

Item Selection

Ryan Donegan • Fall 2017

All stores in the DMV - EM

Created by Emma Maher

Updated 3/14/2016

New England Stores - RD

Created by Ryan Donegan

Updated 3/14/2016

2017 top tier customers

Created by Ryan Donegan

Updated 3/14/2017

Northern virginia openings

Created by Ryan Donegan

Updated 3/14/2016

2016 top performing stores

Created by Ryan Donegan

Updated 3/14/2016

The Project

The Project

Challenge

APT users sometimes need to select from thousands of items

Task

Reduce the time spent selecting items in APT

Metrics

In 80% of cases, surface the desired item in the first 5 recommended items

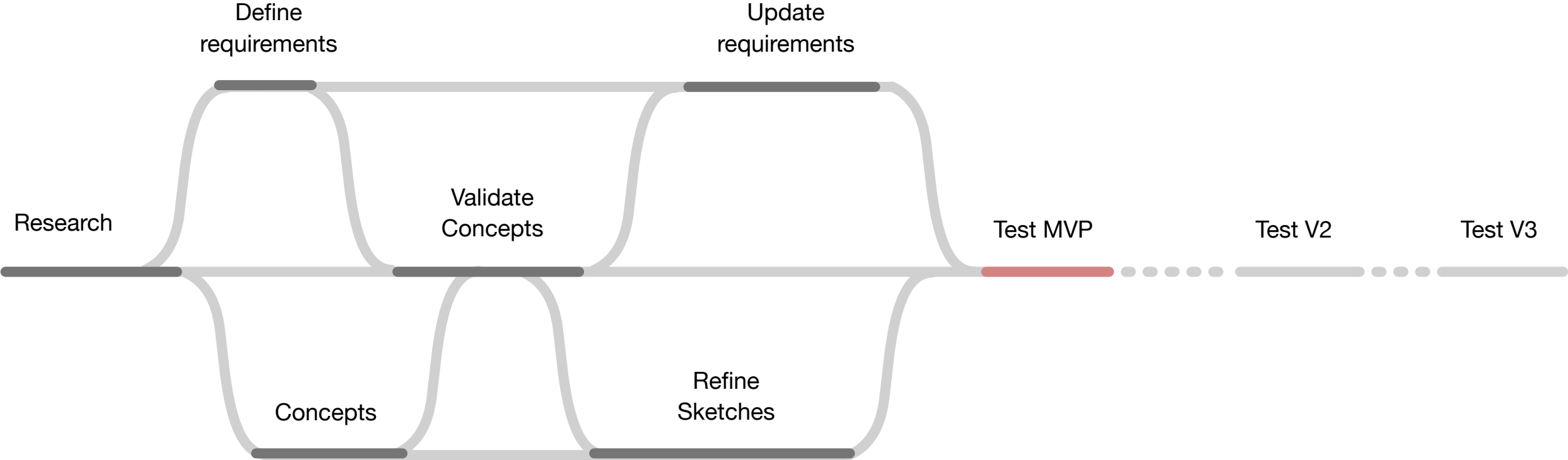
Team

1 UX designer, 1 project manager,
1 Engineer

My Role

UX designer

Process



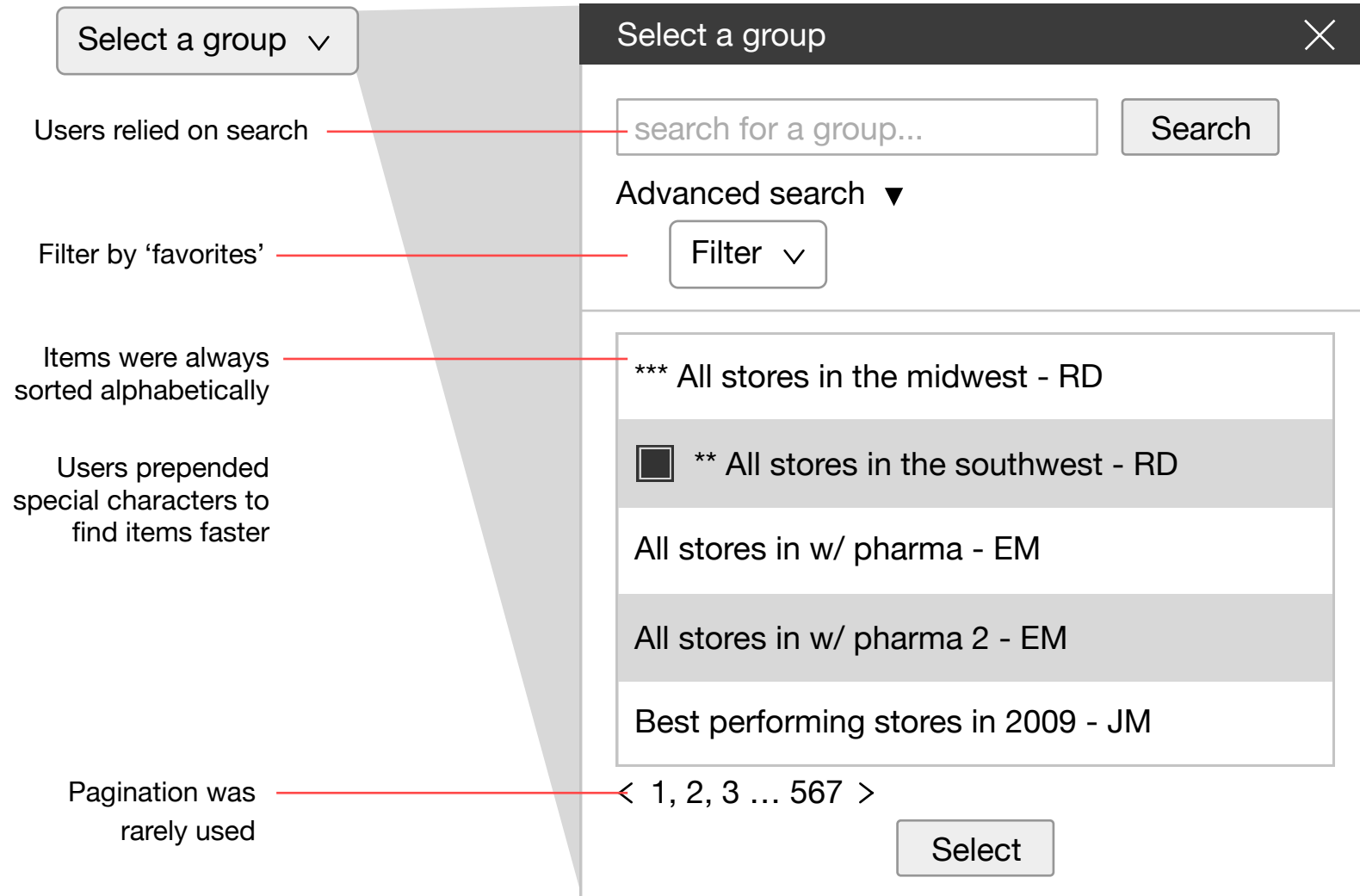
Research

Understanding the Problem

	Item creation	Analysis flow	Selecting an item	After selection
User Actions	<p>Multiple methods:</p> <ul style="list-style-type: none">• Upload• Copy & paste• Duplicate• User-defined	<p>Frequent selection of specific item types.</p> <p>Selectors vary from single to multi-select.</p>	<p>Users are presented with an alphabetical list of all items.</p> <p>Users primarily search by name or initials of user who created the item.</p> <p>Users select one or many items.</p>	<p>Two methods for displaying “Selected” state: name single item, or state “2+ items are selected.”</p> <p>Users must click back into selectors to view selected items and update.</p>
Pain points	<ul style="list-style-type: none">➤ Too many options.➤ No mid-flow creation support exists.	<ul style="list-style-type: none">➤ Inconsistent fields.	<ul style="list-style-type: none">➤ Thousands of items exist.➤ Filter options are hidden.➤ A small number of items are ever needed at a time.	<ul style="list-style-type: none">➤ “Selected” state varies by item.➤ No way to easily view selected items, if multiple.
Opportunities	<ul style="list-style-type: none">• Consolidate• Add to flow	<ul style="list-style-type: none">• Standardize	<ul style="list-style-type: none">• Sort items intelligently• Surface advanced search tools• Utilize item meta-data	<ul style="list-style-type: none">• Standardize “Selected” state• Quick access to selected items

Old UI

Item selectors could contain anywhere from several to thousands of items.



Research

*"I only ever use a few items at a time."
"It's overwhelming to see a huge list."*

*"We use our initials to
remember what we created."*

*"Sometimes I'm not in the software
for months, so I forget what I need."*

Requirements

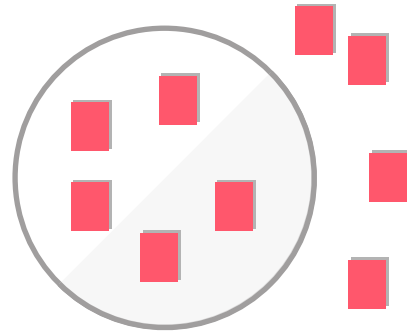
Setting goals

- 1 Increase efficiency by surfacing most recently used groups.
In at least 80% of cases, surface the desired item in the first five results.
- 2 Reduce reliance on search; instead improve the relevance of browse results.
- 3 Eliminate hesitation caused by differences in UI and visuals.
- 4 Build a foundation on which to improve other item selectors.

Scoping the project

An audit uncovered 30+ selector UI types in the software.

Group selectors



"I want to run an analysis on all locations in the midwest serving total populations of 12,000 - 25,000."

High contact UI element
in the software

Often only found as
single-selectors

UI easily translated to
other item types

Concepts

Concepts

Smart Sorting

Recently used ▼

Recently used

Recently updated

Alphabetical A-Z

Alphabetical Z-A

Suggestive search

 northeast|

Northeast stores by demo 2017

All stores in northeast DMV

Northeast NYC DMA

Massachusetts northeast 2015

Viewing selected

[2 selected](#)

Northeast stores by demo 2017

All stores in DMV 2017

The First Pass

Users had trouble differentiating between groups with similar names.

Searching was jarring on first pass for most users.

Select a group

×

Q

search for a group

0 selected

Recently used ▼

All stores in the midwest - RD

All stores in w/ pharma - EM

All stores in w/ pharma 2 - EM

Select group

Second Iteration

Select a group

Q

search for a group

765 groups

Recently used ▼0 selected

All stores in the midwest - RD

Created by Ryan DoneganUpdated 3/14/2016

All stores in DMV w/ pharma - EM

Created by Ryan DoneganUpdated 3/14/2016

All stores in DMV w/ pharma 2 - EM

Select group

Select a group

Q

northeast

1 group

Recently used ▼0 selected

Northeast stores by demo 2017

Created by Ryan DoneganUpdated 3/12/2016

Select group

Select a group

Q

northeast

1 group

Recently used ▼1 selected

Northeast stores by demo 2017

Created by Ryan DoneganUpdated 3/12/2016

Select group

UX Feedback

“Group selection still takes a while. Could it be distracting to users?”

Revisit efficiency and what is expected when a user selects an item

“Search is still the first thing I see. It doesn't seem that different from today.”

Refocus on the original goal: emphasize smart sort over manual search

“What about more complicated cases where items are harder to search?”

Explore more advanced filtering and searching tools

Revisiting sorting

Select a group ▾

Q

search for a group

Browse

Best performing locations 2017

Best performing locations 2017

Best performing locations 2017

Best performing locations 2017

Select group

Select a group ▾

Q

search for a group

Browse

Best performing locations 2017

Best performing locations 2017

Best performing locations 2017

Best performing locations 2017

Select group

Browse

Select a group ▾

Q search for a group

Browse

Best performing locations 2017

Best performing locations 2017

Best performing locations 2017

Best performing locations 2017

Select group

Q search for a group

400 groups

☐ Created by me

Stores in group

☐ > 100 stores

☐ > 1000 stores

☐ > 25,000 stores

Date modified

☐ Last 30 days

☐ Last 60 days

☐ Last 90 days

+ Create new group

Recently used ▾

0 selected

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All stores in the midwest - RD

Created by Ryan Donegan Updated 3/14/2016

All stores in the midwest - RD

Created by Ryan Donegan Updated 3/14/2016

All stores in the midwest - RD

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Select group

Rollout Plan

V1

Select a group ✕

Q

search for a group

765 groups

Recently used ▼

0 selected

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All stores in w/ pharma - EM

Created by Ryan Donegan Updated 3/14/2016

All stores in w/ pharma 2 - EM

Select group

V2

Q

search for a group

Browse

Best performing locations 2017

Best performing locations 2017

Best performing locations 2017

Best performing locations 2017

Select group

V3

Q

search for a group

400 groups

☐ Created by me

Stores in group

☐ > 100 stores

☐ > 1000 stores

☐ > 25,000 stores

Date modified

☐ Last 30 days

☐ Last 60 days

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+ Create new group

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Select group

What's next

