Case Study: Add Item History Feature to Application*

* Specific client sensitive information has been redacted and generalized

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Jennifer Lycke

Impact

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This new enterprise application feature helps supervisors of mission-critical employees track tasking, past actions taken, and allows for auditing of items and staff involved with the system. This allows supervisors to quickly detect issues, create reports more efficiently in 1/5 of the time, and enables the organization workflow processes to become more streamlined.

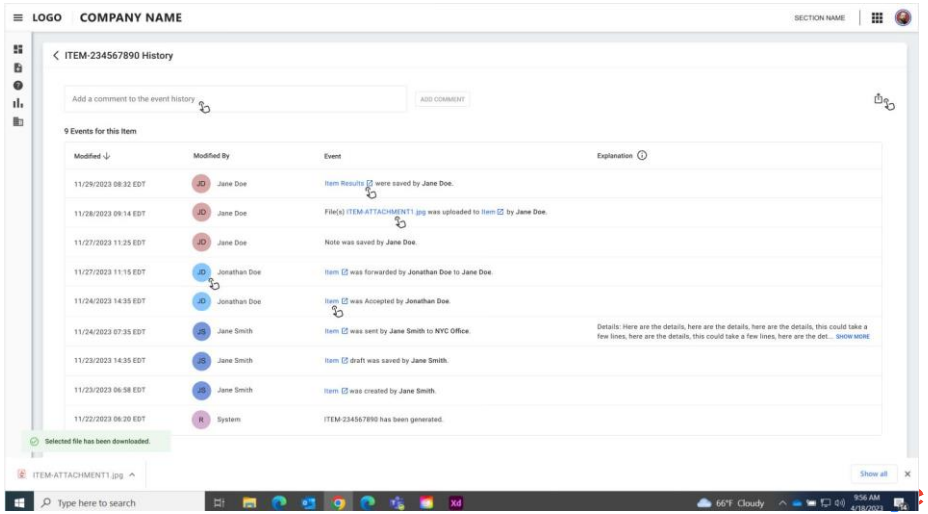
Project overview

The product:

Part of a suite of enterprise applications, this application handles incoming cases which need to be researched, acted upon, and eventually closed. Each case item can be assigned and reassigned as necessary, with involved personnel acting upon each case item.

Project duration:

October 2024 – January 2025



Project overview

The problem:

Supervisors needed to track the actions of their personnel for the case items that came into their department. They needed to monitor patterns on how specific employees were handling items. They also had to audit these actions and quickly create reports. The reports were created manually by the supervisors, which was taking too much time.

The goal:

To enable supervisors to efficiently track and audit the history of each case item and monitor how their staff is handling the items. Supervisors also needed to be able to quickly create reports of these logs to send to their supervisors.

Project overview

My role:

UI/UX Designer

Responsibilities:

Collaboration, problem-solving, user research, business requirements, wireframing, mockups, prototyping, user testing

My team:

UI/UX Designer, Developers, Business Analyst, Scrummaster, Project Manager

Understanding the user

- User research
- Analysis of User Pain Points
- Problem statements
- Ideation

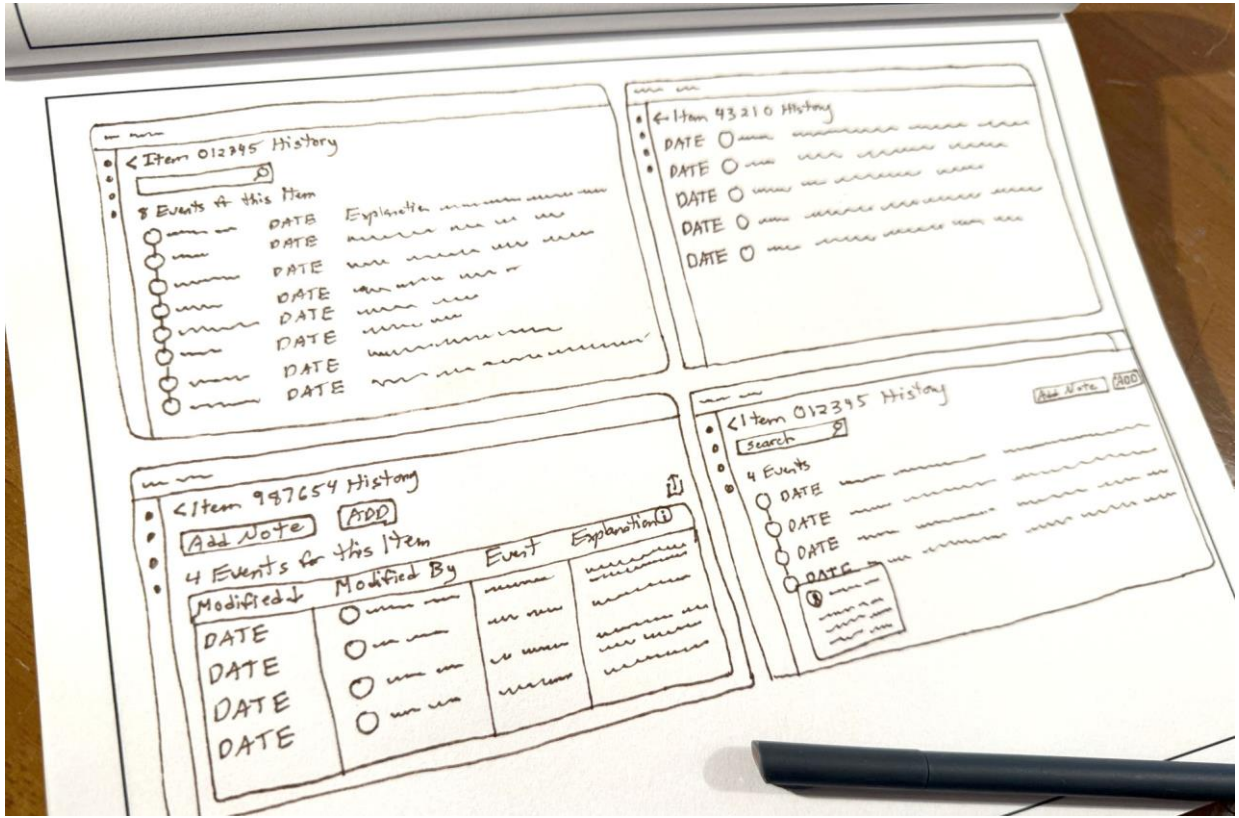
User research: summary

The Business Analyst and I met with users initially to learn about their current needs and pain points. They wanted to determine where and why their office processes were getting stuck. If they could determine patterns, they could find and reduce these backups. They also needed to regularly send reports of all the items addressed through their office to their bosses. They were taking a lot of time doing this manually.

Based upon these needs, I took notes, made user flow diagrams, and made sketches of new user interfaces which would incorporate this new history audit log. This feature would need to be seamlessly incorporated into the existing application, and the new screens would need to be intuitive. Mockups were designed and shared with users at 3 different times and A/B testing was performed with users and stakeholders. Designs were iterated upon, following this data and user feedback.

Ideation

Sketched various layout variations for screen incorporating this new feature, keeping in mind usability and a clean, easy to read interface.

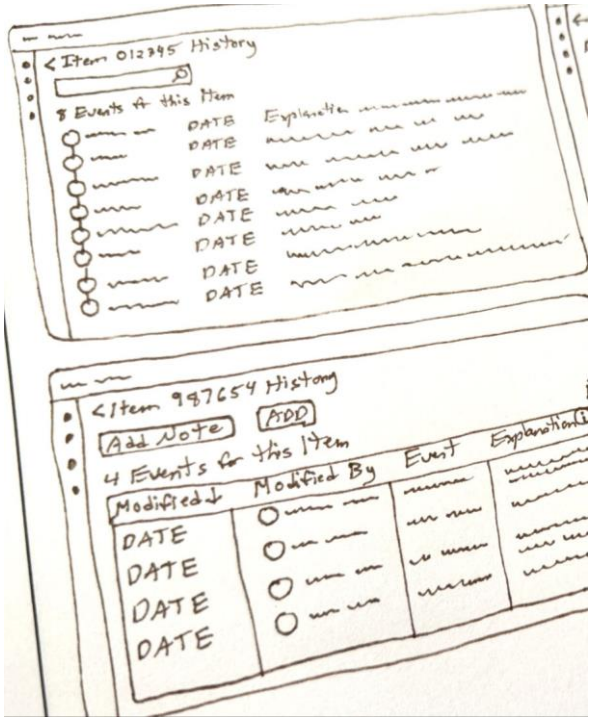


Starting the design

- Wireframes
- Interactive Prototype
- Usability testing

Wireframing

I presented the ideas to stakeholders and A/B tested the variations with users to gather feedback.



Usability research: findings

1

Users were split in their preferences during A/B testing

2

Users liked both designs, but each person preferred one over the other for various reasons.

I listened to their reasons, and came up with a design that incorporated the best of both designs. For example, all users preferred when the date/time was the most prominent data.

3

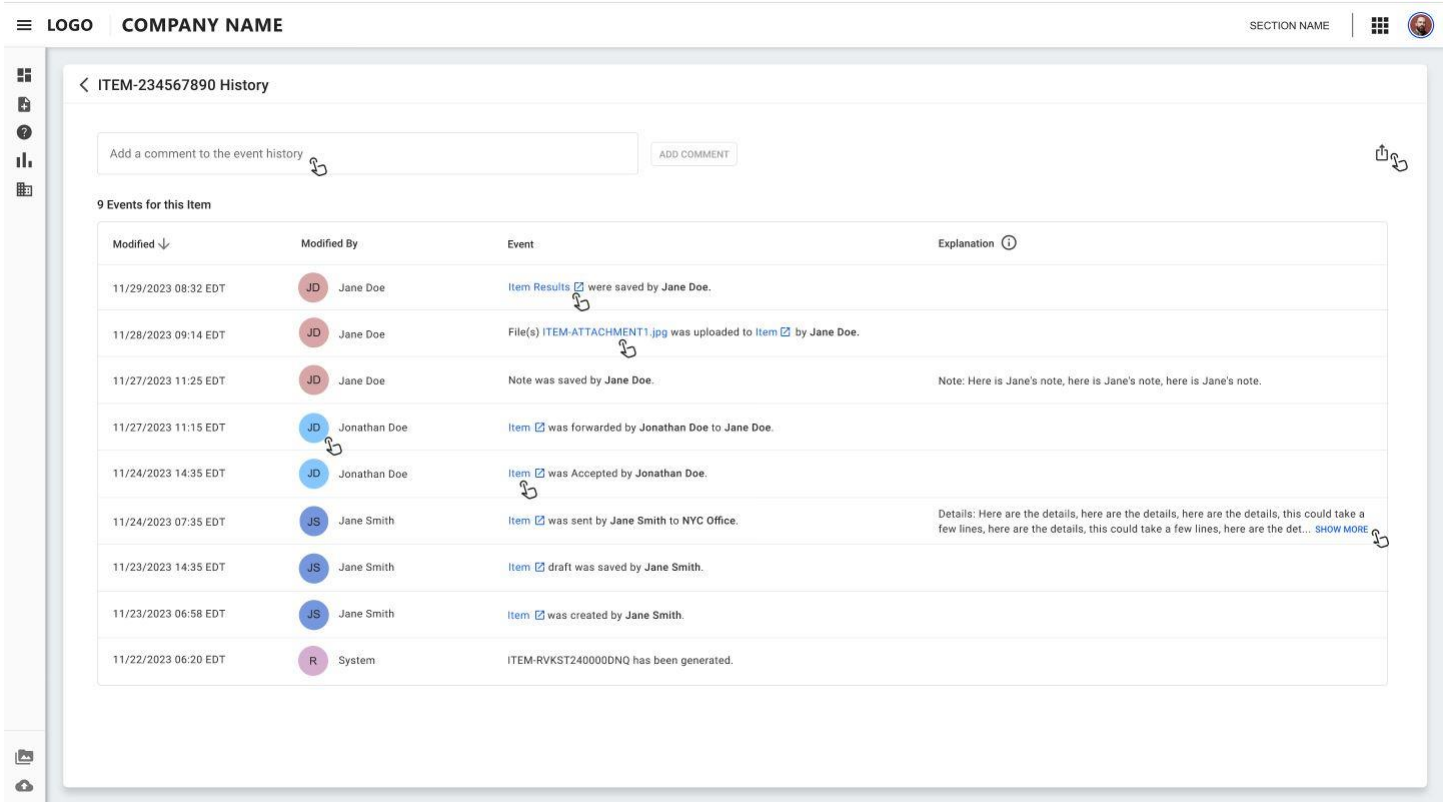
After performing another round of testing with the new iteration, all users were enthusiastic about the new design.

Refining the design

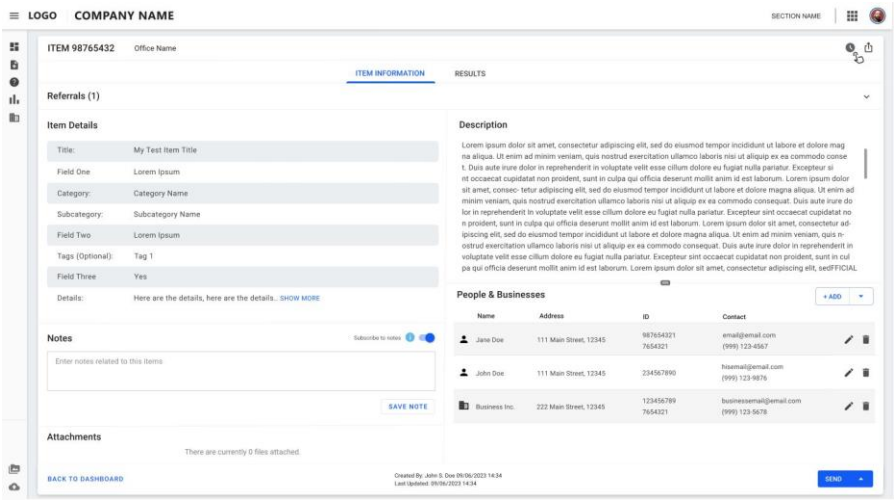
- Mockups
- High-fidelity prototype
- Accessibility

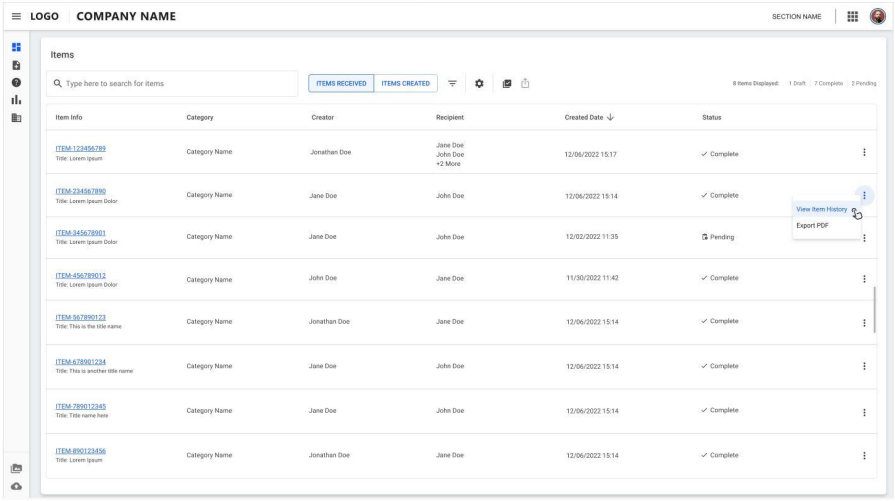
Mockups

High fidelity mockups with all of the possible interactions were created to present to stakeholders and test with users.

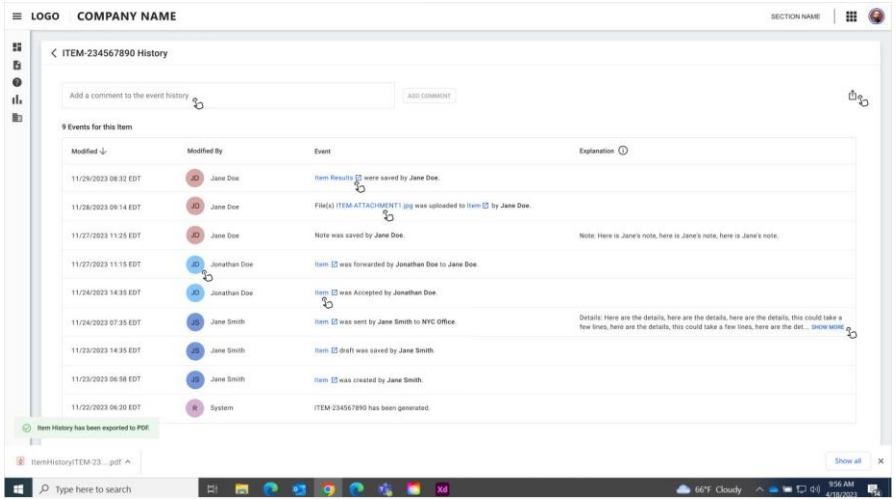


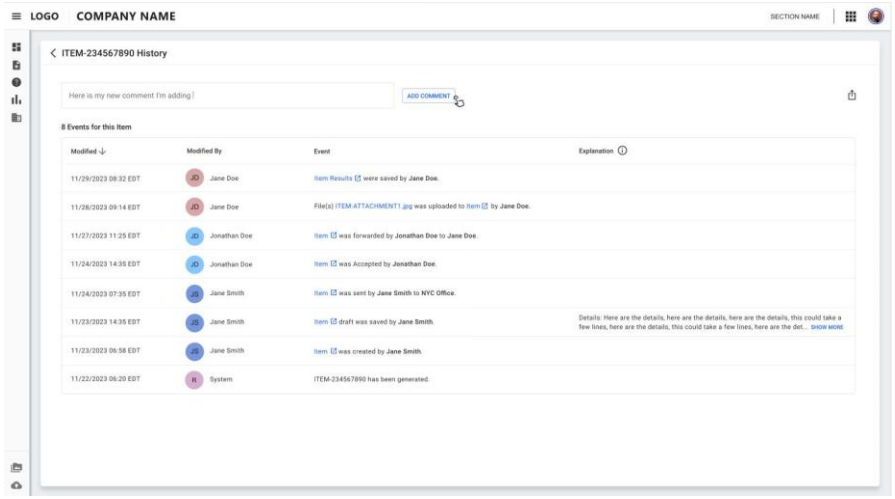
Mockups


LOGO
COMPANY NAME
SECTION NAME
ITEM 98765432
Office Name
ITEM INFORMATION
RESULTS
Referrals (1)
Item Details
Title:
My Test Item Title
Field One
Lorem Ipsum
Category:
Category Name
Subcategory:
Subcategory Name
Field Two
Lorem Ipsum
Tags (Optional):
Tag 1
Field Three
Yes
Details:
Here are the details, here are the details...
SHOW MORE
Description
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.
People & businesses
+ ADD
Name
Address
ID
Contact
Jane Doe
111 Main Street, 12345
98765321
7654321
email@email.com
(999) 123-4567
John Doe
111 Main Street, 12345
234567890
hisemail@email.com
(999) 123-9876
Business Inc.
222 Main Street, 12345
123456789
7654321
businessemail@email.com
(999) 123-5678
Notes
Subscribe to notes
Enter notes related to this items
SAVE NOTE
Attachments
There are currently 0 files attached.
BACK TO DASHBOARD
Created By: John S. Doe 09/06/2023 14:34
Last Updated: 09/06/2023 14:34
SEND


LOGO
COMPANY NAME
SECTION NAME
Items
Type here to search for items
ITEMS RECEIVED
ITEMS CREATED
Item Info
Category
Creator
Recipient
Created Date
Status
ITEM-123456789
Category Name
Jonathan Doe
Jane Doe
John Doe
+2 More
12/06/2022 15:17
Complete
ITEM-234567890
Jane Doe
John Doe
12/06/2022 15:14
ITEM-345678901
12/02/2022 11:35
Pending
ITEM-456789012
John Doe
11/30/2022 11:42
ITEM-567890123
12/06/2022 15:14
ITEM-678901234
ITEM-789012345
ITEM-890123456
View Item History
Export PDF

Mockups


LOGO
COMPANY NAME
SECTION NAME
ITEM-234567890 History
Add a comment to the event history
ADD COMMENT
9 Events for this Item
Modified
Modified By
Event
Explanation
11/29/2023 08:32 EDT
Jane Doe
Item Results were saved by Jane Doe.
11/28/2023 09:14 EDT
Jane Doe
File(s) ITEM-ATTACHMENT1.jpg was uploaded to Item by Jane Doe.
11/27/2023 11:25 EDT
Jane Doe
Note was saved by Jane Doe.
Note: Here is Jane's note, here is Jane's note, here is Jane's note.
11/27/2023 11:15 EDT
Jonathan Doe
Item was forwarded by Jonathan Doe to Jane Doe.
11/24/2023 14:35 EDT
Jonathan Doe
Item was Accepted by Jonathan Doe.
11/24/2023 07:35 EDT
Jane Smith
Item was sent by Jane Smith to NYC Office.
Details: Here are the details, here are the details, here are the details, this could take a few lines, here are the details, this could take a few lines, here are the det... SHOW MORE
11/23/2023 14:35 EDT
Jane Smith
Item draft was saved by Jane Smith.
11/23/2023 06:58 EDT
Jane Smith
Item was created by Jane Smith.
11/22/2023 06:20 EDT
System
ITEM-234567890 has been generated.
Item History has been exported to PDF.
ItemHistoryITEM-23....pdf
Show all
Type here to search
66°F Cloudy
9:56 AM


LOGO
COMPANY NAME
SECTION NAME
ITEM-234567890 History
Here is my new comment I'm adding
ADD COMMENT
8 Events for this Item
Modified
Modified By
Event
Explanation
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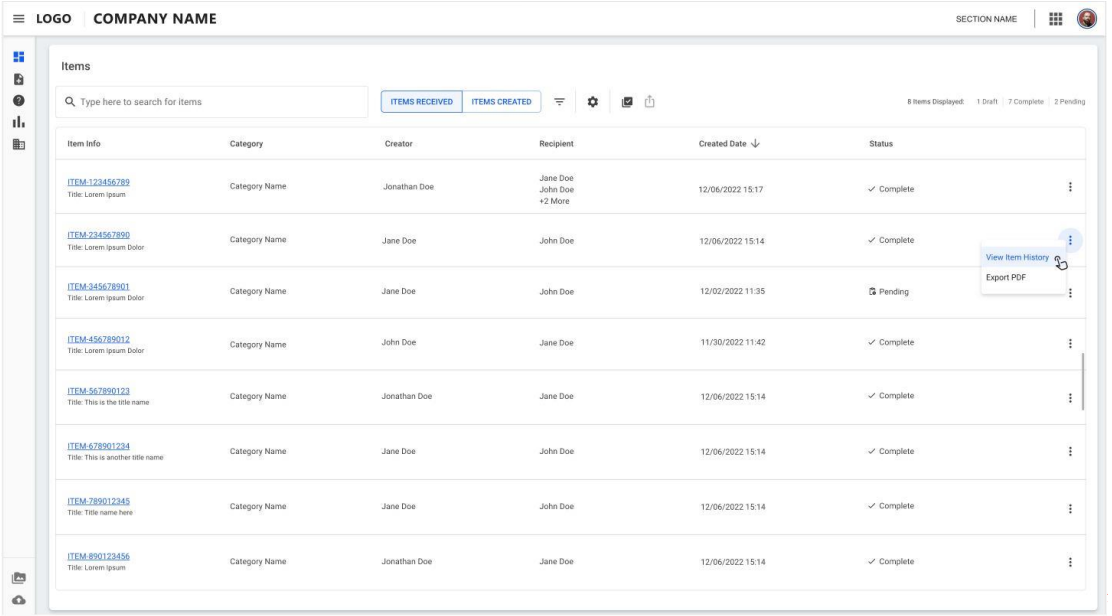
Details: Here are the details, here are the details, here are the details, this could take a few lines, here are the det... SHOW MORE
11/23/2023 06:58 EDT
Jane Smith
Item was created by Jane Smith.
11/22/2023 06:20 EDT
System
ITEM-234567890 has been generated.

Prototype

I created an interactive clickable prototype so the team and users could understand how one would move through the screens for the various scenarios.

[View interactive prototype]



Accessibility considerations

1

Uses design system, which follows 508A accessibility guidelines for all components and is consistent with the rest of the platform. Design is adaptable with screen readers and colors have been tested for adequate contrast

2

Includes clean layout, plain language, and clear headings to aid user in understanding of the new feature

3

Uses column labels and optional help to make the new screen understandable

Results and What I learned

Results: Supervisors were now better able to track and monitor the activities within their busy office and make sure action items were not getting “stuck” in the process. Supervisors were now able to easily create regular reports in **1/5 of the time** it previously took.

I learned that repeatedly testing with users will guide the designs, both in understanding user preferences and the reasons for those preferences. Studying their feedback can spark new ideas which can further optimize the designs. Successfully incorporating a new feature into an application involves understanding user needs and continuously improving the product by continuing to listen to users and adapt. New features can be seamlessly incorporated into an application that users already are familiar with, minimizing their learning curve.

Let’s connect!

Please contact me if you would like to review additional design work.

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