

Dashboard Usability Testing

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Objective

We aimed to evaluate the usability of a proposed dashboard redesign. We also sought to compare the existing dashboard UI and functionality to the proposed changes for various widgets. Insights from this study can help to refine and prioritize dashboard improvements.

Methodology

Moderated usability testing was completed using Teams and Optimal Workshop. 17 participants completed the two-part test.

- Part 1: Dashboard usability testing with an emphasis on the work order card, side panel, and navigation
- Part 2: Preference and perceived usability comparison between the existing UI and the proposed design for various dashboard widgets

Key Findings

Part 1: Usability Testing Results

1. Card Design

- Key Findings: The proposed card design was well received by all participants. All participants rated the design as very helpful (73.3%) or somewhat helpful (26.7%). WO name, WO number and location noted as being essential fields by most participants.
- Challenges Identified: 80% of participants failed to find the “Quick Edit” button on the new card design. Participants noted that the icon in the test did not communicate quick edit functionality. When asked what they would prefer, the majority of participants indicated that they would rather see an icon depicting a clipboard with a pencil.

- Recommendations: Participants preferred the clipboard with pencil icon to access quick edit but we may want to also consider labels, tutorials, and/or Pendo guides to accompany the rollout of this feature.
2. Side Panel
 - Key Findings: Most participants intuitively navigated the work order side panel with minimal errors. Several participants noted that the side panel would be more useful for technicians than admins. Admins will still need to access the full work order to complete their various tasks. Participants would prefer to see tasks/checklists, comments, attachments, and meter readings in addition to the existing fields in the prototype.
 - Recommendations: Participants found the side panel intuitive overall, but they indicated that they'd like to see more information here than what was shown in the usability test. Take participants' recommended fields into consideration and consider making the display customizable to meet various client needs.
 3. Filter/Sort/Navigation
 - Key Findings: The filter and sort functionality was intuitive for all participants. A handful of participants indicated they'd like additional filter options, such as by priority (i.e. critical only) or status (i.e. overdue only). Clients were split on how they would expect to access the full work order page from the new work order card, with 53% expecting to click anywhere in the card to access the full work order and 47% expecting to click the WO Name or Number to access the full work order.
 - Recommendations: Take the client's suggested filter options into consideration. Follow design guidelines for links and clickable areas. If the WO name/number is determined to be the navigation method, the design should be modified to make the area appear clickable.

Part 2: Preference and Perceived Usability Comparison

1. Work Center Widget
 - Key Findings: All participants preferred the proposed work center widget over the existing UI. They indicated that the new widget felt "cleaner" and everyone indicated that the redesign was helpful or very helpful.
 - Recommendations: Consider what functionality will be lost in transitioning to the new widget design. One client noted that they'd like to see the "today/overall" readout from the existing UI

2. Parts Widget

- Key Findings: Not every participant had a use case for this widget, but they appreciated the functionality of being able to filter items based on their specific use case. The proposed design was overwhelmingly preferred to the existing UI. Most clients indicated that it could be helpful.
- Recommendations: Continue to implement the ability for users to customize the dashboard based on their unique needs

3. KPI Widget

- Key Findings: Participants preferred having each individual KPI in its own card with the ability to customize and reorder the KPIs within the KPI widget. Most participants rated this widget as helpful, but noted that it would be used primarily by Admins and probably turned off for technicians. Some reported that having the ability to filter KPIs by location/site was essential. While others noted that they don't fully understand how to use the KPI feature we have today (they don't know where the data is pulling from)
- Recommendations: Implement location/site filters for KPIs per client request. Reevaluate training for the KPI widget and make modifications to help clients better understand what the KPIs do and where the data is being pulled from. Add labels and info hovers to explain the KPI data.

4. Reports Widget

- Key Findings: Most participants noted that they don't use the report widget and get their reports from the WO Page or outside sources. When asked what design they preferred, most participants preferred the proposed reports widget design and indicated that it would be a helpful improvement.
- Recommendations: Additional discovery should be conducted to see why clients are not using the reports widget on the Dashboard

5. Charts

- Key Findings: Similar to the KPI widget, participants preferred having the ability to customize the charts within the widget and indicated that this would primarily be used by Admins.
- Recommendations: This did not appear to be a high priority among participants for the redesign

6. Activity Log

- Key Findings: Most participants indicated that they do not use the activity log. Some didn't even know it existed. When asked what they'd like to see in the activity log, participants noted that they'd like to see others' activity (as an Admin) and to be able to search the activity log for specific WOs or parts.
- Recommendations: This did not appear to be a high priority among participants for the redesign

7. Message Banner

- Key Findings: Participants expressed an overwhelmingly positive reaction to showing messages as a banner on the top of the dashboard. They indicated that it would solve the problem of messages being overlooked. Some even noted that they'd like to remove the ability for critical messages to be dismissed

8. Quick Links

- Key Findings: Participants were split on where they'd like to see quick links. Admins typically prefer for quick links to be nested in the left side menu since they don't use them often, but others indicated that quick links are used daily by technicians and they'd prefer to see the options exposed on the dashboard.
- Recommendations: Give clients the flexibility to turn quick links on/off on the dashboard. Based on client feedback, a default technician profile should always have quick links turned on and easily accessible.

Overall Insights and Recommendations

- It should be noted that most technicians will be using the mobile application to access the dashboard. Most of the testing was completed with administrators and the designs were for web. It would be worthwhile to design a technician-specific dashboard for the mobile application and test it with technician users.
- High-Priority Changes:
 - Updating the work order card
 - Add the work order side panel functionality
 - Implement the message banner on the dashboard