User Feedback: Tracking

Report for the Initial Feedback on the Redesign of Tracking Screens; eBH 3.0

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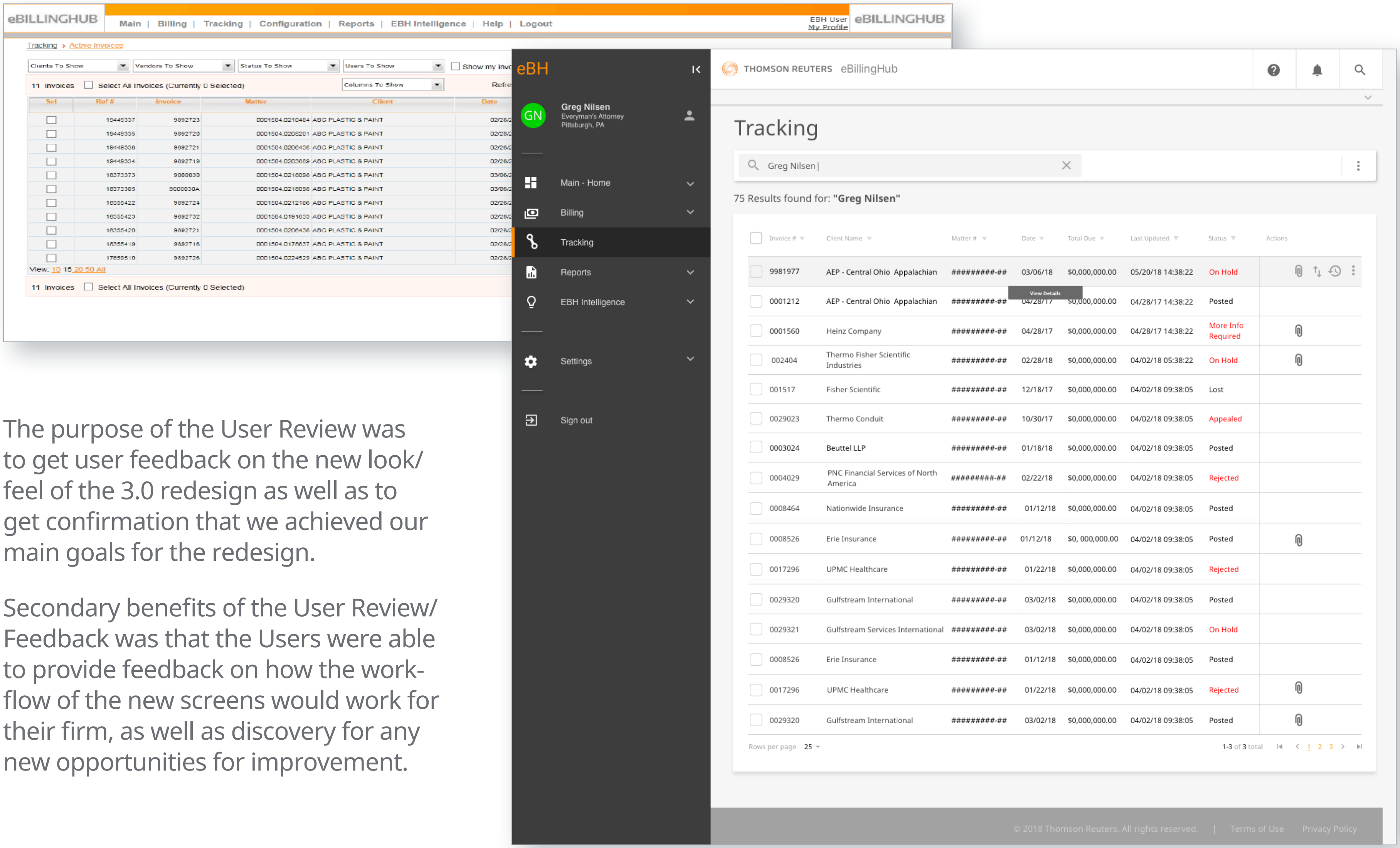
Introduction



The purpose of the User Review was to get user feedback on the new look/feel of the 3.0 redesign as well as to get confirmation that we achieved our main goals for the redesign.

Secondary benefits of the User Review/Feedback was that the Users were able to provide feedback on how the work-flow of the new screens would work for their firm, as well as discovery for any new opportunities for improvement.

First iteration of eBH 3.0 Tracking Screen with Grid Results

Objectives

Our Goals

The goals of reviewing the prototypes with Users was to understand if we had met the main goals in the redesign effort and addressed User's previous pain points within the old application:

- Improve the overall navigation of the application.
- Streamline the workflow of Billing and Tracking.
- Reduce the number of clicks it takes for a user to accomplish frequent or redundant tasks.
- Make labeling across the application more transparent and consistent to the User in order to reduce cognitive overload and reduce learning curves.
- Enhance UI and incorporate previous feedback from Users.

In addition:

- Identify additional opportunities for enhancements or additional features.

Prep Work for Testing

Preliminary Work

A prototype in Axure was created with only a certain set of tasks available to walk through.

A script was then created by the UX lead for any moderators that were to walk through the prototype's tasks with the various users.

The script was created as a talking point reference for moderators when walking through the prototyped screens with each user. This was done in order to be consistent with the delivery of the information to each user no matter who moderated, as well as to prevent any oversights of information.

Once that was preliminary work was created, invitations to review the prototype with a moderator was sent to a selected group of users from the eBH User Board.

eBH Script for Tracking - User Review *Sharon Orienza*

June 11, 2018

Tracking Review

1. *Find the Tracking module within the navigation.*
2. *Begin a search of bills for the attorney Greg Nilsen: Just type in Greg to begin your search.*
3. *Select the option of Billing Attorney*
4. *Click on the Search button (Return does not work on the prototype)*

Viewing Details:

1. *Select the first invoice on the page*
   a. *(note how users select all)*
2. *Once the invoice has been selected;*
   a. *Select the Details to view the details*

Inbound Data

1. *Does User know what the label means? (get feedback on their thoughts for labeling)*
2. *Select it*
3. *Is this the information the User was expecting?*
4. *If not – what were they expecting to find here?*

Outbound Data

1. *Does User know what the label means? (get feedback on their thoughts for labeling)*
2. *Select it*
3. *Is this the information the User was expecting?*
4. *If not – what were they expecting to find here?*

Action Buttons

1. *Walk user through each of the action buttons*
2. *Does the User recognize each of the action buttons?*
   a. *If not – which ones were they struggling with?*
   b. *Why were they struggling with them? Does picture not visually represent the button well?*
3. *Once told what a button was (if struggling) did it make sense?*

History

1. *Does User know where the History button is? (get feedback on their thoughts for labeling)*
2. *Select it*
3. *Is this the information the User was expecting?*
4. *If not – what were they expecting to find here?*
5. *Can the User figure out how to get back to the grid on their own?*

User Demographics

Breakdown of Users

The test users were selected from a volunteer board. The selection process was based on a sample of people who work daily within the application and who typically have one or more staff billers reporting to them.

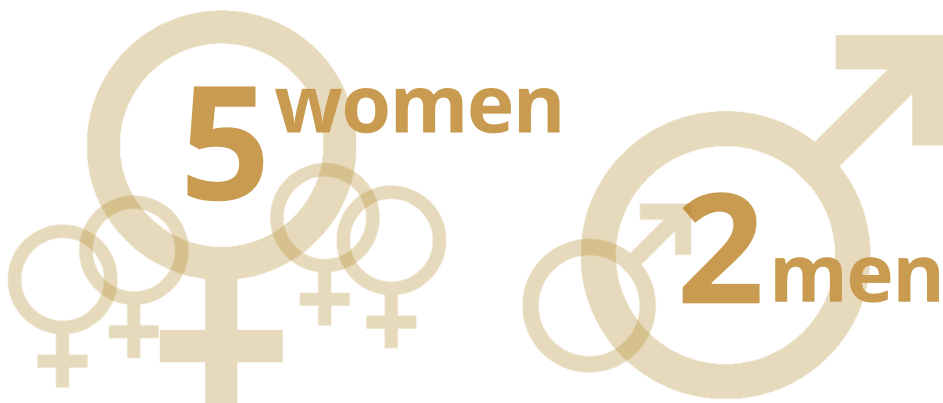
5 Firms

7 People

2 Directors

5 Managers

5 firms returned recruitment responses and 7 people participated in the exercise.



5 Women

2 Men

The Interview Process

What was done

Each user was asked permission by the tester to record the session and approval was given by a signed electronic consent form.

The sessions were conducted through webex remotely due to time and distance limitations. The webex tools of screensharing and recording were utilized by the moderator to control the situation and record the sessions.

A link to the cloud-based prototype was given to the users beforehand, along with instructions on how to use the link so that users had some time to preview the interface. Normally this is not done in this type of testing, but as our time with user's was limited, the moderator wanted to give the users the opportunity to develop any questions they may have.

At the beginning of the test, the tester opened the application in Chrome on their desktop and instructed the user on how to turn on screenshare so that they could control the user's desktop. This enabled the tester to take back control of the interface at any point and time if a user struggled.

Firm: K&L Gates

Users

Andrew Harris: Director of Client Accounting
Denise Martinez: Billing Supervisor
Susan Vogel: Billing Supervisor

Overview of their daily work

- 80-85% of their invoices get processed in Elite.
- 99% of their billing is domestic.
- There are 4 people in the billing department and they cover all the firms' billing nationwide.

Comments

How they search

They thought it was a nice feature that eBH added ‘billing attorney’ as a search opportunity, but noted that they would never use that search feature in searching their invoices. They typically search through invoices by the following categories (listed in order of priority and/or frequency of use):

1. Client Name
2. Client Number
3. Invoice Number
4. User Name
5. Status of Invoice

Filtering opportunities

All three users commented that they would like to retain filtering capabilities after their initial search. None of them felt that the search was intuitive enough for them to provide this filtering capability after they performed a search. In addition, they felt that they needed to view all invoices based on a certain criteria; review that information and then determine if they needed the results to be filtered down to a more detailed level.

Firm: Ropes & Gray

User

Ali Fangueiro: Assistant eBilling Manager

How she searches

When showing her the search, she thought it was great that you would be able to search by Billing Attorney, but she said she would typically want to search for items (because of their workflow) in the following order of preference:

1. Fidelity (?)
2. CMId – client Matter ID
3. Client Symbol
4. Attorney
5. Matter ID
6. Matter Name
7. Biller
8. Billing Attorney

Comments

Search, filtering and sort

Ali liked that eBH would now contain a smart search, and loved that a user could now search by Billing Attorney. However, she felt she would like some filtering capabilities after her initial search. Her other concern was that she might like to do a basic search, and would like to then filter by biller. When shown the ability to search by biller, she brought up that she would like to filter down by several billers at once, like the current application.

Areas she identified for search:

1. Filter by multiple billers/team members at once after initial search
2. Search on holds that were older than 30 days
3. Search by a date range (in tracking)

“I just don’t want to see any of the current functionality of eBH to go away.”

Firm: Lester Schwab Katz & Dwyer

User

David Glicksman:
Director of Finance

Overview of his work

- The billing team consists of himself and another employee.
- A large portion of their bills are manual submissions.
- He stated that they have very little time for troubleshooting if there's issues.

Comments

How he searches

When running through the script in order to search by ‘billing attorney’ he noted that they would never use that search criteria when searching for invoices. They typically search by the following categories (listed in order of priority):

1. Vendor (stated it’s a good way to troubleshoot connection by submitting all invoices from one vendor).
2. Client Number.
3. Client Name.

Filtering opportunities

He reflected what others had said previously: that he would like to retain some of the filtering capabilities in Tracking after his initial search. He noted that he would like to filter down from his initial search by

1. Status (of invoice).
2. Billers (or users – but he wanted to be able to filter by multiples, not just one)

Firm: Fredrickson & Byron

User

Jami Peterson: Billing Supervisor

Overview of her daily work

- She is one of 4 staff members in their Billing Department.
- She supervises 2 Billing Admins.
- The 4 staff members services the Billing for 275 attorneys.

Comments

How she searches

Jami like that you could search by Billing Attorney, but stated that wouldn’t be her first way to search. She typically would search for items in the following order:

1. Client Name
2. Client Number
3. Matter Name
4. Billing Attorney
5. Invoice Number

Filtering opportunities

She noted that she would like to be able to view all new invoices in the system without having to put in search criteria.

In the Billing Wizard, she noted that she uses the Sync all quite frequently so she can see these invoices. She said that is helpful in a variety of circumstances.

Firm: Zelle LLP

User

Kathryn Snyder: Billing Supervisor

How she searches

When illustrating how the search worked, she commented that she would typically search by client Name or Client number first. She typically would search for items in the following order:

1. Client Name
2. Client Number
3. Matter
4. Status

Comments

Comments regarding the grid

She didn't have many comments regarding the filtering capabilities or search categories. Her main focus and comments were regarding the grid display in the Tracking screens (combined comments for Tracking and Billing):

1. Status – make this sortable
2. Status – would like to actually see it as a filter
3. Status – would like to see a "New" status type
4. Invoice # - set as invoice – and place it next to Amount. Wanted it in a more prominent place
5. She really would like to keep the filtering options – especially where they have the opportunity to select multiple people/users.
6. Tracking # in grid is very important as she uses that to add notes and see where the invoice stands

Common Remarks

6 out of 7 users

Want eBH expand the "Tracking" section of its note capabilities or create more capabilities to add notes at the top level of the grid.

Andrew Harris, Denise Martinez and Susan Vogel:
"We use the notes in the Tracking Number field frequently, and I would expect that functionality to be at the top level, or at least accessible at the invoice level."

Kathryn Snyder:

"We really need that ability to add notes as well as see the status on this results page (Tracking)."

Tracking and Notes

David Glicksman:

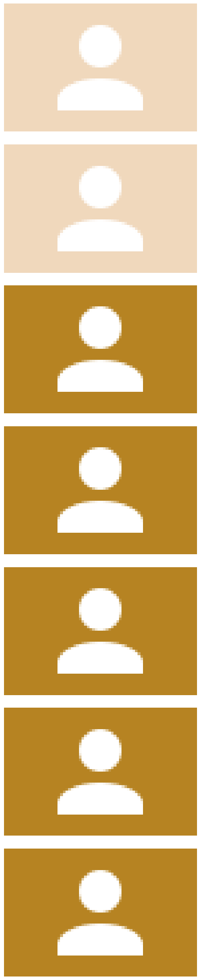
“Where is the ability to add notes and the status on the first page of Tracking?”

“We use the notes in the Tracking Number field frequently; I would expect that to remain at the top level, somewhere in the grid (Tracking).”

Ali Fangueiro:
“I’m concerned that this new design doesn’t have the ability to add notes and display the status on this (Tracking) page. We frequently need to add additional info and we use the Tracking # field to put reference notes in. This is a nice way to get an overview of the last action performed on an invoice.”

“I would like to see the most recent status – as well as the ability to change it - at the top level of Tracking. If this is taken away, it would drastically affect how we work”.

Common Remarks



5 out of 7 users

Want eBH to retain the ability to select various columns to view in the grid – with the ability to save a view or retain it when they return.

Andrew Harris, Denise Martinez and Susan Vogel:
“Turning on and off the view of certain columns is very useful. Why was that going away? Are you going to introduced it back in later?”

“We don’t want to see any of the current functionality of 2.0 to be eliminated in the new design.”

Currently, when we customize the column views – it can’t be “saved” and every time we go in we have to reset our view. Is there a way to save our preferred view somehow? That way, when we go into the application we don’t have to redo that work again.”

Column Views

Kathryn Snyder:

“I wish there was a way to keep the view of columns saved in the way that I have them set up. It would be nice if you could move the columns around the way you wished, then you wouldn’t have to worry about how it’s set up – people can just change it to fit their work style”

Ali Fangueiro:

“We currently have the ability to turn on/off the view of certain columns and I was really hoping that the new design would keep that functionality – plus add a feature that would allow you to save that view.”

Results

Based on the interviews, we believe we have met the majority of the main goals in the redesign effort and addressed User's previous pain points within the old application:

Improve the overall navigation of the application: All 7 users gave positive feedback on the navigation. The only negative comment was that some stated "it would take getting used to the navigation being on the side instead of the top."

Streamline the workflow of Billing and Tracking: All 7 users gave positive feedback on the limitation of multiple grids in order to complete one task.

Reduce the number of clicks it takes for a user to accomplish frequent or redundant tasks: All 7 users agreed that it takes less clicks to complete a task.

Make labeling across the application more transparent and consistent to the User in order to reduce cognitive overload and reduce learning curves: The majority of users said that while some of the icons were not as intuitive, they would be easy enough to learn. Several users suggested just adding a tooltip.

Enhance UI and incorporate previous feedback from Users: This goal did not seem to be met, as several users commented that previous functionality seemed to be lacking within the UI

Recommendations

A new prototype should be created to incorporate the following features into the Tracking Pages:

1. **Make the headers of all grids sticky:** Make all headers of the grids sticky so that they remain at the top as the user scrolls
2. **Retain Tracking note capability:** Return the Tracking # column into the grid and display its notes at the top level.
3. **Retain the capability to turn on/off columns within the grid:** return functionality of all the columns that are available in the 2.0 system and allow users to turn on and off their view.
4. **Allow the User to save their column view:** Allow users to save the profile view that they created within a profile, or set up custom views that they can click through in a pull-down. At the minimum, allow users the ability to retain the last organized view upon returning to the Tracking feature.