

# AQUINAS AND MORE

# ADMIN USER INTERFACE

# DOCUMENTATION

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# UI/UX RESEARCH PLAN

01/20/2012

User Experience Employee Interviews

by James Rutherford, Sr. Operations Designer, james@aquinasandmore.com

Stakeholders: Ian Rutherford (President and web developer), Employees

## Background

The current Aquinas and More admin site serves as a POS system, inventory management system, fulfillment system, and data entry system. The abilities of the system are largely organized by data similarities. As the need for more efficient operations has become imperative, it has been shown that a task-based system would greatly reduce the amount of labor required to perform the daily tasks of the various departments.

## Goals

Ascertain each employee's technological experience, note their most frequented tasks, and get user input for the admin redesign project.

## Research Questions

What is your technological experience?

Do you use touch-based interface systems in other areas of your life?

What are your five most-frequented tasks?

Do you have ideas on how to improve the efficiency of these tasks?

## Participants

Because of the small number of employees at Aquinas and More, each one will be interviewed so that there is a full sampling of data from each department. The total number of participant will be six or less.

## Schedule

Interviews will be conducted the week of 1/23/2012. A signup sheet will be posted for employees so that they can choose a time that has the least impact on their work schedules.

## Script

See Department Folders\IT\UI\_InterviewQuestions.pdf

# UX INTERVIEW

Aquinas and More Catholic Goods, Inc.  
 User Experience Interview

User Name: \_\_\_\_\_  
 Job Title: \_\_\_\_\_  
 Department: \_\_\_\_\_  
 Date: \_\_\_\_\_  
 Conducted by: \_\_\_\_\_

**TECHNOLOGICAL EXPERIENCE:**

1. How would you rate your level of comfort with computers?

very comfortable					very uncomfortable				
1	2	3	4	5	6	7	8	9	10

2. Do you have a computer at home?

Yes  No

3. What programs do you use the most?

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

4. Have you ever used a touch screen device like an iPad or smart phone?

Yes  No

5. Do you ever use pay-at-the-pump or self-checkout? Why or why not?

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

6. Do you find those interfaces intuitive?

Yes  No

1

**OVERALL IMPRESSION OF ADMIN SITE:**

1. How would you rate the usability of our admin site?

<b>utterly confusing</b>					<b>very intuitive</b>				
1	2	3	4	5	6	7	8	9	10

2. How would you rate the efficiency of the site?

<b>way too much clicking to find the pages I need</b>					<b>everything is right where I need it</b>				
1	2	3	4	5	6	7	8	9	10

3. When you've finished a task does it usually end where the next task begins?

Yes	No
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How would you rate the graphical design of the site?

<b>there's a graphical design to the site?</b>					<b>I can't imagine a more beautiful site</b>				
1	2	3	4	5	6	7	8	9	10

**TASK ANALYSIS:**

1. What are the five most-frequented tasks you perform on the admin site?

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2. Do you any ideas on how to improve the efficiency of these tasks?

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3. Are there any additional features associated with these tasks that you would find helpful?

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4. Are you aware of any bugs associated with these tasks?

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**OBSERVATION:**

Instructions: Watch the user perform the top five tasks and take notes.

**Task 1** \_\_\_\_\_

1. Is the user performing the task the way the task was designed?

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2. If there is more than way to perform the task, is user taking the shortest route?

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3. Is the user proficient at finding the proper buttons and links?

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**Task 2** \_\_\_\_\_

1. Is the user performing the task the way the task was designed?

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2. If there is more than way to perform the task, is user taking the shortest route?

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3. Is the user proficient at finding the proper buttons and links?

---

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**Task 3** \_\_\_\_\_

1. Is the user performing the task the way the task was designed?

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2. If there is more than way to perform the task, is user taking the shortest route?  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3. Is the user proficient at finding the proper buttons and links?  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Task 4** \_\_\_\_\_

1. Is the user performing the task the way the task was designed?  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2. If there is more than way to perform the task, is user taking the shortest route?  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3. Is the user proficient at finding the proper buttons and links?  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Task 5** \_\_\_\_\_

1. Is the user performing the task the way the task was designed?  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2. If there is more than way to perform the task, is user taking the shortest route?  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3. Is the user proficient at finding the proper buttons and links?  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

4

# INTERVIEW SUMMARY

## Table of results

Common Task Summary		Tech Experience						Averages		
cust order status	3	1 - tech comfort	7	10	5	10	3	10	7.5	
Add/Edit item	2	2	Y	y	y	y	y	y	y	
change item inventory	2	3	Office	Outlook	web email	Firefox	Windows XP	Photoshop		
change warehouse loc.	2		Excel	Firefox	Paint Shop Pro	web email	Outlook	Dreamweaver		
item search	2		Outlook	Eclipse	Open Office		Firefox	inDesign		
receive boxes	2		web email	Word	PC games			Windows Media Player		
send Pos	2		Windows Media Player	SQL Server Manager				Word		
take order	2		4	n	y	y	n	y		
take orders	2		5	y - convenience	y - faster	y - faster / convenience	y - faster, easy learning curve	y - faster	y - convenience	
create credit accounts	1		6	y	y	y	y	y	y	
create coupons	1		Overall Impression							
do drawer/sales report	1		1 - usability	7	6	8	8	9	4	7
fill orders	1		2 - efficiency	7	5	2	5	9	3	5
find pending orders	1		3	n	n	n	n	y	n	
PO status	1		4 - graphics	5	2	3	1	9	1	3.5
process orders	1		Task Analysis							
process PP, Google...	1		1	process returns	Add/Edit item	take orders	take order	process orders	Add/Edit item	
process returns	1			PO status	take order	cust order status	cust order status	ship packages	receive packages	
ship packages	1			cust order status	view invoice report	item search	do drawer/sales report	change item inventory	change item inventory	
update order location	1			receive boxes	create coupons	fill orders	item search	change warehouse location	change warehouse location	
view invoice report	1			take orders	send Pos		find pending orders	process PP, Google...	create credit accounts	

## PERSONA 1

*Sydney Skirvin*

Age: 42

Position: Fulfillment Specialist



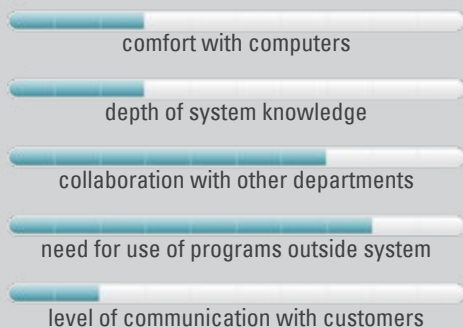
***“Everything has to be finished, every day.”***

SYDNEY HAS A BACKGROUND in fulfillment / logistics. He is very self-driven and likes all his work finished before the end of the day. Sydney believes that the key to successful and efficient work is the result of planning and organization rather than system optimization.

In his free time, Sydney enjoys spending time with his wife and two teenage children and taking in the occasional football game. Sydney has been using computers in his occupation for 12 years, but only uses his home computer for simple tasks like writing emails and checking the score from the previous night’s game.

Sydney is most comfortable using uncluttered user interfaces that allow him to quickly accomplish his task. He seldom explores a program’s capability beyond the basic level of functionality and this sometimes means that he misses out on time-saving techniques like using shortcut keys and saving frequently used pages as grouped tabs. He has to conquer a steep learning curve to understand computer programs, but once he has learned the technique he will

### Statistics



### Objectives

- Fill orders and ship packages without errors
- Have a clean workspace at the end of the day
- Get customer orders out as quickly as possible
- Insure shipping costs do not exceed shipping income

### Frustrations

- System bugs and errors
- Inventory discrepancies
- Multiple non-integrated essential systems
- Non-documented procedures

### Common Tasks

- process orders
- ship packages
- fix item inventory
- change item warehouse location



## PERSONA 2

Jane Vasterling

Age: 29

Position: Customer Service Representative



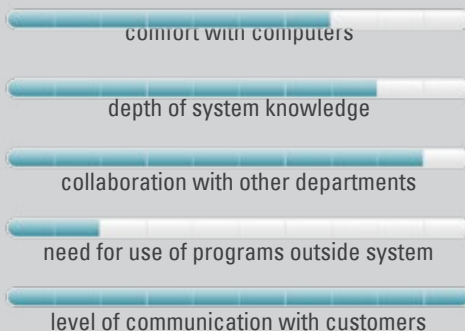
***“I have to be creative when trying to solve customer problems.”***

JANE IS A CUSTOMER SERVICE REPRESENTATIVE who has been with the company four years. Her previous jobs included cashier and receptionist. She is talented at understanding the customer’s needs and coming up with creative solutions to resolve issues as they arise.

Jane has a smart phone and a home computer and considers herself fairly adept at learning new technologies. At home she uses Facebook, consumer-level photo manipulation software, and plays the occasional PC game. She enjoys spending time with friends and family and is an active volunteer in her community and church.

Her job as a customer service representative requires that she be able to use the user interface system in a variety of creative ways. While many of her tasks are linear, she also has to have access to the fulfillment / purchase order system in order to track order progress with customers and vendors. She works closely with other departments to provide customers with a satisfying shopping experience. For Jane, communication is the key to professional success.

### Statistics



### Objectives

- Provide customers with a high level of attention and care
- Resolve customer issues quickly and satisfactorily
- Always find the item a customer is looking for, even if it is not part of the standard inventory

### Frustrations

- Lack of documentation
- Task flows that do not reflect customer expectations
- Inability to change existing orders

### Common Tasks

- take customer orders
- check purchase order status
- check customer order status
- find item SKUs

## PERSONA 3

*Mitch Abernethy*

Age: 36

Position: Product Manager



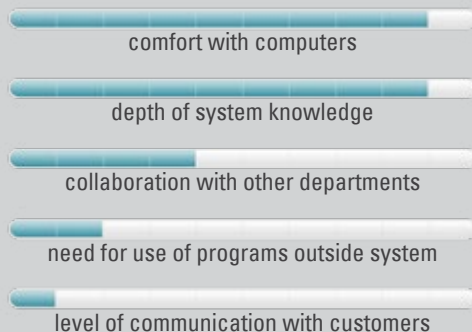
***“I have to be efficient to manage a large database of products.”***

MITCH IS AN AVID READER with a great depth of product knowledge. He is well suited to his position because he uses the products in his off time and enjoys keeping up with industry news and changes. He has a 4-year college degree and a background in sales.

While Mitch’s primary talents are in sourcing product, he also has some technical training using professional level image manipulation software and has a thorough understanding of the product management system. He is adept at pulling data out of the internal system as well from other online sources. Mitch’s capabilities at using the system surpass that of employees in most other departments. He can do data entry using the standard techniques as well as through spreadsheet upload.

Mitch obsesses over having the proper tools to do his job. Workarounds and system inefficiencies lower his productivity and overall job satisfaction. The large database he has to manage makes smooth processes essential to his productivity.

### Statistics



### Objectives

- Source new products that will excite customers
- Update pricing the most efficient way possible
- Write copy for items that will entice shoppers to buy
- provide customers with accurate information about products

### Frustrations

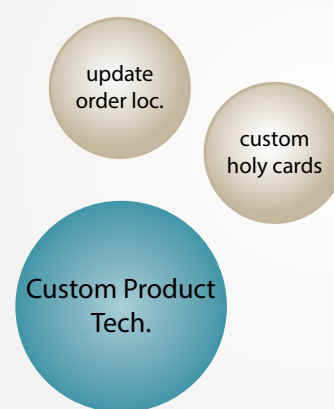
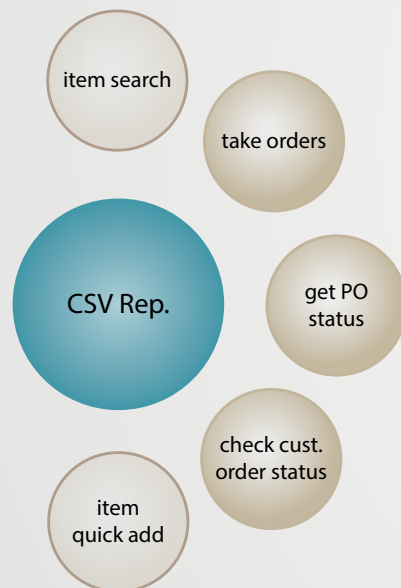
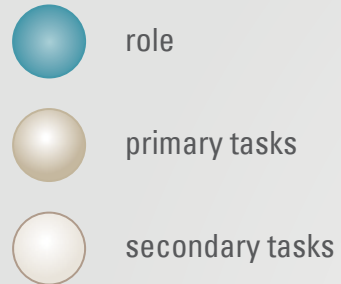
- Not having enough information to thoroughly add an item
- Managing a dynamic database of constantly changing items
- Using a category tree that does not work intuitively
- Not having a standard way of receiving product information from vendors

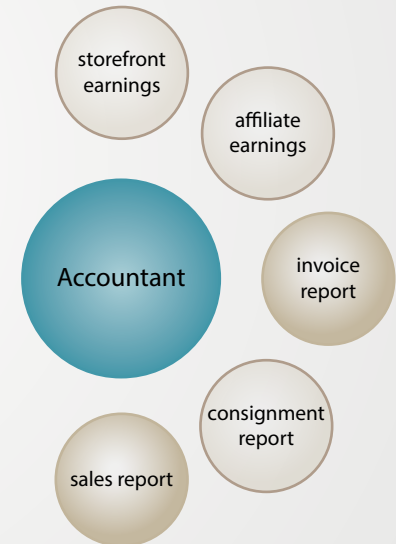
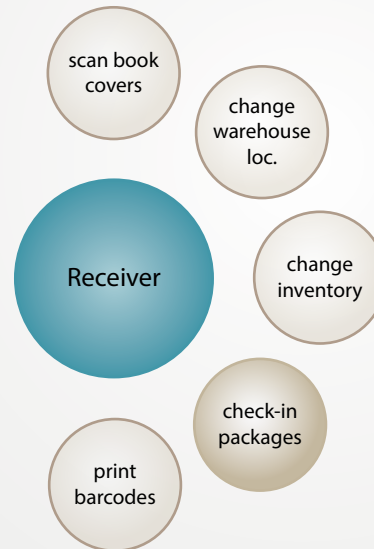
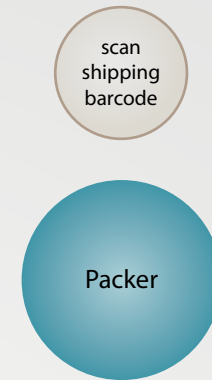
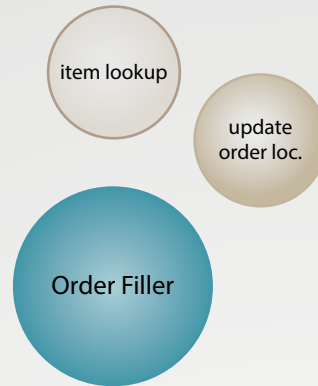
### Common Tasks

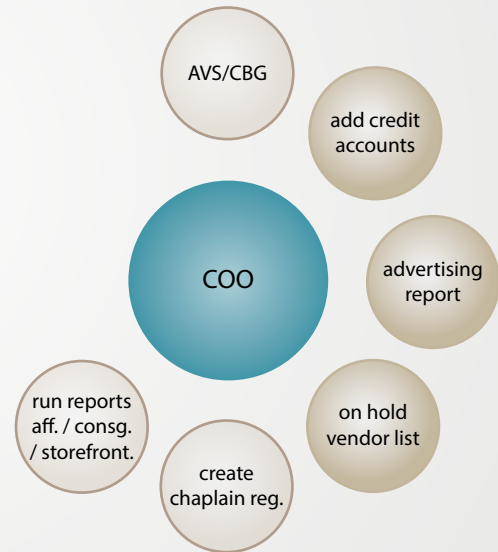
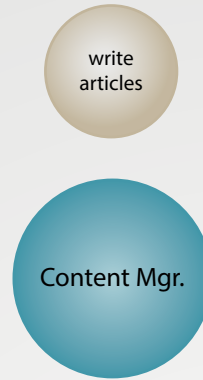
- adding and editing items
- changing prices
- adding new vendors
- creating product images

## TASK ASSESSMENT

The purpose of this task assessment is to document the types of tasks each employee role handles according to user interviews.







## SHIPPING

### Ship a Package

The screenshot shows a shipping form with the following elements and callouts:

- 1**: Customer order number: W20121210223487
- 2**: Current order status: Is Being Processed
- 3**: Notes: Please ship package before the end of the month.
- 4**: Shipping Method: Standard
- 5**: Carrier selection: Radio buttons for USPS, FedEx, and UPS.
- 6**: Quick Selects: Buttons for FC, MM, and PM.
- 7**: Drop-down menu: Currently set to First Class.
- 8**: Accumulated Shipping: \$0.00
- 9**: This shipping cost: Input field.
- 10**: Enter Tracking Numbers: Three input fields.
- 11**: Ship Package button.

- |  |  |   |
|--|--|---|
| <p>1. Customer order number.</p> <p>2. Current processing status of the order.</p> <p>3. Notes submitted by customer or customer service department.</p> <p>4. Customer's chosen shipping method.</p> <p>5. Shipper selects from available carriers. Selected radio button defaults to customer's chosen method.</p> <p>6. Quick Selects buttons for common carrier service methods. Options are based on the radio button selected (5).</p> | <p>USPS has First Class (FC), Media Mail (MM), Priority Mail (PM).<br/>FedEx has Smart Post (SP), Ground (FXG), and Second Day (FX2).<br/>UPS has Ground (UPSG), Second Day Air (UPS2).</p> <p>7. Drop down has all available shipping options from every carrier.</p> <p>8. Accumulated shipping shows the shipping costs from any prior shipments on the order.</p> <p>9. Shipper enters the shipping cost for the current shipment.</p> | <p>10. Shipper scans in barcodes from package.</p> <p>11. Shipper marks package shipped. This updates the order status and charges the customer for the shipment.</p> |
|--|--|---|

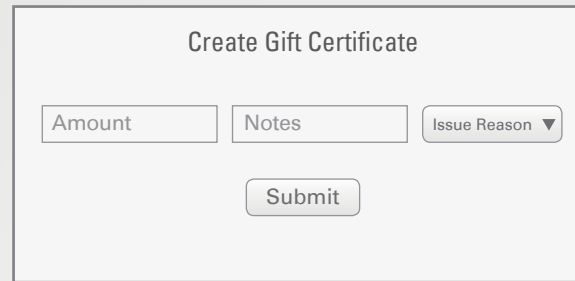
## CREATE GIFT CERTIFICATE

*Step 1: Fill out fields*

### Amount and Notes

Enter gift certificate amount.

Add notes for reasons like “faithful shopper” customer name or an order number associated with the gift certificate.

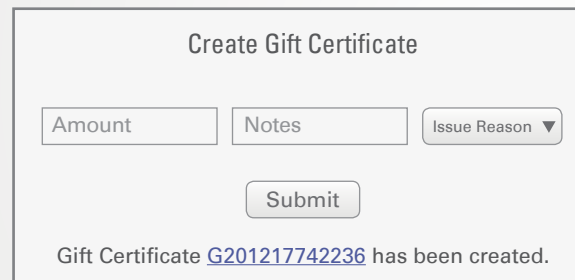


The screenshot shows a form titled "Create Gift Certificate". It contains three input fields: "Amount", "Notes", and "Issue Reason" (a dropdown menu). Below these fields is a "Submit" button.

### Reason

Select reason so that a report can be generated for gift certificates.

*Step 2: Confirmation page*



The screenshot shows the same "Create Gift Certificate" form as in Step 1, but with a confirmation message below the "Submit" button: "Gift Certificate [G201217742236](#) has been created."

### Confirmation

Confirmation shows the gift certificate number. Click on number

## BARCODES AND WAREHOUSE LOCATIONS

*Step 1: Fill out fields*

**Fields**  
Enter SKU and quantity (to print).  
If not printing, leave quantity blank.

### Location Dropdown

If "Print Y" is selected, barcodes print based on qty, and warehouse location is updated on SKU.

If "Print N" is selected, only the warehouse location is updated.

When warehouse location has not changed on SKU, warehouse location is not updated.

Warehouse location sticks for entry of next SKU and field focus returns to SKU.

*Step 2: Confirmation page*

65213 has been updated.'"/>

### Confirmation

Confirmation shows which SKU has been updated and provides a "\_blank" link to the "item edit" page.



## CHANGE INVENTORY

*Step 1: Fill out fields and select warehouse location*

**SKU Field**  
Field focus is set on SKU.

**Location Dropdown**  
Warehouse Location dropdown defaults to N/A and only updates the item if an alternate location is selected.

### Print Barcodes

Print Barcodes prints number of barcodes in QTY and default is set to N.

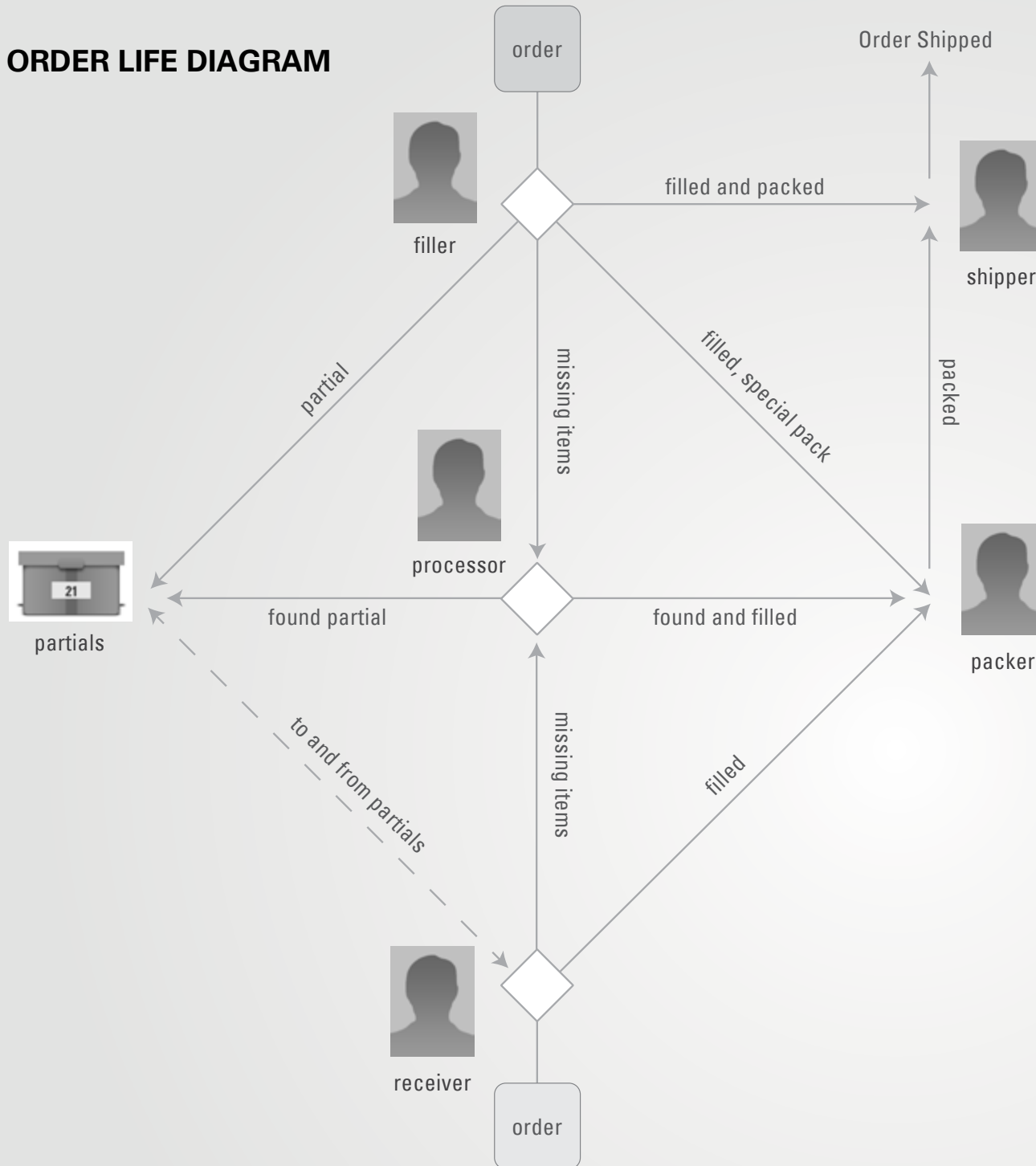
*Step 2: Confirmation page*

### Confirmation

Confirmation shows image of updated item. Text shows qty updated and current inventory value. SKU number is a “\_blank” link to the inventory changes for that item.

Field focus returns to SKU field and warehouse location stays on previous value.

# ORDER LIFE DIAGRAM



# FILLABLE ORDER TASK FLOW



a. Queue is all orders which can be filled and shipped including Ship As Available Orders with items in inventory.

b. When all items have been scanned into the order, the screen shows an order-filled page and displays the “Packed” and “Bagged” button.

c. When the “Packed” and “Bagged” button has been clicked the screen moves to the next order in the queue.

d. Package sealed with shipping voucher, shipping barcode affixed to package, and package placed in bin for the shipping line.

e. Items, barcode, and shipping voucher placed in zipper bag and put in bin for the packing line.