

UX Mocks/Fishfood: gap analysis

...or, what does “convergence” mean for the Fishfood milestone?

Functionality, not VisD: Herald 1/23/18

purpose

1. Extent to which Fishfood trusted tester feedback can inform v1 UX direction
2. Identify deltas between Fishfood prototype and UX direction
 - a. **Functional** APIs and core system requirements
 - b. **Structural** UX system and information architecture
 - c. **Visual** Presentation layer

FF caveats (functional) To be confirmed by eng

Key: Set TT expectations for FF functions and data mgmt

1. FAQ: No Blanket POs or Payroll data migration/connection
2. FAQ: Forecasts in Requisitions created in FF will not be migrated to Prophet and vv
3. FAQ: Data migration/connection between FF and Legacy systems
4. Confirmation that Placeholders will be live (from Chris Ip)
5. User types are not discrete/can view
 - a. Business users can see Financial data (forecasts not cross-populated)
 - b. Placeholders may not work as expected

gains : feedback expectation from Trusted Tester launch



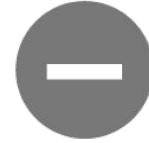
FUNCTIONAL (code)

- Core API validation
- Data latency
- Future functionality / APIs



STRUCTURAL (data hierarchy)

- Inline editing functionality
- Info organization & flow
(how user moves through data)



VISUAL (UI-presentation layer)

- Material design validation

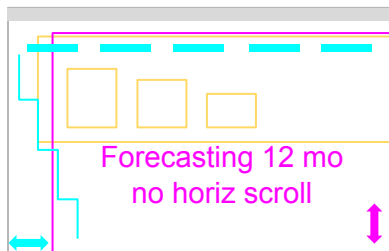
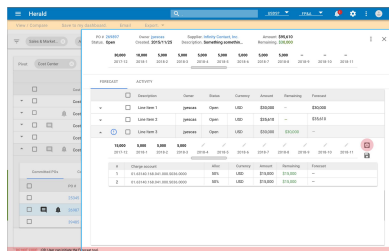
Caveats

- Some concerns we have to be very clear about with TTs (next slide)
- Info flow cog disconnect w/v1
- Info obfuscation at the PO list level may disorient users
- Info density/display expectations/perceptions will be skewed

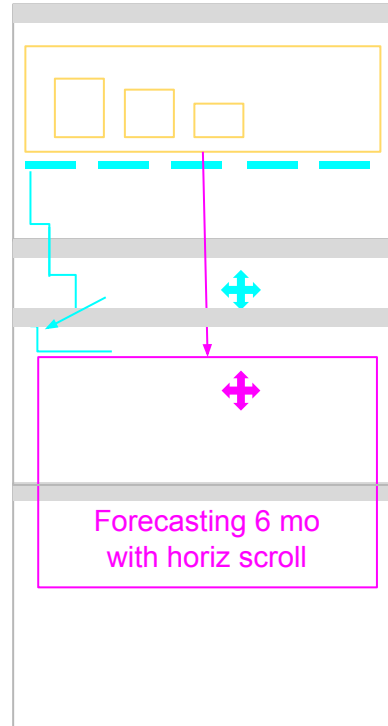
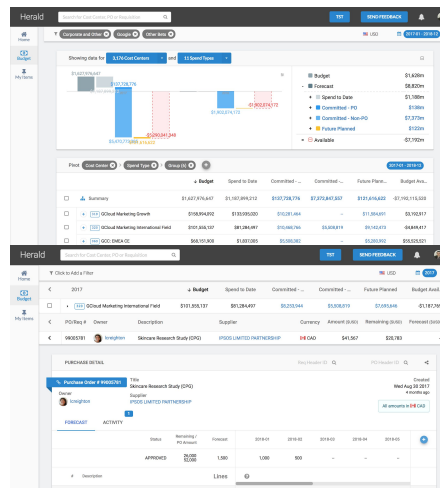
gap analysis: information hierarchy : FPA Table->PO expansion

UX direction

Integrating insights from prototype

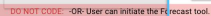


Fishfood



→ Stacked UI elements
require more scrolling
and pagination

UX Mockup



Recommendations

Extent to which Fishfood trusted tester feedback can inform v1 UX direction...?



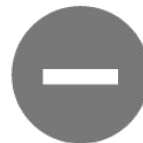
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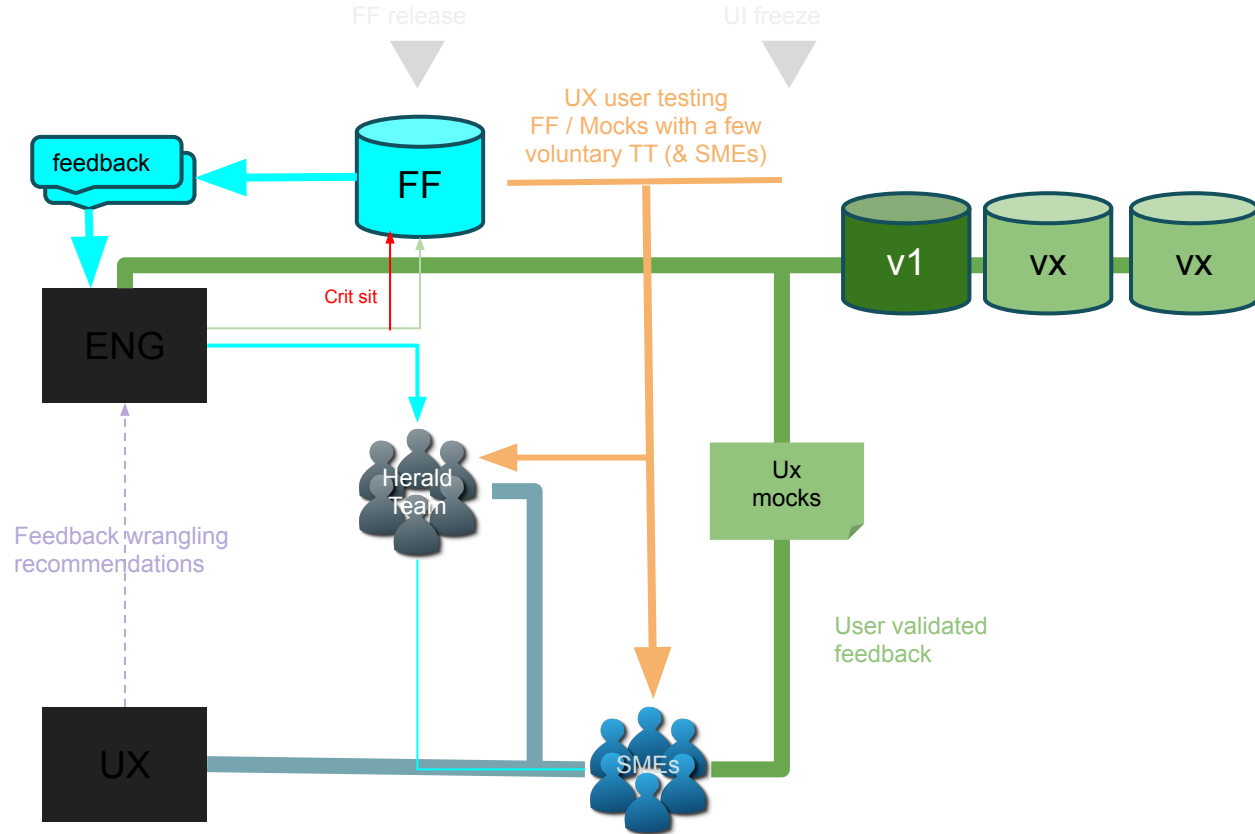
VISUAL (UI-presentation layer)

- Material design validation

UX engagement

UX will Engage on an advisory level for FF release feedback gathering/triage/milestones.

UX will focus on UX mocks for V1-x and incorporate feedback as needed from FF release with SME validation.



Sales & Market...

Pivot

Cost Center

Cost

Cost

Cost

Cost

Cost

Cost

Committed POs

Co

PO #

25345

26987

39485

PO # 269897

Owner [jyesca](#)

Supplier. [Infinity Contact, Inc.](#)

Amount **\$95,610**

Status. **Open**

Created. 2015/11/25

Description. **Something somethin...**

Remaining. **\$30,000**

30,000	10,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000	—	—	—
2017-12	2018-1	2018-2	2018-3	2018-4	2018-5	2018-6	2018-7	2018-8	2018-9	2018-10	2018-11

FORECAST

ACTIVITY

	<input type="checkbox"/>	Description	Owner	Status	Currency	Amount	Remaining	Forecast
	<input type="checkbox"/>	Line Item 1	jyesca	Open	USD	\$30,000	—	\$30,000
	<input type="checkbox"/>	Line Item 2	jyesca	Open	USD	\$35,610	—	\$35,610
	<input checked="" type="checkbox"/>	Line Item 3	jyesca	Open	USD	\$30,000	\$30,000	—

15,000	5,000	5,000	5,000								
2017-12	2018-1	2018-2	2018-3	2018-4	2018-5	2018-6	2018-7	2018-8	2018-9	2018-10	2018-11

#	Charge account	Alloc	Currency	Amount	Remaining	Forecast
1	01.63140.168.041.000.S036.0000	50%	USD	\$15,000	\$15,000	—
2	01.63140.168.041.000.S036.0000	50%	USD	\$15,000	\$15,000	—

okrs for Q1 FF launch

From Eng

Goals

- Provide users real and accurate picture of budget availability, including committed spend component
- Get early feedback to improve experience for broader launch
- Gain advocates who can evangelize Herald to other teams/users
- Stress test APIs, performance

Success metrics

- Users abandon old way (spreadsheets, Prophet, etc)
- x% of PO's in scope have forecast
- x# of placeholders created
- x% time saved on budget check, getting forecast

UX (map back to CUJs)

- Provide users real and accurate picture of budget availability, including committed spend component
- * Get early feedback to improve experience for broader launch (user feedback --> UX testing)
- Gain advocates who can evangelize Herald to other teams/users
- * Stress test API's, performance (≤ 1 second for retrieval)
- * Users start to use Herald for some TRX & Prophet basic manual aggregations
- * Monthly Budget Open period has more forecasted POS than prev year
- x% time saved on budget check, getting forecast

main proposed UX principles (draft)

GOLDEN RULE If we aren't working on a User pain point/requirement, we are doing it wrong

USERS

DESIGN

DELIVERY

ACCESS

LOCATION

STRUCTURE

LATENCY

UX engagement plan (draft)

- Assess & add functionality based on CUJs / Prototype functionality
 - Design remaining CUJs items based on spreadsheet (v1 & v-next setup)
 - Validate mocks with SMEs
-
- Triage FF feedback with the Eng team (weekly turnaround)
 - Assess & validate feedback with SMEs
 - Design and test validated feedback items with SMEs
 - Testing & Validation (Mid-March-->April end)
 - Testing: FF / V1 Cog walk / GVC Testing with SME+ list
 - Validate main CUJs
 - some HEART survey questions
 - Integrate UX testing results into UX mocks-->V1 code

recommendations

Fishfood milestone		Code	Data hierarchy	UI/preso layer
Trusted tester feedback				

Fishfood milestone

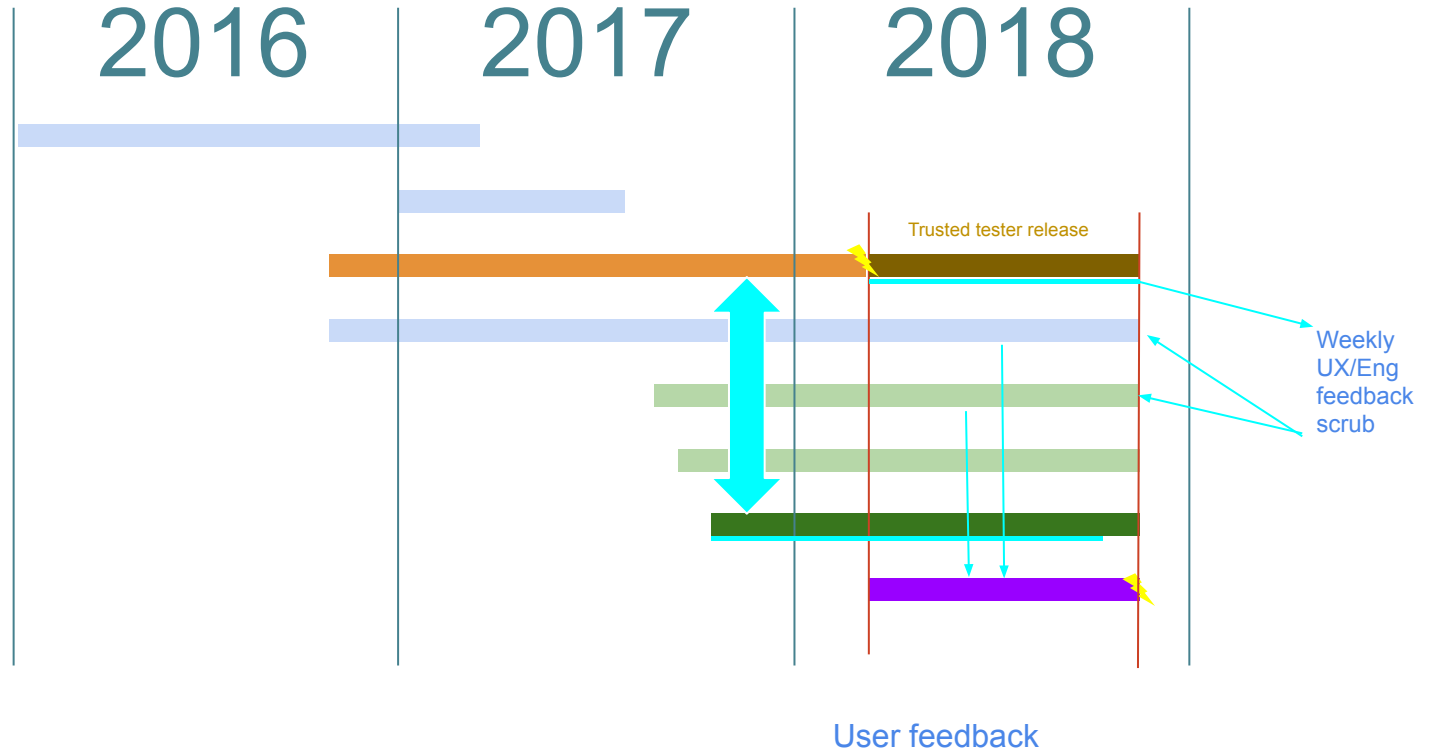
Trusted tester feedback

- UX impact
- Feedback methodologies
 - Recommended:
 - Not recommended:
- TBD: Success metrics

Post-Fishfood

- UX impact
- Research methodologies
 - —
 - —

Herald development landscape



gap analysis: information

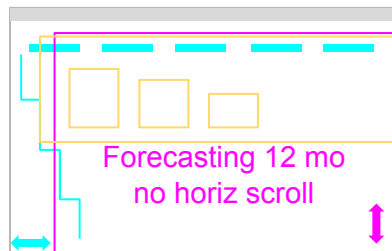
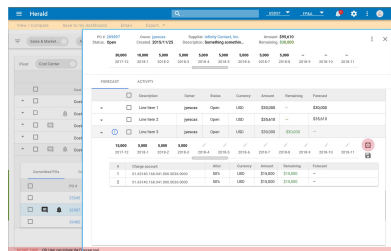
hierarchy

Slated: V1

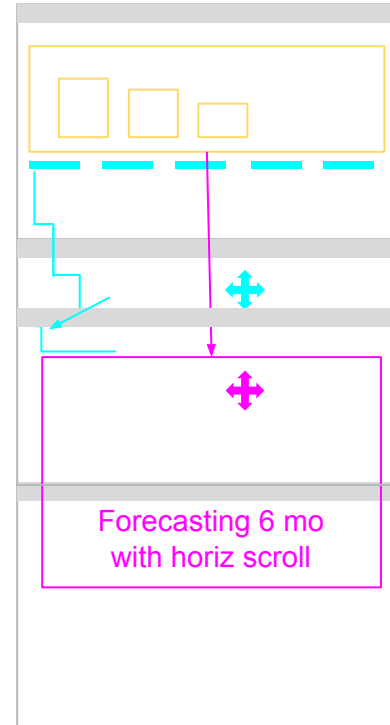
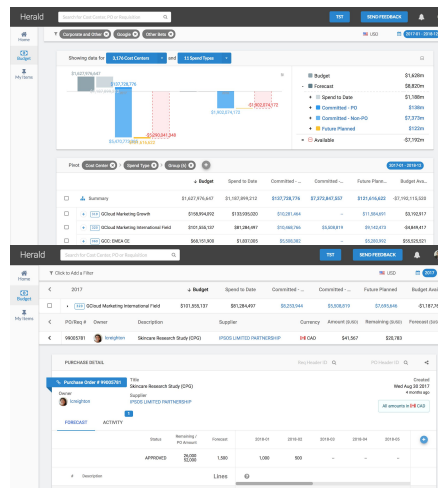
Parity: 50% function, 90% content

UX Mocks build on insights gleaned from the Prototype

UX Mockup



Fishfood



- Data vis is about 50% of the content area, persists until opt out
- Forecast scrolling for >6 months is necessary

gap analysis: information hierarchy (sans data viz)

FPA Table->PO expansion

Slated: V1

Parity: 90% function, 50% display

UX Mockup

The mockup shows a sidebar with navigation options like 'View / Compare', 'Save to my dashboard', 'Email', and 'Export'. The main content area displays a PO expansion table with columns for PO #, Status, Owner, Supplier, Amount, and Remaining. Below this is a forecast table with columns for Description, Owner, Status, Currency, Amount, Remaining, and Forecast. The forecast table is further divided into 'FORECAST' and 'ACTIVITY' tabs. The 'FORECAST' tab shows a table with columns for #, Charge account, Alloc, Currency, Amount, Remaining, and Forecast. The 'ACTIVITY' tab shows a table with columns for #, Description, Owner, Status, Currency, Amount, Remaining, and Forecast. The forecast table is further divided into 'FORECAST' and 'ACTIVITY' tabs. The 'FORECAST' tab shows a table with columns for #, Charge account, Alloc, Currency, Amount, Remaining, and Forecast. The 'ACTIVITY' tab shows a table with columns for #, Description, Owner, Status, Currency, Amount, Remaining, and Forecast.

PO #	Status	Owner	Supplier	Amount	Remaining
269897	Open	jyescas	Infinity Contact, Inc.	\$95,610	\$30,000

Description	Owner	Status	Currency	Amount	Remaining	Forecast
Line Item 1	jyescas	Open	USD	\$30,000	--	\$30,000
Line Item 2	jyescas	Open	USD	\$35,610	--	\$35,610
Line Item 3	jyescas	Open	USD	\$30,000	\$30,000	--

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Fishfood

The screenshot shows the Herald interface with a search bar and navigation options. The main content area displays a PO expansion table with columns for PO #, Owner, Description, Supplier, Currency, Amount, Remaining, and Forecast. Below this is a forecast table with columns for Description, Owner, Status, Currency, Amount, Remaining, and Forecast. The forecast table is further divided into 'FORECAST' and 'ACTIVITY' tabs. The 'FORECAST' tab shows a table with columns for #, Description, Owner, Status, Currency, Amount, Remaining, and Forecast. The 'ACTIVITY' tab shows a table with columns for #, Description, Owner, Status, Currency, Amount, Remaining, and Forecast.

PO/Req #	Owner	Description	Supplier	Currency	Amount (\$USD)	Remaining (\$USD)	Forecast (\$USD)
99005781	lcreighton	Skincare Research Study (CPG)	IPSOS LIMITED PARTNERSHIP	CAD	\$41,567	\$20,783	--

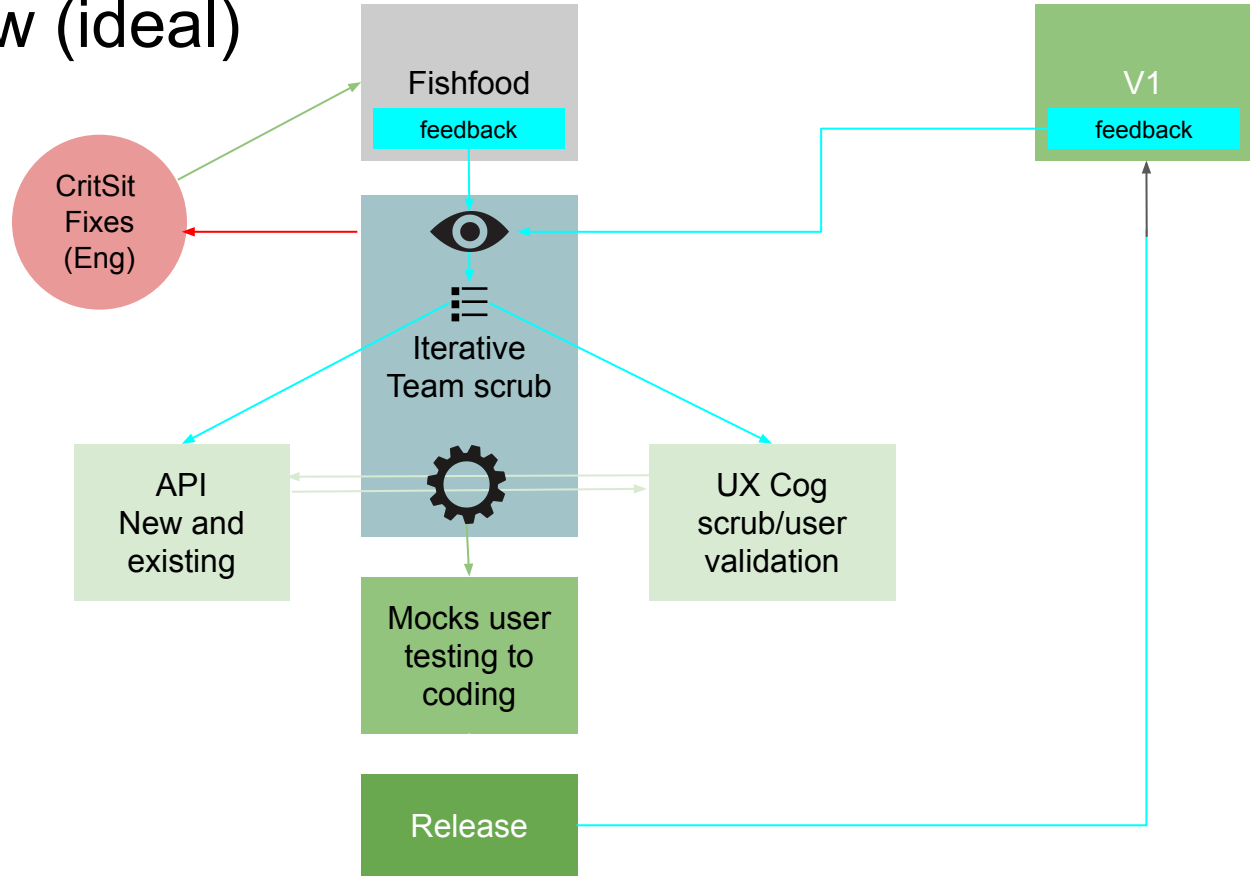
Status	Remaining / PO Amount	Forecast	2018-01	2018-02	2018-03	2018-04	2018-05
APPROVED	26,000 / 52,000	1,500	1,000	500	--	--	--

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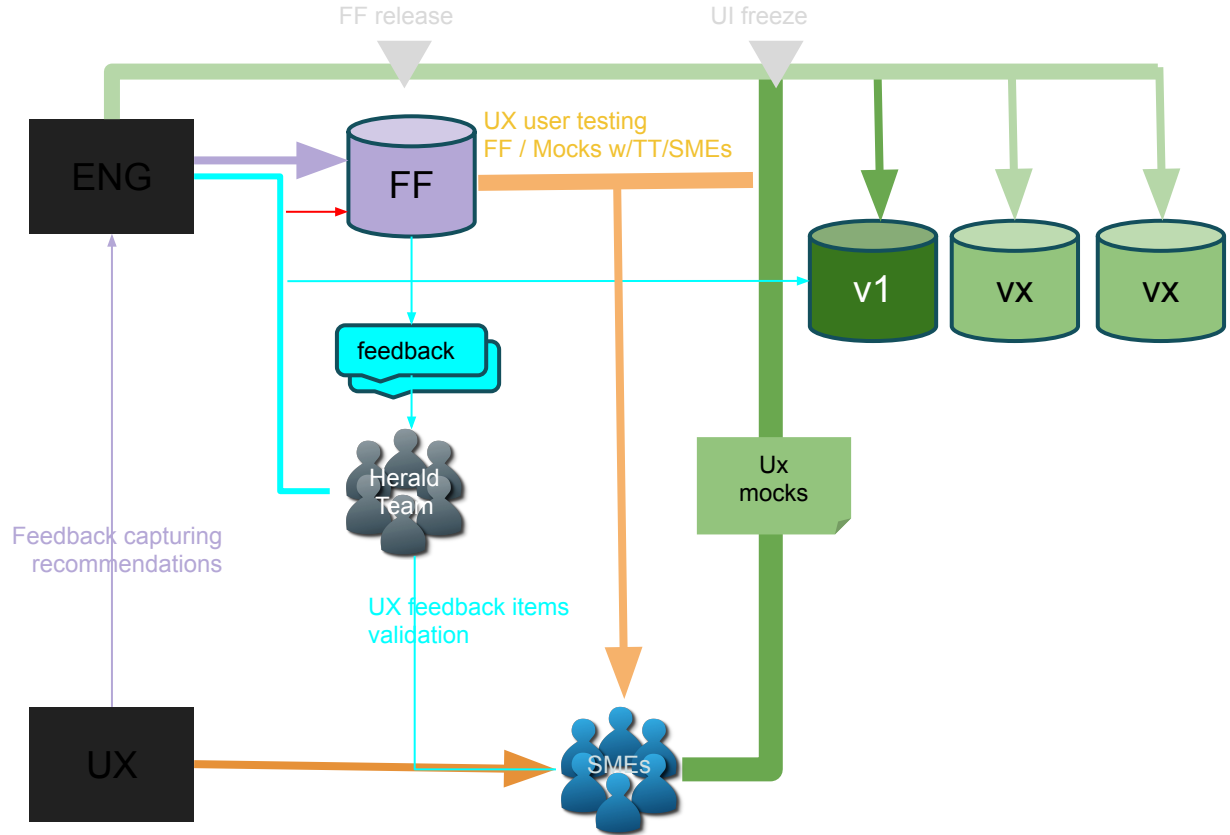
feedback flow (ideal)



UX engagement

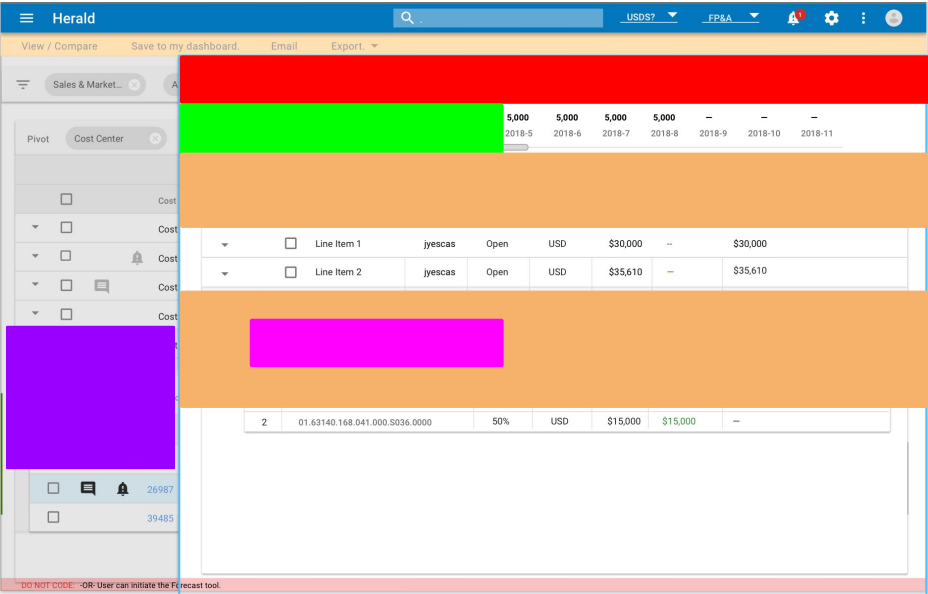
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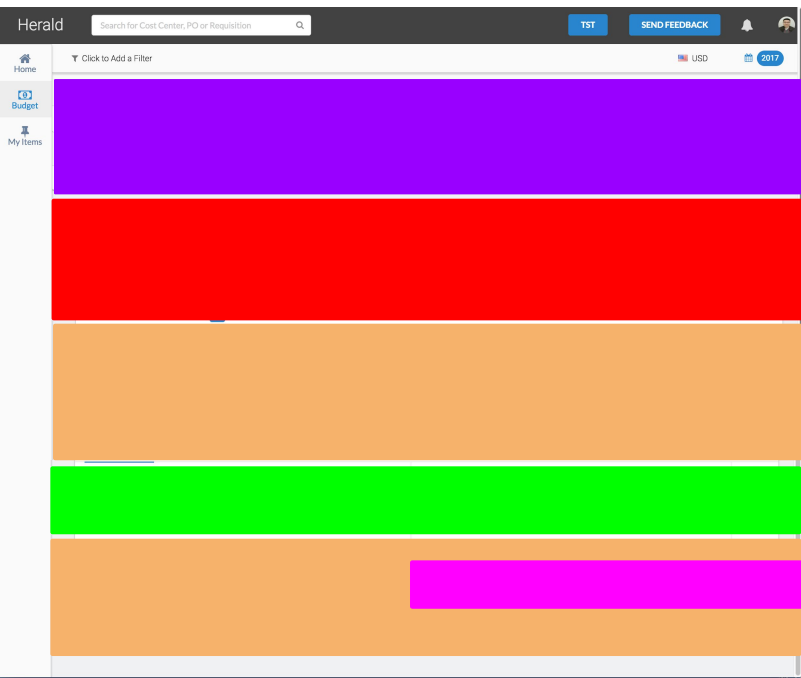


gap analysis: slider pane

UX Mockup



Fishfood

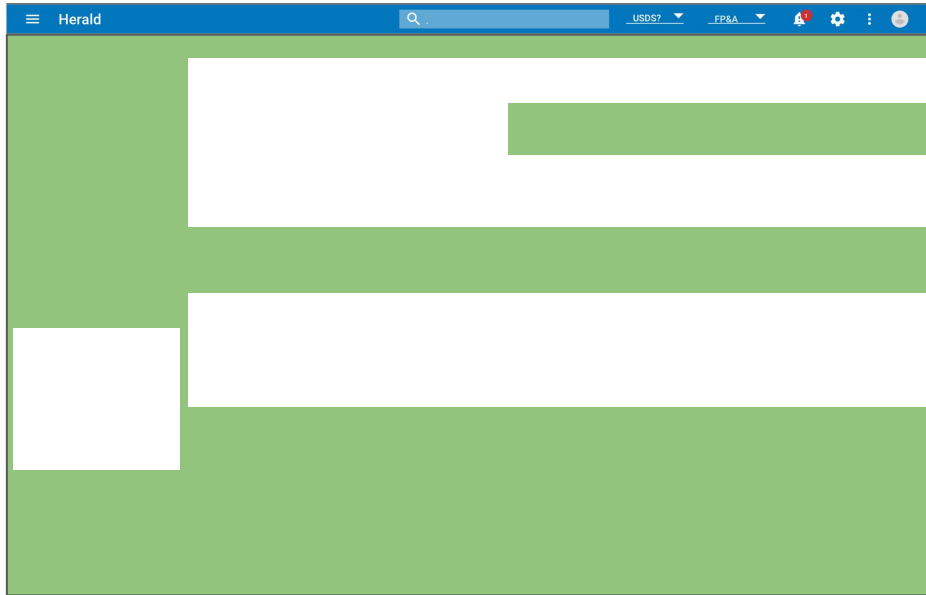


gap analysis: slider pane

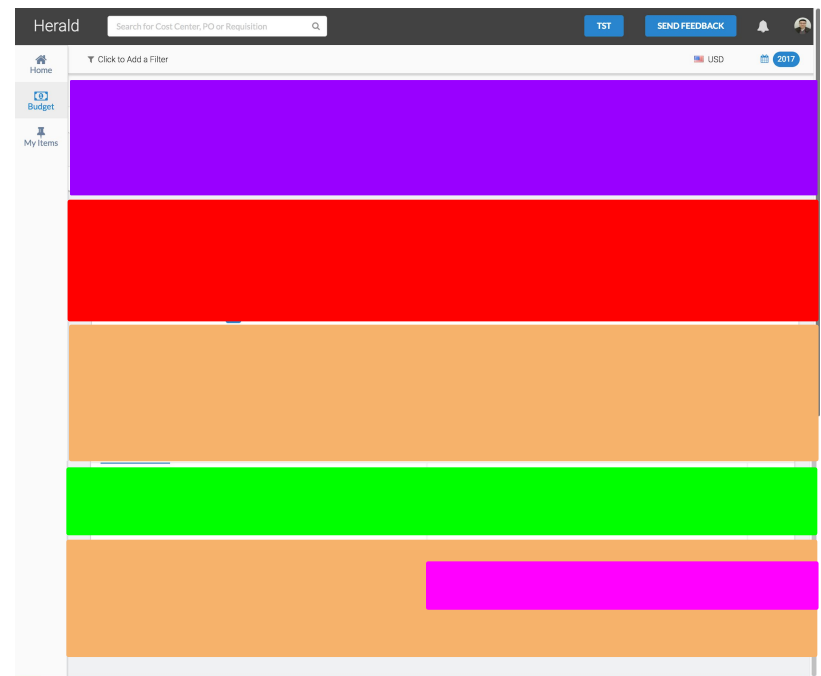
Slated: V1

Parity: most

UX Mockup ; green area represents the added area the UX mocks have for data display



Fishfood



gap analysis: banner : left nav

Slated: V1

Parity: mostly

UX Mockup: left nav is on-call (slides in from left from hamburger click)

The mockup shows a web interface for 'Herald'. It features a top navigation bar with a search bar, user profile, and settings. A left navigation bar is visible, containing links for 'Budgets', 'My Items', and 'Feedback'. The main content area displays a table with columns: Pivot, Cost Center, GL, Location, Budget, Spend to date, Committed (PO), Committed (nPO), Future Planned, and Available. The table lists five cost centers with their respective financial data.

Pivot	Cost Center	GL	Location	Budget	Spend to date	Committed (PO)	Committed (nPO)	Future Planned	Available
<input type="checkbox"/>	Cost Center	Summary		\$1,627,976,647	\$1,187,899,212	\$138,997,450	\$17,543,224	\$98,497,811	\$185,038,951
<input type="checkbox"/>	Cost center 1			\$158,994,092	\$133,935,020	\$11,990,777	-	\$10,644,682	\$2,423,814
<input type="checkbox"/>	Cost center 2			\$101,555,137	\$81,284,497	\$8,854,668	\$5,508,819	\$7,618,751	\$1,711,599
<input type="checkbox"/>	Cost center 3			\$68,151,900	\$51,837,005	\$5,412,506	-	\$4,728,149	\$56,174,240
<input type="checkbox"/>	Cost center 4			\$61,590,772	\$26,717,595	\$4,765,671	-	\$4,476,658	\$25,628,447
<input type="checkbox"/>	Cost center 5			\$53,324,324	\$17,137,116	\$4,925,981	-	\$4,665,918	\$26,594,308

Fishfood: left nav persists

The Fishfood interface shows a web application for 'Herald'. It has a top navigation bar with a search bar, user profile, and settings. A left navigation bar is visible, containing links for 'Home', 'Budget', and 'My Items'. The main content area displays a table with columns: Pivot, Cost Center, Budget, Spend, Comm, Commit, Future, and Budget Ava. The table lists five items with their respective financial data.

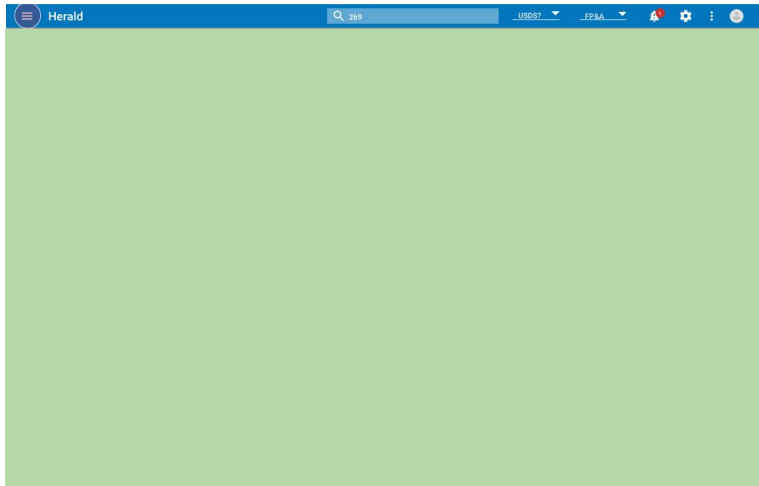
Pivot	Cost Center	Budget	Spend	Comm	Commit	Future	Budget Ava
<input type="checkbox"/>	Summary	--	--	--	\$1,902,074,172	--	-\$1,902,074,172
<input type="checkbox"/>	667 Chrome - Browser PM	--	--	--	\$1,180,960	--	-\$1,180,960
<input type="checkbox"/>	000 Balance Sheet	--	--	--	--	--	--
<input type="checkbox"/>	306 Marketing - Mexico	--	--	--	\$0	--	\$0
<input type="checkbox"/>	40K Tech Infra CorpEng Apps - Finance Works	--	--	--	\$3,912,241	--	-\$3,912,241
<input type="checkbox"/>	451 Legal - Americas	--	--	--	\$0	--	\$0

gap analysis: banner : left nav

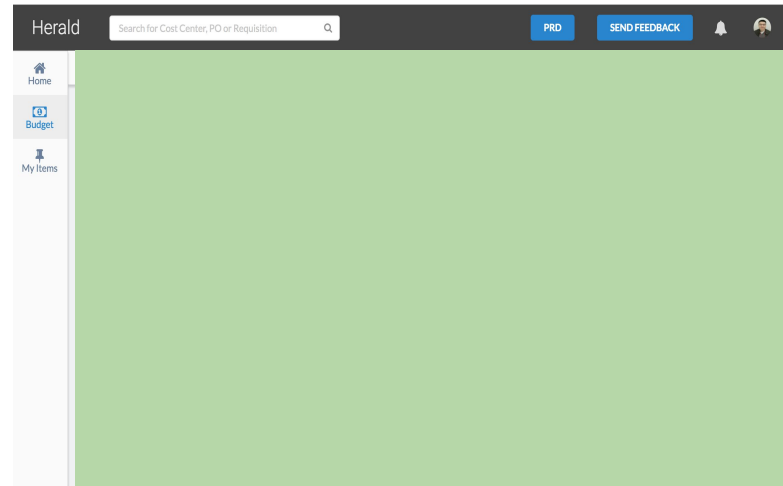
Slated: V1

Parity: partly

UX Mockup: green area represents the available data area.



Fishfood



gap analysis: banner

Slated: V1
Parity: mostly

Functionality table:

Rel	UX Mocks	Fishfood
1	Hamburger nav dd	N-nav persists
		y
		y
1	Currency Picker	N-diff loc
		n
		Alerts v1
		n
		n
		y

UX Mockup



Fishfood



Hamburger:

- RISK: Low, however, given that enterprise sw is so data dense, we need to let the critical data shine.

Currency Picker:

Both Business and FPA users have stated that they would like the Currency Picker always visible.

UX:

Fishfood:

- RISK: Miscalculation/perception of current currency

gap analysis: slider pane

Slated: V1
Parity: most

Functionality table:

Rel	UX Mocks	Fishfood
1	PO Header	y
1	PO forecast	y
		y
		y
		y
		y
		y
1	Slider functionality	n

PO Header:

Text

- **UX:** All key PO header data is duplicated on the Slider header area
- **Fishfood:** While
- **RISK:** Text

PO Forecast:

Efficiency / Accuracy

Users have said that it would be more efficient to see 12 months across without having to scroll.

- **UX:** While both allow for a year view, the UX mocks allow for it in a single view without scrolling, and the slider is resizable. <ADDRESS OVERALL SCROLLING DATA>
- **Fishfood:** While Fishfood does allow for forecast stacking, the user must scroll horizontally in order to see >6 months, and there is no resizing option.
- **RISK:** With the user having to scroll there could be a possibility to misforecast.

Slider:

Context loss (hierarchical & forecast months)

Users have said that it is very helpful to be able to keep their table structure behind the pane and to overlay their main work area (forecast table).

- **UX:** In the UX mocks, the user is kept resident on their main screen with the lowest level of data (PO Forecast screen) overlays and presents the user with their main working screen without removing them from the main table or losing context.
- **Fishfood:** the entire hierarchy is removed from the screen and the user is presented with the PO forecast data, and the user loses all context.
- **RISK:** If user loses context or have to needlessly switch back to gain context, it could be detrimental to their ability and accuracy to forecast correctly.

gap analysis: data overlay vs

push

Slated: V1

Parity: most

Functionality table:

Rel	UX Mocks	Fishfood
1	Filters overlay	y
1	Data Viz overlay	y

Filters & Data viz overlay

Users have said that it is distracting and confusing to have their existing data moved off the screen.

UX:

Fishfood:

- RISK: Data push unnecessarily relocates the User and can be confusing when their data is pushed off the screen.

Thank you!