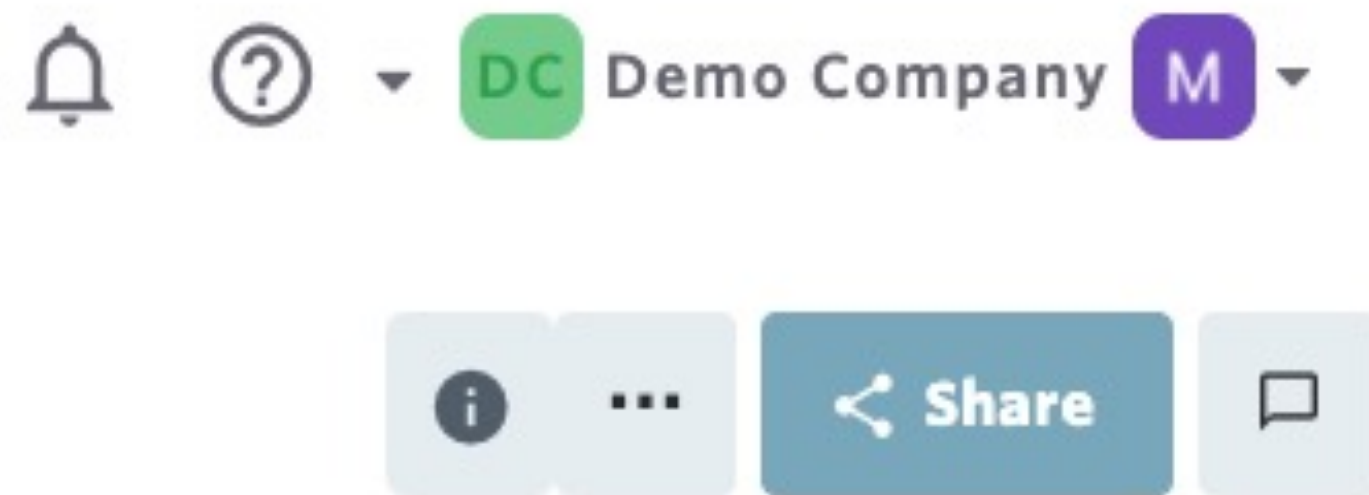# UX Improvements

Overview

I went through the application section by section and noted all the "quick fix" UX improvements I could find. I took screen shots and added descriptions as to what the issues are. I have also done design improvements which have been shared with the developers. Pending approval they are ready to start implementing the design changes over the next few sprints. These updates, while small will help the overall experience while using the application.

Plans

Plans

Upper Right Nav

The info button blends with the 3 dot menu, also this is an odd spot

Plans

Save Bar

The save bar across the bottom gets lost, consider a modal as a "roadblock"

Plans

Table

Actuals | Forecast are easy to miss and the color differential is not good on bad monitors

Plans

Table

Table scroll should be always available

Plans

Table (Menus)

Too many actions are hidden, we need to determine primary actions vs "overflow" actions. All primary should be available at all time and not hidden. Also, the expand icon isn't always available and the user has to rollover the "sweet spot" in order to see it.

Plans

Table

When I double clicked the cell it brought up the blue cell below. There is no context for this and it is confusing. On the right (Jan) when a user clicks to sort the column shrinks.

Revenue by Account ⓘ ∨ … ⮩ 🗨

Account	Department	↑ Jan-20	Feb-20
Revenue	**Unassigned**	-	-
Billable Expense Income (38)	Unassigned	-	-
adfasdf	Unassigned	-	-
Billable Expense Income (38)	Unassigned	-	-
Billable Expense Income (37)	Unassigned	-	-
Billable Expense Income (36)	Unassigned	-	-
Billable Expense Income (35)	Unassigned	-	-
Billable Expense Income (34)	Unassigned	-	-
Billable Expense Income (33)	Unassigned	-	-

Plans

Table (Row)

Row actions should be visible and more easily accessible. If we want to put them into a menu structure then the menu should be visible at all times. The current method is difficult to use and implements the wrong icons.
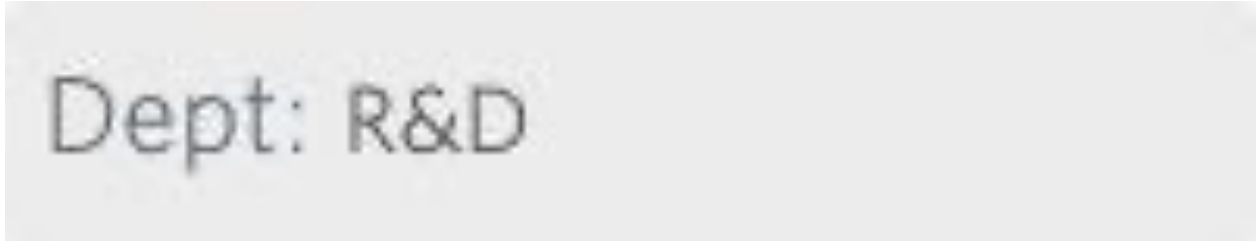
Plans

Department

The department switcher is disconnected from the modules and looks like a disbaled button not a context switcher.

Plans

Dropdown

- Active (3 of 5), where are the other plans?
- The rollover menu is difficult to find
- The orange line is far from clear that a name is needed, maybe a hint text.

Plans

Charts

When a user clicks the charts icon there is a several second delay it feels like the link is broken, perhaps a loader (typing giraffe)

COGS ⓘ ⌄ ... 📊 💬 ⛶

Income Statement

Account	Department	Jan-18	Feb-18	Mar-18
Revenue	Unassigned	-	-	-
Sales	Unassigned	-	-	-

Plans

Drivers

The way to create drivers is inconsistent. Some has the "Add" button under it and for some, you have to click on the "..." menu

COGS ∨ ... ▭

There are no rows to display

OpEx ∨ ... ▭

There are no rows to display

Other Income & Expense ∨ ... ▭

There are no rows to display

Balance Sheet ∨ ... ▭

There are no rows to display

CapEx Assets ∨ ... ▭

There are no Assets ADD

CapEx ❶ ∨ ... ▭

There are no rows to display

Allocations ❶ ∨ ... ▭

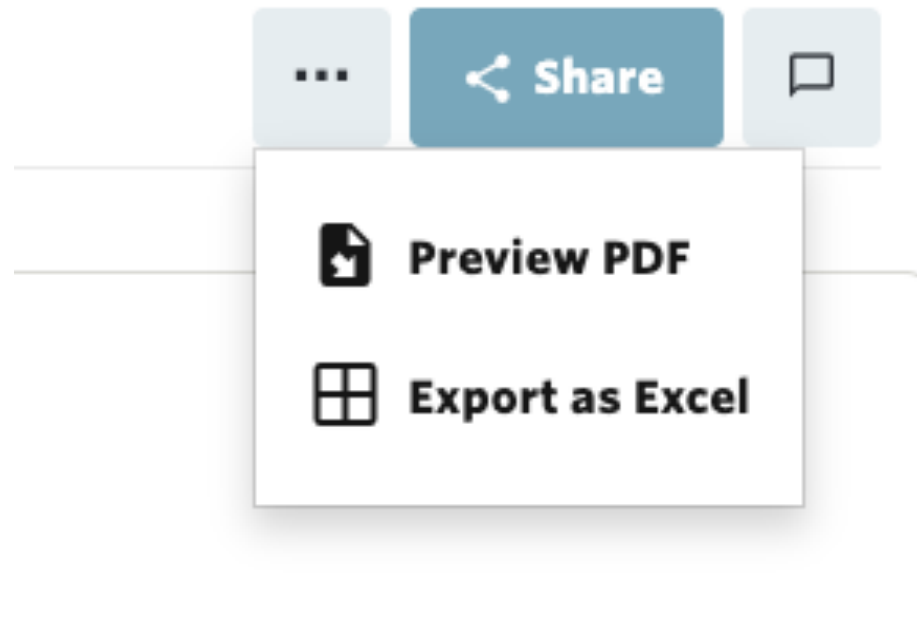There are no rows to display

Staffing ❶ ∨ ... ▭

There are no rows to display

Reports
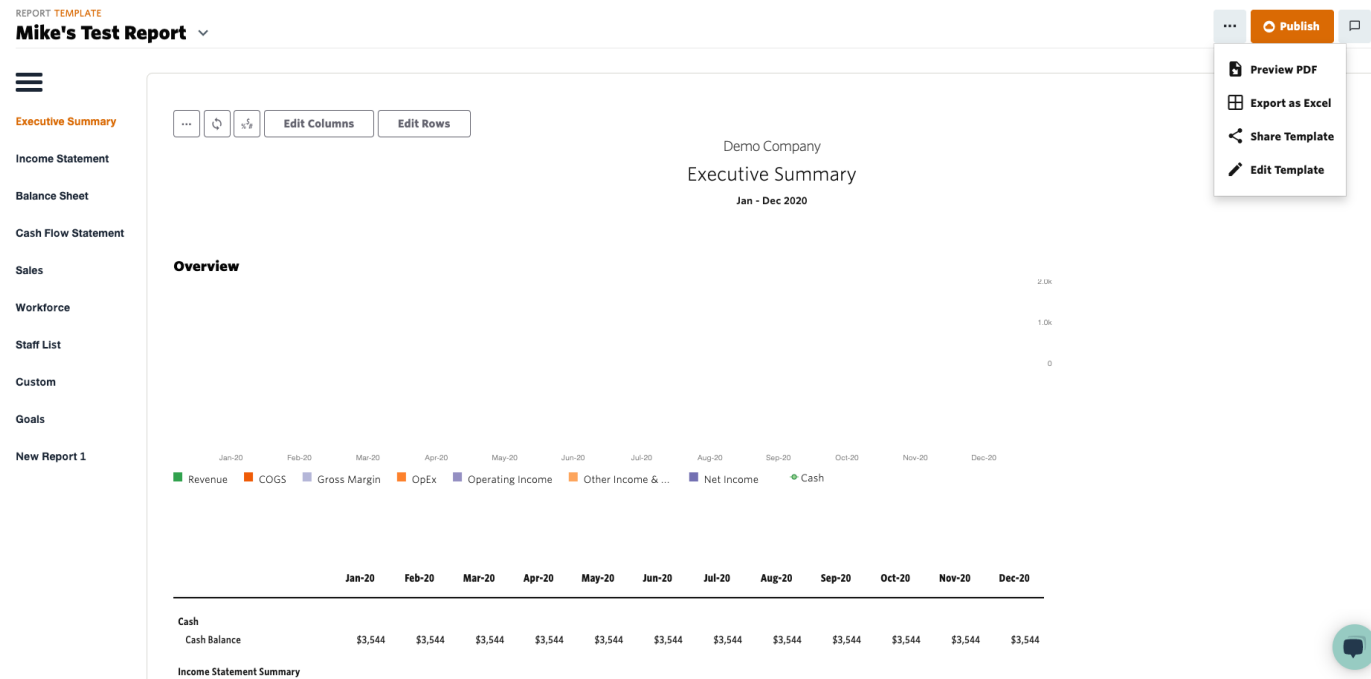
Reports

Upper Right Navigation

The ... menu actions should not be hidden and should be more readily available.

Reports

Upper Right Navigation

The … menu is very disconnected, the actions should be available and not hidden

Reports

Report Actions

The actions are hidden in the … menu and are completely disconnected from the actual data

Reports

Edit Template

The rollover menu is difficult to access. It also uses the wrong icon for a menu. We should determine what are primary and what are overflow actions.
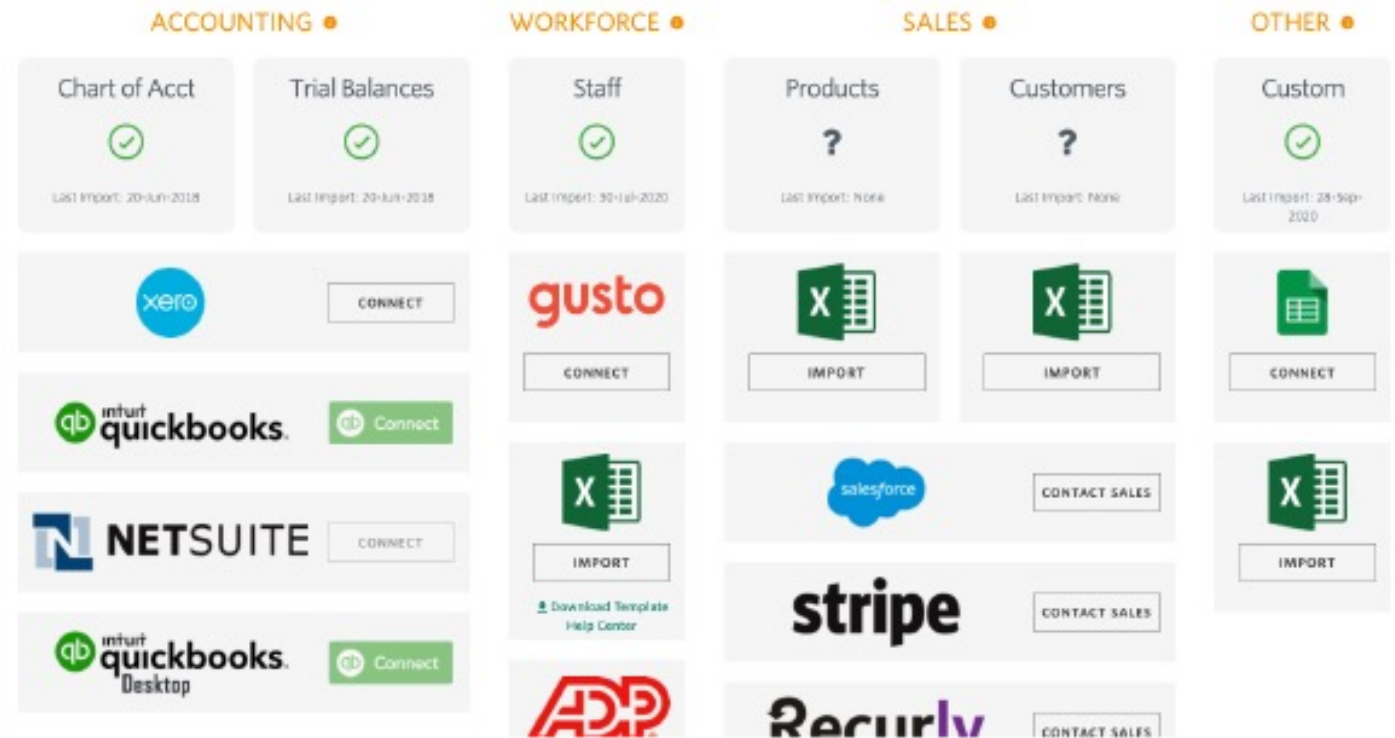
Setup

Setup

Landing Page

- The page feels very overwhelming, there is no actual flow to it.

- The tiles blend together and the orange column titles are difficult to read and can be confused for links

- The connect buttons look very similar to the inactive buttons

- It is not clear that each section has a sub section (especially Products & Sales)

Setup

Cashflow

With a form set up that is so vertically tall we need to set up "sticky" titles. That way as the user scrolls through they are always aware of which radio button they are selecting

Cash Flow ⌄

Account Classification

	Operating	Investing	Financing
Assets			
Assets	◉	○	○
Current Assets	◉	○	○
Bank Accounts	◉	○	○
Other Current Assets	◉	○	○
Accounts Receivable	◉	○	○
Prepayments	◉	○	○
Inventory	◉	○	○
Test	◉	○	○
Unmapped	◉	○	○
Fixed Assets	○	◉	○
Office Equipment	○	◉	○
Less Accumulated Depreciation on Office Equipment	○	◉	○
Computer Equipment	○	◉	○
Less Accumulated Depreciation on Computer Equipment	○	◉	○
Unmapped	○	◉	○
Other Assets	○	○	◉
Unmapped	◉	○	○

Dashboard

Dashboard

Setup

- The vertical orange line makes it feel like 2 different sections and it's far from obvious the left controls the right.

- The two "GO" buttons in the right column look like a proper call to action when in reality they launch a video.

- All the videos have the same opening frame, it is not obvious the videos change

- In the Getting started areas the actions on the right get lost in the "chaos."

- Crossing out completed tasks look like a CSS error not a checklist

Dashboard

Setup

Dashboard

Upper Right Navigation

These actions should not be hidden but should be clearly accesible at all times

Dashboard

Whole Dashboard

The dashboard is not responsive, there is a ton of wasted white space on the right side forcing the user to have to scroll instead of taking advantage of the space
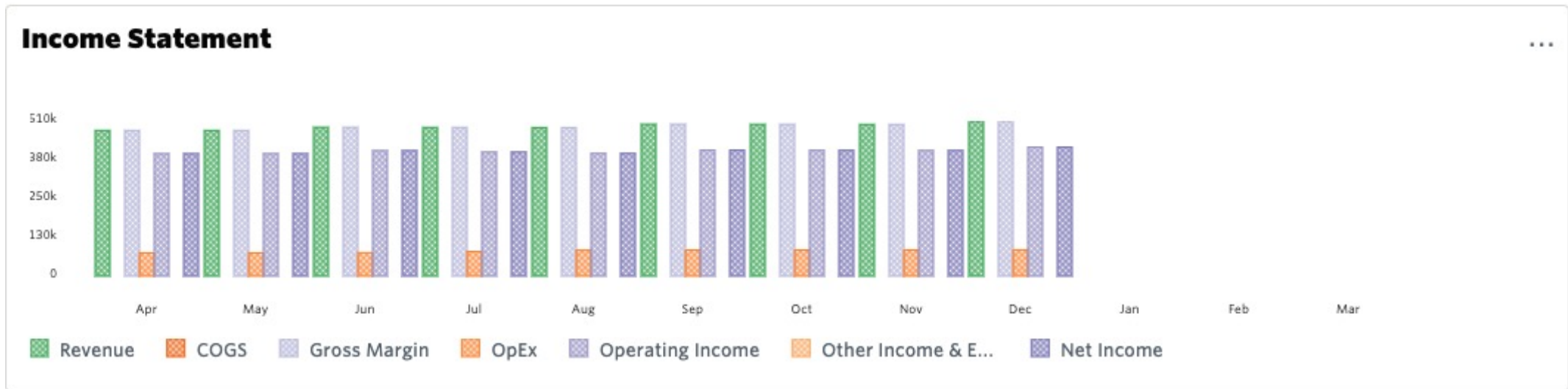
Dashboard

Edit

The edit and overflow menus are hidden

Dashboard

Edit Modal

There is a pencil in place of the traditional X/close button

The save and cancel buttons are not visible, the user has to scroll to the bottom to see them. Now they don't have an easily accessible escape route.

Global Issues

Global Issues

Save/Cancel

Inconsistent Button Formatting

Global Issues

Form Fields

I know it is "cooler and cleaner" to user underlines as form fields, but it is not obvious these are meant to be filled out.
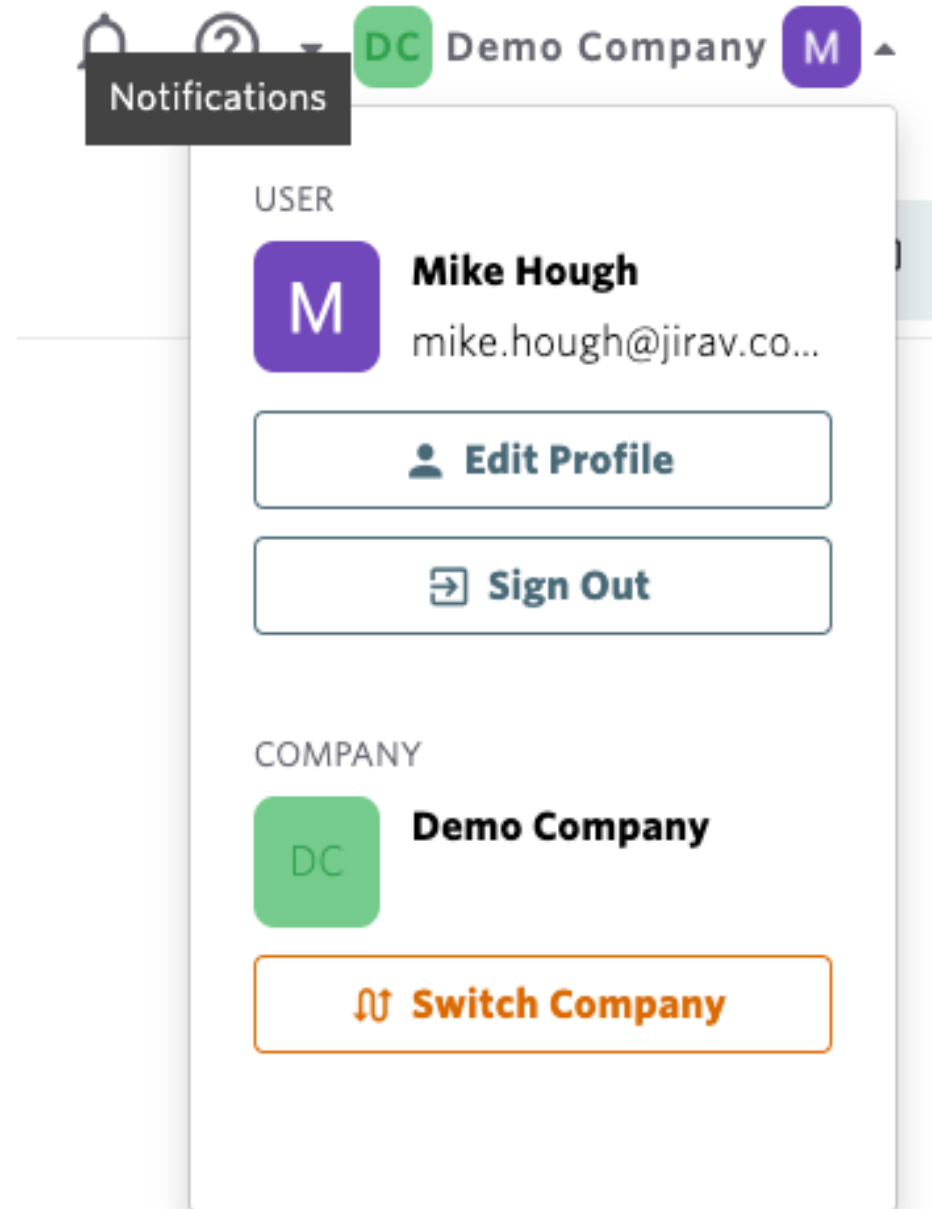
Global Issues
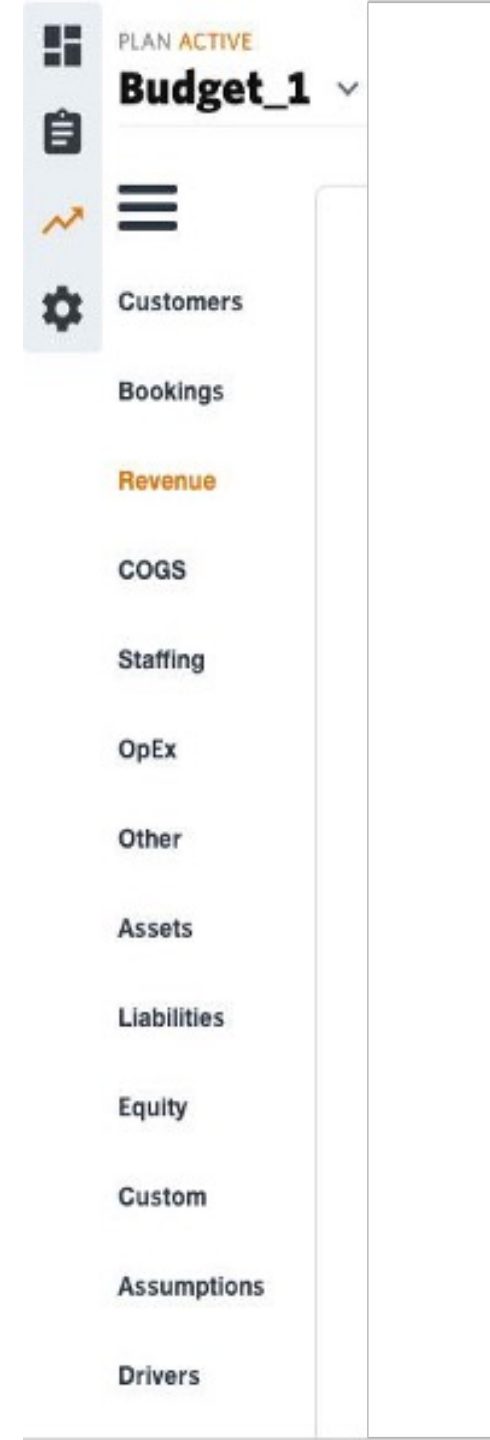
Upper Right Navigation

The two different colored squares made me think there were supposed to be two seperate dropdowns.

Global Issues

Menu

- The menu structure lacks a visible hierarchy. When I was first introduced to the app I had no idea what was going on

- The left primary navigation relies entirely on icons and rollovers. Icons should never be a primary menu, they are good for secondary actions or highlight a menu

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PLAN **ACTIVE**

Budget_1 ⌄

Customers

Bookings

Revenue

COGS

Staffing

OpEx

Other

Assets

Liabilities

Equity

Custom

Assumptions

Drivers

Global Issues

Menu (continued)

- In this image, it's the plan section. It was not clear that "Budget_1" was a plan. Also, the "PLAN ACTIVE" is confusing. I haven't found another state other than "ACTIVE."

- The hamburger menu icon is wrongly used here. The icon is not meant to be an expandable/collapseable icon, it s meant to be a primary menu icon.

PLAN ACTIVE
Budget_1 ⌄

Customers

Bookings

Revenue

COGS

Staffing

OpEx

Other

Assets

Liabilities

Equity

Custom

Assumptions

Drivers