

Targeted heuristic assessment

- Consistency
- Simplicity for **speed to task**
- Recognition, not recall for learnability and training
- Adherence to SFLDS to leverage their extensive testing, and reduce maintenance
- Error recognition and recovery
- International site transfer considerations

10 Usability Heuristics



Visibility of System Status



Match Between System & the Real World



User Control & Freedom



Consistency & Standards



Error Prevention



Recognition Rather than Recall



Flexibility & Efficiency of Use



Aesthetic & Minimalist Design



Help Users Recognize, Diagnose & Recover from Errors



Help & Documentation

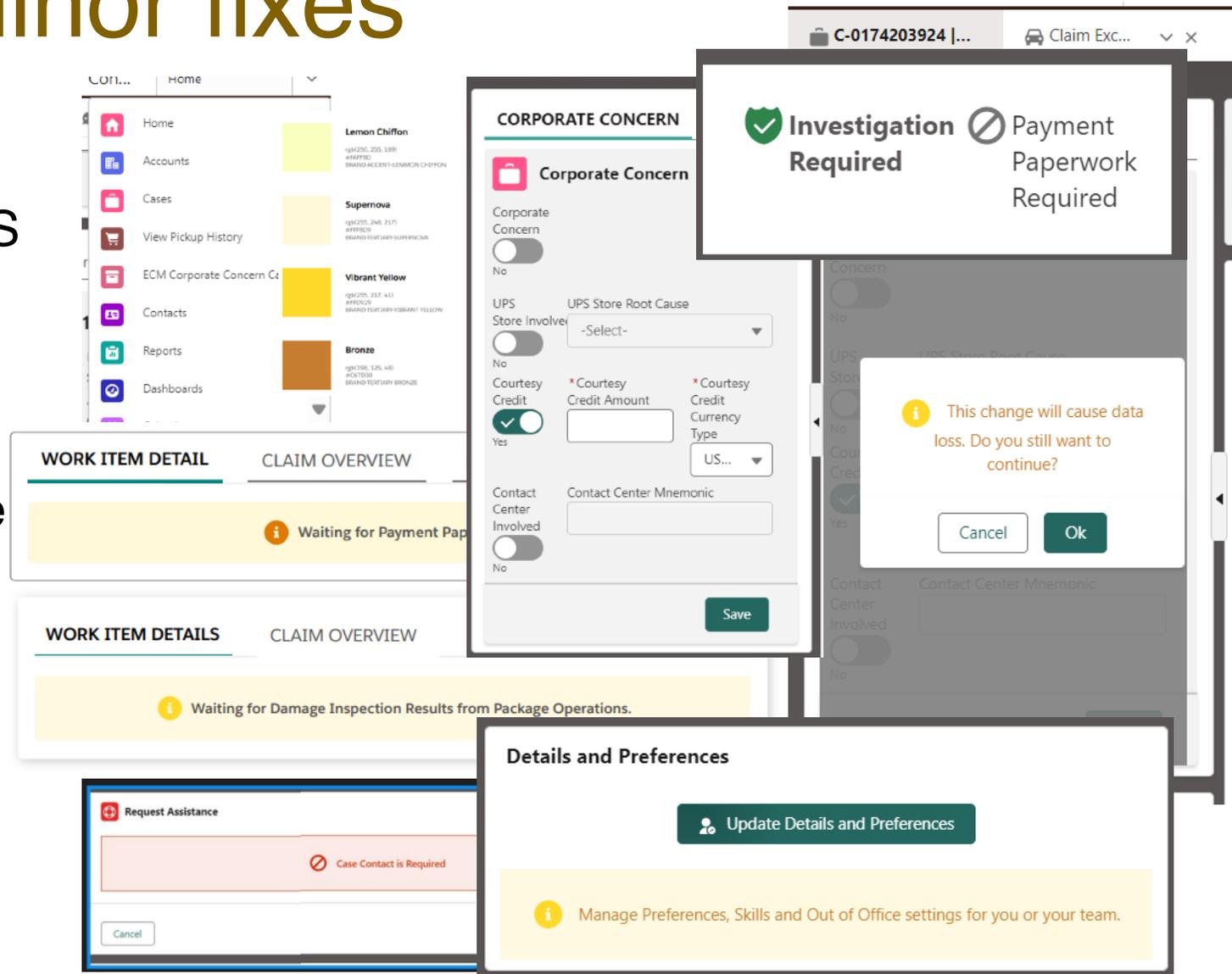
Interaction Design Foundation
[interaction-design.org](https://www.interaction-design.org)



<https://www.nngroup.com/articles/ten-usability-heuristics/>

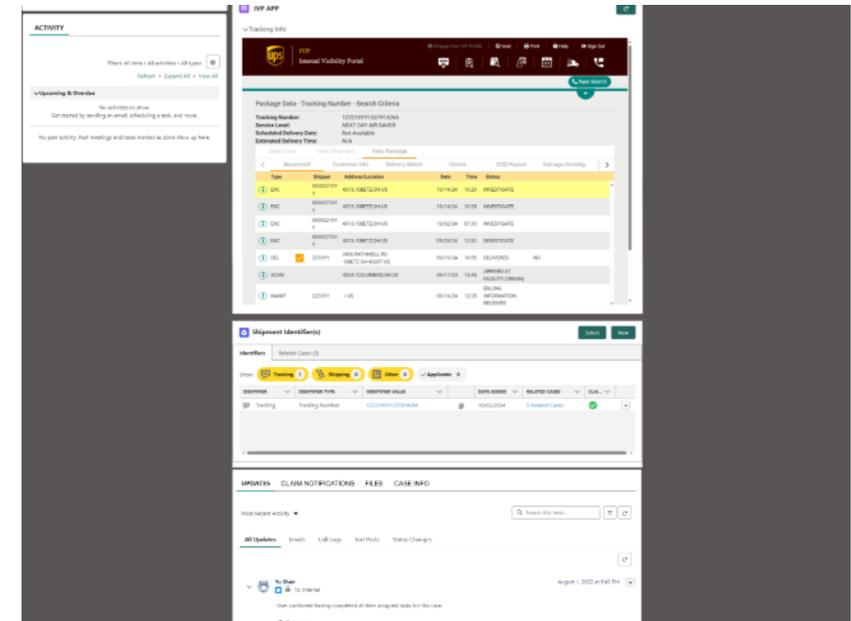
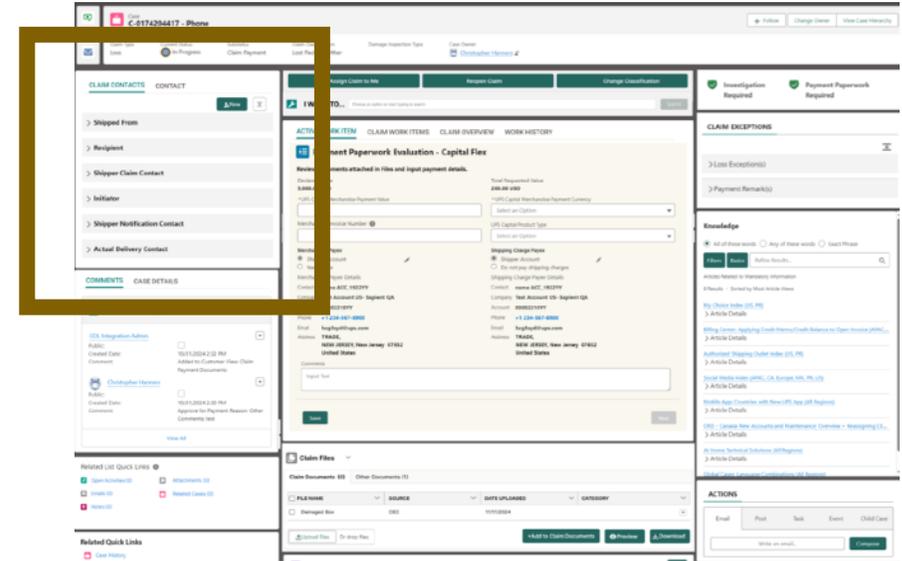
Major UX debt, minor fixes

- Use existing style guide & SFLDS
- Use disabled buttons to reduce errors, simplify UX
- Implement contextual error feedback system that is recognizable, consistent, concise (SFLDS error feedback is well-tested and clear)
- Use single column designs whenever necessary to avoid reflow, user friction
- Consider accessibility, target sizes, legibility, hierarchy issues



Claim Contacts/Contact

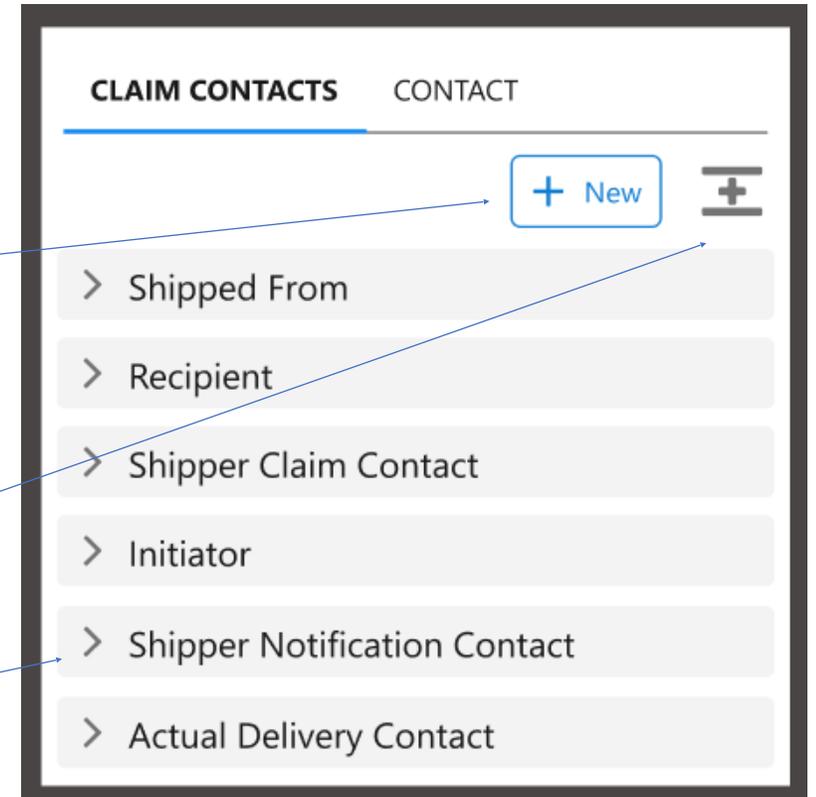
- High visibility, high risk
- Section header type: tabbed with accordions
- Current UI issues:
 - Inconsistent colors and typography
 - Inconsistent buttons
 - Inconsistent icons
- Solutions considered:
 - + NEW button
 - Expand button
 - Consistent type styling and icon usage
 - Background color usage on accordions



Claim Contacts

All tabbed sections with accordions:

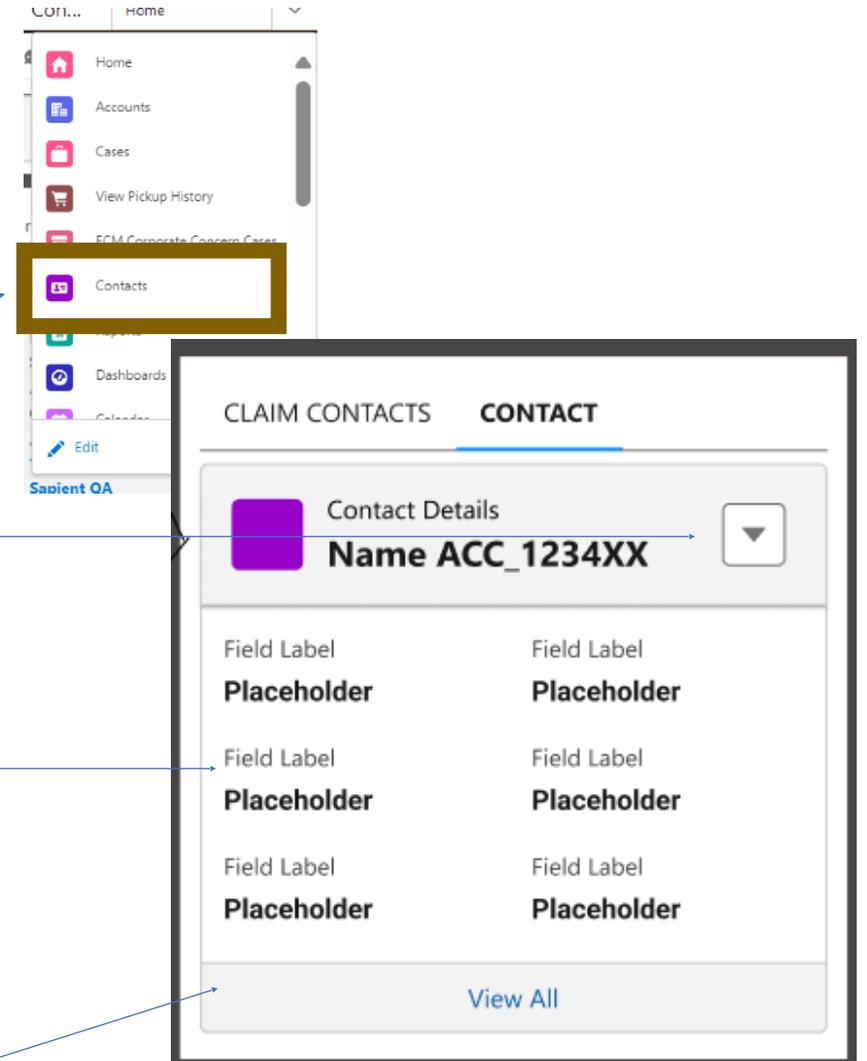
- Consider + New button for all sections applicable--this should be VERY consistent
 - Consider primary brand outline button in these cases instead of primary default CTAs to lesson noise and give critical call to actions hierarchy
- Expand All icon should be consistent size, spacing and usage in all sections
- Accordions should have identical colors, typography, icon placement and spacing (currently not matching in different sections on console)



Contact

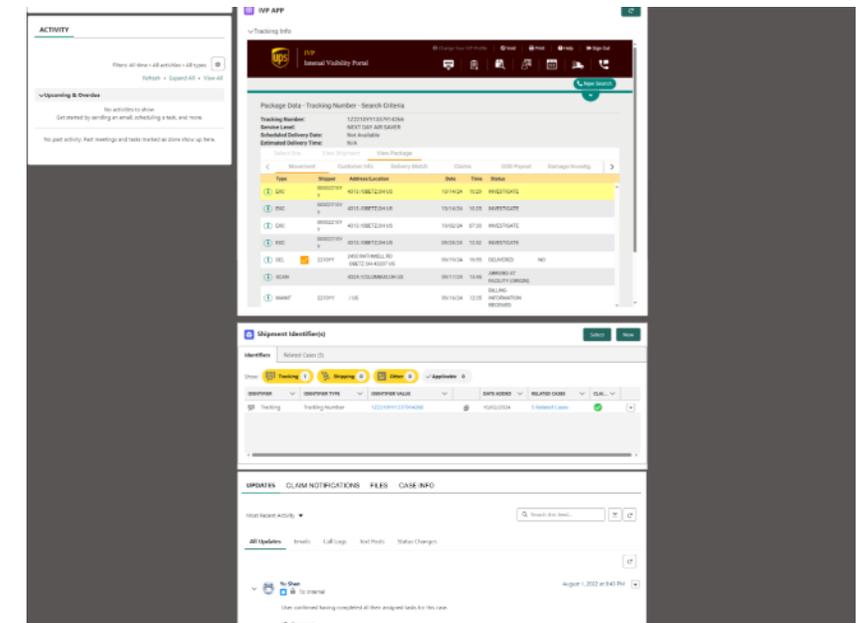
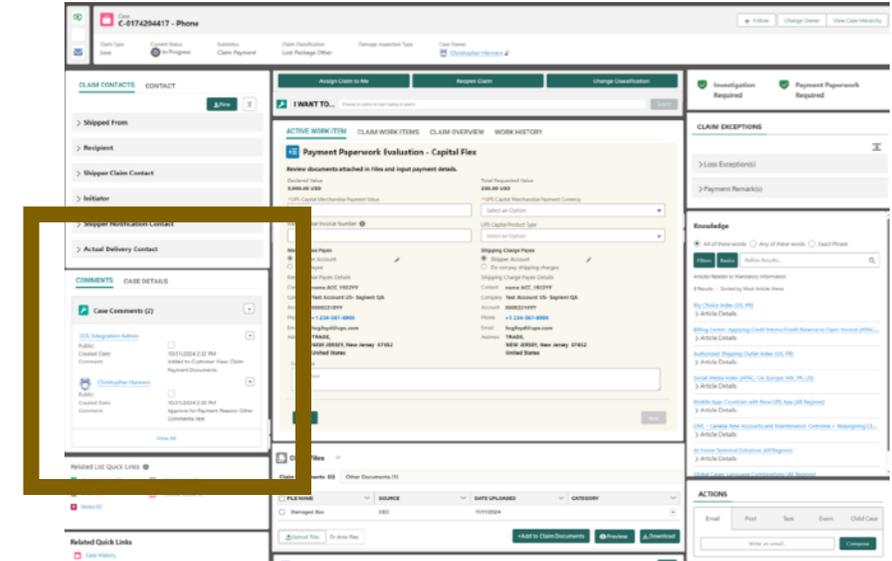
All headers with icons sections:

- Keep color and icons consistent
- “more options” work button should have consistent sizing, usage and layout
- Backgrounds vary
 - Read only should have consistent typography
 - Bkgds should be white (not grey) with yellow denoting necessary info needed
- View All/View Less should be consistently designed (currently several versions)
 - Recommend shaded bar with consistent text



Comments/Case Details

- High visibility, medium risk
- Section header type: tabbed with section headers
- Current UI issues:
 - Inconsistent colors and typography
 - Inconsistent buttons
 - Inconsistent icons
- Solutions considered:
 - Consistent type styling and icon usage
 - Background color usage
 - Single columns to avoid reflow issues



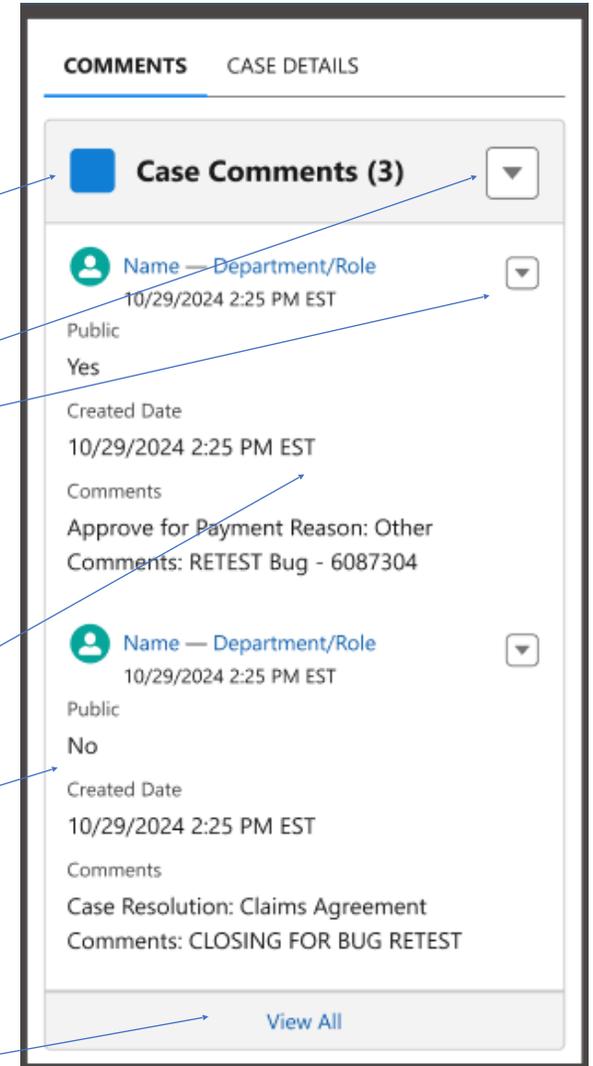
Comments

Comment logo usage should be consistent

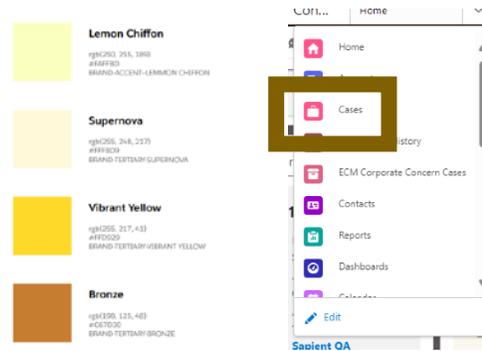


All header icon sections:

- Keep color and icons consistent
- This action should be VERY consistent
 - Always same size and for same type of usage (Edit, View, Delete, New, etc)
- SINGLE COLUMN design layout for readability and to avoid reflow
- Consistent READ ONLY design (follow SFLDS)
- View All/View Less should be consistently designed (currently several versions in console)
 - Recommend shaded bar with consistent text



Case Details



Case logo/color should be consistent

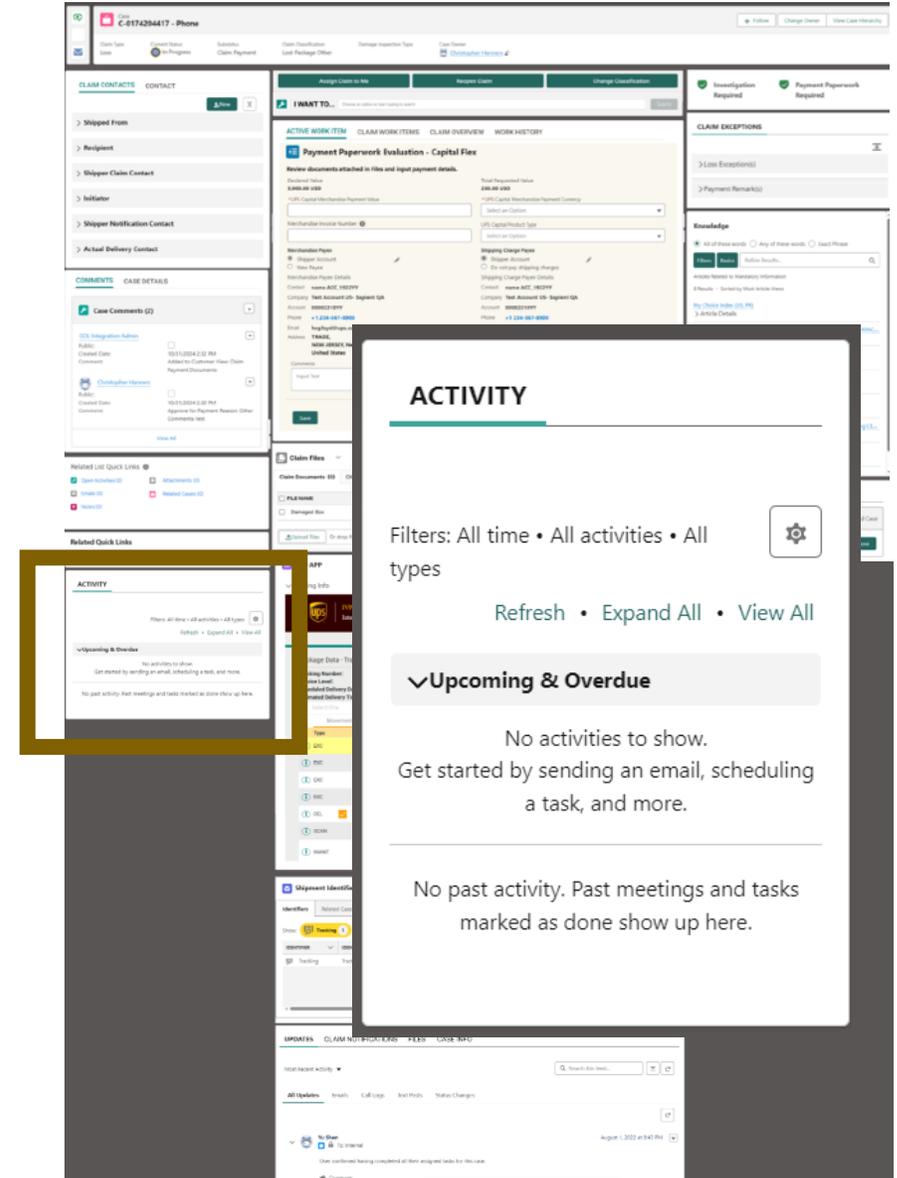
“CASE DETAILS” and “MANDATORY INFORMATION” labels are confusing. Recommend using one term for the same information.

All header icon sections:

- Consistent FORM FIELD design (use SFLDS)
 - Currently, many fields are not developed as ROWS, so any reflow or error will result in confusing UI
 - Spacing and alignment for ALL form fields should be accurate (currently very disrupted)
- Bkgd with Supernova in forms that need input, otherwise use white (not greys)
 - Be consistent with Supernova color usage: #FFF8D9
- Button bars should be consistently designed (currently several versions)
 - Recommend shaded bar with consistent button usage and right justified CTA placements for forms

Activity

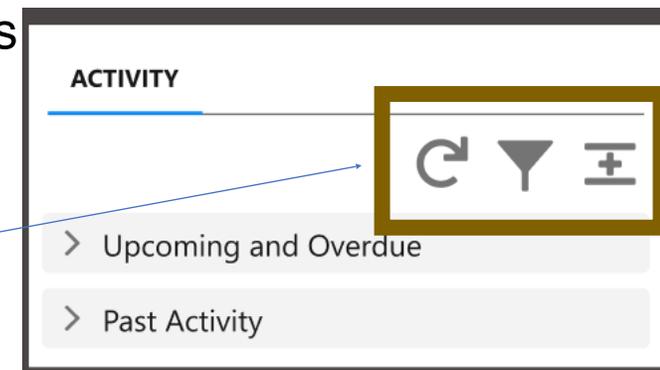
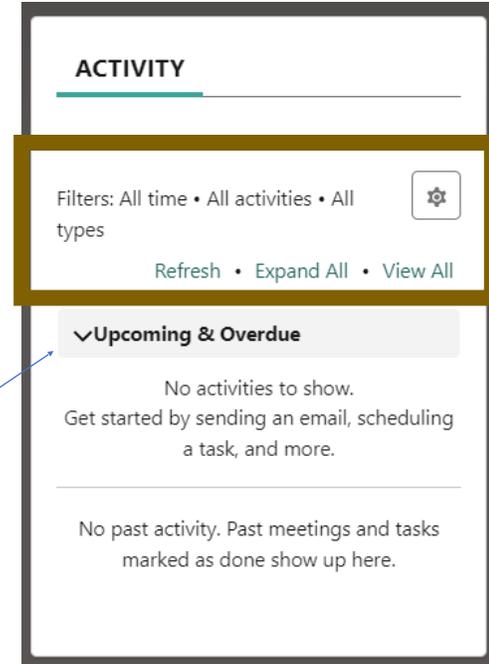
- Lower visibility, medium risk
- Section header type: tabbed with accordions
- Current UI issues:
 - Inconsistent icons
 - Inconsistent messaging
 - Inconsistent filters
 - Accordion inconsistent UI
- Solutions considered:
 - Consistent type styling and icon usage
 - Use similar icons for similar workflows
 - Address filter inconsistencies
 - Address error inconsistencies



Activity

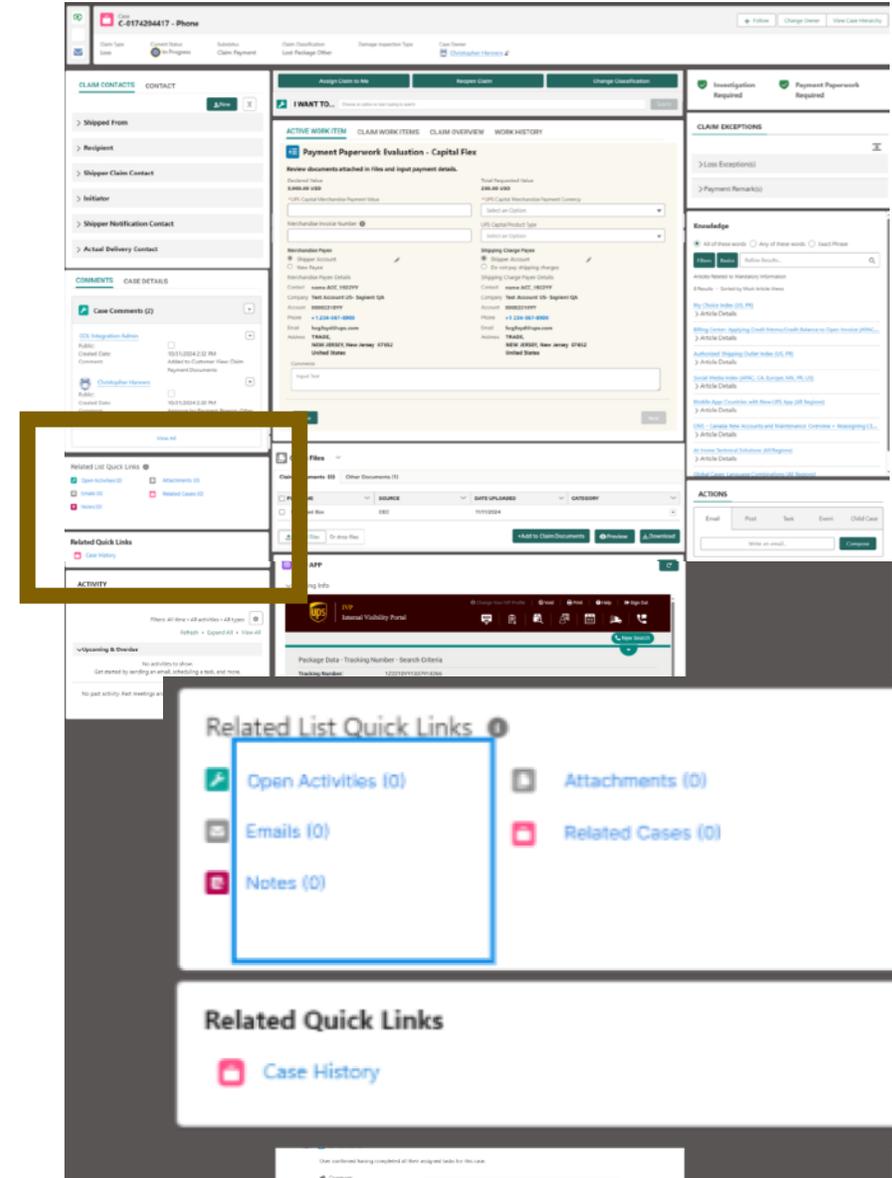
All header icon sections:

- Consistent FILTER design (use SFLDS and consistent icons)
 - Currently, there are several filter designs which is a high risk, high cost UX issue, but will become a bigger problem for international sites
 - Different icons and flows is unnecessary and causes friction for users
 - Replace 'settings' icon with a filter icon and allow user to keep filters thru sessions
- Accordions are inconsistently designed
- All icons should be consistent
 - Use a 32x32 icon size for scanning and targeting
 - Always have alt text on hover
 - Use universal utility icons



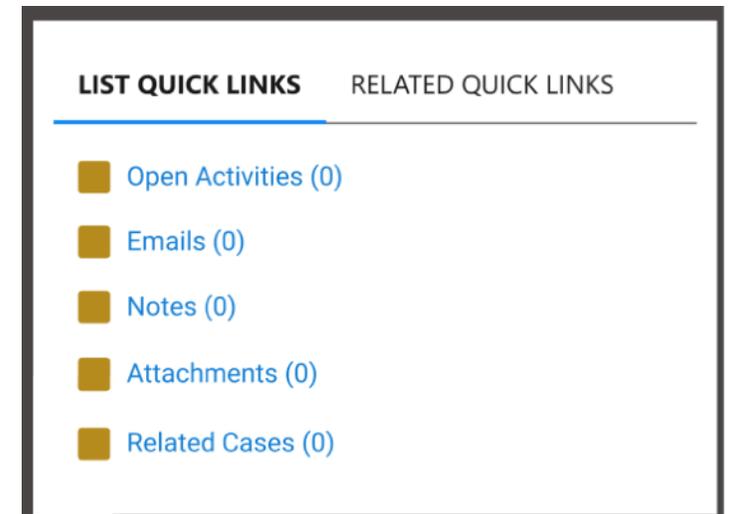
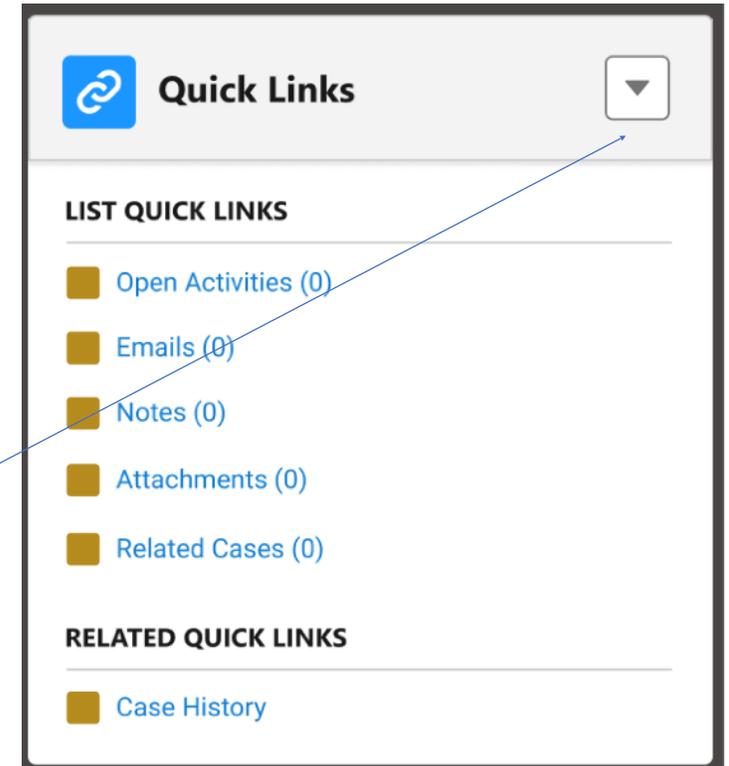
Quick Links

- Lower visibility, low risk
- Section header type: list
- Current UI issues:
 - Two sections that should be combined
 - Confusing titles
- Solutions considered:
 - Tabbed section design
 - Header section with icon
 - EDIT function for users
 - Docked hover view for links



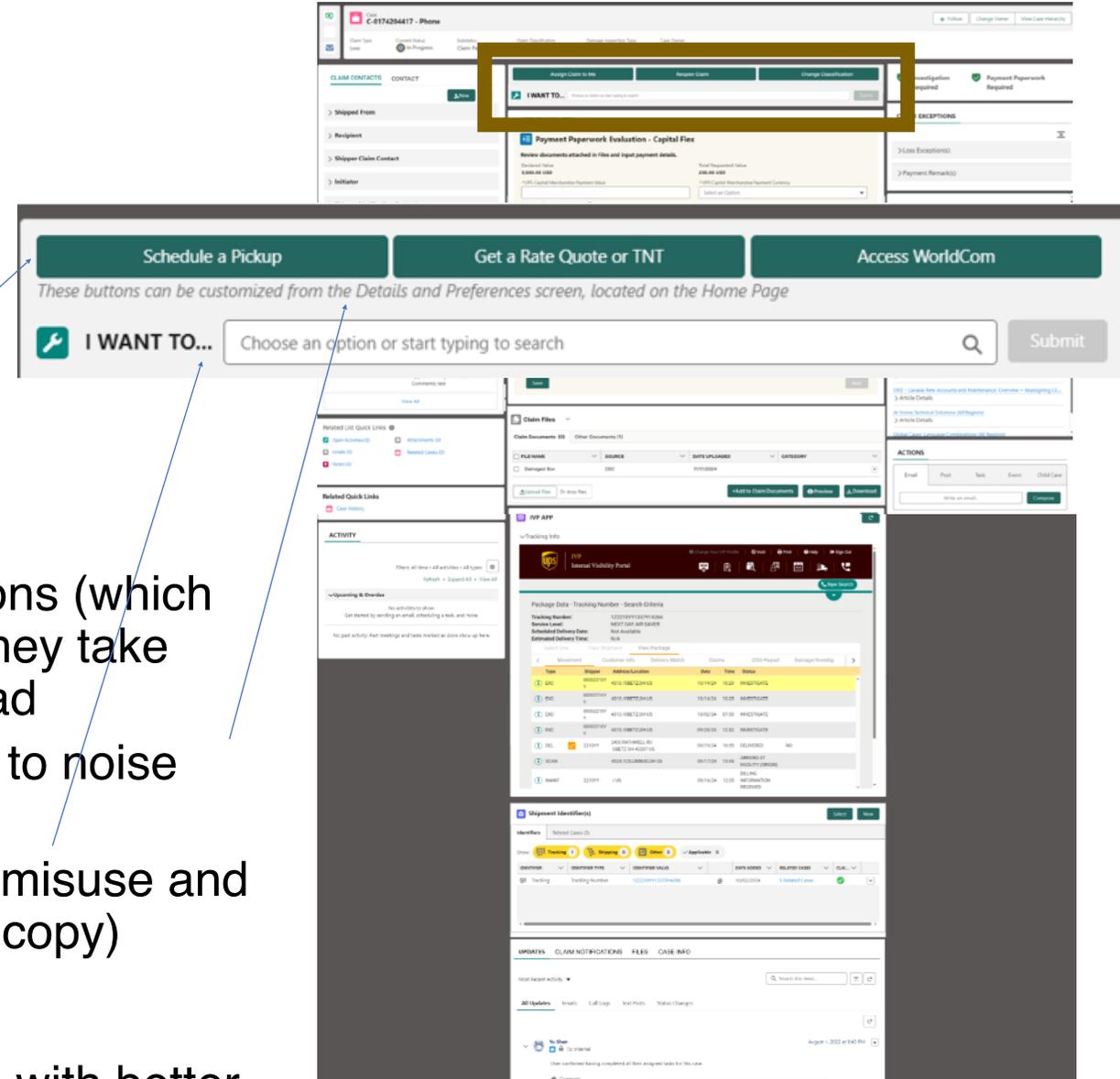
Quick Links

- Simplify the header names
- Combine in either a tabbed section or a header section with icon and editable option
- Section header:
 - Links more available
 - Option to add or edit links
- Tabbed section:
 - Combined sections
- For any solution, the hover functionality should be reconsidered
 - Either open new tab
 - Or click thru to a DOCKED VIEW that is expandable to new tab



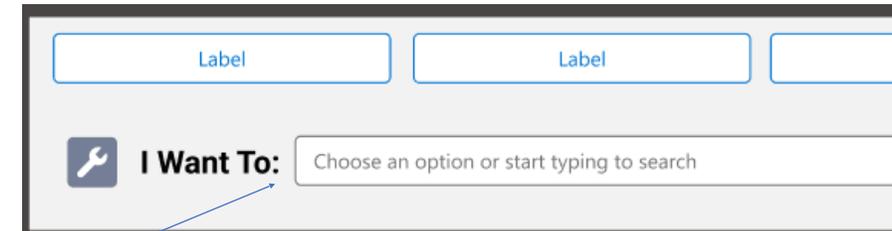
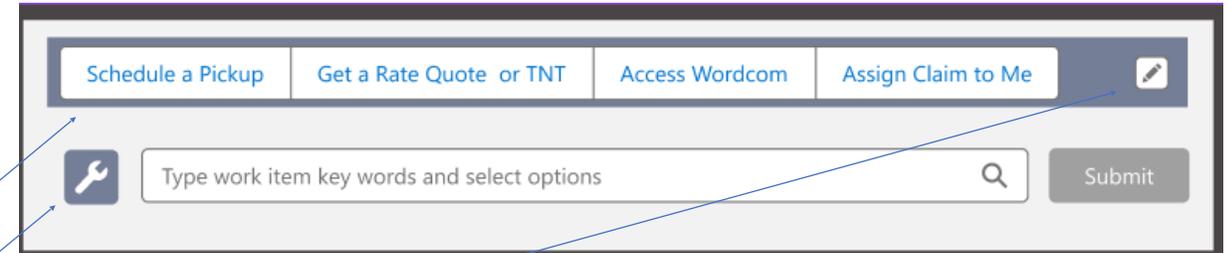
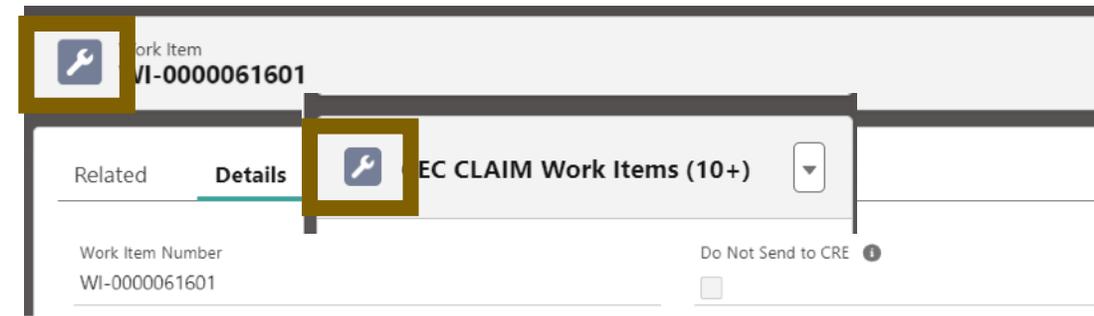
I Want To

- Highest visibility, highest risk
- Section header type: custom
- Current UI issues:
 - Links to shortcuts appear to be buttons (which is confusing), too large, too heavy, they take away from the tool, add cognitive load
 - Instructions under the shortcuts add to noise and confusion, unnecessarily
 - Ellipsis after all cap I WANT TO is a misuse and is confusing (ellipsis is for truncated copy)
- Solutions considered:
 - More consistent presentation design with better focus for most used, most critical work tool



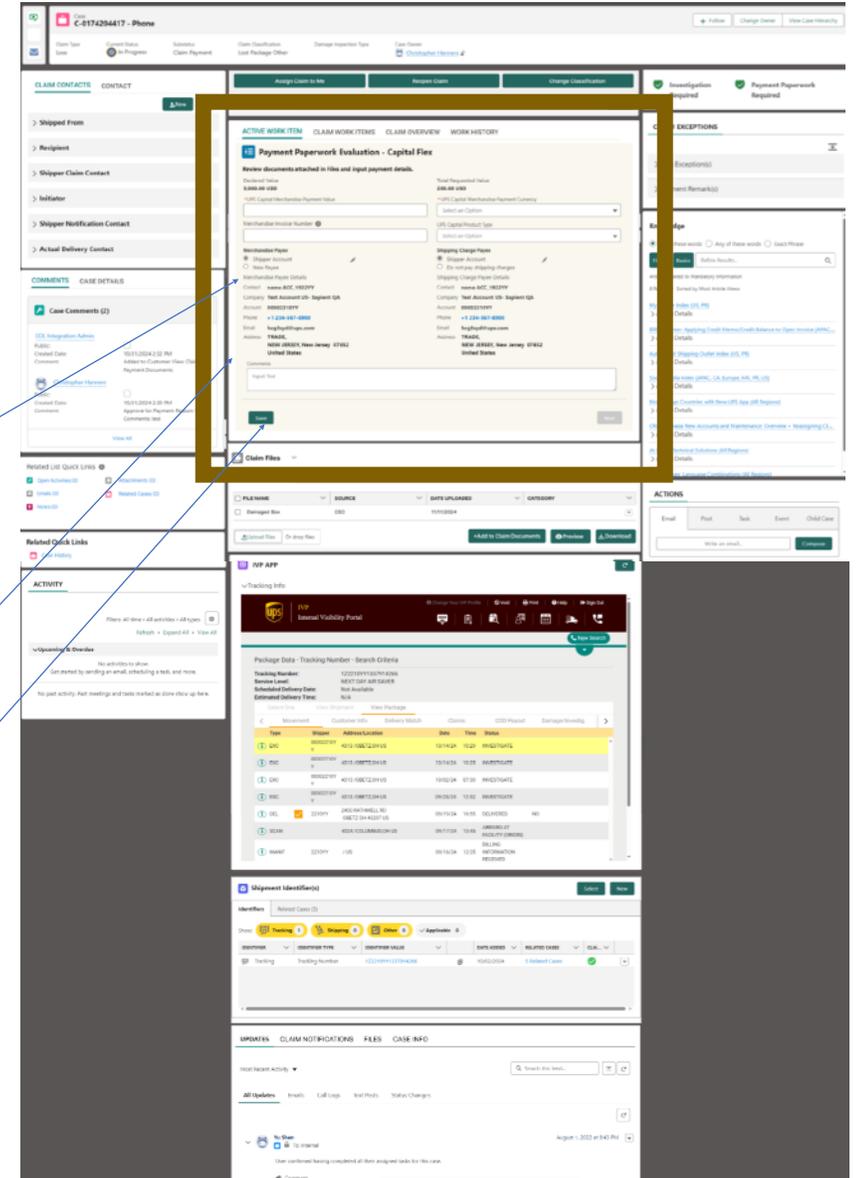
I Want To

- Match work item icon/color used throughout system
 - Using primary button colors and styling detracts from usability
- Remove text under links, add an edit icon that opens modal to edit buttons
 - Ability to add more links
 - Reduce visual noise and friction in most used tool
- Use a button bar section to differentiate from main call to action
 - Matching system color for work item helps with confusing connection to primary CTA buttons
- Remove ellipsis after I want to
 - Replace with colon if necessary—or remove entirely and use placeholder text in search bar)



Active work item

- Highest usage, highest risk, highest cost
- Section header type: custom
- Current UI issues:
 - Form fields should be standardized
 - Read only fields should be standardized
 - Background color should be white or correct Supernova # FFF8D9
 - Button bar with CTAs should be standardized
- Solutions considered:
 - Standardization for consistency in most critical tools to save thousands of work hours daily
 - Work item designs are not predictable



Active work item



All header icon sections:

- Consistent FORM FIELD design (use SFLDS)
 - Currently, many fields are not developed as ROWS, so any reflow or error will result in confusing UI
 - Spacing, alignment, type for ALL input fields and display data should align (current inconsistency is confusing)
- Supernova bkgd only in forms that need input
 - Be consistent with Supernova color usage: #FFF8D9
- Button bars should be consistently designed (currently several versions)
 - Recommend shaded bar with consistent button usage and right justified CTA placements for forms

The screenshot shows a form titled "Payment Paperwork Evaluation" with a yellow background. The form includes a list of required and optional documents, a table for "Declared Value" and "Total Requested Value", and several input fields. Annotations with blue arrows point from the text on the left to specific elements in the form: the "Consistent FORM FIELD design" text points to the input fields; the "Supernova bkgd" text points to the yellow background; and the "Button bars" text points to the "Previous", "Save", and "Next" buttons at the bottom.

Active Work Item | Claim Work Items | Claim Overview | Work History

Payment Paperwork Evaluation

Review documents attached in Files to categorize and input payment details

- ✗ Proof of Value (Required)
- ⚠ Release Letter (Required)
- ✓ Claim Payment Form (Required) (file_name.xxx)
- ⚠ Proof of Shipment (Optional)

Declared Value	Total Requested Value
Placeholder	300.00 USD

Field Label Placeholder

Field Label Placeholder

Field Label Placeholder

Merchandise Payee
 Label
 Label

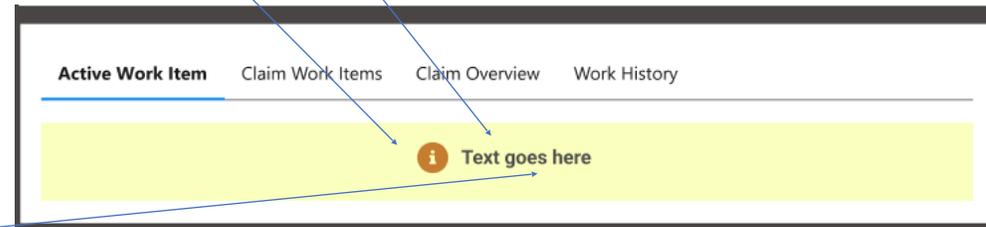
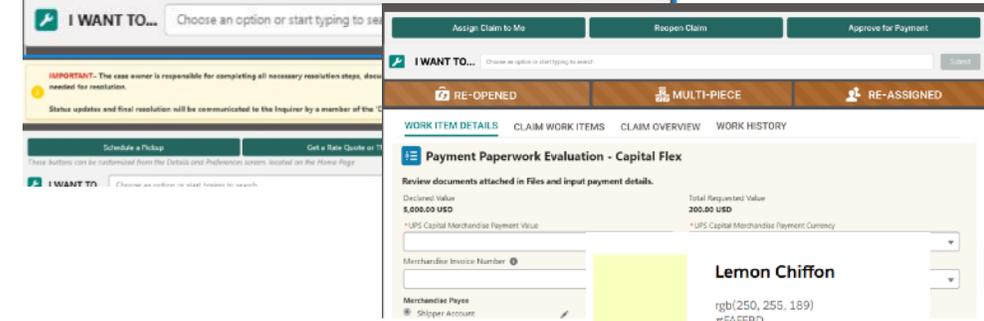
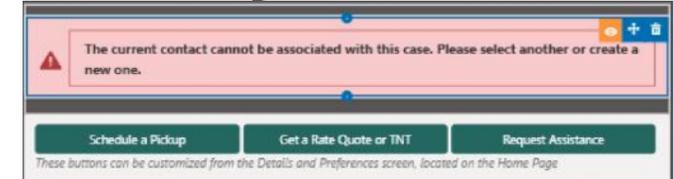
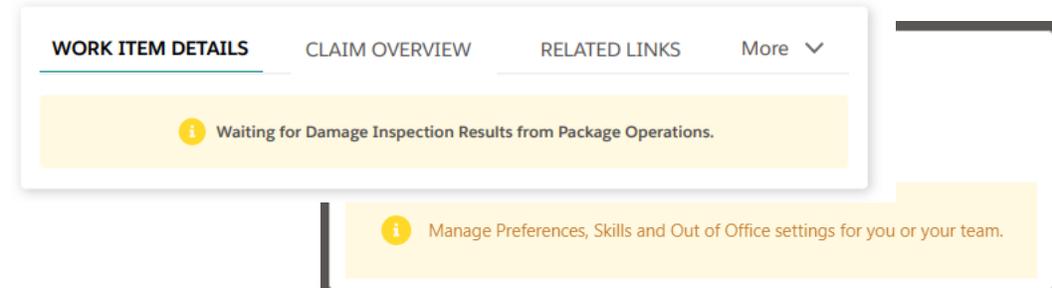
Shipping Charge Payee
 Label
 Label

Field Label Placeholder

Previous Save Next

Active work item alerts

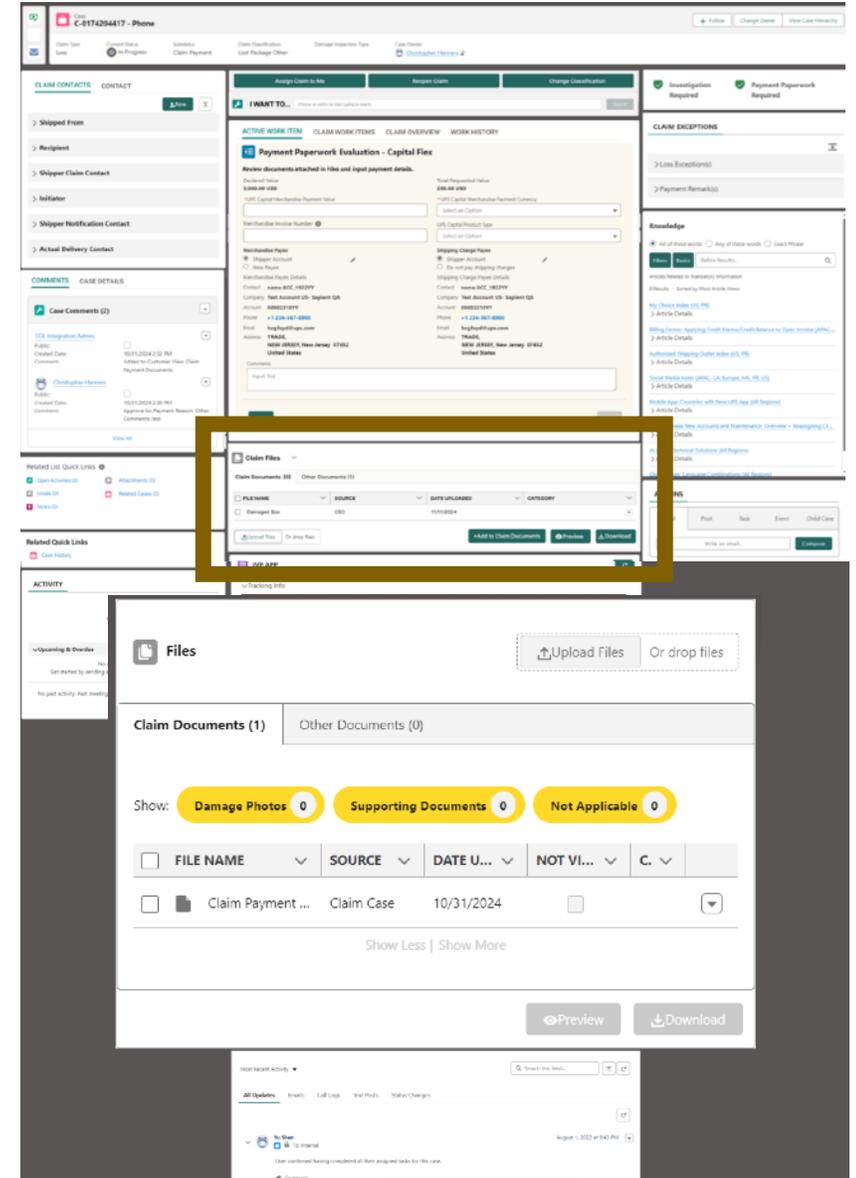
- Alert system issues
 - Current alerts do not follow design guide
 - Current alerts need a discernable pattern
- Lemon chiffon bkgd color
 - Inconsistent bkgd color and usage: #FAFFBD
- Bronze Icon
 - Inconsistent icon colors and usage: #C67D30
- Bold, grey text
 - Inconsistent colors and usage
 - Text color: #514F4D
 - Text weight: Bold



	Lemon Chiffon rgb(250, 255, 189) #FAFFBD BRAND-ACCENT-LEMMON CHIFFON
	Supernova rgb(255, 248, 217) #FFF8D9 BRAND-TERTIARY-SUPERNOVA
	Vibrant Yellow rgb(255, 217, 41) #FFD929 BRAND-TERTIARY-VIBRANT YELLOW
	Bronze rgb(198, 125, 48) #C67D30 BRAND-TERTIARY-BRONZE

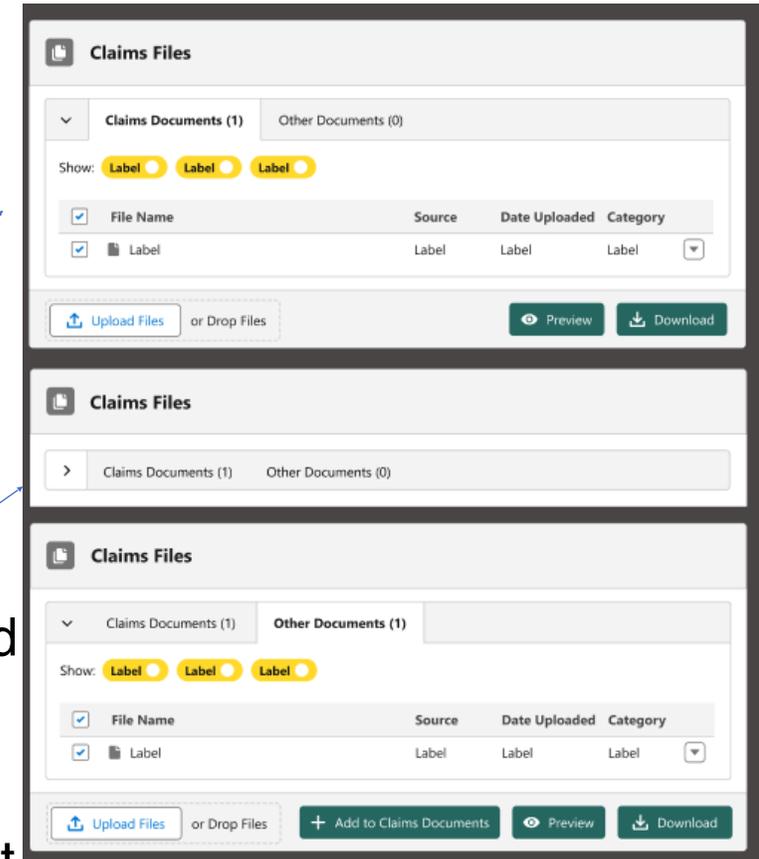
Claim Files

- Medium usage, medium risk
- Section header type: header with icon
- Current UI issues:
 - Ask for collapsible content
 - Inconsistent button layout
 - Confusing file upload interaction
- Solutions considered:
 - New custom collapse tab design
 - More intuitive, speed-to-task focused file upload design for adding file to claim work flow



Claim Files

- Default view open to added claim docs
 - When only one file, its preselected for download/preview
 - If multiple files, none selected and preview/download buttons are disabled
- Collapsed view
 - If caret tab clicked while collapsed it opens to default
- Default view after upload is “other documents” tab
 - User must move any newly uploaded doc to Claim Document section manually. Defaulting to this tab upon upload offers user intuitive interaction
 - Not defaulting to this tab is requiring user recall/training as to where the document is filed and how to add it to claim document section
 - Confusing, slower upload interaction without this option



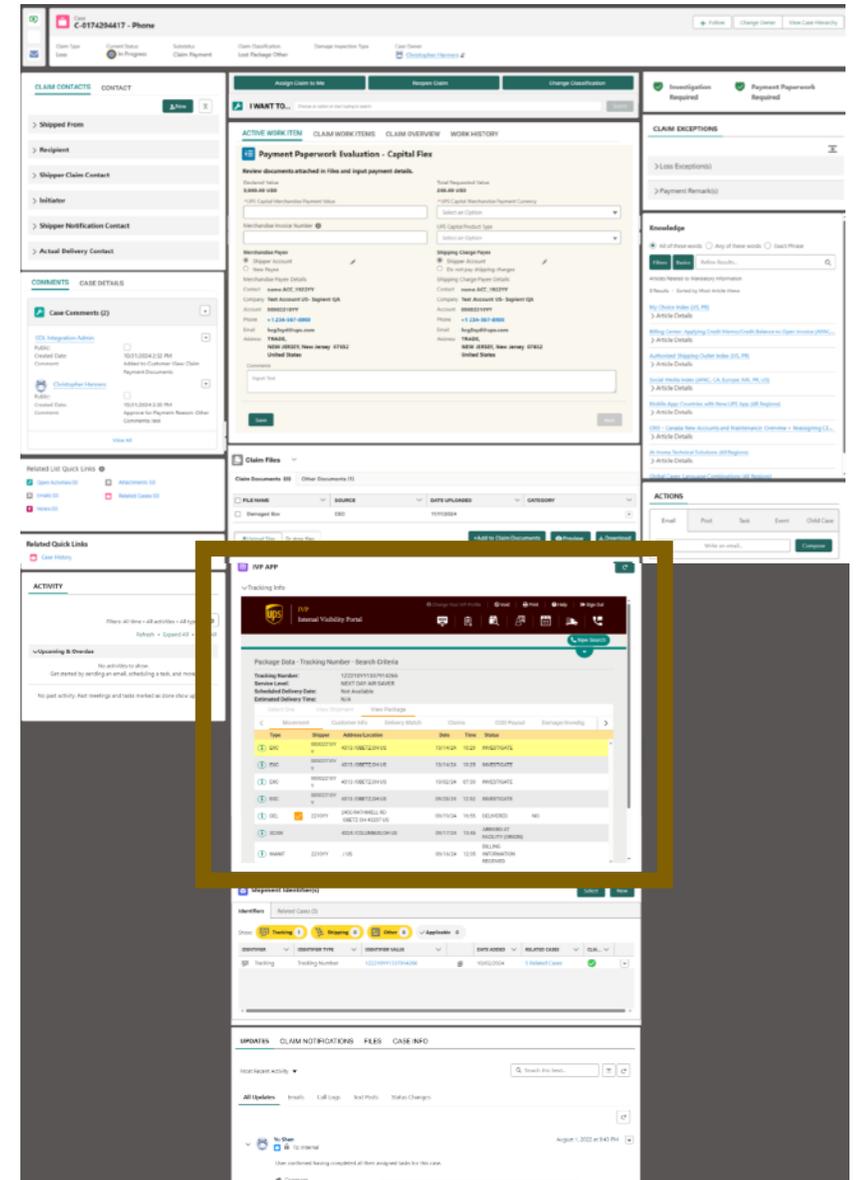
Default

Collapsed

File
uploaded
default

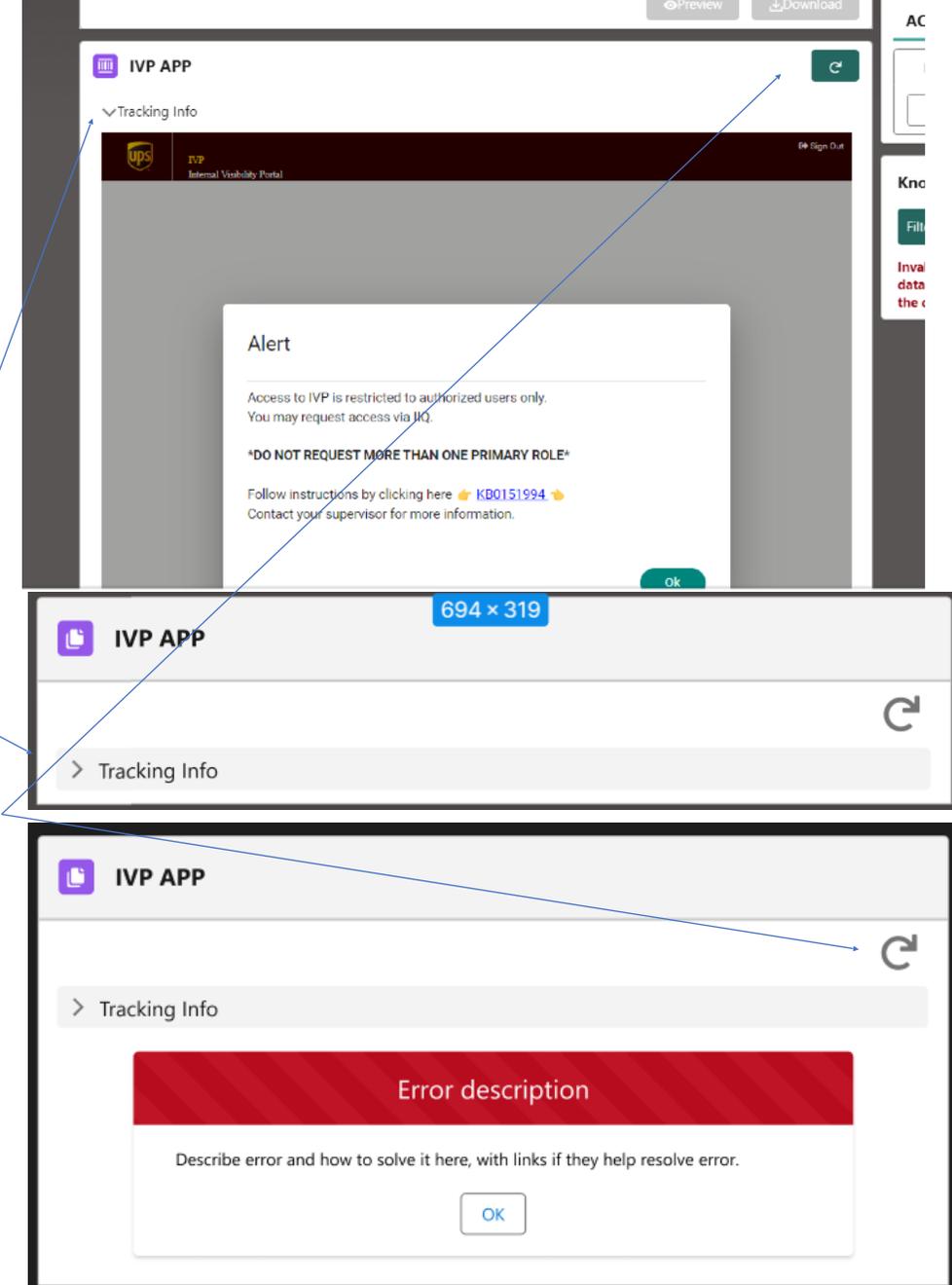
IVP App

- Medium usage, medium risk
- Section header type: header with icon and accordion
- Current UI issues:
 - Current accordion control is inconsistent UI
 - Error feedback is unhelpful
 - Consider full IVP name in heading (in addition to acronym)
- Solutions considered:
 - Follow system design for accordion
 - Consider more helpful error messaging



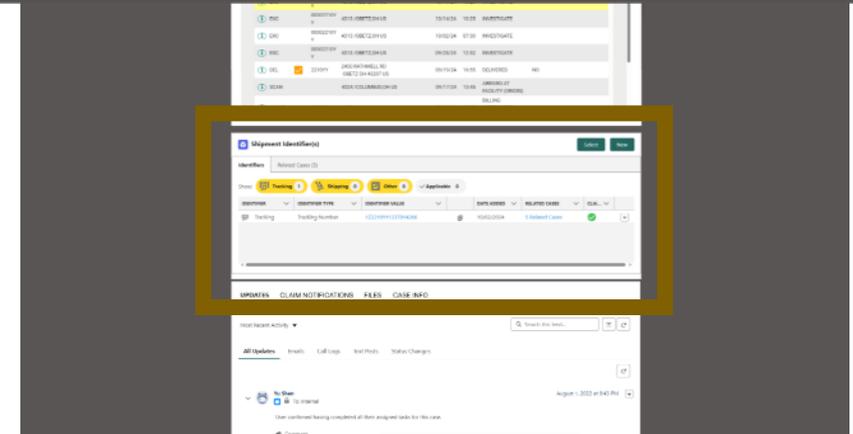
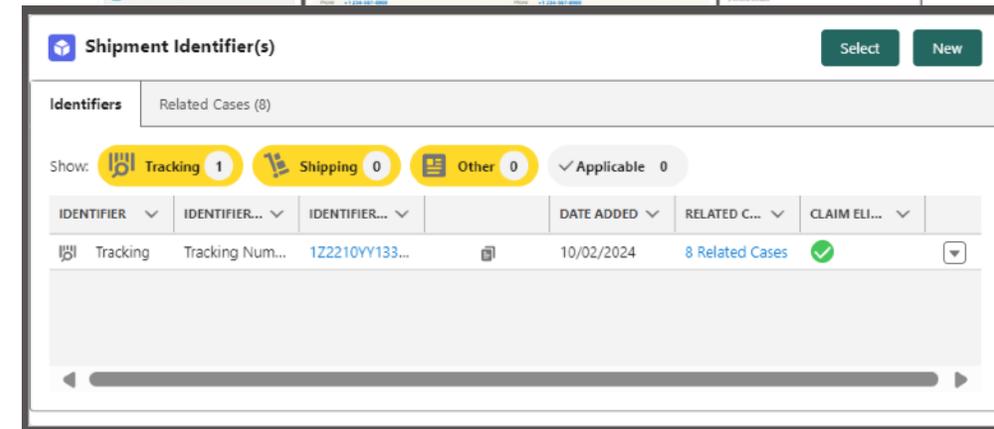
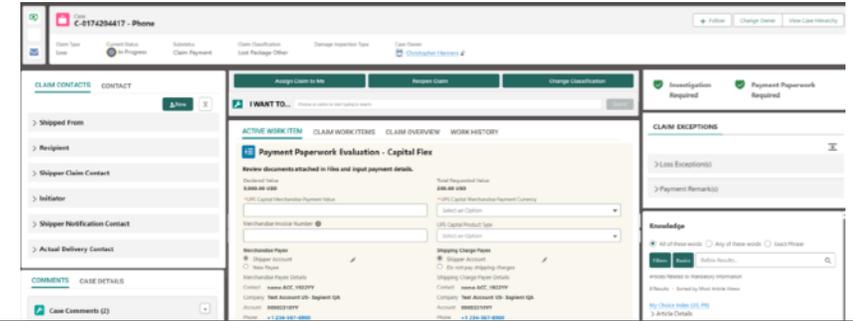
IVP App

- Medium usage, medium risk
- Section header type: header with icon and accordion
- Align accordion UI with the rest of the system
- Align refresh with system design and placement
- Use SFLDS error prompt for error codes when possible
 - Reconsider current error messaging
 - Provide simpler messaging that resolves the error code
“Follow instructions by clicking here with images of fingers pointing to a code” is confusing and the current link is a PDF with the same code with no additional information for resolution



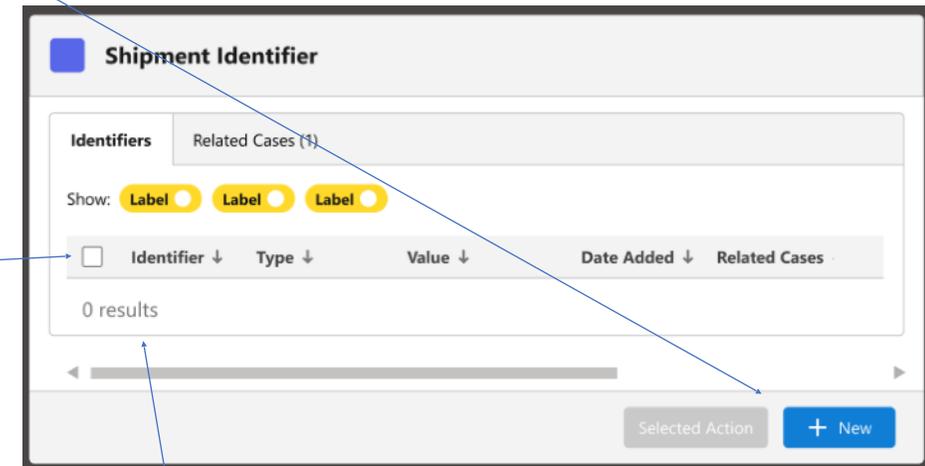
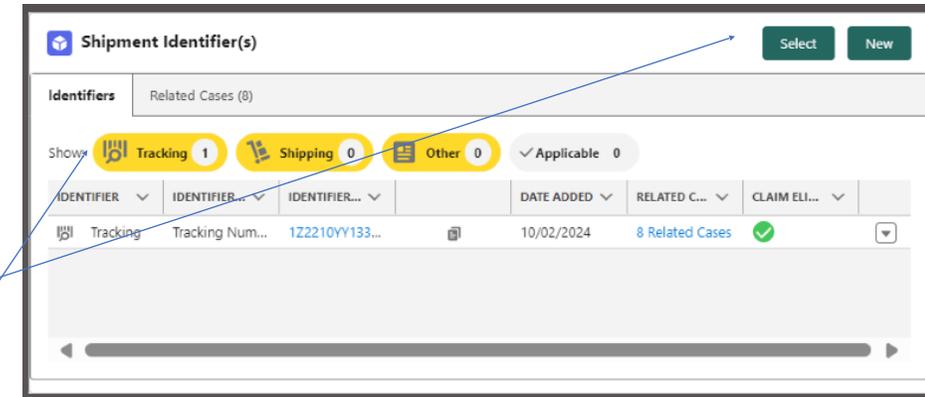
Shipment Identifier

- Medium usage, medium risk
- Section header type: header with icon
- Current UI issues:
 - Button placement is inconsistent
 - Table design is challenging
 - Select functionality is non-standard
- Solutions considered:
 - Follow system designs
 - Reconsider some table elements
 - Consider select in table to be consistent and standard functionality



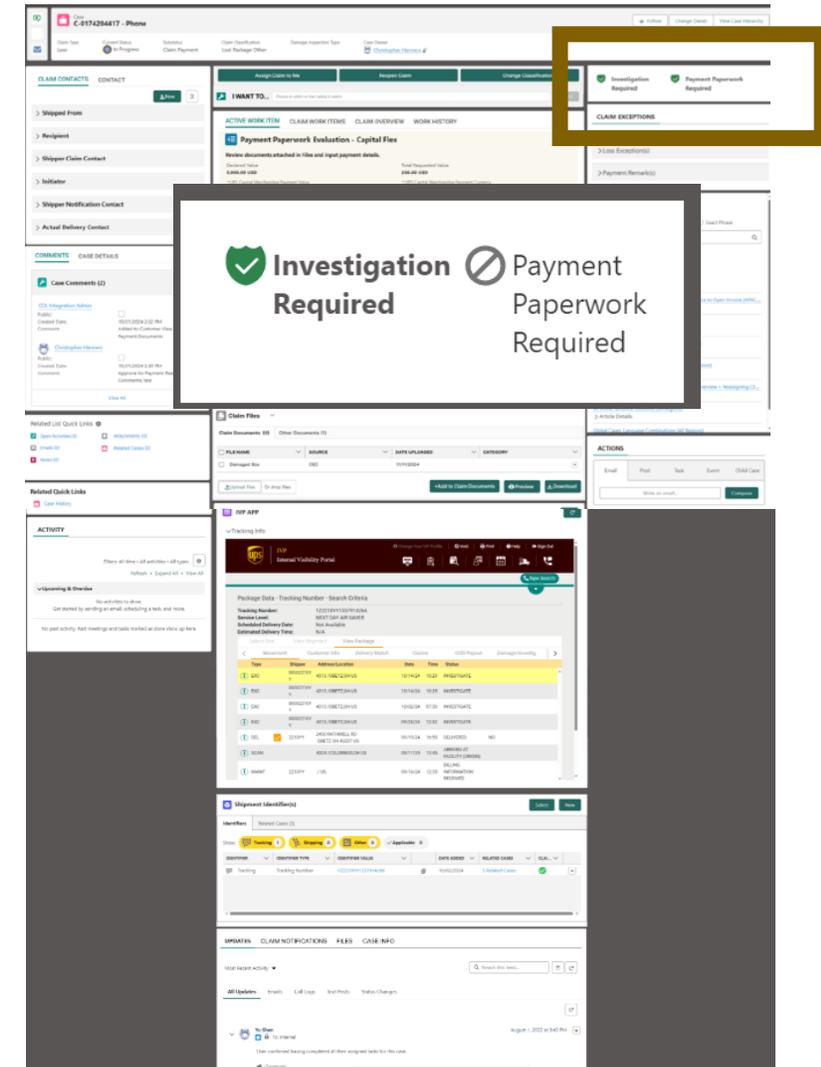
Shipment Identifier

- Align button placement with button bar
 - Add new select action that works with checkboxes in table as with several other table designs/interactions
- Remove icons in filter pills
 - Inconsistent usage and they are not additive
- Add check box for selecting rows
 - Keeping with table usage standards
 - Consider removing icon in IDENTIFIER column as it is not additive (data name is sufficient)
 - Revisit business need for all columns and consider truncating less important data so critical data columns can be viewed easier
- No data state for tables should be consistent (not empty or error)

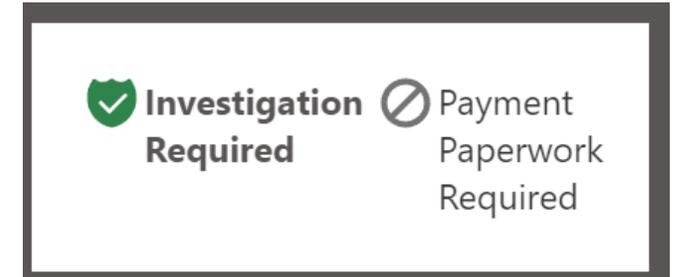


Indicators

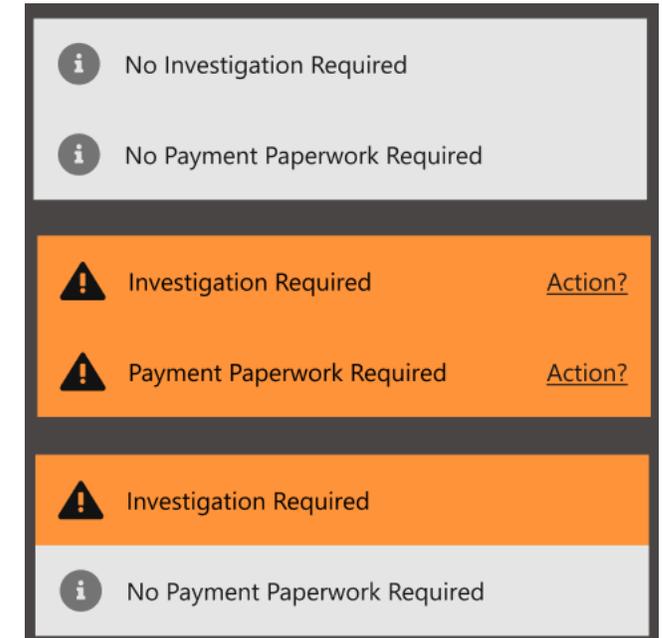
- High visibility, high risk
- Section header type: Custom
- Current UI issues:
 - Reflow caused by two columns causes presentation issues
 - Positive and negative icon use is confusing and inconsistent
 - Confusing, inverted icon usage: Shield
 - Positive green icon usually means success, but this means work necessary, should be a warning or at least in 'work to be done' category
 - Confusing, inverted icon usage: Error
 - "Error icon" is used throughout site for very different purpose
 - Grey error denotes "no work to do" which is not any kind of error state
 - Confusing language
 - The language does not change. Only the icon. So even when no payment paperwork is required, it reads "Payment Paperwork Required"
 - Serious international translation implications



Indicators

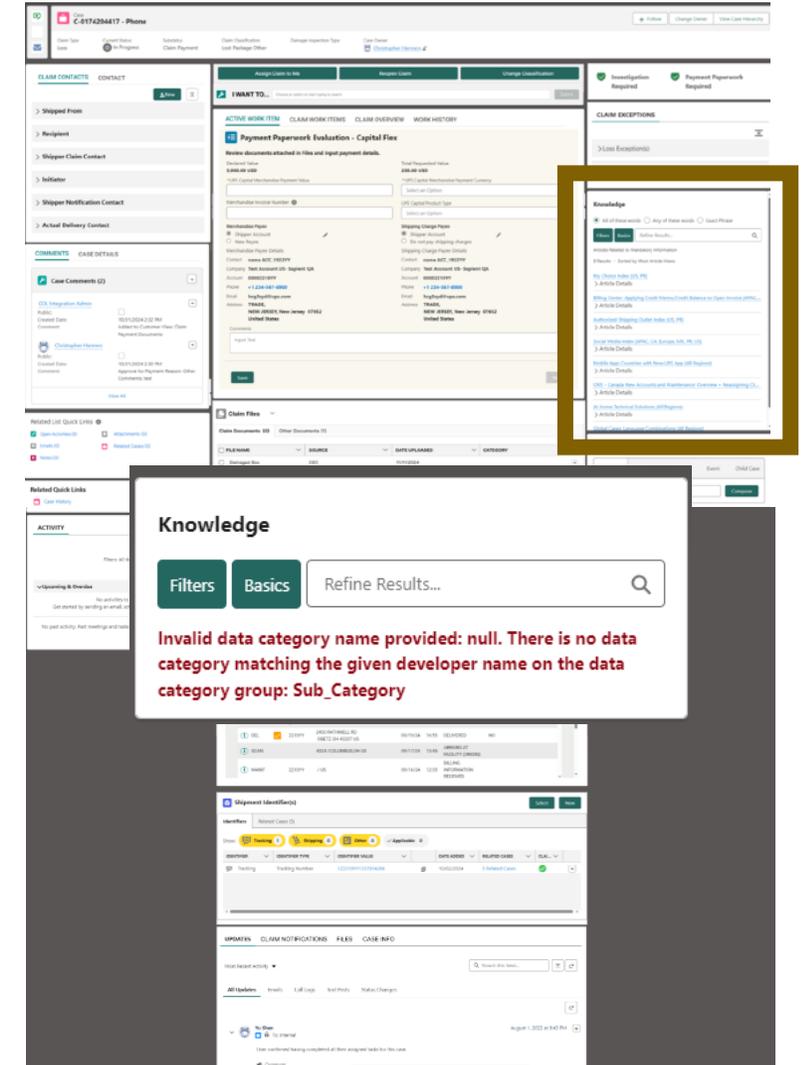


- Recommend stacked scoped notifications in SFLDS
- Recommendations
 - Use INFORMATIONAL notification when no work is necessary
 - Consider information icon
 - Consider changing the copy to reflect messaging “No payment paperwork necessary”
 - Consider grey for lower visibility to avoid cognitive load
 - Use WARNING notification when work is necessary
 - Establish warning color and icon colors
 - Offer an action if applicable to launch warning resolution
 - Consider changing copy to reflect messaging “Investigation Required”
 - Consider orange as a universal warning color to visually cue users for immediate scanning
 - Serious international translation implications
 - These changes will translate better and will be easier to train and avoid user costs



Knowledge

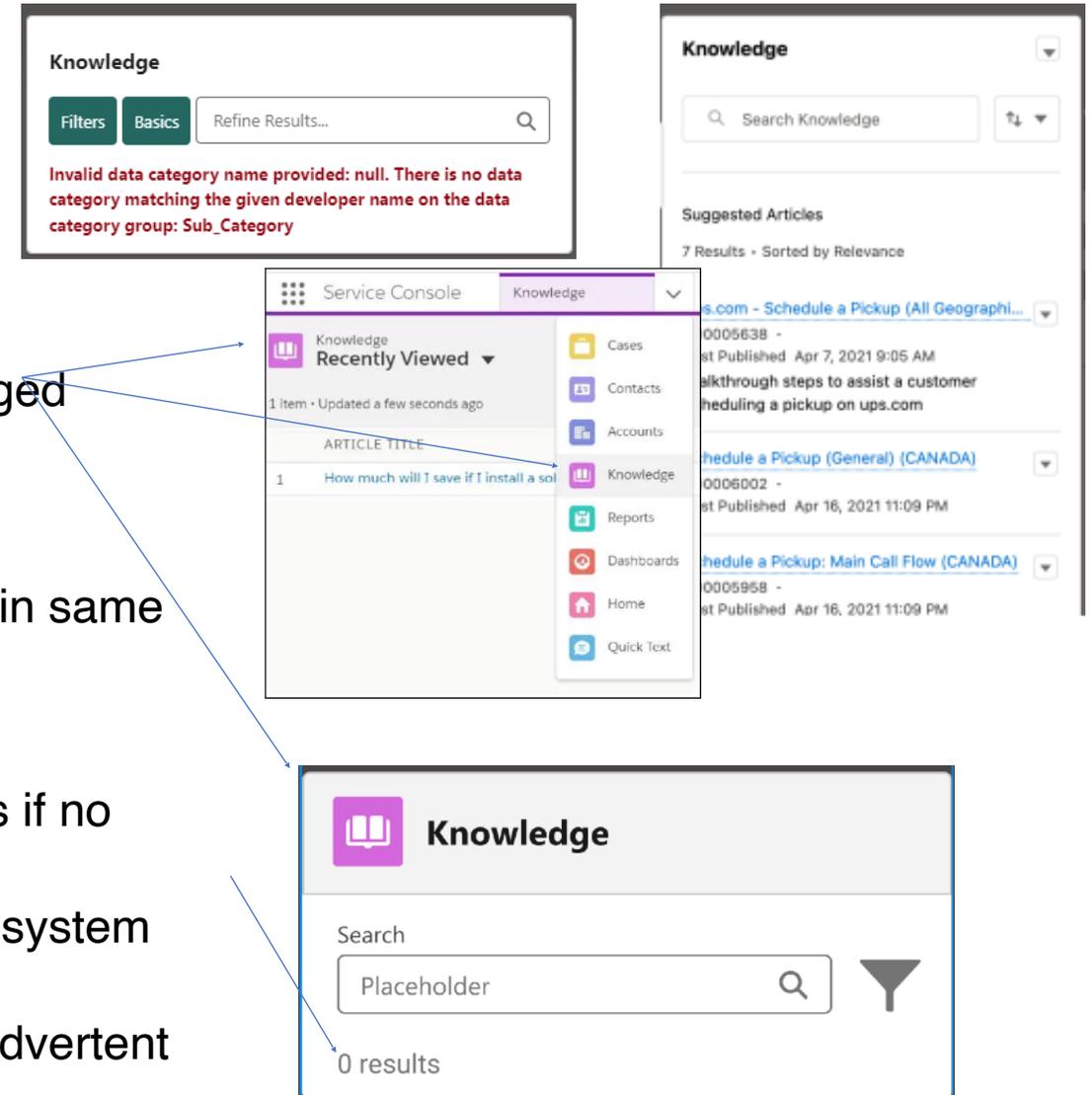
- Medium visibility, medium risk
- Section header type: Header with icon
- Current UI issues:
 - Icon not used (otherwise used throughout system)
 - Filters confusing, inconsistent
 - Currently not working as expected
 - Error messaging is not consistent or concise
- Solutions considered:
 - Use proper iconography
 - Consider standard filters and search
 - Tech debt on “basic” functionality, consider moving into full filter to avoid confusion. Current UI does not offer significant value to end users (a full menu of filter options would be more efficient)



Current design guide also concurs with problematic search/filter UI

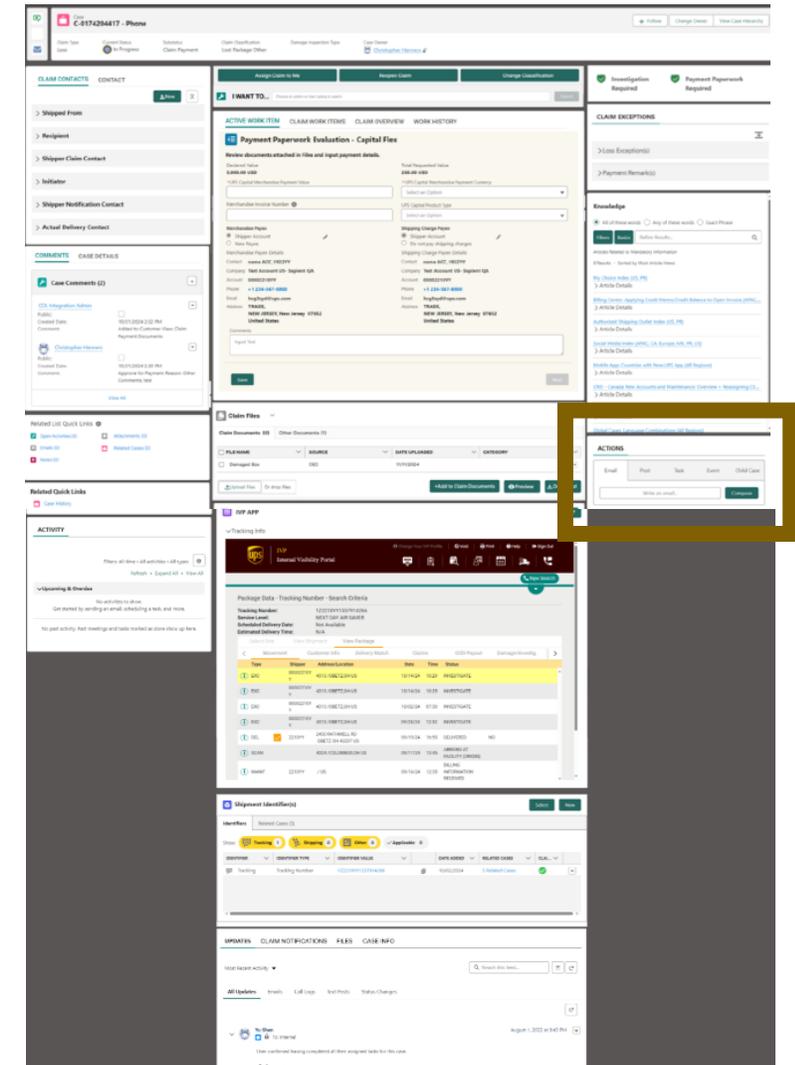
Knowledge

- Use Knowledge Icon
 - Icon is used throughout system, should be leveraged
- Search and filter placement not standard
 - Lead with search, then filter in this layout
 - Simplify UX with standard filter icon with all filters in same modal or docked view
- Error messaging
 - Use grey empty table and result typography styles if no results
 - Use common field error red/regular font styles for system errors
 - Use consistent common red/regular styling for inadvertent user error:
“Results exceed [#}, please refine search or filter”



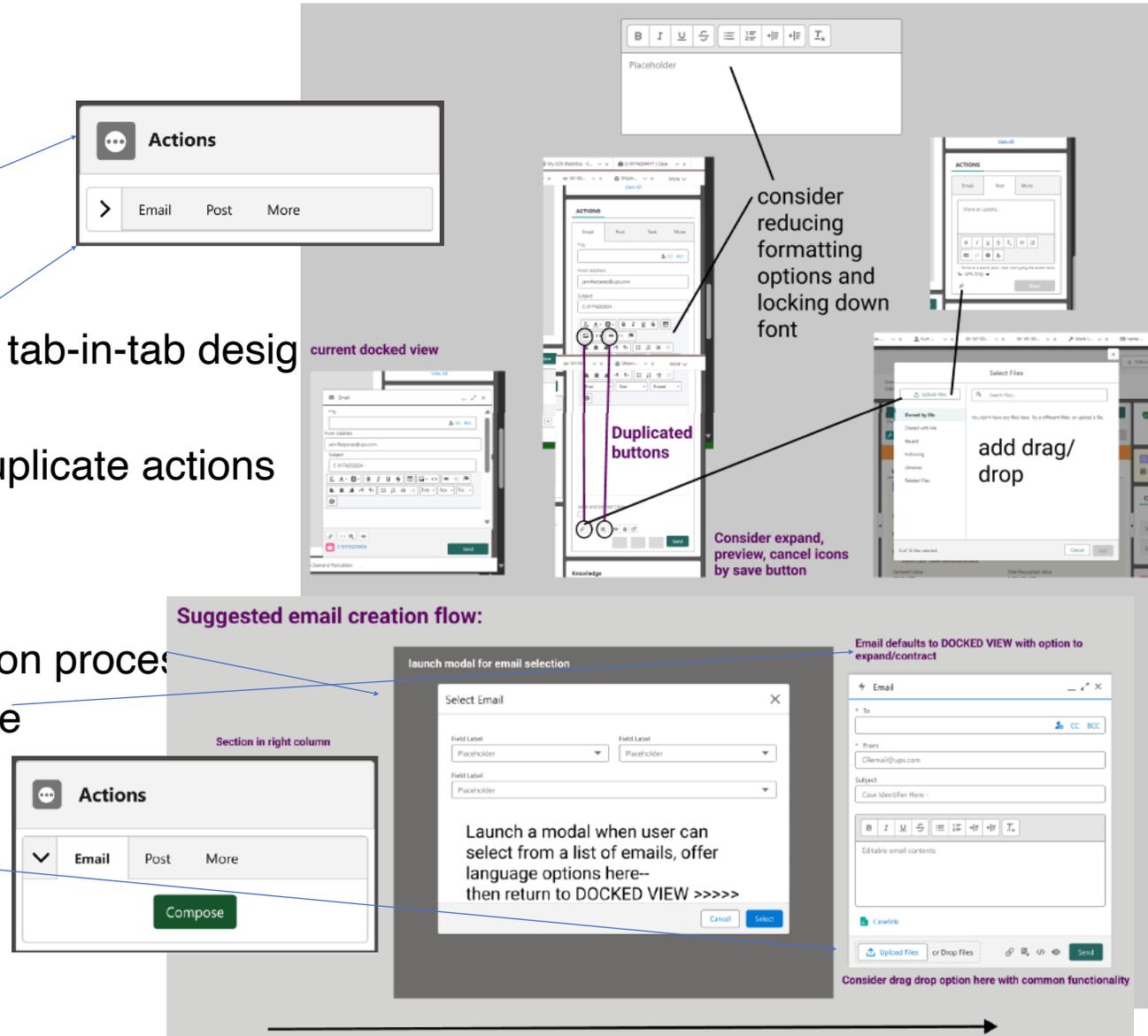
Actions

- Lower visibility, medium risk
- Section header type: Tabbed header with tabs
- Current UI issues:
 - More than three vertical tabs in right column
 - Search field for Email does not work (only expands tab)
 - Tabs cannot collapse after opening
 - Space too small for the work required
- Solutions considered:
 - Open all tabs immediately to an expandable docked view
 - Remove non-functioning fields and buttons
 - Use three tabs with “more” as the over-flow, as is done most other places (prioritize most used tabs for order)



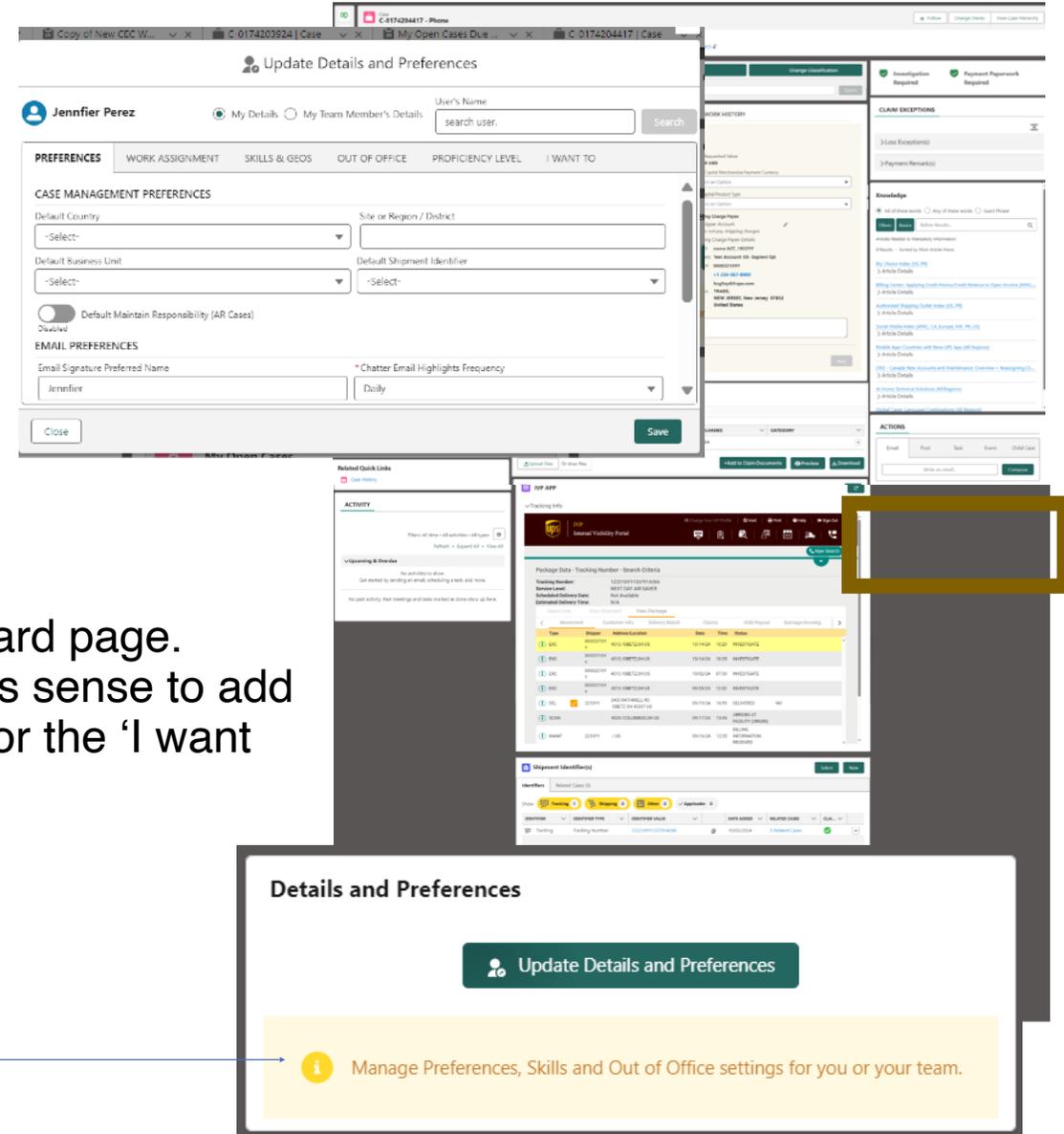
Actions

- UI opportunities:
 - Consider using header with icon to avoid a tab-in-tab design
 - Reduce tabs to 3 plus collapse caret
 - Reduce WYSIWYG options and remove duplicate actions
- Functionality and workflow:
 - Remove non-functioning fields and buttons
 - Consider a modal for the new email selection process
 - Open all tabs immediately to an expandable docked view
 - Consider adding drag/drop functionality to the at least the email and post tabs



Preferences

- Low visibility, medium risk
- Section header type: Header with icon
- Current UI issues:
 - The preference section is on the landing/dashboard page. Since it directly affects this console view, it makes sense to add the functionality here too, in context. Especially for the 'I want to' section usability
- Solutions considered:
 - Adding Preferences to console
 - Updating Preferences UI design
 - Removing warning error



Preferences

- Section header
 - Align with other preferences icons in SF
- Affordance
 - This section will directly affect the personalization and functionality of this page, adding it will help with in-context understanding of the tool for users
 - Duplicating the section on this page (and keeping it on dashboard) will increase engagement and expedite workflows
- Link to preferences work modal
 - Simple edit icon to launch modal
 - Add drop down that deep link to preference section tabs
 - Preferences
 - Work Assignment
 - Skills and Geos
 - Out of Office
 - Proficiency level
 - I Want To:

