Catalogs and Items: Internal Testing

Description:

- Usability testing with the an invision prototype. [Protocol here.](#)
- 5 Sessions
- The data within the prototype was changed to mirror more real-life use cases in the last 2 sessions. This gave more context to the user, which they would have if managing their own items and catalogs.. Data in the first 3 acted more as a placeholder.
- Final Prototype can be found here: https://drive.google.com/file/d/1_-_kOqEmNTeey1jS3EI4JZxntnbq_4zx/view?usp=sharing

Goals:

- Uncover usability problems
- Test the testing protocol for external testing

Findings:

Though we found some usability problems, participants were able to complete all tasks.

Clarity

Issue	Description	Possible Solutions
Adding and removing to Catalogs and Items	Remove action is hidden	Display a disabled remove button. Add a tooltip that explains why it's disabled
Required Properties	This is a new concept, and there isn't enough context. A few participants thought this feature related to "dynamic searchable lists" or a theoretical "Smart Catalogs."	Add more descriptive text including changing the label to say "Required Item Properties". Add a pattern in design system to include a checkbox group with a description under the label.
Export	Participants were entirely clear if it would export would include all the catalogs or items, or the filtered view.	Add a modal that gives the user the option if their list is filtered.
Column Headers	In the Details view, participants were confused by whether a list contained	Add "Catalog ID" and "Item ID" to headers. This might not be a

	catalogs or items.	problem when users are managing their own data.
Column Headers	Participants assumed the chevron represented sort.	This differs from the sort icon and aligns with the dropdown icon we use today. The participants were asked to filter a multi-value column with no sort option. If they did sort a column, they would see a different sort icon, which should dispel confusion. There would be a slight learning curve that would easily be overcome.
Add Item/ Add Catalog	Participants didn't know if all fields were required or no fields were required	Will add. Didn't see a required field in the design system, so may need to add.
Item Count (Catalogs)	Participants wanted to know the number of Active Items, not the total number of items.	Update the mock-ups.
Page Headers	On details page, a few participants were confused why "Save" was disabled. Participants didn't think "Cancel" was the right option.	Change "Save" to "Save Changes." Change "Cancel" to "Close"

Consistency

Issue	Description	Possible Solutions
Adding and removing to Catalogs and Items	Differs from other adding and removing paradigms like UAPs	Change to be more like UAP paradigm. Would need to change PG and Teams as well.
Show versus edit page	Differs from People and Places. Participants looked for Edit and Disable buttons.	Continue to follow the new paradigm with some changes. Implement hover state in prototype.
Adding Property Values	Participants said it differs from the current properties experience.	Include the text "Add '[Value]' as a new value to dropdown with a plus sign.
Page Header	One participant was wary about using "Save" to complete the process of creating a new item or catalog. For Missions, customers will choose "Save" when they want to	Try changing "Save" in the add new flows to "Create"

	choose "Deploy." The may confuse them further.	
Page Headers	The disable flow differs across People, Places, and PG and Teams.	This flow slightly differs from the new PG and Teams flow. We would want to make sure those align, before we implement.

Feature Feedback

Issue	Description	Possible Solutions
Mission Responses	Several participants did not see the value in this	Remove feature. Users would gain little to no value with this feature. Originally it was included to be consistent with People and Places. Users would rather see this information on a more aggregate level rather than a per item level, which can be better accomplished through reporting.
Add Item	Participants would want to immediately add a new item to catalogs within the same flow.	Consider adding this to MVP.
Required Properties	Participants wanted the ability to "fix" disqualified items - add property values if necessary.	The easiest way to accomplish this may be allow the use to add "Null" property values to all the disqualified values. We could also allow users to click into the item, allowing them to go through the item edit flow, and redirect them back to the page once they've saved the changes.
Add Item/ Add Catalog	Participants weren't sure why there were two pages to create a new item or catalog	This is a pattern we've established. It will be helpful if we ever do implement "Smart Catalogs." Would we want to implement it for People and Places as well?
Assigned Missions	Participants were glad to see this feature	This won't be used everyday, but it saves CSMs a lot of time.

CSV Upload	Participants told us that their customers do not bulk manage people or places.	Re-examine the uploader wizard in the future. Are customers confused by it or would they rather have someone do it for them rather than even try.
Barcode Scanning	Right now, no dedicated way to input barcode number - sometimes it's a custom ID, sometimes it's a property	Add a standardized field for Barcodes
Position	Participants would want to add and position an item in the same screen.	Combine position and add items in Catalogs. Drag and drop functionality would be the most intuitive for this feature.

Notes:

All the finding highlighted have been addressed in the current file in Abstract. The finding highlighted in purple may change since the design team is planning to decide on a page structure to guide future updates to the web app. The findings not highlighted will be addressed once the work is picked up by a team.