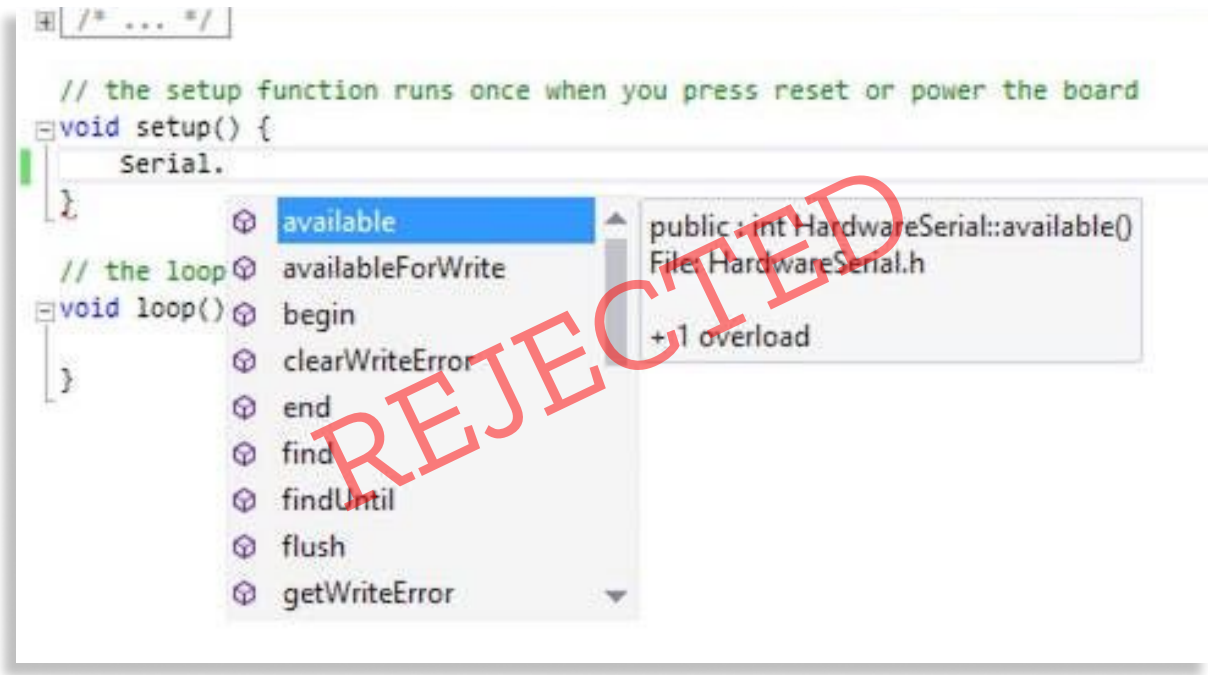
Rules and Workflows

Allowing Paragon ERP users to modify its behaviour to suit their specific business needs by creating “rules” using a natural language wizard.

Main Challenges

- Developing a natural language alternative to programming that is intuitive and not intimidating.
- Allowing for the potential complexity of rules while maintaining simplicity in the design.
- Allowing rules to be arranged into “workflows”: strings of automated actions with conditional logic.
- No user data and no option to collect any.



An example of the software I ranked as part of my competitive analysis.

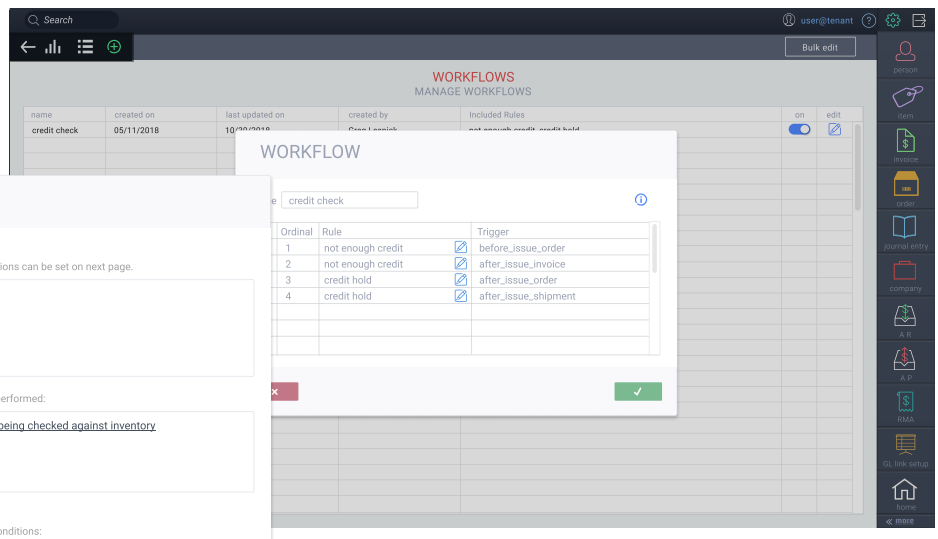
1 We tried to move away from interfaces like this, but it was difficult to find a solution that allowed for as much complexity without the high learning curve.

Approach

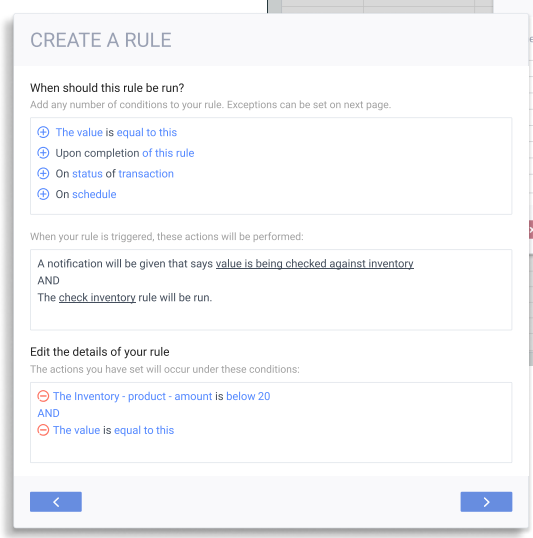
- Conducted stakeholder interviews with CEO, team leads, and team members with expertise either in the technology or the clients (developers, business development, services).
- Completed competitive analysis of software with similar functionality, ranked their solutions according to findability, ease-of-use, and aesthetic.

Key Product Decisions

- Using work from my predecessor as a base, I went with a clean design that sacrificed some capacity for very complex rules for a wizard that presented a series of short lists of options from which users could create basic rules. More complex rules could still be added by developers.



The Workflows screen.



The Rule Wizard modal.

3 Users can chain rules together into "workflows" and automate the most tedious parts of their work.

2 The interface is clean and approachable. Users can check their rules in plain language and in code before putting them into action and can edit them any time.