

MSIX: INITIAL ANALYSIS REPORT (DRAFT)

July 11, 2016

AGENDA

- 1 What We've Done
- 2 What We Found Out
- 3 (Recap of) What We Know
- 4 What We Recommend
- 5 Next Steps

WHAT WE'VE DONE



WHAT WE FOUND OUT

User Research Summary



13

User Interviews

User Interviews

- 4 Project Staff
- 9 States
 - California
 - Colorado
 - Georgia
 - Nebraska
 - North Carolina
 - Pennsylvania
 - South Carolina

Findings

- Admin would like basic functions to be easier on mobile include:
 - Password reset
 - Quick search (during trainings, presentations, etc.)
 - User admin functions
- All users would like basic functions to be easier on mobile include:
 - Student search
- Password is most difficult and inconvenient area of application
- More information regarding qualifying moves/qualifying work within the last 3 years
- More school-level information such as grades, courses, etc., especially at the high school level would be helpful for placement
- Online help / tool tips that are readily available would be helpful and convenient
- More information on the student that can be captured in the system would be very helpful. This may not necessarily have to do with the site itself; more of a state issue (don't input all the information)
 - Tying together related information (i.e., siblings, parents, etc.) would also be very useful
- Being able to complete tasks on the fly, i.e., move notifications, look up supporting information like how to spell certain states in foreign countries, and quick simple search, instead of waiting to get back to the office would save time and decrease errors
- Ability to see records even if some information is wrong/misspelled – similar to how Google does it, would make search easier

WHAT WE FOUND OUT

Heuristic Evaluation Summary

“A heuristic evaluation is a usability inspection method for computer software that helps to identify usability problems in the user interface (UI) design. It specifically involves evaluators examining the interface and judging its compliance with recognized usability principles (the “heuristics”).”

Priority 1 Categories

- **Consistency & Standards**
RECOMMENDATION: Develop MSIX web standards and styles to ensure consistent look, feel, tone and language.
- **User Control & Freedom**
RECOMMENDATION: Implement breadcrumbs and/or sub navigation; confirmation alerts and ability to undo certain actions.
- **Recognition Rather Than Recall**
RECOMMENDATION: Make it easier for users to request a password reset by making the appropriate contact information readily available.

Priority 2 Categories

- **Match Between System & the Real World**
RECOMMENDATION: Make it easier for users to request a password reset by making the appropriate contact information readily available.
- **Flexibility & Efficiency of Use**
RECOMMENDATION: Allow for bookmarking and/or selecting favorites for actions and links. Implement breadcrumbs and/or sub navigation; confirmation alerts and ability to undo certain actions.
- **Help Users Recognize, Diagnose & Recover from Errors**
RECOMMENDATION (for future release): Consider utilizing autocomplete, more “Google-like” approach, particularly for returning search results.

Priority 3 Categories

- **Visibility of System Status**
RECOMMENDATION: Add progress bars or other indicators to set user expectations.
- **Error Prevention**
RECOMMENDATION: Standardize error handling requests. Develop standard MSIX web standards and styles to ensure consistent look, feel, tone and language.
- **Aesthetic & Minimalistic Design**
RECOMMENDATION: Develop MSIX web standards and styles to ensure consistent look, feel, tone and language.
- **Help & Documentation**
RECOMMENDATION (for future release): Create more prominent navigation, organization of help materials and descriptions of training materials

(RECAP OF) WHAT WE KNOW

Preliminary Scope

- Redesign existing site to be responsive
- Make it intuitive and accessible to users in all available form factors
- Offer a more efficient experience for simple but frequently accessed activities.
- Put the power of MSIX search features in MSIX users hands at all times, wherever they may be.
- Incorporate a rebranding of the MSIX logo throughout the mobile and desktop ~~applications~~ sites
- Provide the ability to search student records and offer basic functionality that ensures merges, email notifications, and eligibility data that will improve recruiting and data capture
- Gain a better understanding of MSIX impact, usage, and adoption through analytics
- Allow investment in a direction that will provide growth and wider access for MSIX users

WHAT WE KNOW

Assumptions

- The current MSIX site will remain live when the redesigned site is launched
- MSIX website enhancements planned for a Summer 2016 release will be included in the redesign
- The following features cannot be modified at this time due to technical constraints
 - Reports
 - Password Reset

Risks

- Duplicate interfaces (two “versions” of the MSIX site: current vs redesigned site) will confuse users and disrupt their experience
- Including everything in the current site would mean that part of the newly redesigned site would have to link the “old” site; look and feel would be different which would dilute the refreshed MSIX branding

Recommendation

**DESIGN AND ENGINEER A RESPONSIVE
SITE, WITH A USER EXPERIENCE
TAILORED TO EACH DEVICE.**

TAILORED USER EXPERIENCE

To improve the mobile experience, features available on mobile will be tailored to those most critical *on-the-go*, based on user research.

	DESK	TABLET	PHONE
LOGIN			
Login flow (including privacy)	X	X	X
Password request/update (incl admin search)	X	X	X
Password reset (admin)	X	X	X
ADMIN, USER			
User account edit (admin)	X	X	
User account edit (user)	X	X	
User account add (admin)	X	X	
ADMIN, DATA/REGIONAL			
State/regional data (admin)	X		
Technical references	X		
External links	X		
STUDENT			
Student search, basic	X	X	X
Student search (advanced)	X	X	X
Student detail, basic/tier 1 (*)	X	X	X
Student detail, tier 2 (**)	X	Only enrollment	Only enrollment
Student detail, tier 3 (***)	X		
Historical/raw data views	X		

(*) includes full name, state of residency, DOB, gender

(**) includes guardian info, qualifying info, verification, multi birth + list of enrollments, courses, assessments and privacy policy

(***) includes details of enrollments, courses, assessments and privacy policy

X: Deep-linked to legacy site

TAILORED USER EXPERIENCE (CONTINUED)

	<u>DESK</u>	<u>TABLET</u>	<u>PHONE</u>
REPORTS			
All reports	X		
WORKLIST			
Combined worklist	X	X	X
Worklist History	X		
Initiate merge/split	X	X	X
Approve merge/split	X	X	X
Initiate move	X	X	X
EXTRAS (Enhanced UX)			
My saved list	X	X	X
GENERAL			
Global navigation	X	X	X
How-to (Training) / Help / FAQ / Contact	X	X	

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(***) includes details of enrollments, courses, assessments and privacy policy

X: Deep-linked to legacy site

(RECAP OF) WHAT WE KNOW

Preliminary Scope

- ✓ Redesign existing site to be responsive and available on different devices
- ✓ Make it intuitive and accessible to users in all available form factors
- ✓ Offer a more efficient experience for simple but frequently accessed activities.
- ✓ Put the power of MSIX search features in MSIX users hands at all times, wherever they may be.
- ✓ Incorporate a rebranding of the MSIX logo throughout the mobile and desktop applications sites
- ✓ Provide the ability to search student records and offer basic functionality that ensures merges, email notifications, and eligibility data that will improve recruiting and data capture
- ✓ Gain a better understanding of MSIX impact, usage, and adoption through analytics
- ✓ Allow investment in a direction that will provide growth and wider access for MSIX users

NEXT STEPS

- Get green light on moving forward recommendation of responsive website with tailored mobile experience for October 2016
- Complete and final Initial Analysis Report (IAR)
- Brand Board Presentation (July 6)

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