "Back". Below the menu is a toolbar with icons for "New", "Edit", "Delete", "Download", "Upload", "Select Phase (Lot Analysis Values)", "Select Columns", and "All". The main area contains several yellow warning bars at the top. A large table titled "Lots" is displayed, showing columns for Name, Lot Type, State, Goods Carried, Stream, Route Owner, Collection Country, Collection Town, Collection Postcode, and Collection location Longitude. The table lists six entries for FTL lots. To the right of the table is a sidebar with sections for "Lots", "Questionnaires", "Bid Supplements", "Bid Types", "Excel Templates", "Lot Access", "Bidding Rules", "Bid Input Settings", "Feedback Settings", "Tendered Volume & Historic Data", and "Discounts and On-Costs". A status bar at the bottom indicates "Found a total of 104 matches. Press Enter to open the first match."

The screenshot shows a modern web-based application interface for "FTL and LTL General Demo 2015-16". The top navigation bar includes "Project", "Data & Documents", "Sourcing setup" (which is highlighted in blue), "Messages", "Bids & Submissions", "Analysis", and "Reports". The left sidebar has sections for "Lots", "Questionnaires", "Bid Supplements", "Bid Types", "Excel Templates", "Lot Access", "Bidding Rules", "Bid Input Settings", "Feedback Settings", "Tendered Volume & Historic Data", and "Discounts and On-Costs". The main content area features a search bar with the placeholder "questionnaire" and a "Search" button. Below the search bar is a table titled "Lots" with columns for "Name", "Lot Type", "State", "Goods Carried", "Stream", "Route Owner", "Collection Country", "Collection Town", "Collection Postcode", and "Collection location Longitude". The table lists six entries for FTL lots. A sidebar on the right lists various project components like "Questionnaires", "Questionnaire Replies", "Questionnaire Scores", etc., with checkboxes for "Include in RFQ" and "Carrier List". A footer note states "Lots are specifications of the things you want to buy. Use lot types to group similar lots together. You can for example have one lot type for land transport type. You must have at least one lot type." and "Found a total of 104 matches. Press Enter to open the first match."

Thank You!

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Adam Gardefjord

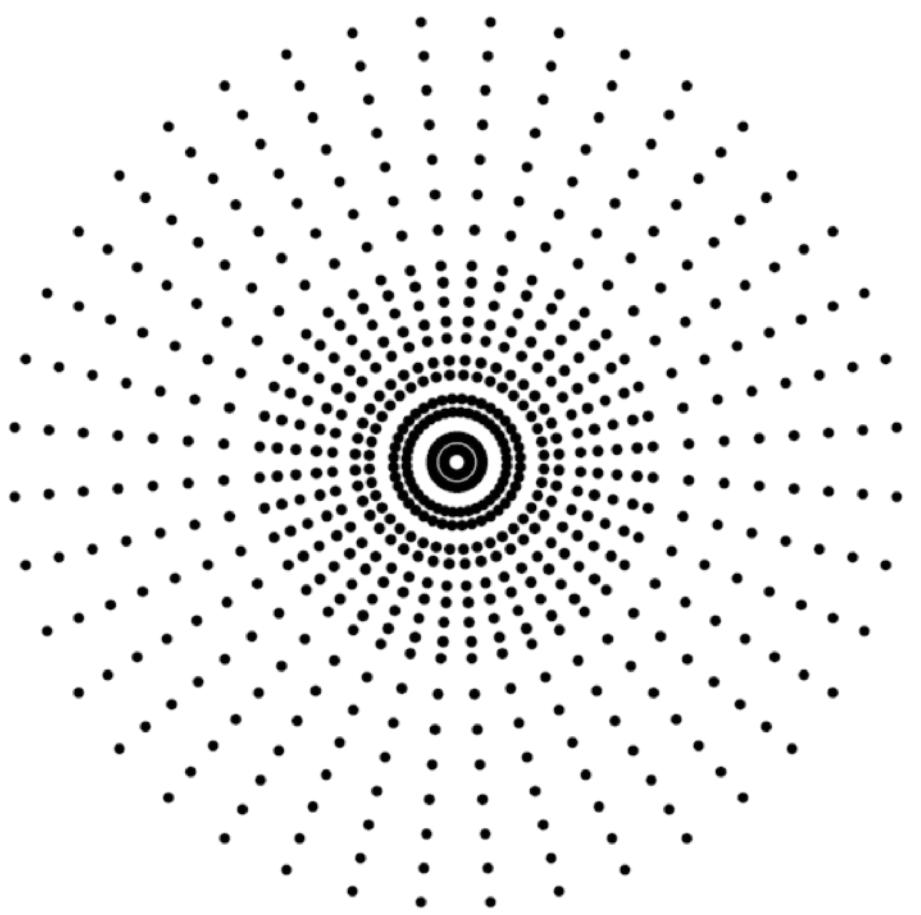
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