Ideate

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Market analysis

Question: How are the setup settings managed by other applications?

Research method: Market analysis

Why: To gather important information about each app's settings management.

How: By creating list of inspiring web applications and defining objectives, which aspects of settings management I am going to look for, then gather that information, pinpoint the advantages and user needs that appear to be unaddressed and, in the end, create a comparison.

List of potential apps:
- Monday is tool that allows you to collaborate with your team right from the palm of your hand.
- Jira is a suite of agile work management solutions that powers collaboration across all teams from concept to customer.
- Trello is the visual tool that empowers your team to manage any type of project, workflow, or task tracking.
- Asana is a tool used to break down large work into manageable tasks.
- Basecamp – is used to keep track of assignments, work together on documents, plan projects, chat, and many more.

Objectives:
- **Settings management:**
  - Options and features (categories, subcategories, and depth of customization).
- **Usability:**
  - Evaluation of the settings interface (intuitive design, clear labels, and ease of navigation)

First web application: Monday

Settings

Within the settings page, I found the primary settings listed in the left sidebar. Once the main setting is clicked, second modal appears on the right side, reviling additional sub-settings. (Figure 1). On the Users sub-settings modal, there is an extra setting that allows the user to manage teams, it is located on the top right corner of the modal. (Figure 2) It opens deeper placed settings where a team can be created and managed. (Figure 3)
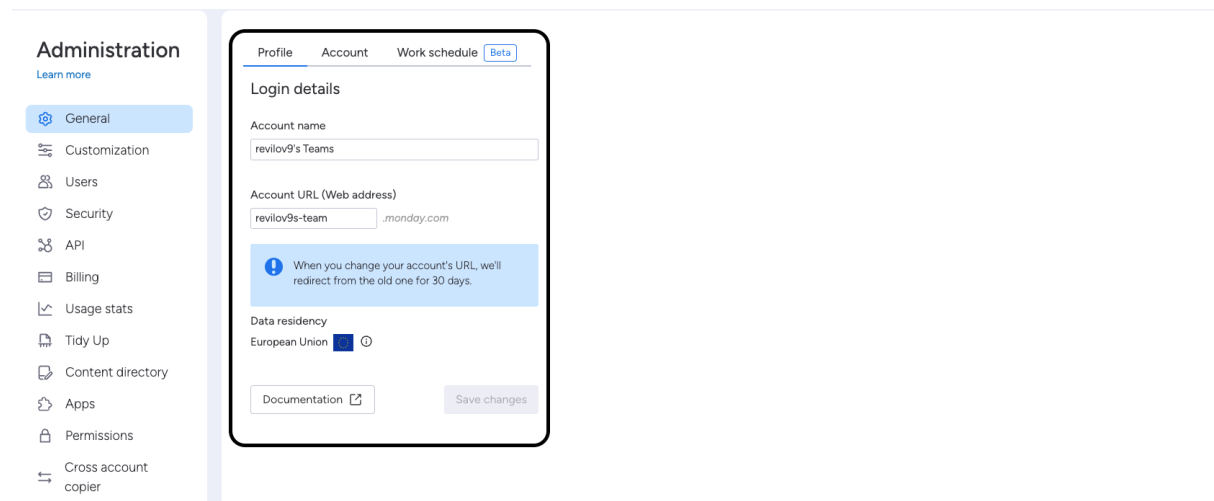
Figure 1. Sidebar with settings and its content.
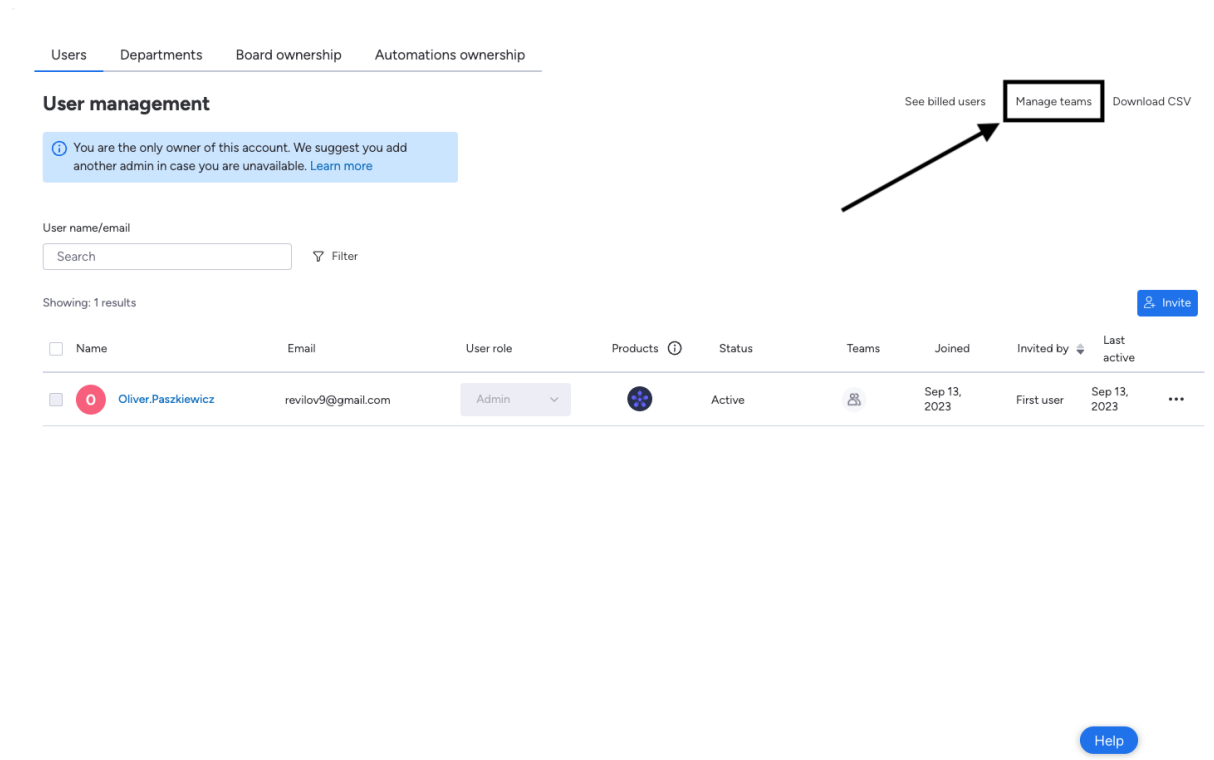
Figure 2. Sub settings which allow the user to make deeper customizations.
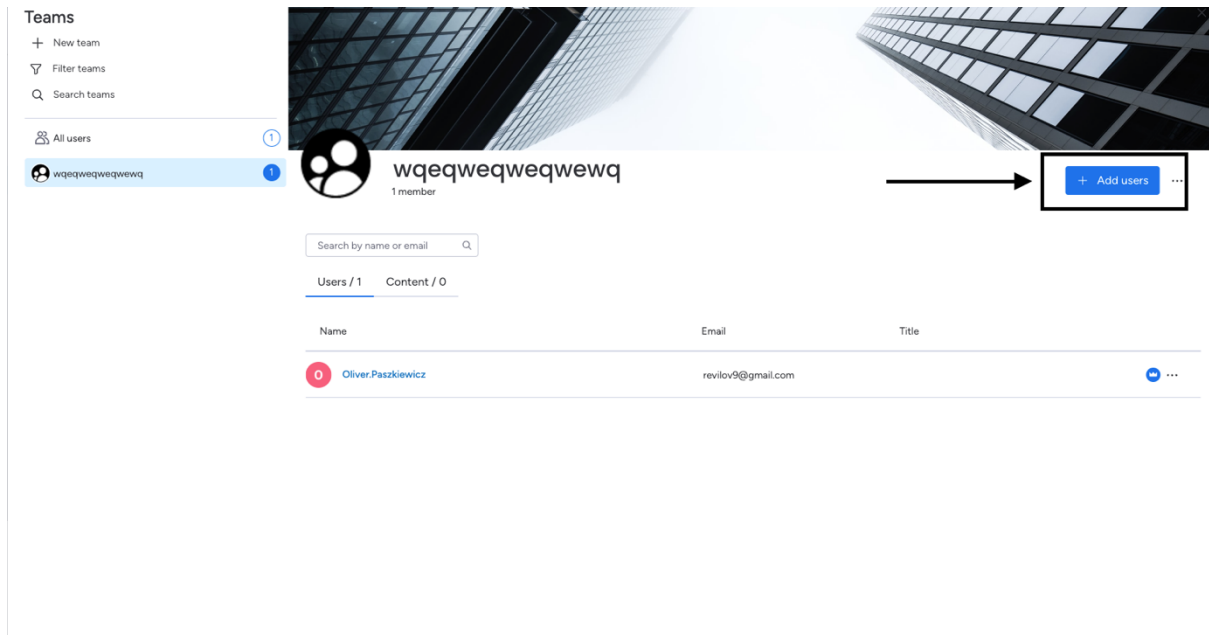
Figure 3. Modal where team can be managed, users added as well as removed.

Usability

The settings page features clear and distinct labels for each setting, comprising both an icon and descriptive text to convey their purpose. These labels are highlighted to provide users with a visual indicator of their current tab. Users have the option to filter and sort users by various criteria such as role, status, board, and team. Permissions are organized into user roles, each with its own set of permissions. Furthermore, permissions are grouped together under descriptive labels, making it easy for users to understand the purpose of each permission group. For example, the "Permission Board" group includes options such as creating main boards, private boards, and sharable boards. (Figure 4)
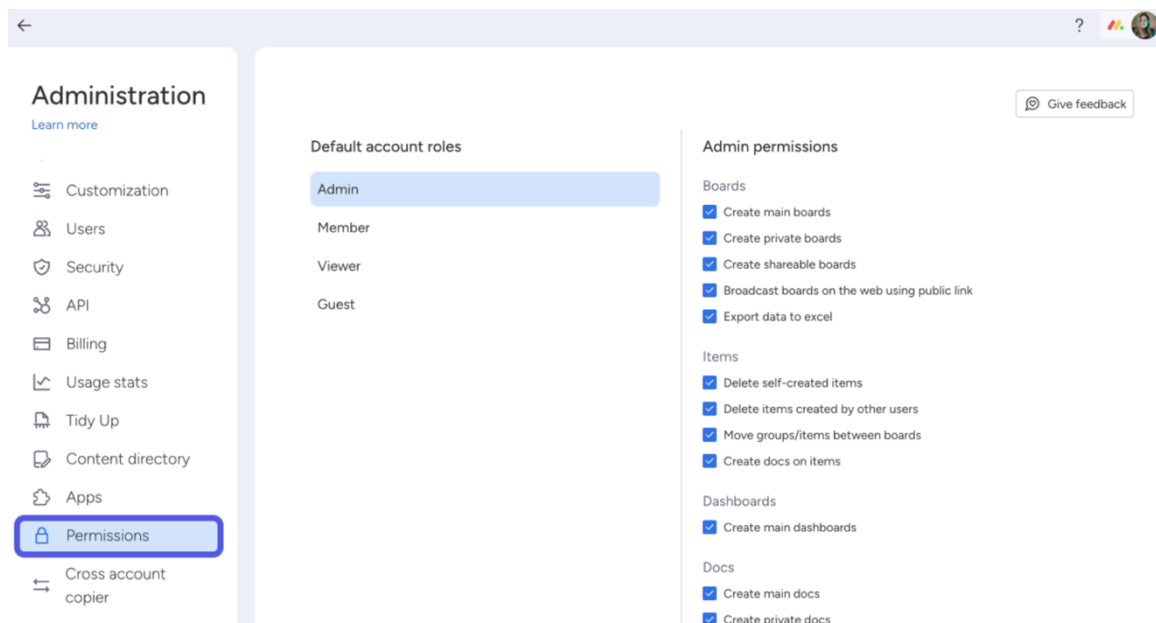
Figure 4. User roles and its permissions.

Conclusion

The platform's clarity, with clear labeling, icons, and highlighted tabs, contributes to a user-friendly experience by reducing the chances of errors. Furthermore, the organization of permissions into roles and groups with descriptive labels enhances the management of permissions, particularly in complex systems. Additionally, the ability to create and manage teams fosters efficient organization in collaborative environments. The use of modals for sub-settings further improves the user experience and workflow, enabling users to focus on specific tasks without the need to navigate away from the main settings page.

Second web application: Asana

Settings

Primary settings are conveniently presented in a left sidebar, while sub-settings dynamically appear on the right side in separated boxes when selected. (Figure 5.) Although in-depth customization options are somewhat limited, these sub-settings remain easily accessible. Clicking on a sub-setting triggers a small modal window to open, allowing users to make edits and save changes efficiently. (Figure 6.)

Figure 5. Interface of primary settings and sub settings.
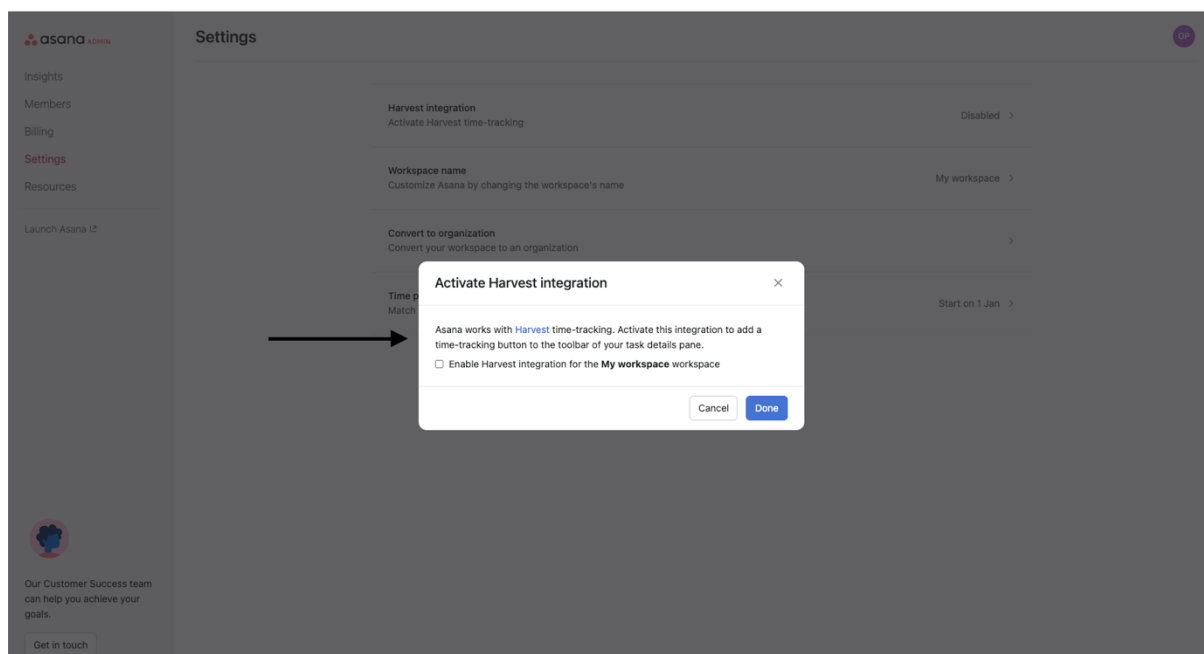
Figure 6. Modal for saving sub settings.

Usability

Primary settings are clearly distinguished by highlighting and labeled with text only, becoming bold when clicked for easy recognition. On the right side, sub-settings are displayed with a prominent label at the top, provid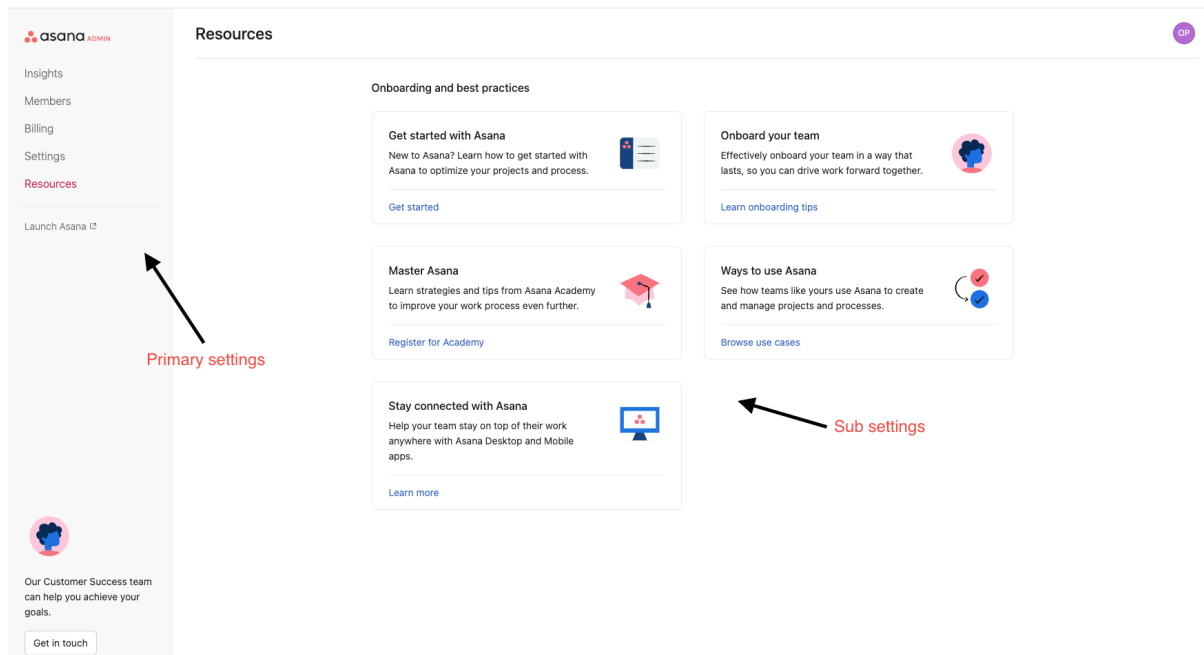ing users with clear context. Settings are organized into clickable boxes that become highlighted upon hover. (Figure 7) Each block includes a text label describing the sub-setting and a brief explanation of its function. On the opposite side, the current state of the setting is displayed. Clicking on it triggers a modal window, where users can check a checkbox to make changes and then save those changes with a dedicated save button. This intuitive design enhances user interaction and ensures a seamless settings management experience.
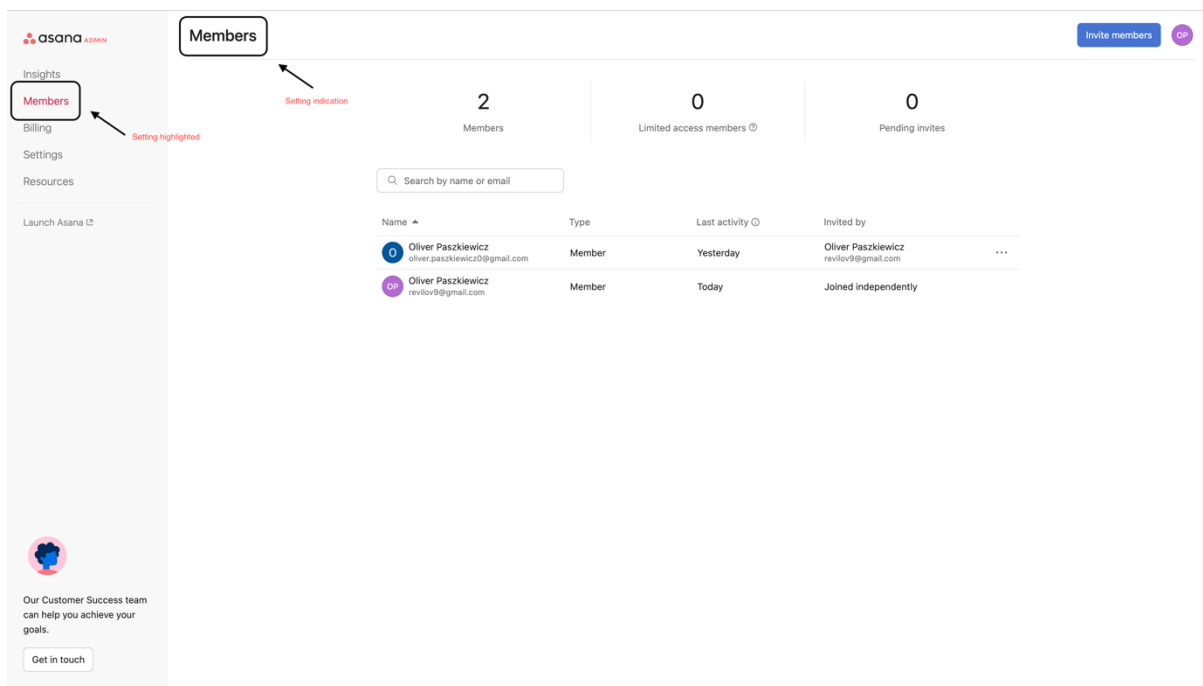
Figure 7. Primary settings are highlighted and then indicated on the top of its content.

Conclusion

The user interface for managing settings exhibits a thoughtful and intuitive design. Primary settings are conveniently accessible from a left sidebar, while sub-settings are presented dynamically on the right side, enhancing user convenience. Although the level of in-depth customization may be limited, the layout and interaction flow remain user-friendly. The interface effectively employs clear labeling, highlighting, and a modal system to streamline the process of making and saving changes to settings. Overall, this design promotes user confidence, reduces the likelihood of errors, and ensures a seamless and efficient settings management experience.

Third web application: Basecamp

Settings

Primary settings are conveniently listed on a single page (Figure 8), and when clicked, a second page opens to reveal editable sub settings. (Figure 9) While the level of in-depth customization is limited, the platform offers essential features such as the creation of groups, the addition of users, and the management of teams. This streamlined approach focuses on providing users with the settings they need, simplifying the user experience and ensuring efficient settings management.
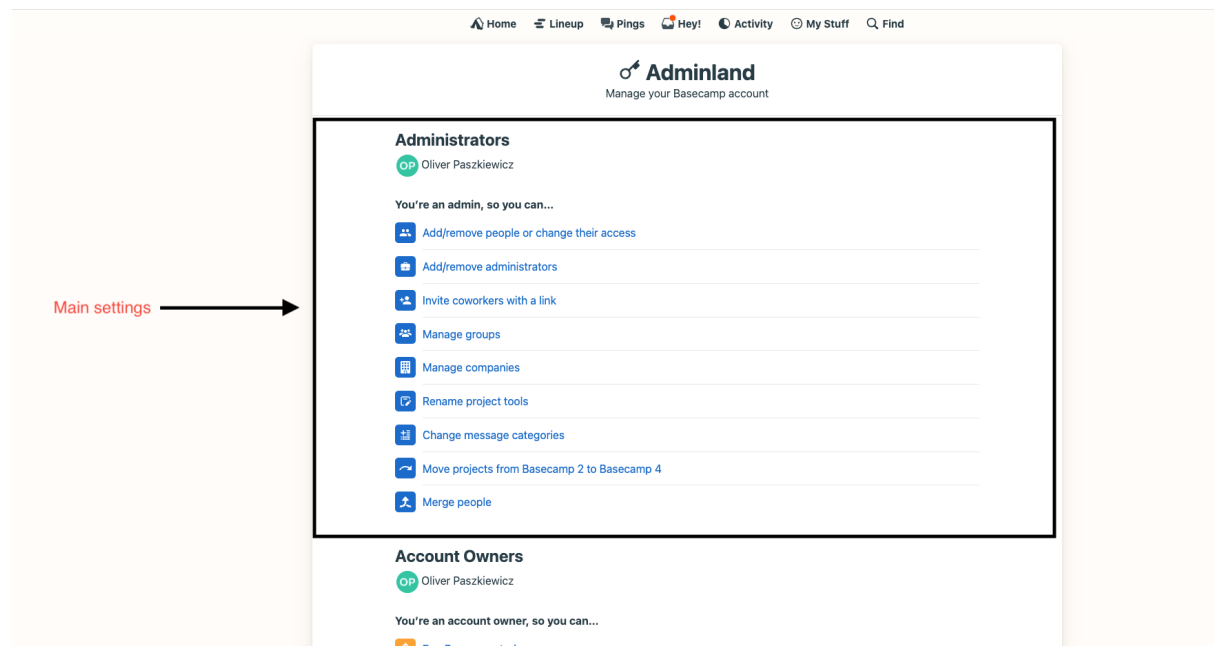
Figure 8. Primary settings are displayed on the main page.
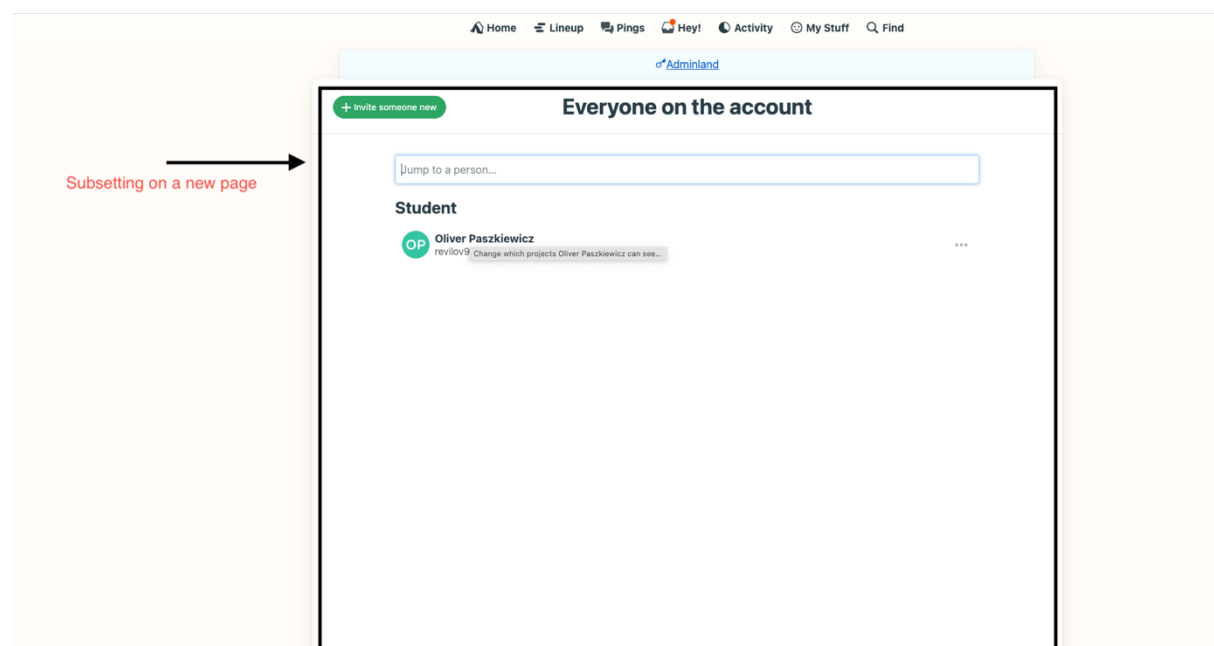
Figure 9. Sub settings are displayed on the second page.

Usability

Primary settings are conveniently displayed at the top of the page as separate links, each comprising an icon and descriptive text outlining its functionality. However, once clicked, a new page opens, which may potentially confuse users due to the absence of a clear navigation indicator to return to the previous page. On the sub-settings page, users have the capability to add new categories or remove existing ones. When inviting a co-worker, users can adjust their role, but there is a limitation in terms of in-depth customization, as permissions are pre-defined and cannot be manually edited, restricting user flexibility in this regard.

Conclusion

The platform's settings management offers convenience and essential functionality with primary settings accessible on a single page and editable sub-settings available on a separate page. While it simplifies the user experience by focusing on specific user needs such as group creation, user addition, and team management, there are potential usability challenges due to a lack of clear navigation indicators when transitioning between pages. Additionally, the platform's limited in-depth customization, particularly with pre-defined permissions, may restrict user flexibility. Balancing simplicity and functionality, addressing navigation clarity, and enhancing customization options could further refine the overall user experience and user satisfaction.

Forth web application: Trello

Settings

The settings interface features a modal that slides in from the right side, presenting users with primary settings options. Within this modal, users can delve into sub-settings, some of which may include nested sub-sub-settings for deeper level of customization and configuration. (Figure 10)
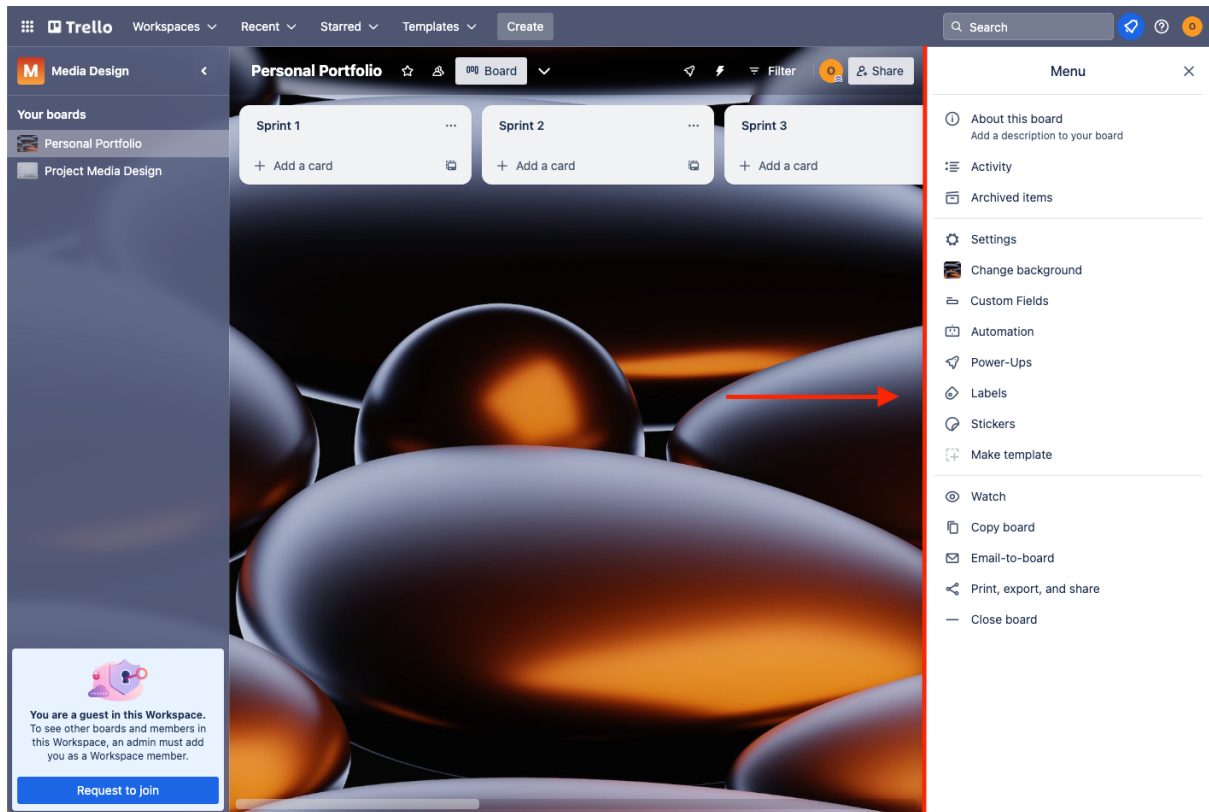
Figure 10. Representation of the sidebar with primary settings.

Usability

In terms of usability, accessing settings involves clicking on the three dots located next to the profile icon. This action triggers a right-sided sidebar to slide in, revealing a range of sub-settings. Each sub-setting is represented by an icon-text combination that explains its function. When users hover over a sub-setting, it becomes highlighted. The interface allows for navigating even deeper into sub-sub-settings, accompanied by a top indicator showing the user's current location and an arrow for returning to the previous level with sub-settings. For editing sub-sub-settings, users must click on the setting of interest, which can be checked or unchecked, or a small modal can appear, offering further customization options such as selecting from a list of possible actions.

Conclusion

The settings interface provides a seamless and intuitive user experience by utilizing a right-sliding modal accessed through a three-dot menu next to the profile icon. This approach allows users to explore primary settings and go into nested sub-settings, some of which may contain sub-sub-settings for deeper customization. The clear representation of sub-settings with icon-text combinations and interactive highlighting enhances usability. Additionally, a top indicator aids in user navigation, while the ability to edit sub-sub-settings is straightforward, either through a click-to-toggle or via a small modal for more specific customization, offering a robust and user-friendly settings management system.

Fifth web application: Jira

Settings

Menu is thoughtfully divided into two distinct categories: admin settings and app settings, each of which opens in separate windows for user convenience. Within these primary settings, users can access sub-settings that may contain nested sub-sub settings, offering a high degree of configurability and customization.

Usability

The application's usability shines through its well-organized settings structure, neatly divided into two distinct groups. The primary settings, found in the first group, are seamlessly accessible through a left sidebar featuring easily decipherable icon-text labels. Selecting a setting opens its content on the right side, sometimes revealing nested sub-settings. Changes can be effortlessly made by checking boxes, selecting from lists, or utilizing a convenient search input at the page's top. An indicator at the page's top keeps users informed of their current location. The second group of settings is dedicated to user management (Figure 11), presenting users in an orderly table format. Clicking on a specific user drill down to more detailed options, including the ability to change roles, assign users to different projects or applications, and check user activity, all conveniently accessible through intuitive dropdown menus.
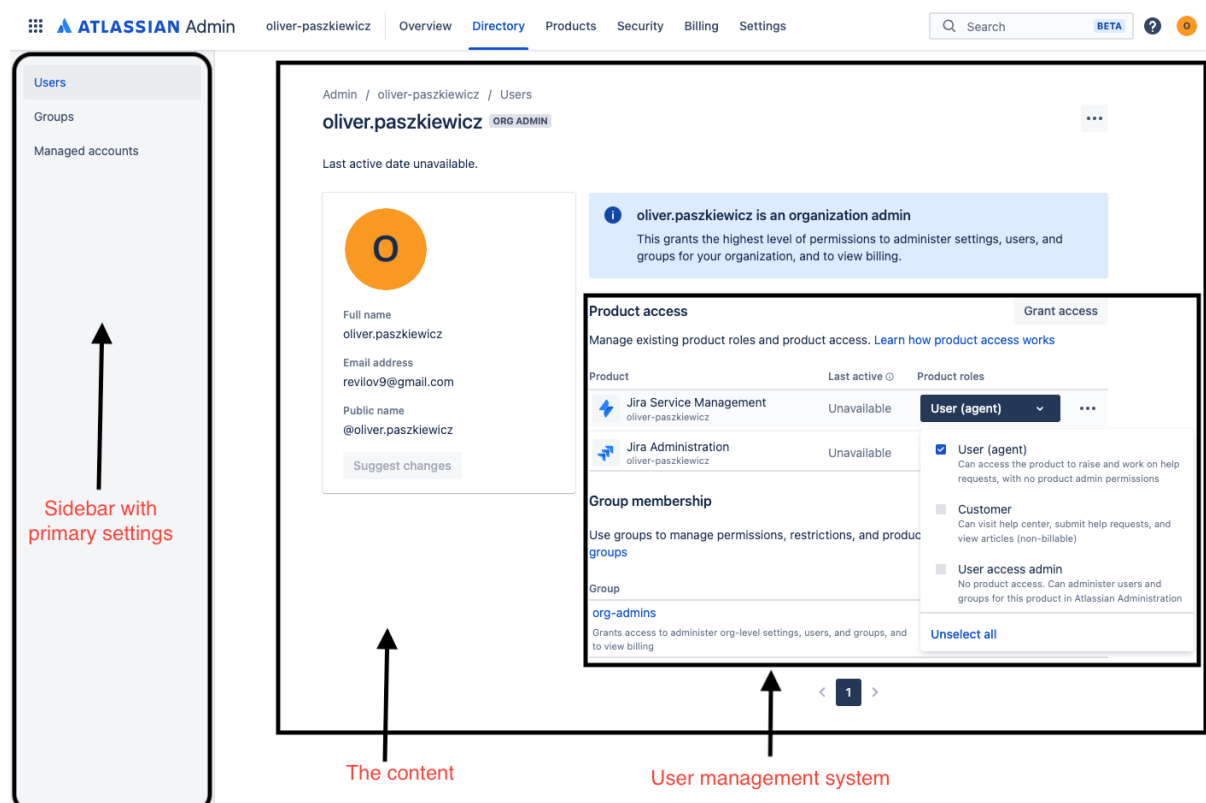
Figure 11. Sidebar, the content, and user management system.

Conclusion

This application's user interface design excels in user-friendliness and efficiency. Its thoughtful menu categorization into admin and app settings, with separate windows for each, allows users to seamlessly navigate and configure their preferences. The nested sub-settings and sub-sub settings provide a high degree of customization. The left sidebar's clear icon-text labels, combined with the intuitive right-side content display, complemented by a helpful location indicator. Furthermore, the user management section, presented in a structured table format, offers control over user roles, project assignments, and activity tracking, all accessible through user-friendly dropdown menus. Overall, the application's usability and organization enhance the user experience, making it a user-friendly and efficient tool.

Market conclusion and key takeaways

Each of these applications excels in different aspects of user interface design to offer user-friendly and efficient settings management experiences. They prioritize clarity through clear labeling, icons, and intuitive layouts. The organization of permissions, team management capabilities, and the use of modals enhance usability. However, there are varying levels of customization and navigation clarity across these apps, reflecting their unique approaches to balancing simplicity and functionality.

Monday:

- Clear labeling, icons, and highlighted tabs enhance user confidence and reduce errors.
- Permissions organized into roles and groups with descriptive labels streamline complex systems.
- The ability to create and manage teams fosters efficient organization and collaboration.
- The use of modals for sub-settings improves workflow and task focus.

Asana:

- An intuitive design with accessible primary settings and user-friendly interaction flow.
- Dynamic presentation of sub-settings on the right side enhances user convenience.
- Clear labeling, highlighting, and modals streamline the settings management process.

Basecamp:

- Primary settings are on a single page, while editable sub-settings are on a separate page.
- Focus on specific user needs like group creation and team management.
- Lack of clear navigation indicators between pages and limited in-depth customization.

Trello:

- Right-sliding modals with clear representation of sub-settings enhance usability.
- Users can explore nested sub-settings for deeper customization.
- A top indicator aids in user navigation, simplifying sub-sub-settings editing.

Jira:

- Thoughtful menu categorization, nested sub-settings, and clear labels enhance user-friendliness.
- Extensive customization options for a high degree of configuration.
- Structured table format and user-friendly dropdown menus for granular user control.

Content inventor

How: I'll begin by categorizing the settings within the target application, documenting their names, descriptions, options, default values, dependencies, and user interface elements. This will allow me to conduct a comparative analysis with Cape's, evaluating the user experience, and identifying any innovative features.

Why: By studying how other app's structure and design their settings, I gain insights into user-centered design and innovations. It also provides a competitive edge by benchmarking against other applications and pinpointing areas for improvement.

Results:

1. **General:**
   a. **Profile:**
      i. **Login details (Account name, Account URL, Data residency, Documentation)**
   b. **Account:**
      i. **First day of the week, Timeline weekends, Export account data**
   c. **Work schedule**

   What does this primary setting do:

   In the primary setting (General), you have the capability to review and modify the login credentials, adjust the starting day of the week to either Monday or Saturday, and configure work schedule.

   Interface:

   In the left sidebar, there are the primary settings, and selecting it highlights the option while displaying its content on the right side. Within the content, at the top, there's a navigation bar featuring three sub-settings: Profile, Account, and Work Schedule, each indicated with an underline when selected. The Profile section comprises input fields with clear labels and a save button at the bottom for making changes. In the Account section, there are radio buttons and a save button for configuration. Lastly, the Work Schedule section includes a table with days of the week and an option to add a schedule, offering comprehensive control over these key aspects in a well-organized layout.

2. **Customization:**
   a. **Branding**
   b. **Features**
   c. **Boards**
   d. **User profile**
   e. **User notifications**

What does this primary setting do:

Within the primary settings, you have the flexibility to personalize the branding, including main menu logo and e-mail header picture. Additionally, you can toggle features on or off, establish default boards, arrange their sorting, tailor the fields that invited users must complete, and manage user notifications. This comprehensive range of customization options empowers the user to shape and optimize the platform according to the specific needs and preferences efficiently.

Interface:

In the left sidebar, selecting the settings option results in it being highlighted, and its content becomes visible on the right side. At the top of this content, a navigation bar offers choices such as Branding, Features, Boards, User Profile, and User Notifications, with each selection being underlined when clicked, revealing specific content below. In the Branding section, there are buttons for changing the logo and header. The Features section allows the user to enable or disable various features via radio buttons. Boards offer draggable elements that can be stacked to create hierarchies. The User Profile section features draggable elements containing input text fields. Lastly, User Notifications present a large dropdown menu containing numerous notification settings that can be checked or unchecked, affording comprehensive control over preferences and configurations within the settings interface.

3. **Users**
   a. **Users**
   b. **Department**
   c. **Board ownership**
   d. **Automations ownership**

What does this primary setting do?

Within the primary settings, the user has access to a comprehensive user management system. It is possible to review existing users, including their names, emails, roles, products, status, teams, join dates, and invite origins, as well as their last activity. Additionally, there's an option to invite new users and conduct name-based searches. Furthermore, there's a sub-sub setting called "Manage Teams" that allows users to examine existing teams. The "Departments" feature, organizational capabilities. "Board Ownership" lets the user to identify by using colors and modify the board's current owner, while "Automations Ownership" facilitates the assignment of automation ownership to a new user. This extensive suite of user and ownership management tools ensures robust control and oversight within the settings interface.

Interface:

In the left sidebar, the "Primary Settings" option is highlighted upon selection, and its content is displayed on the right side. At the top of this content, a navigation bar offers choices including Users, Departments, Board Ownership, and Automations Ownership, with each selection providing specific content below. In the "Users" section, there's a search bar and a table featuring labels alongside a dropdown menu offering user role options. Additionally, there are buttons, with three grouped options for tasks such as accessing billing information, managing teams, and downloading CSV files. A separate button allows for sending new invites. In both the "Board Ownership" and "Automations Ownership" sections, dropdowns are available for selecting new owners, and a button enables the saving of these changes, facilitating efficient management of ownership and user roles within the settings interface.

4. **Security**
    a. **Login**
    b. **Audit**
    c. **Compliance**
    d. **Advanced**

What does this primary setting do?

Within the primary settings, you have the option to review and configure login security and authentication settings. This includes the ability to enable two-factor authentication for enhanced security. Additionally, you can access support services for assistance. However, please note that the Audit, Compliance, and Advanced sub-settings are not accessible with the free plan, suggesting that they may offer additional features or functionalities that are available only with certain subscription levels or upgrades. This configuration enables users to manage their security preferences effectively while providing further options for advanced features based on their subscription tier.

Interface:

Located in the left sidebar, the "Primary Settings" option becomes highlighted upon selection, revealing its content on the right side. At the top of this content, a navigation bar displays sub-settings, each underlined upon selection. The first sub-setting, "Login," presents numerous options that can be configured using radio buttons, checkboxes, and standard buttons. However, in the second sub-setting, "Audit," as well as the subsequent "Compliance" and "Advanced" sections, no features are available due to the limitations of the free plan. This layout allows users to customize their login preferences comprehensively while signaling that certain advanced functionalities are reserved for premium plans.

5. **API**
What does this primary setting do?

This primary setting allows the user to fill in the personal API token.

Interface:

The primary setting is inside the sidebar that is located on the left side of the webpage. Once selected, it gets highlighted, and then the content appears on the right side of it. There is one input field and a label that is not quite self-explanatory.

6. **Billing**
   a. **Overview**
   b. **Settings**
   c. **Invoices**
   d. **Payment method**
   e. **Billing contacts**

What does the primary setting do?
Within the primary settings, users gain access to a comprehensive range of billing-related options. This includes an overview of the billing plan, insights into settings limited by the free plan, access to invoices and payment methods, all presented in a consistent and straightforward manner. Toward the end, there is a "Billing Contacts" sub-setting that permits users to add and manage billing contacts, streamlining the management of billing and payment-related aspects for a seamless user experience.

Interface:
Within the sidebar, the "Primary Settings" option, when selected, becomes highlighted, revealing its content on the right side. At the top of this content, a navigation bar displays five sub-settings, each underlined upon selection. The first sub-setting is "Overview," which provides an illustrative overview accompanied by visuals, labels, and interactive buttons. However, the remaining sub-settings are inaccessible due to limitations imposed by the free plan, except for "Billing Contacts." In the "Billing Contacts" section, users can add new billing contacts using a dedicated button, and this section also features text input fields and a dropdown button for further customization, making it a useful component for managing billing-related contacts within the settings interface.

7. **Usage stats**
   a. **Storage**
   b. **Automations**
   c. **Integrations**
   d. **Advanced**

What does the primary setting do?

Within the primary settings, users can access valuable insights into board usage through a range of metrics. These include basic statistics on storage utilization, automations, and integrations. Additionally, users can delve into advanced usage statistics on a per-user basis, providing a comprehensive view of how resources are allocated and utilized across the board. This feature-rich information empowers users to effectively manage and optimize their board's performance and resources.

Interface:

In the left sidebar, the "Primary Settings" option, when selected, highlights and displays its content on the right side. At the top of this content, a navigation bar presents sub-settings: Basic, Storage, Automations, Integrations, and Advanced, with each becoming underlined when clicked. Within the "Basic" sub-setting, there are visual representations summarizing basic statistics. Moving on to "Storage," there is a table providing detailed information and visual displays illustrating the storage usage. The "Automations" and "Integrations" sub-settings both feature green progress bars to visually depict the respective storage usage. Finally, in the "Advanced" section, users can access a table that presents advanced usage statistics, offering a comprehensive overview of board performance and resource allocation in a well-organized manner.

8. **Tidy Up**
    What does this primary setting do?
    The user can check existing and archived boards as well as delete or archive them.

    Interface:
    Located within the left sidebar, the "Primary Settings" option, upon selection, becomes highlighted, unveiling its content on the right side. At the top of this content, a navigation bar presents two sub-settings: "Boards" and "Archived Boards," each underlined when selected. Within the "Boards" sub-setting, users can access a table containing comprehensive information about existing boards, while the "Archived Boards" sub-setting offers another table displaying details about archived boards. This structured layout simplifies board management by providing users with an organized view of their active and archived boards within the settings interface.

9. **Content directory**
    Unavailable with the free plan

10. **Apps**
    What does this primary setting do?
    Within the primary settings, users gain the ability to review the installed apps within the board, offering insights into the current app ecosystem. Additionally, users can access information about pending app installations, providing a comprehensive view of app management within the board. This feature enables efficient oversight and control over the apps integrated into the board, ensuring a well-organized and optimized digital environment.

Interface:

Situated within the left sidebar of the website, the "Primary Settings" option, upon selection, becomes highlighted, unveiling its content on the right side. At the top of this content, a navigation bar offers two distinct sub-settings: "Installed Apps" and "Pending Installs," both marked with underlines when selected. In the "Installed Apps" section, users find a button that conveniently redirects them to the app store, facilitating the exploration and management of installed applications. Similarly, the "Pending Installs" content presents a comparable button for app store access. An additional button, labeled "Explore Marketplace," offers the same functionality, streamlining the process of discovering and accessing apps within this well-organized settings interface.

11. **Permissions**
Unavailable with the free plan

12. **Cross account copier**
What does the primary settings do?

Inside of this primary setting, the user can copy boards and dashboards to another account.

Interface:

Within the left sidebar of the website, you'll find the "Primary Settings" option, which, upon selection, becomes highlighted, revealing its content on the right side. The content offers users a practical search bar for locating specific folders and text input fields for specifying the source and destination accounts for moving items. This layout facilitates efficient organization and management of digital assets, streamlining the process of locating and transferring items within the settings interface.

Conclusion

Analysis and categorization of settings within the target application provide valuable insights for decision-making during application development. This analysis helped evaluate user experience and identify innovative features for the new Cape's interface for settings management. This process is essential for user-centered design, enhancing usability, and gaining a competitive edge. The results of the settings analysis showcase a well-organized and user-friendly interface across various categories, such as general settings, customization, user management, security, API, billing, usage statistics, tidy up, apps, and cross-account copier. Despite some features being limited by the free plan, the overall settings interface is thoughtfully designed, providing a comprehensive and user-friendly experience for efficient management and optimization of the application.

Best, good, and bad practices & Literature study

Question**:** What are the optimal practices for designing settings within a digital interface?

Research methods**:** Best, good, bad practices, Literature study

Why**:** To identify best and bad strategies described by other designers.

How**:** By doing a literature study of selected articles. Using google search engine for relevant articles written by people with knowledge in that area. This will have to be validated.

First article: Designing a setting page

Author: Kelsey Campbell-Bones

Occupation: Senior product designer

Date of the upload: 12.01.2022

Setting up settings

1. **Be selective.**
   When designing user-customizable settings, it can be challenging to determine what to include and what to omit. This dilemma can result in an overwhelming array of options and toggles, causing users to feel lost and abandon the process without making any changes. Ideally, user settings should be configured once and rarely revisited, such as preferences for email notifications, as opposed to layout choices like viewing a specific page as a list or table, which should be kept within the context of the affected page. Utilizing the Android settings flow chart can serve as a valuable tool to guide decisions on what elements to incorporate and what to exclude from your settings interface.

2. **Group related settings.**
   As you design your settings page, you may observe that certain settings share similarities in their functions. For instance, you might have one setting for in-app notifications and another for email notifications. It's advisable to group these settings together within a dedicated "Notifications" section. This organizational approach eliminates the need for users to search for specific notification-related settings, enhancing overall accessibility. Furthermore, grouping related items can facilitate users in discovering other relevant settings they might not have been aware of previously, thereby improving their overall user experience.

3. **Priorities categories.**
   Once you've organized your settings into groups, the next step is to arrange and prioritize them on the screen. Place settings that you anticipate users will change frequently near the top for easy access. Conversely, position settings with potentially significant consequences, often referred to as "destructive" settings, toward the bottom to minimize the risk of accidental changes. Additionally, you can employ visual cues such as color or icons to

highlight and distinguish destructive settings, providing users with a clear indication of their potential impact.

4. **Avoid technical terms.**
When creating a guide for your settings, aim to steer clear of technical jargon. While it might come naturally if you're immersed in technical language daily or work in a highly technical field, it's best to lean towards simplicity. This approach significantly aids new and less experienced users in navigating your system without encountering frustration or confusion.

5. **Provide a description.**
It's not advisable to rely solely on a single sentence or a single word to explain the outcome of changing a setting, especially for more technical settings. Whenever possible, include a descriptive explanation for the setting, outlining the specific changes or consequences that will occur if it's modified.

6. **Include a search.**
When dealing with an extensive array of settings or help guides, considering the inclusion of search functionality can be a valuable decision. This feature accelerates users' ability to locate their desired settings promptly, reducing the time spent on the task and enabling them to seamlessly access your primary features. Additionally, search proves to be an indispensable tool for power users, as it allows them to swiftly uncover buried information or settings that might otherwise be challenging to locate within the interface.

7. **Show a confirmation.**
When a user modifies a setting, it's essential to provide feedback indicating that the change has been successfully implemented. If users need to save their adjustments manually, consider employing a toast notification as a visual confirmation that their actions were successful. Alternatively, if changes are saved automatically, you can use color cues to signify the alteration, such as switching the background color of a toggle from green to red or grey, providing users with a clear visual indication of the change.

Settings considerations
1. **Cater to power user.**

Among your user base, there may be individuals who possess a higher level of technical expertise or a more profound understanding of your platform, often referred to as "power users." These users typically seek greater customization options to tailor the platform to their specific needs. For certain settings, you can implement a dual approach: offering a basic setting that's intuitive and accessible to all users, while also providing more advanced functionality for those power users who desire greater control. This approach is commonly observed in appearance customization, where users can choose from pre-designed themes as the basic option or input their own color hex codes for advanced customization. By catering to these diverse user types, you empower them to fine-tune their experience and derive satisfaction from achieving a precisely tailored environment.

2. **Admin settings**
   Certain settings may need to be restricted to specific users and should not be accessible to everyone. A prime illustration of this is integration settings for products that enable connections with other applications. Typically, such settings are limited to certain user types, namely administrators, as altering them can lead to unintended repercussions or potential cost increases at the end of the billing cycle. These are often referred to as admin user settings.

3. **Test the settings.**
   During the process of designing a settings page or introducing new settings, consider presenting them to your users or customer support team to gather feedback and make necessary refinements. It's possible that customers may request additional settings or enhanced functionality once they interact with your initial version. This iterative approach ensures that your settings are not only functional but also user-friendly, catering to the needs and preferences of a broader audience.

Conclusion

The design of user-customizable settings demands careful consideration and thoughtful implementation. Key takeaways encompass the need to be selective about which settings to include, grouping related settings to enhance accessibility, prioritizing settings based on user behavior and potential consequences, ensuring clarity by avoiding technical language, offering descriptive explanations, and integrating search functionality for efficient navigation. Furthermore, providing visual feedback to confirm changes is paramount. It is crucial to cater to power users who may seek advanced customization options and to restrict specific settings, like admin settings, to designated user types. Lastly, continuous testing and gathering user feedback play an indispensable role in refining settings to meet the diverse needs and preferences of the user base.

Second article: How to Improve App Settings UX

Author: Mayank Sharma

Occupation: Specializes in creating user-centered designs and translating complex systems into beautiful web and mobile experiences.

Date of the upload: Unknown

App settings enable users to manage various aspects of their app experience, including push notifications, time zones, and login information. Despite being a fundamental feature, both users and designers frequently overlook the interface panels that govern these settings. Users tend to disregard these options, and designers often delay their consideration until the later stages of app development.

While users may not have a compelling reason to delve into app settings, designers have a strong motivation to prioritize them. Well-crafted settings can reduce customer support expenses and enhance user engagement by providing the flexibility for users to customize their app according to their preferences. The objective is to streamline the process of users managing their preferences, but designing settings that align seamlessly with user needs presents a considerable challenge. Even seemingly straightforward tasks, such as updating email addresses, require meticulous planning.

Group Categories.

When applications boast an array of settings, locating specific ones can pose a challenge for users. The remedy lies in organizing these settings into distinct categories. For example, Shopify offers an extensive list of settings, but they have structured them into easily navigable categories.

Establish Visual Hierarchy.

Achieving success with settings panels hinges on establishing a clear visual hierarchy. Prioritize frequently used settings by bringing them to the forefront. In cases where there is an abundance of options, consider dividing them into subpages within categories to alleviate cognitive overload.

Avoid names with jargon.

The use of jargon prompts users to seek additional context beyond the settings panels. It's advisable to describe settings using straightforward language that clearly communicates their functionality. Avoid employing technical or clever terms that may satisfy product and marketing teams but ultimately bewilder users.

Provide Clear Descriptions.

Settings should be accompanied by descriptions that elucidate their consequences or effects. It's essential to offer a clear and concise definition of what each setting accomplishes, striking a balance so that users do not overlook vital information due to excessive detail. Always employ everyday language and include the option for users to revert to default settings if needed.

Give status indicators and feedback on saved states.

In numerous applications, settings are updated automatically; nevertheless, users still require feedback to validate their modifications. If users are required to click a "Save" button, ensure that it is prominently displayed. Forcing users to scroll may lead to settings not being saved.

Use appropriate UI controls.

Radio buttons and checkboxes serve as common UI controls within settings panels, but they serve distinct purposes: Radio buttons necessitate users to make a single selection from a provided list of options. Checkboxes enable users to make multiple selections or none from the available options. When actions do not necessitate review or confirmation, it is appropriate to utilize toggle switches and contemplate the inclusion of "On/Off" labels for added clarity. Radio buttons, checkboxes, and toggle switches are all prevalent UI elements found in app settings panels.

Provide basic and Advanced Settings

An effective approach to managing apps with an abundance of settings is to offer a two-tiered input system. Basic settings are automatically displayed in settings panels, catering to the requirements of typical users, while advanced settings cater to those seeking finer, more detailed control.

Start with information architecture and user flow.

Commence the settings design process by focusing on information architecture. Employ card sorting exercises to gain insight into how users naturally group settings, subsequently establishing a clear hierarchy among the emerged categories. Develop user flows for each setting, create labels that resonate with users' expectations, and aim to limit the number of top-level categories to four or five for optimal organization.

Conclusion

Crafting effective app settings is a nuanced process that requires careful consideration and user-centric design. Users often overlook settings, so it's vital to present them with clear, plain language descriptions and maintain a well-organized visual hierarchy. Grouping settings into categories and offering both basic and advanced options can enhance user experience. Starting with thoughtful information architecture, including card sorting exercises and user flow design, ensures that settings align with users' expectations. Ultimately, well-designed settings panel not only empowers users to customize their experience but also reduces support costs and boosts user engagement.

Main conclusion and key takeaways

Crafting user-customizable settings necessitates meticulous planning and user-centric execution. Key takeaways include the importance of selective inclusion, organized grouping for accessibility, prioritization based on user behavior and clarity through plain language, descriptive explanations, and search functionality. Providing visual feedback for change confirmation is crucial. It also includes a balance of basic and advanced customization options and restricted settings for specific user types. Continuous testing and user feedback are vital for refining settings to meet evolving user preferences. Ultimately, well-designed settings panels empower users, reduce support costs, and enhance engagement, solidifying their significance within any successful app.

Takeaways:

- Choose settings judiciously, including those that align with user needs and preferences while avoiding clutter.
- Organize related settings into categories for easier navigation and accessibility.
- Prioritize settings based on user behavior and potential consequences and maintain clarity by using plain language and descriptive explanations.
- Incorporate search functionality for efficient settings discovery and navigation.
- Provide visual feedback to confirm changes, ensuring users are aware if the adjustments they make.
- Cater to both average and power users, offering basic and advanced customization options, and restrict certain settings to designated user types.
- Continuously test and gather user feedback to refine settings and meet the evolving needs and preferences of the user base.

Question: What are the strategies for creating intuitive information architecture in interfaces?

Research methods: Best, good, bad practices, Literature study

Why: To identify best and bad strategies described by other designers.

How: By doing a literature study of selected articles. Using google search engine for relevant articles written by people with knowledge in that area. This will have to be validated.

First article: Information Architecture Design: A Step-By-Step Guide

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Occupation: Product designer & editor-in-chief of UX Planet

Date of the upload: 07.11.2022

Information architecture is a discipline that focuses on organizing information within digital products clearly and logically. It helps users answer the question, "Where can I find the information I'm looking for"?

Step 1: Understand user goals.

In product design, understanding the preferences and behaviors of your target audience is essential. People have different ways of looking for the information, and their needs may vary. Therefore, it's crucial to comprehend users' objectives when they interact with your product.

"Who will be using a product?"

"What are they going to do?"

"What do they want to achieve?"

Step 2: Define business objectives.

Once you've pinpointed user objectives, the next step is to align the information architecture with the company's overarching business goals. Consider organizing a brainstorming session involving stakeholders to establish well-defined business objectives, encompassing both primary and secondary goals.

Step 3: Conduct competitor analysis.

Once you've established both user and business goals, the next step involves conducting a competitive analysis. Your information architecture design should align with your users' expectations regarding your product. Analyzing similar products in the market will provide insights into your

customers' expectations. Take a closer look at your competitors' strategies and perform a SWOT analysis, aiming to pinpoint the strengths and weaknesses in their content organization. This analysis will facilitate the identification of potential opportunities for you to explore.

Step 4. Define content.

Following that, it's essential to clarify your content. Information architects should possess a comprehensive grasp of the product's available content. If you are in the process of redesigning an existing product, it's advisable to commence with a content inventory.

Step 5. Categorize and prioritize content.

Subsequently, you must categorize and establish content priorities. It's crucial to determine the content that should be featured on the website. Arrange content into categories and cluster similar items to form coherent segments. Utilize web analytics tools such as Google Analytics and techniques like card sorting and contextual inquiries to gain insights into structuring the content effectively.

Step 6. Create a sitemap.

Building upon the content groups identified in the preceding step, you can generate a sitemap, which serves as a depiction of the available content within your website or application. This sitemap includes both parent and child pages, offering a clear view of the content hierarchy and the overall structure of the website or app, illustrating the connections and pathways between different elements.

Step 7: Label content

Labels play a crucial role in guiding users on your website. These labels can take the form of page names, menu category names, or section titles. They serve as signposts, conveying to users the content or destination associated with a particular choice. For instance, when users encounter a category labelled 'Macbooks,' they anticipate that clicking on it will lead them to a page featuring MacBooks.

Step 8: Design navigation system & user flows

Following that, you should sketch out the navigation framework and user pathways. This navigation system aids in comprehending how users will move from point A to point B, revealing the interconnectedness of content within your product and illustrating how users will transition from one page to another. Components of the navigation system encompass menus, breadcrumbs, and internal links. Your objective in this phase is to define all the conceivable routes users can follow to access a specific page.

Step 9: Prototype user flow

The goal of creating a prototype is to define a visual hierarchy of content on individual pages and see how different pages work together. Visual hierarchy defines the order in which users will explore the content on individual pages. You need to ensure that the visual hierarchy you have helps users achieve their goals and, at the same time, increase your conversion rate.

Step 10: Validate your design.

The crucial part of validating the design is during the usability testing. It involves creating a series of tasks, inviting individuals who mirror your target audience, and observing them as they navigate within your design while attempting to complete these tasks. For instance, if you're designing an eCommerce website, one of the tasks could be "Locate a laptop that appeals to you and make a purchase."

Conclusion

Successful product design relies on a thorough understanding of user preferences and behaviors with the strategic alignment of overarching business goals. Begin by identifying user and business objectives, conducting a comprehensive competitive analysis, clarifying content, and crafting a meticulous information architecture to create a user-friendly and effective product. Emphasizing the significance of well-crafted labels and a thoughtfully designed navigation framework is essential, as they seamlessly guide users through the content. Ultimately, developing a prototype and conducting rigorous usability testing play a pivotal role in ensuring that the design addresses user needs.

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Date of the upload: Unknown

What Is Information Architecture, and Why Is It Important?

Information architecture, much like a blueprint, serves as a visual depiction of a product's infrastructure, features, and hierarchy. The level of detail included in IA, which can encompass navigation, application functions, behaviors, content, and workflows, is at the discretion of the designer. While there are no strict constraints on the size or format of IA, it should encapsulate the fundamental structure of the product in a way that makes it comprehensible to anyone. Just as a blueprint offers a comprehensive overview of a building, IA provides designers, product development teams, and engineers with a high-level understanding of the entire product. Having a single document that presents a clear and accessible representation of how an application or website functions is crucial for developing new features, updating existing ones, and exploring possibilities within the current product framework. With IA at hand, making critical decisions regarding new features and implementations, gauging timelines for product modifications, and tracking user behavior across various processes becomes notably more manageable.

How to Design Information Architecture

In the realm of UX design, crafting an information architecture (IA) closely mirrors the process of creating flowcharts: you incorporate shapes and connect them with lines within a single document. The primary challenge in constructing IA lies in grasping the user's perspective regarding how your app or website functions and then translating that understanding into a coherent and comprehensible format. Constructing IA hinges on two key aspects: establishing a visual hierarchy, which means organizing features, functions, and behaviors in a structured manner, and developing a legend that clarifies the representation of various features, interactions, and workflows. While conventional flowcharts adhere to specific shape conventions (e.g., rectangles for processes, diamonds for decision points, etc.), adhering to these conventions is not obligatory. In essence, the pivotal factors in creating effective IA are the hierarchical placement of individual architectural elements and the clarity and labelling of these elements within the structure.

Understanding and Showing Visual Hierarchy

The most significant challenge in creating a new information architecture involves establishing a hierarchical structure. There is a common misconception that IA must strictly adhere to a "top-down" approach that can be more complex. When building IA from scratch, especially if your website or application doesn't conform to standard templates, it's akin to asking a mechanic to construct a car from the roof down instead of assembling it piece by piece. Each component requires prior planning, dedicated research, design time, and development efforts, mirroring the intricate nature of IA itself. Illustrating a visual hierarchy within IA holds a great value, not only by providing readers with

improved context but also by simplifying the representation of critical sections within the product. For example, if your app's primary feature revolves around ride booking, like Uber or Lyft, and this function is accessible from the homepage, then page naturally becomes the focal point with the most touchpoints and significance. This principle applies throughout the visual hierarchy.

Hierarchy of Shapes, Colors, and other Visual Elements

Beyond its hierarchical organization, the architecture presented above excels in another crucial aspect: it effectively communicates each interaction point using a clear and straightforward legend, complemented by concise key phrases. This legend not only denotes the page and content type but also distinguishes variations using different shapes and colors. This distinction holds significant value because, although Duke's website may appear deceptively simple, the IA only extends three levels deep. It's essential to note that each yellow rectangle signifies an application, with the processes within these boxes omitted from this document. Even with these omissions, the structure provides a comprehensive understanding of how to navigate the website based solely on the IA. This clarity persists until we encounter an application within the website, at which point it becomes unnecessary. The IA diagram below pertains to a game, employing just four shapes, a monochromatic scheme, and strategically placed text snippets. This approach ensures that every major interaction is easily comprehensible without the need for prototypes and, most importantly, can be understood by anyone involved in its development.

Conclusion

Information architecture (IA) functions as a visual blueprint representing a product's structure and features. The level of detail in IA, covering navigation, application functions, content, and workflows, is at the designer's discretion. While IA has no strict size or format constraints, it must convey the product's core structure for universal understanding. Just as a blueprint provides an overview of a building, IA offers a high-level grasp for designers, development teams, and engineers, crucial for informed decision-making and product development. Crafting IA mirrors the process of creating flowcharts, emphasizing visual hierarchy and clarity. Overcoming the challenge of hierarchical construction in IA is essential, especially when starting from scratch. A well-structured IA simplifies navigation and user comprehension. Ultimately, effective IA streamlines development, decision-making, and user-centered design in the realm of UX.

Main conclusion with key takeaways

Successful product design hinges on a deep understanding of user preferences and behaviors aligned with overarching business goals. This process involves identifying user and business objectives, conducting comprehensive competitive analyses, clarifying content, and meticulously crafting information architecture. It's crucial to underscore the importance of well-crafted labels and intuitive navigation frameworks for guiding users seamlessly through content. Furthermore, the development of prototypes and rigorous usability testing is pivotal to ensure the design effectively addresses user needs.

Key Takeaways:

- Understand user preferences and align them with business goals for successful product design.
- Identify user and business objectives, conduct competitive analyses, and clarify content to inform the design process.
- Prioritize well-crafted labels and intuitive navigation to enhance user experiences.
- Utilize prototypes and rigorous usability testing to validate and improve the design.
- Information architecture serves as a visual blueprint for product structure and should emphasize visual hierarchy and clarity.
- Effective IA simplifies navigation and enhances user comprehension.
- IA is a crucial tool for streamlining development, decision-making, and user-centered design in the realm of UX.

User flow

Analysis

Application: Monday

When navigating the main page, also known as the Dashboard, there isn't a direct icon for accessing settings. Instead, the user needs to click on their profile picture located in the top right corner. This action opens a modal with various redirecting links, including the option to access settings. This approach enhances user-friendliness by combining icons with text labels. Upon selecting the settings link, a new page emerges, presenting primary settings on the left sidebar and their corresponding content on the right side. The primary settings are thoroughly explained, accompanied by icon-text labels and a distinctive background color upon selection, creating a user-friendly experience. Navigating through different settings and sub-settings is effortless, thanks to a consistent design and layout maintained across each section. Each sub-setting is comprehensively described and enriched with visuals and text, contributing to a smooth user interaction.
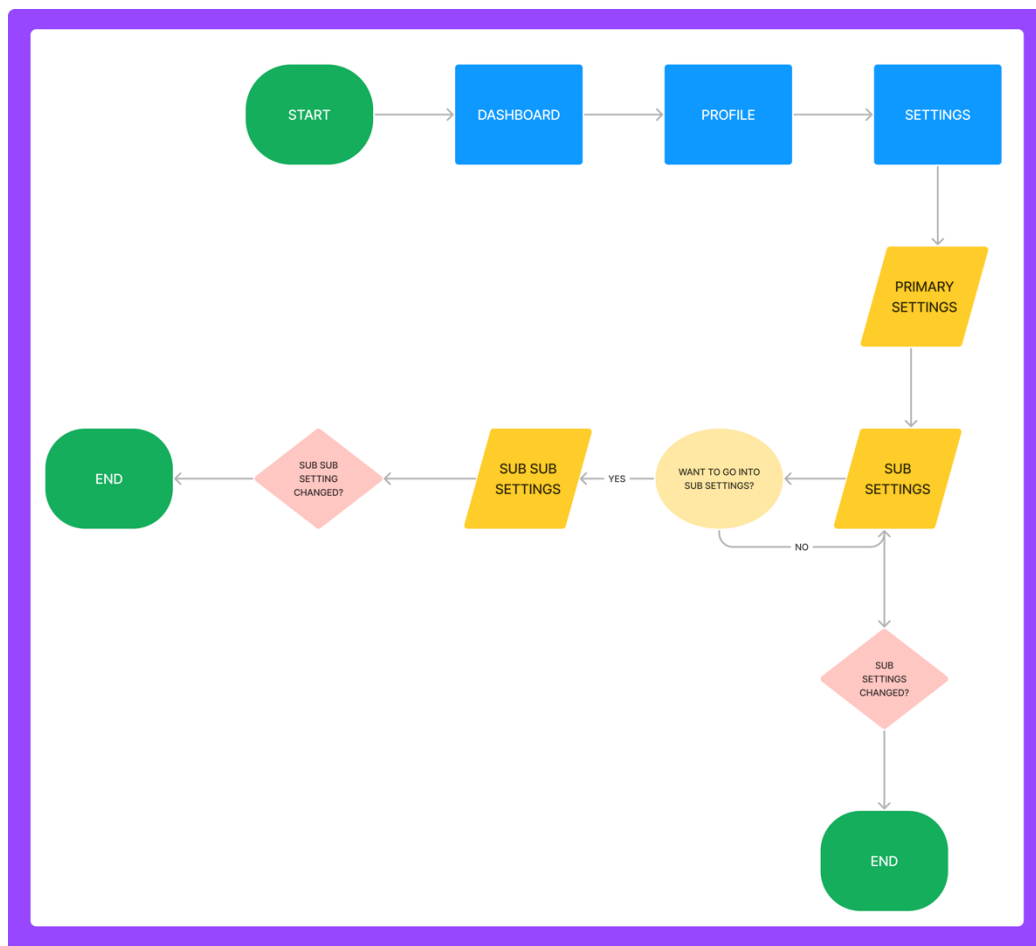

Figure 12. User flow of navigating to and through settings of Monday app.

Application: Cape (before the assignment)

On the primary interface, known as the Dashboard, a distinct button seamlessly guides users to the settings menu, offering a comprehensive array of options for customization. The focus centers on resource configuration, and with a simple click on "resources", an assortment of sub-settings unveils itself. Further exploration leads to the "setup" option, where the JSON data stands ready for modification, enabling users to implement and apply changes.
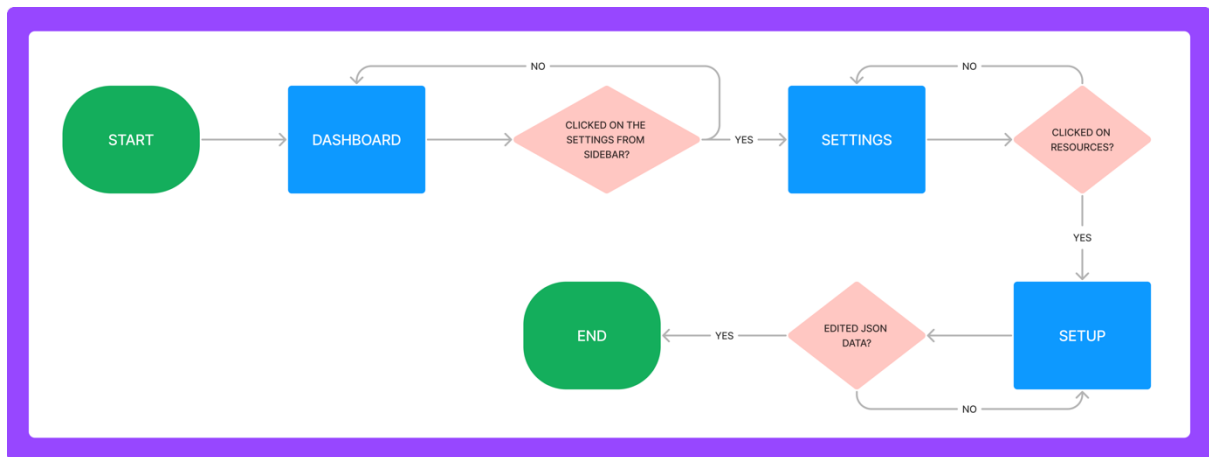

Figure 13. User flow of navigating to settings of Cape.

New user flow for the interface

This user journey was designed with the goal of removing a language from the setup. In the updated flow, users are presented with a visual preview of all editable settings. In this specific instance, the user chooses languages from the modules & features list. Upon selection, a modal open displaying all available languages for the user to choose from. Once chosen, the selections can be saved, and the settings will be updated accordingly.
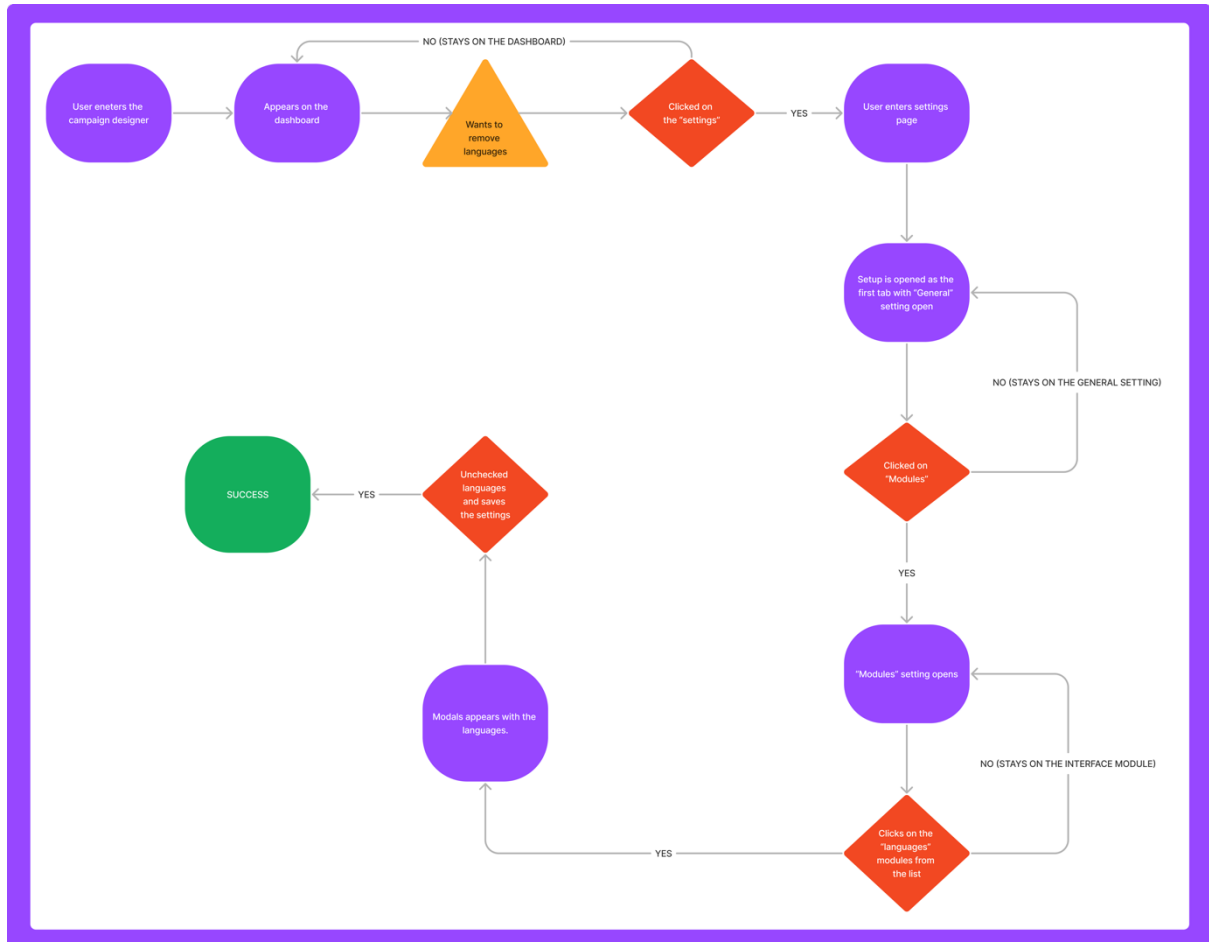

Figure 14. New user flow of navigating to settings and changing languages.

MoSCow Analysis

The analysis outlines a prioritized framework for the project. Essential must-have elements encompass a user-friendly interface with buttons, switches, checkboxes, and dropdowns, devoid of complex animations. It includes a preview option for settings, creation of user roles, consistent colors, saving settings, detailed descriptions, connecting to social media, and adding brands, departments, and markets. A sidebar streamlines navigation. Should-have features extend usability with options like switching interfaces, searching, and filtering sub-settings, editing sub-settings, describing user rights, and color-coded social media connection states. Could-have features offer further customization, allowing users to edit social media publishing configurations. The will-not-have category clarifies exclusions, such as an onboarding option, ensuring focused development on prioritized features. (Figure 15)

Must have	Should have	Could have	Will not have
• Interface should have buttons, switch elements, checkboxes, dropdown list. • User interface without complex animations • Option for preview of the already selected settings. • Option for creating new user roles. • Consistent colours throughout the pages. • Option for saving settings. • Descriptions of settings and its sub-settings. • Option for connecting to social media platforms. • Option for adding brands, departments and markets. • Sidebar that contains main settings.	• Option for switching back to the previous interface. • Option for searching and filtering sub-settings of modules & features. • Option for editing sub-settings. • Description of user rights. • Option for filtering and searching user roles. • Colour coded states for the state of the connection with the social media platform. • Option for deleting brands, departments and markets.	• Option for editing social media publishing configuration.	• Onboarding option that explains step by step what can be done inside of the settings.

Figure 16. Representation of the MoSCow table.

Initial sketches

After completing the MoSCoW analysis, I began sketching to bring my ideas to life (Figure 17). I first focused on the sidebar layout, central for main settings and navigation. Then, I visualized general settings, capturing essential customer details. Moving forward, I designed the modules and features page, emphasizing a user-friendly modal for sub-setting edits. The final sketches included creating new roles and checking social media connections, aiming to ensure simplicity and functionality in managing roles and editing app features. These visualizations aimed to align with the project's prioritized features identified in the analysis.
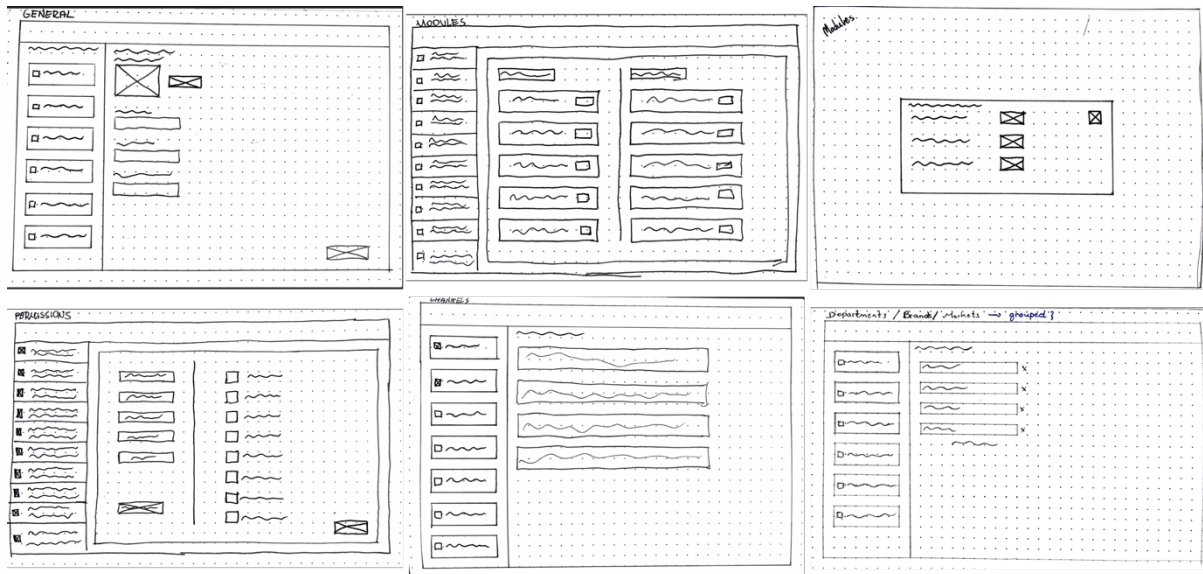

Figure 17. Initial sketches

Conclusion

The meticulous analysis of settings management across various applications provides valuable insights for informed decision-making in application development. The study underscores the significance of well-organized and user-friendly interfaces, striking a balance between simplicity and functionality. The comparative analysis, coupled with insights from Cape, aids in evaluating user experiences and identifying innovative features for a competitive edge. Crafting user-customizable settings demands careful planning, user-centric execution, and continuous refinement through testing and user feedback. Key takeaways include the importance of selective inclusion, organized grouping of settings, prioritization based on user behavior, clarity through plain language, and visual feedback. Successful product design hinges on understanding user preferences and aligning them with business goals, involving comprehensive competitive analyses, content clarification, information architecture crafting, and rigorous usability testing. The content inventor within the analyzed applications exemplifies effective design choices, such as combining icons with text labels, presenting primary settings in a consistent layout, and providing detailed descriptions and visuals for sub-settings. The MoSCoW analysis establishes a prioritized framework for essential, should-have, could-have, and will-not-have features, guiding focused development. The sketching process further translates these priorities into visualizations, emphasizing a user-friendly sidebar, essential customer details, modal interactions for sub-setting edits, and simplicity in managing roles and platform integration. Ultimately, well-designed settings panels empower users, reduce support costs, and enhance engagement, contributing significantly to the success of any application in the market.