Prototype & Test

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Wireframe

First iteration

Link to the wireframe

Feedback:

General Page:

- Button color can be removed. Because it is not working

Brands Page:

- Descriptions of each setting would improve the user experience because not everyone knows what they do and mean.
- Brands market and departments are optional settings, would be nice to switch them off and on.

Modules & Channels Page:

- List is preferable than grid layout because of the readability advantage.
- Search and filter would be nice to have whenever the list gets too long.

Permissions Page:

- **“**Permissions**”** is not descriptive enough.
- It contains both user roles and use rights when it could be combined into one element.

Second iteration

Link to the wireframe

Feedback:

General Page**:**

- The headline should be more descriptive containing a subline and explanation.
- The element containing inputs should have smaller width because it occupies too much space.

Business**:**

- The headline should be more descriptive containing a subline and explanation.

Modules**:**

- The headline should be more descriptive containing a subline and explanation.
- Everything is aligned to the left side that’s why the search input should be placed like that as well.

Users**:**

- If the right side is editable the left one should be editable as well

User roles**:**

- Rights should contain description.

Languages:

- Explanation of what this setting does.

Campaigns**:**

- Adding an extra explanation to modals.

Publish:

- It is not clear what is happening inside of these settings.
- Would be nice to have an extra explanation.
- Adding connect button instead of a switch to toggle it off and on.

Third iteration

Link to the wireframe

Feedback

Modules:

- Grouping modules would give a visual hierarchy.

Forth iteration

Link to the wireframe

Feedback

Modules:

- Options that contain sub options should be editable.
- Description is needed per module. It would give a better understanding.

Channels:

- Management and Publishing should be combined.
- Only connected platforms should appear inside of the publishing.

Fifth iteration

Link to the wireframe

This was the final iteration of the high-fidelity wireframe before creating the prototype.

Conclusion

In the course of the wireframing process, several iterations were undertaken to enhance the user interface and functionality. The initial wireframe highlighted areas of improvement, such as non-functional button colors and the need for better descriptions in various settings.
The second iteration addressed concerns on the General Page, Business, Modules, and Users sections, emphasizing the importance of descriptive headlines and streamlined alignment for improved visual appeal and user experience. Specific suggestions were made for various settings, including adding descriptions for user roles and explanations for language settings.
The third iteration introduced the concept of grouping modules to establish a visual hierarchy, contributing to a more organized and intuitive layout. This demonstrated a commitment to refining the wireframe based on user feedback.
The fourth iteration focused on making options with sub-options editable and including module descriptions for a clearer understanding. Additionally, recommendations were made to combine management and publishing in the Channels section, streamlining the user interface further.
In the fifth and final iteration before prototype creation, the wireframe incorporated the accumulated feedback, ensuring a high-fidelity representation of the refined design. The iterative process showcased a commitment to user-centric improvements, resulting in a wireframe that lays a solid foundation for the subsequent prototype development.

Usability testing
Analysis of the first test

First participant**:** Martijn
Occupation**:** Project manager & product owner

Task 1. Add a new brand, department, and market.
- Explanation for brands markets and departments.
- It would be nice to have a toggle that switches off and on brands, departments, and markets. Sometimes I won't need all three of them, it is usually one or two.

Task 2. Create a new user role.
- It would be nice to have Explanation of what the user roles do.
- Navigation is unclear, in the sidebar, we have the Users Permissions and once you click it, you see the "Users roles" heading.
- It would be nice to have a description of what are we doing inside of this page. What is its purpose?

Task 3. Switch off the multi-channel feature.
- I don't know if "Modules" is the right word to explain this settings part.
- It seems like there should be many more modules but there is only one that contains features.

Task 4. Select the available setup screen fields.
- Make it visual, explain what it does - even though there is an explanation it still doesn't ring a bell.
- Description + button explain more.

Task 5, 6 Select the available tags and categories.
- Makes sense. Nothing to add.

Task 7. Change the calendar options.
- "Show details" as a button doesn't explain its purpose. Once you click it, you a modal pop up with options that can be edited. It would be better to have a button saying, "Edit details"?

Task 8. Connect to the Facebook platform.
- Why isn't Channel management and publishing on the same page. It looks like you do two different things, but it is the same one.
- Publishing feels like a separate feature but shouldn't.
- Only Facebook is connected but I still can see other platforms.
- Order is different (Channel setting).
- If you press connect, you see the pop up with the publishing information.
- Modal with info.

Conclusion

The addition of a new brand, department, and market was successfully implemented. The introduction of a toggle for brands, departments, and markets provides flexibility, allowing users to customize their view based on specific needs. The creation of a new user role was accomplished, but feedback highlighted the need for clearer navigation. A more intuitive path within the sidebar and a descriptive explanation of the purpose of the "Users Roles" page would improve user understanding. The terminology used for "Modules" in the settings may require reconsideration for better clarity. Users expected more modules, but only one was found, containing various features. A revision of the terminology might enhance user expectations. While an explanation is provided, users expressed a desire for a more visual representation of the selected fields and a clearer description of the button's purpose. Adding more contextual information could improve user comprehension. Feedback suggested that the "Show Details" button may be misleading. Renaming it to "Edit Details" could provide a more accurate representation of its functionality, as it leads to a modal popup with editable options. User feedback indicated a discrepancy in the user flow. Combining Channel Management and Publishing on the same page might create a more cohesive experience. Additionally, the order of information and the visibility of other platforms should be reviewed for consistency.

Analysis of the second test

Second participant: Michel
Occupation: Project manager

Task 1. Add a new brand, department, and market.

- All clear.

Task 2. Create a new user role.

- It would be nice to bring roles and permissions closer to each other.

Task 3. Switch off the multi-channel feature.

- Maybe remove the “Module” category and leave only features as one pager.

Task 4. Select the available setup screen fields.

Task 5, 6 Select the available tags and categories.

Task 7. Change the calendar options.

- What options has been already made? Like a preview of them, maybe inside of the table. The calendar option containing the “company path” is not descriptive.

Task 8. Connect to the Facebook platform.

- Not sure why management and publishing are separated.
- Would be nice to have indicators for the connection state.
  - Green = connected
  - Red = Not connected
  - Orange = disconnected
- One page would be better instead of dividing them into two separate sub-tabs.

Conclusion

I found that the addition of a new brand, department, and market in Task 1 was executed seamlessly, with no reported issues. Task 2, involving the creation of a new user role, elicited feedback indicating a preference for a closer integration of roles and permissions. Task 3 suggested streamlining the user interface by potentially removing the "Module" category and consolidating features onto a single page. Tasks 4, 5, and 6, related to selecting setup screen fields, tags, and categories, were generally well-received, though the user expressed interest in a more informative preview of available options, particularly within the calendar options in Task 7. Concerns were raised about the descriptive clarity of the "company path" in the calendar options. Task 8, involving connecting to the Facebook platform, prompted recommendations for merging management and publishing into a single page for improved cohesion. Users also suggested incorporating connection state indicators (e.g., green for connected, red for not connected, orange for disconnected) for enhanced visibility. Overall, addressing these insights would likely contribute to a more integrated and user-friendly platform experience.

Analysis of the post-testing survey

Participant: Anonymous
Occupation: Unknown

1. On a scale from 1 to 5, how would you rate your overall experience with the self-service settings and configuration testing session?
    a. 4

2. Did you encounter any issues with the Sidebar visibility? If yes, please describe the problem and how you attempted to resolve it.
    a. Yes, at first it was not visible, but I clicked the icon on the left and it appeared.

3. Brand, Department, and Market Addition (Task1):
    a. it was easy to follow the steps, but maybe the name Business is not very intuitive for when you want to add markets, users or departments

4. User Role Creation (Task 2):
    a. Easy to follow.

5. Multi-channel Feature (Task 3):
    a. This was easy; the switch makes it easy to turn the features of campaigns on/off.

6. Setup Screen Fields Selection (Task 4):
    a. Took a bit more time to find the setup screen fields, with so many options there and the writing not so big but in the end I did it.

7. Tags Selection (Task 5):
    a. The same small thing as before, took a few seconds to locate the tags.

8. Categories Selection (Task 6):
    a. Yes, the options were clear I could easily select all, instead of clicking them one by one.

9. **Calendar Options Change (Task 7):**
    a. This was a bit confusing, as I did not think of calendar to adjust how to view the live campaigns; but other than that, the options were clear and straight forward.

10. **Facebook Platform Connection (Task 8):**
    a. The publish sub-setting was a bit difficult to find but once I found it was easy.

Conclusion

The feedback from the self-service settings and configuration testing session, participant generally rated their overall experience at a commendable 4 on a scale from 1 to 5. Some initial challenges were reported with Sidebar visibility, promptly resolved by clicking the left icon. Task 1, involving the addition of Brand, Department, and Market, was deemed easy to follow, though there was a suggestion to reconsider the term "Business" for its intuitive understanding. Task 2, focused on User Role Creation, was straightforward and user-friendly. Task 3, addressing the Multi-channel Feature, was perceived as easy, thanks to a convenient switch for toggling campaign features. Task 4, involving Setup Screen Fields Selection, presented a minor challenge in finding options due to their abundance and font size. Tasks 5 and 6 (Tags and Categories Selection) were generally smooth, with minor delays in locating options. Task 7, related to Calendar Options Change, raised initial confusion but was otherwise clear and straightforward once understood. Finally, Task 8, concerning the Facebook Platform Connection, posed some difficulty in finding the "publish" sub-setting but was ultimately manageable. Overall, these insights provide valuable user perspectives and highlight areas for potential improvement in clarity and terminology for a more seamless user experience.

Main conclusion of Usability Testing

The analysis of the testing sessions reveals a generally successful implementation of the addition of a new brand, department, and market, demonstrating seamless execution and a user-friendly approach. The introduction of a toggle for customization in Task 1 is acknowledged for providing flexibility. However, feedback suggests areas of improvement, particularly in Task 2, where the creation of a new user role highlighted the need for clearer navigation and a more intuitive presentation of roles and permissions. In Task 3, participants recommended streamlining the user interface by reconsidering the terminology used for "Modules." The overall sentiment across Tasks 4 to 8 indicates well-received functionalities, with minor challenges noted in locating options and a desire for more visual representations. User suggestions for merging Channel Management and Publishing, adding connection state indicators, and refining terminology collectively highlight opportunities for enhancing the platform's cohesion and user-friendliness. Participants generally rated their experience positively at a commendable level of 4, with some initial challenges, particularly related to Sidebar visibility, promptly addressed. These insights collectively offer valuable perspectives for refining the platform's clarity and terminology, contributing to an improved and more user-centric experience.

Next steps

Navigation and Terminology: Evaluate and redesign the user navigation, especially in tasks related to user roles and permissions. Provide descriptive explanations and consider refining terminology to improve user understanding.

Visual Enhancements: Incorporate more visual representations in tasks where users expressed a desire for clearer visuals, such as the selection of setup screen fields. Visual cues can enhance user comprehension and streamline the user interface.

Cohesive User Flow: Explore opportunities to merge related functionalities, such as Channel Management and Publishing, into a single, cohesive page. Ensure consistent information ordering and visibility across different platform settings.

Connection State Indicators: Implement color-coded indicators for connection states, providing users with a quick and easily understandable visual representation of the status of their connections.

Prototype

Link to the prototype with commented elements.
Link to the prototype without commented elements.

What changed after the usability testing?

Feedback from the target audience got applied per page of the prototype.

1. General Page (Figure 1)
    a. Sidebar settings are located on the left side of the page.
    b. Every sidebar setting is consisted of an icon, title, and subtitle for additional description.
    c. Current location of the user is highlighted.
    d. Selected option appears in a header as a title together with the subtitle.
    e. Decreased the width of general's content.
    f. Button for saving the overall tool's state.
    g. Fallback to JSON interface

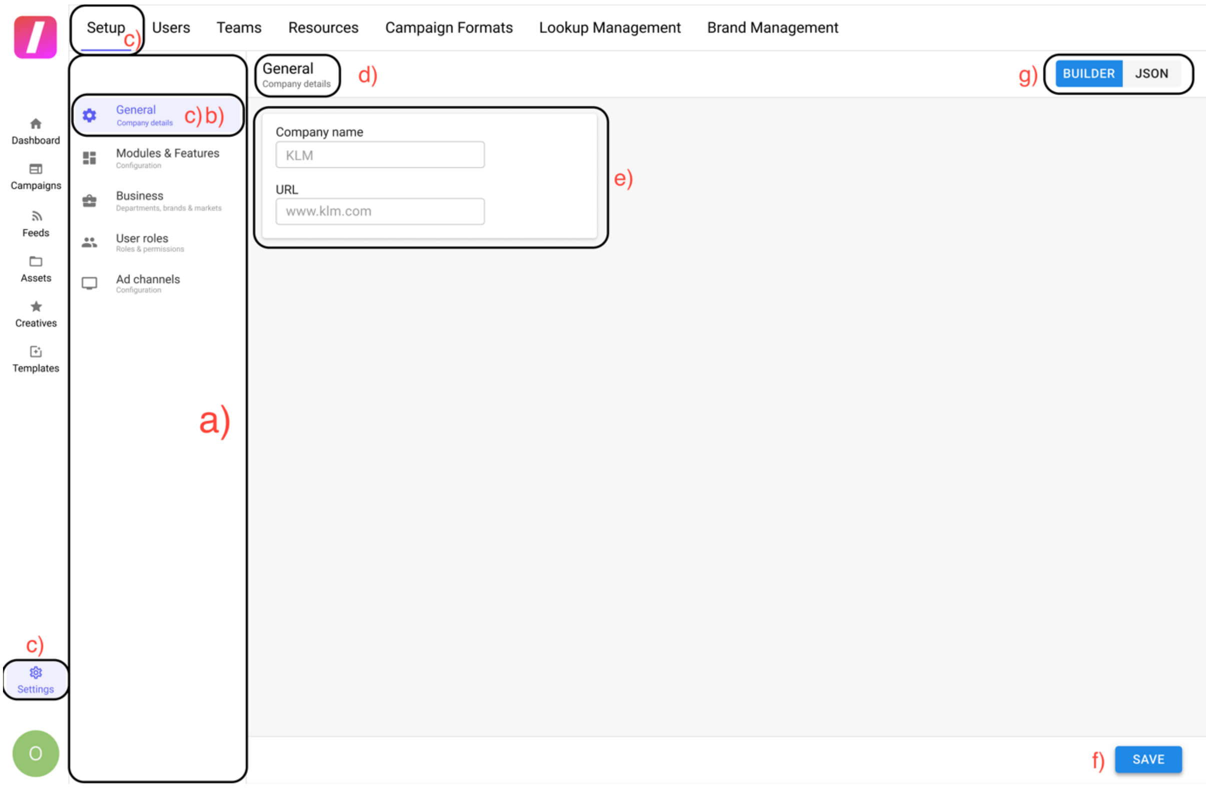

Figure 1. General page divided into elements that has changed.

2. Modules and Features Page (Figure 2):
    a. Additional description of what is happening in the current selection.
    b. Elements for filtering and searching modules.
    c. License based features, these have no nested options and contain a switch element for toggling them on and off.
    d. These are the settings that contain nested sub settings which are editable. This is why, you can see the preview of selected options. Because these options are always there and that's why it is written "Always on".
    e. Name of the feature.
    f. Description of the feature, what does it do within the tool.
    g. Preview of selected options, if any.
    h. If the feature is License based add a toggle element. If not add "Always On".
    i. If the option is editable add "Edit". If not leave "None"

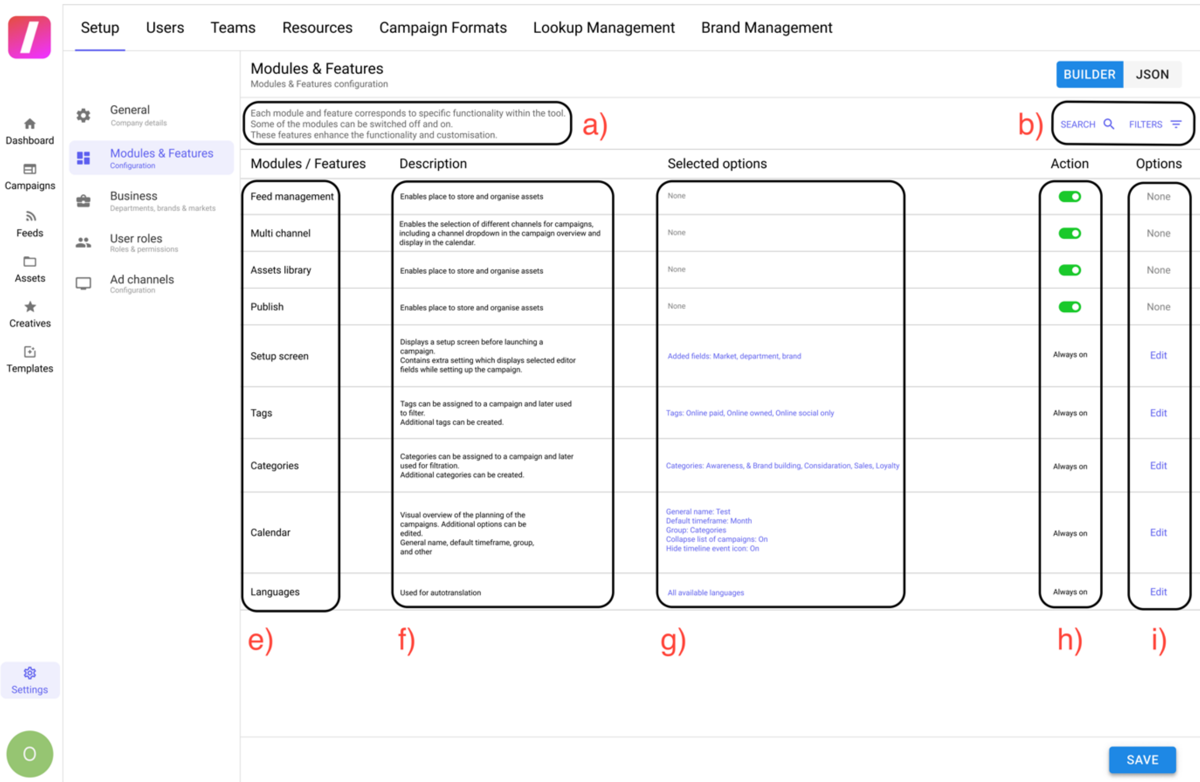

Figure 2. Modules & Features updated.

3. Modals that open when you click on edit, this belongs to the Modules & Features page. (Figure 3)
    a. Header of the modal is consisted of a title, description, and a closing button.
    b. If there is a lot of options, it is possible to select or deselect all of them by clicking on the buttons.
    c. Button for adding a new tag.
    d. Button for saving the tag.

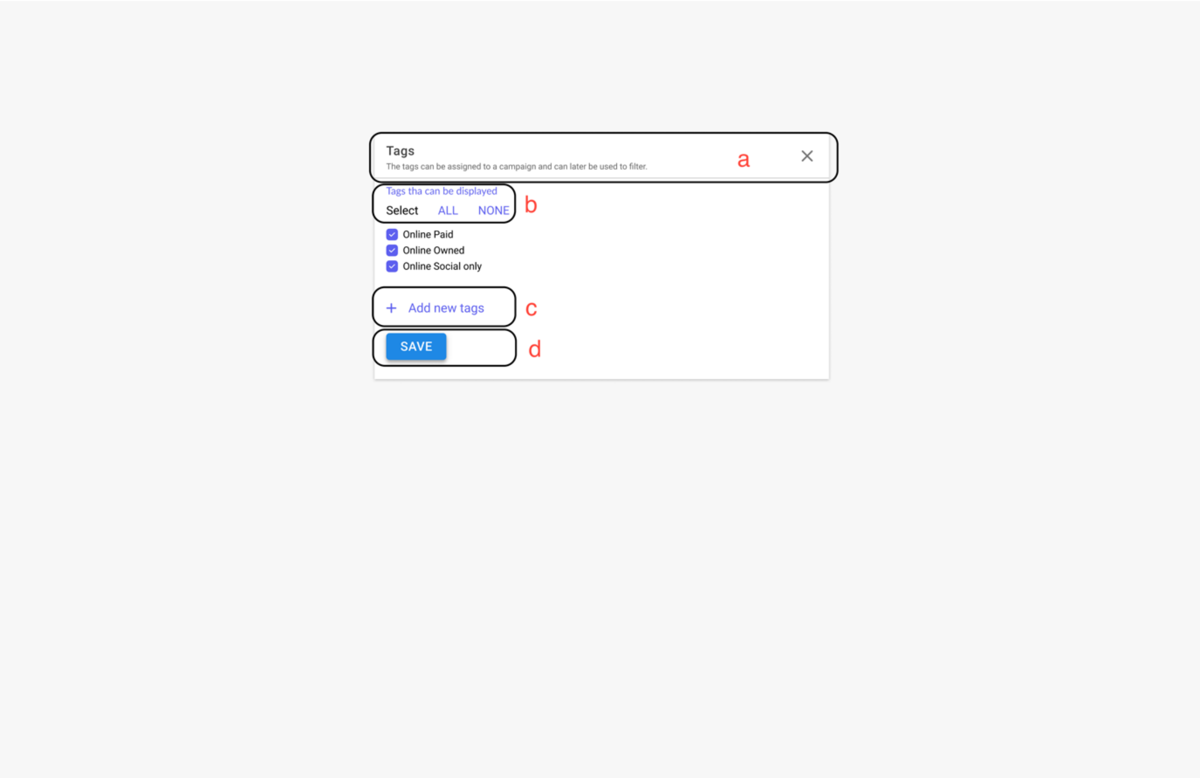

Figure 3. Modal that opens when "edit" is clicked.

4. Business (Figure 4)
    a. Element consisted of a Title, description, switch element for toggling it off and on.
    b. Button for adding a new option. Once pressed, it opens a modal with the content of that setting.
    c. Additional labels for clarity
    d. Elements containing Markets, Departments and Brands.

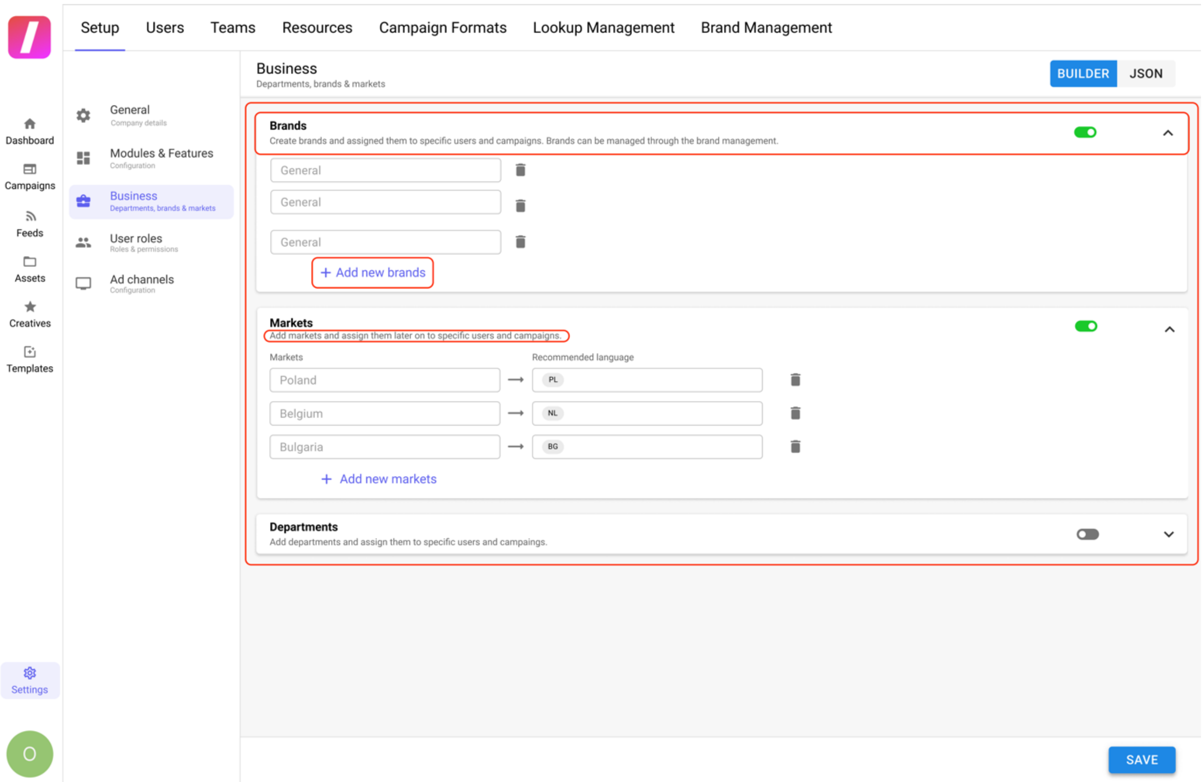

Figure 4. Business page

5. User roles (Figure 5)
    a. User permissions got changed to User roles
    b. Once the role is selected, it gets highlighted and the rights that are assign to it are displayed on the right side.
    c. Predefined user roles.
    d. Authority level so Market Manager won't create a super admin role.
    e. Elements for searching and filtering user rights.
    f. Button for adding a new role.
    g. Rights that are assigned to the currently selected role. Those rights are grouped together having one blue title.
    h. Description for the user rights.
    i. User role's content. Got closer together.

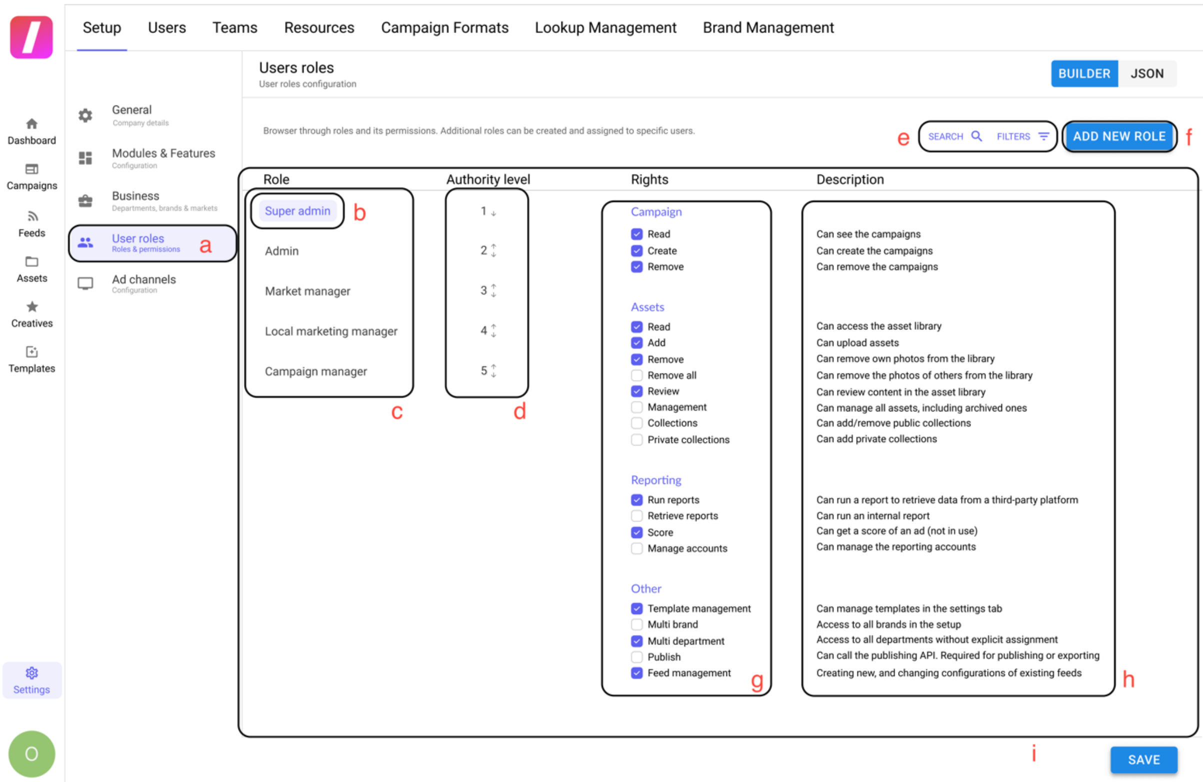

Figure 5. User roles.

6. Modal for user creation (Figure 6).
    a. Modal that opens once you click on the add user. Description input field got deleted because the target audience responded that isn't necessary.

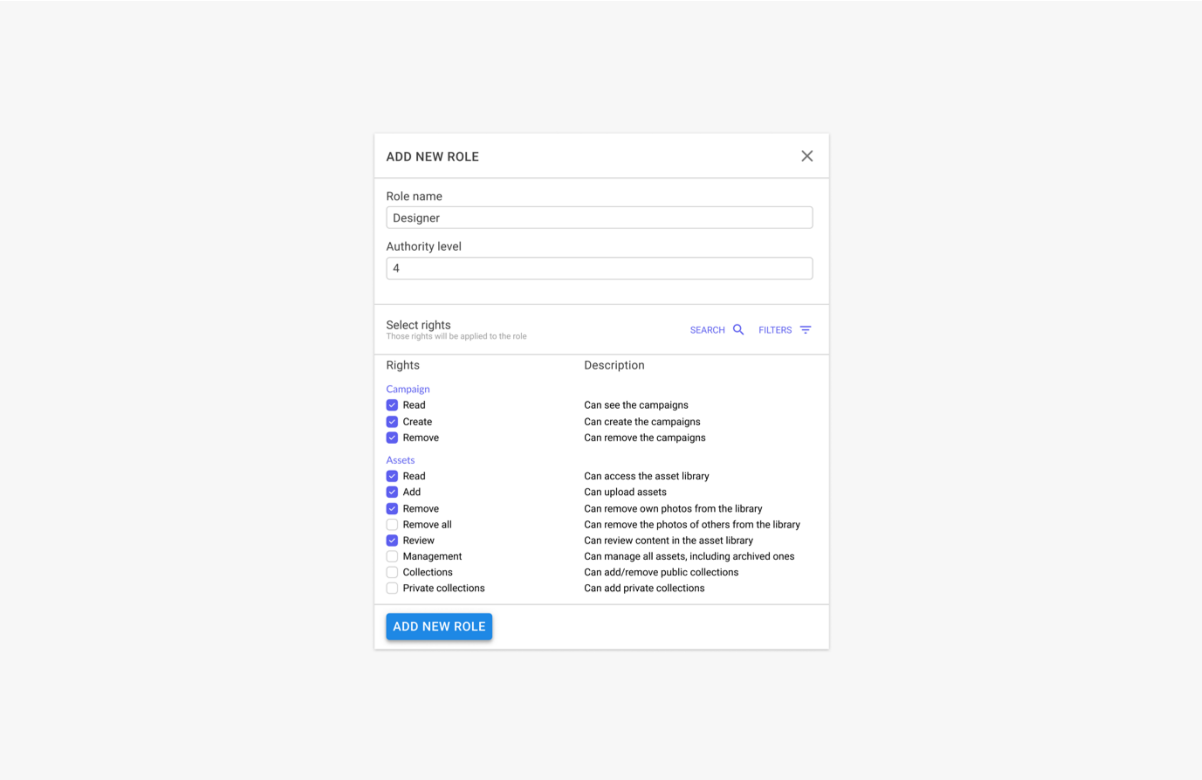

Figure 6. User creation

7. Ad channels (Figure 7).
    a. Possible social media platforms that you can connect with.
    b. Additional description.
    c. Preview of connected account.
    d. Color coded state.
    e. Actions that can be executed. Connect and disconnect.
    f. Once a social media platform got connected, highlight the Edit button.

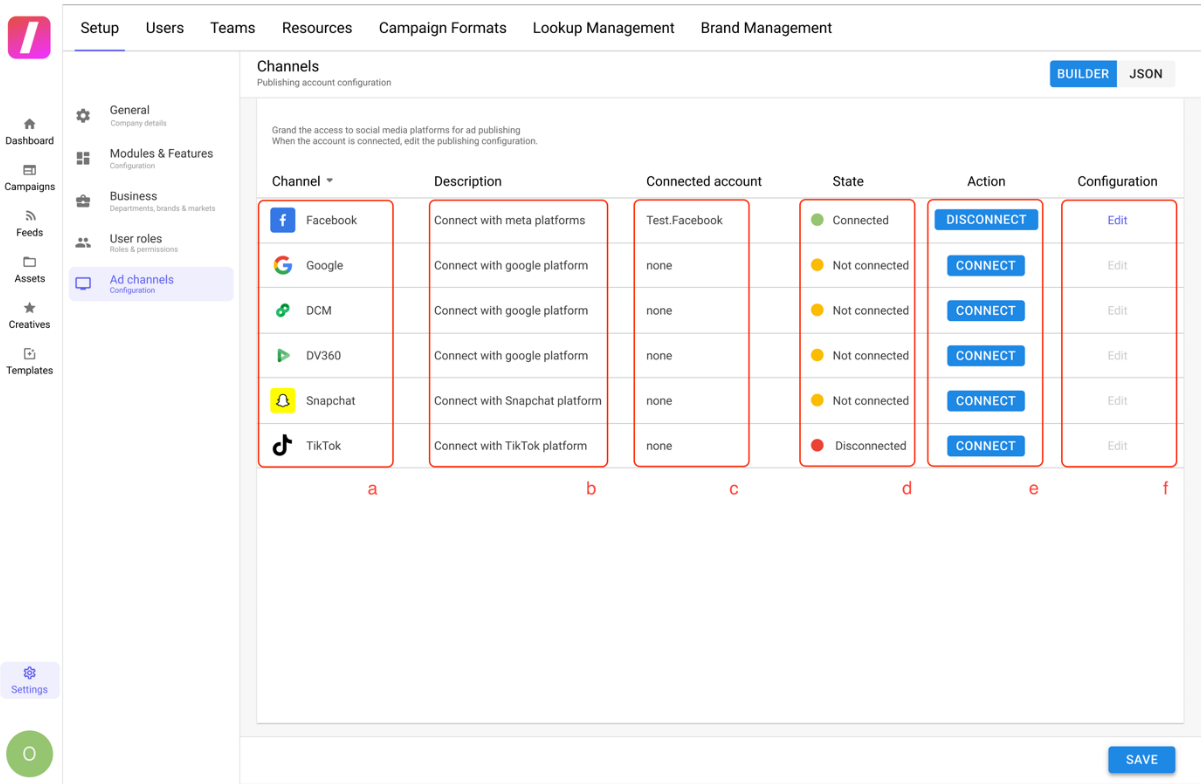

Figure 7. Add channels page.

8. Modal with the publishing configuration (Figure 8).
    a. Once the edit button was clicked, You can see the preview of the publish account configuration.

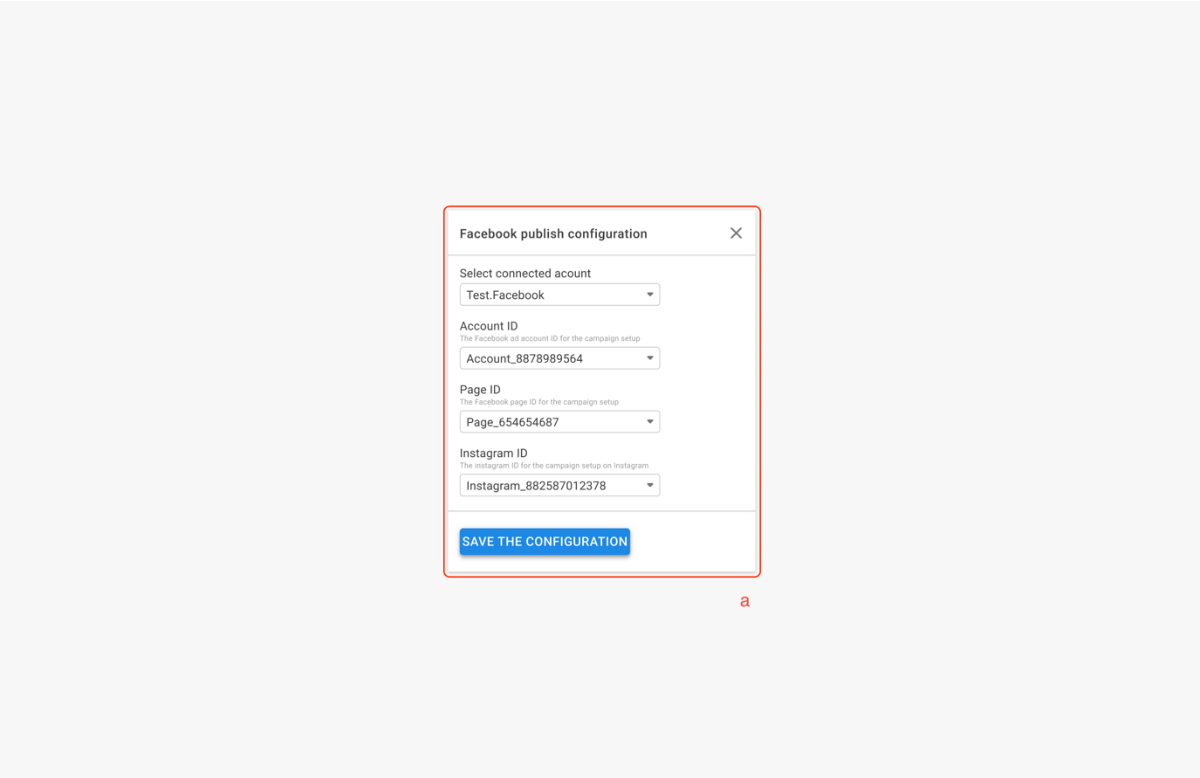

Figure 8. Modal with the publishing configuration.

Conclusion

The prototype underwent significant enhancements following user feedback across multiple pages. In the General Page, the sidebar settings were relocated to the left, accompanied by icons, titles, and subtitles for clarity. User location is now highlighted, and selected options are presented in a header format. The width of the general content was reduced, and a save button for the tool's state was added. A fallback to the JSON interface was implemented. On the Modules and Features Page, improvements include additional descriptions, filtering options, and license-based features with toggles. Nested settings now display a preview, and editable options feature an "Edit" button. Modal interfaces for Modules & Features were refined, introducing options for selecting/deselecting all, adding new tags, and displaying additional labels for clarity. User permissions were renamed to User roles, featuring predefined roles and an authority level to prevent role misuse. The Social Media Connection Page includes color-coded states and actions for connected platforms, with the Edit button highlighted post-connection. Lastly, the Modal for Publishing Configuration now showcases a preview upon clicking the Edit button. These updates collectively aim to improve user experience, streamline functionality, and address specific user concerns.