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PAS Phase 2

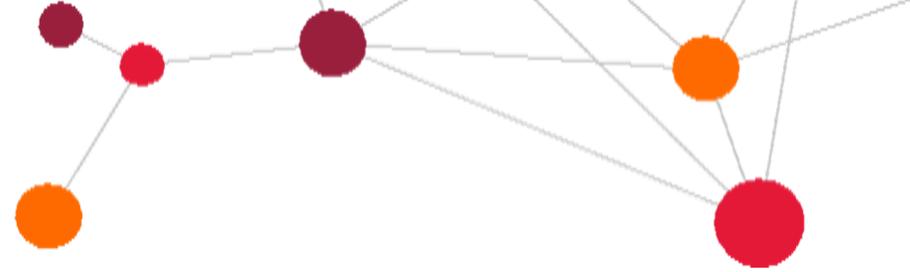
Analysis

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Agenda

- High Level Scope Review
- Heuristics intro
- Feedback by heuristics
- Next Steps



High Level Scope Review

- Phase 1: PAS Reskin

- Reduce Cognitive Load
- New Design System (set of icons, typeface and other design elements);
- Constraint: time for development (3 months)

- Phase 2: PAS UX-UI Review (3 years plan)

- Shadowing (done)
- Interviews (done)
- Surveys/Personas
- Scenarios
- Analysis
- Experience Mapping
- New user-flows
- New Sitemap
- Wireframes/ User tests
- Mock-ups/User tests
- Development
- Design Review

Heuristics basics*

Following feedback was organized based on Jacob Nielsen's Heuristics :

1. Visibility of status (users should always know what's going on)
2. Match between systems and real world (match user's language)
3. User control and freedom (undo; redo and override the system)
4. Consistency and standards (consistent behaviours)
5. Error prevention (prevent errors from happening)
6. Recognition rather than recall (make objects, actions and options visible)
7. Flexibility and efficiency of use (expert users prefer fewer screens and less clicks)
8. Aesthetic and minimalist design (present only necessary information for the task)
9. Manage errors (precisely indicate the error and suggest a solution)
10. Help and documentation (contextual help)

1 - Visibility of status

- See progress over time – while being able to dismiss it
- “Expand notifications” button
- Inform users (e.g. show what jobs are running, or at least show they are in process)
- It should alert users when it is done;
- Some feedback should always be available and do not disappear when you change views (e.g. running jobs)
- Spinning does not tell you much, how long it is going to take. “Sometimes it stops spinning and we don’t know what’s happening”

2 - Match between system and real world

- Offer new features (e.g. overview of facilities, see what is connected to what (in, out));
- Fix negative inventory
- Wording: Process vs Run
- “A Well is a well and a facility is a facility”
- Why do we use the word “blinger”? It is an upload;

3 - User control and freedom

- Users should be able to move columns (e.g. excel);
- Users should be able to sort in different ways;
- Some views could use filters;
- Search could be improved with fields like “contract id”, “location”, “name” “well licence”;
- Users should be able to expire, edit, freeze, archive, delete files where applicable;
- Users should be able to edit or delete a comment in the first 30 days;
- Why can't we search on contracts?
- Be able to import/export comments;
- Queries: One user can delete; others should be able to hide/archive;
- Be able to set parameters; priorities;

4 - Consistency and standards

- Fix return (back should take you to the previous view)
- Tabs behaviour (move linearly to the next cell)
- Sticky headers;
- Facilitate identification (e.g. show what matters:topic.doc);
- Make sure pop-ups have a standard sizes, where all actions are visible;
- Change icons print/notepad for text – view; see more details (?)
- When you change the type of menu, content should stay where it was (e.g. If user chooses tree; from/to or find, it should stay where it was).
- Lists that do not anchor;
- Contract allocation view is the only place where save actually process it instead of saving;
- Behaviour should be to click on save in all screens, instead of saving when you navigate away;

5 - Error Prevention

- Validate that changes were saved (e.g. consistent "save behaviour"; warning if did not "save")
- Validate new dates (e.g. consistent "calendar behaviour"; warning if updated)
- If you are loading files; warn users if dates do not match
- Separate "risky" buttons to avoid mistakes (e.g. separate reset from other buttons on financial)
- Add a confirmation pop-up if information is crucial and will be destroyed;
- Avoid erasing content (e.g. a different production date wipes everything else)
- Fix behaviour that if a user "moves to other page, it erases everything" – show an alert if it can't be fixed.
- Differentiate prod environment);
- "I'd love to see validations; confirmation on what you will see on the pdf"
- Show previous dates only view mode; it has to be more difficult to edit things;
- I'd like to be able to lock; make it harder if you need to make a change;

6 - Recognition rather than Recall

- Choose better information targets (e.g. on wells, show 3-6 months to indicate issues over time)
- Improve choice (e.g. show more information on hover)
- Add notes/comments to well list table;
- Integrate views that work together (e.g. sales and marketing input views; if a product has multiple contracts, show at the same time);
- Have the list/page stay where the user is (don't refresh and go up all the time)
- User roles view, you don't see what are the details for each row from the main view (where you pick)
 - auditors ask about a role and you don't know what's in there.

7 - Flexibility and efficiency of use

- Users should be able to set up what they want to see (e.g. show only groups that they are primarily responsible for);
- Users should be able to define what they want to see about them;
- Users should be able to customize report fields (e.g. choose what to show like in queries);
- Users should be able to edit the “xml file” before sending it to gov;
- Streamline operations (e.g. multi-select; batch operations) – avoid repetitive tasks;
- Reduce waiting time (e.g. improve code; load less items at a time etc);
- Fix “Reprocessing” – users need to wait to use the software again;
- Suggestion: a guidance window where you can always see whats connected to what;
- An arrow beside the calendar
- Show both monthly and masters at the same time;

8 - Aesthetic and minimalist design

- Facilitate scanning of the view (e.g. less design noise);
- Show only what is related to task;
- Show only/Highlight the warnings users can take action upon;
- Use a bigger font/show how to increase;
- Adapt breaking points so it works in different configurations (vertical screen, lower resolution)
- Design for 2 screens (views that can be detachable)
- Fix long dropdowns (e.g. analysis dropdowns are huge - users should key in or search month/year with effective date)
- Breadcrumbs I dont use them: my eyes have changed, I cant read them;
- Resizing on a vertical screen;

9 - Manage Errors

- Check integration between PVR and PAS (e.g. identify if it loaded at all/ correctly)
- Offer integration software similar to “PAS Tools” (e.g. avoid manual input);
- Alert users (e.g. if they click on something that is not applicable, show an alert)
- Confirm if data seems odd (e.g. warning if value varied above a standard)
- If a field should be filled and it is not, confirm with user if it is by choice
- Improve errors visualization (separating columns, grouping, selecting what to show);
- Have an undo button!
- Analysis should show not only the date but also who imported them;
- Digital approval/signature?
- Running a query - Measurement owner should have the BA name

10 - Help and documentation

- One link instead of 4 on the main view (it can be confusing which one to choose);
- Knowledge base search: it should offer a way to remove the highlight – overwhelming;
- Search is offering too many results and it is hard to sort them;
- Define if hovers will be used for definitions or more information (there's also an info icon that can be used)
- Search can be sorted by type of document: videos, pdf etc.

Next Steps

- Analyse what are the most recurrent issues
- Create a matrix with recommendations (plan of action)
- **Link issues to flows**

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