

# High-Fidelity Concept Testing

## Research Report

### Overview

In order to finalize the recommendations for our minimum viable product (MVP) version of our Slate redesign efforts, our Slate UX Team conducted hi-fidelity user testing of our concepts, allowing us to move from conceptual designs to fully built-out flows, focused on the core user needs surfaced throughout our project engagement.

We tested design concepts for new Slate features such as the Applicant Dashboard, SIR Dashboard, as well as a revamp of Slate’s Reader, with a focus on specific tasks and use cases to improve the holistic applicant review cycle. Overall, the designs were received positively, and we make a number of recommendations to move forward with as we finalize our delivery of MVP specifications and roadmap items for future development and exploration.

### Insights Summary

- Our Applicant Dashboard section will move forward with conceptual designs largely as-is
  - Updates are focused on design and information polish and improving feedback for system status changes
  - We narrowed the scope of our designs in instances when execution would require additional research and deep design exploration
- The Reader/Applicant Packet section will move forward with conceptual designs largely as-is
  - Updates are focused on completing the build out of functionality for exploratory designs that performed well (e.g., the drop down navigation)
  - Updates also include design and information polish
- The SIR Dashboard section will move forward with conceptual designs largely as-is
  - Updates are focused on improving poor-performance designs when a design solution won’t require additional research (e.g., the program selector)
  - Updates and roadmap items include design and information polish in instances in which mental models require additional validation

### Recommendations

Slate Section, Subsection	Recommendations / Proposed Solutions
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<b>Applicant Dashboard:</b> Program Selection	<ul style="list-style-type: none"> <li>● Roadmap: Only display programs that I am responsible for</li> </ul>
<b>Applicant Dashboard:</b> Graphs	<ul style="list-style-type: none"> <li>● Roadmap: Make the graphs displayed customizable</li> <li>● Roadmap: Make the graph ranges customizable</li> <li>● Roadmap: Make clicking graphs filter table</li> <li>● Move forward with adding percent to graphs</li> <li>● Roadmap: Add ability to export report</li> <li>● Move forward with updating graph range precision to display hundredths (e.g. 2.99)</li> <li>● Move forward with adjusting the ordering of graphical ranges from low to high</li> </ul>
<b>Applicant Dashboard:</b> Assign Reviewer	<ul style="list-style-type: none"> <li>● Move forward with creating confirmation notification after assigning reviewers that states that the assignees will get notified</li> <li>● Roadmap: Add a comment while assigning reviewers</li> </ul>
<b>Applicant Dashboard:</b> Grid List	<ul style="list-style-type: none"> <li>● Roadmap: Add the ability to sub-sort columns</li> <li>● Move forward with replacing Bin column with “Application Date” column as default column</li> <li>● Roadmap: Set default columns per program</li> </ul>
<b>Applicant Dashboard:</b> Search	<ul style="list-style-type: none"> <li>● Move forward with name-based search functionality</li> <li>● Roadmap: Need to define UX post-search for materials</li> </ul>
<b>Reader: Application Packet Overall</b>	<ul style="list-style-type: none"> <li>● Move forward with confirmation modal once review submitted</li> </ul>

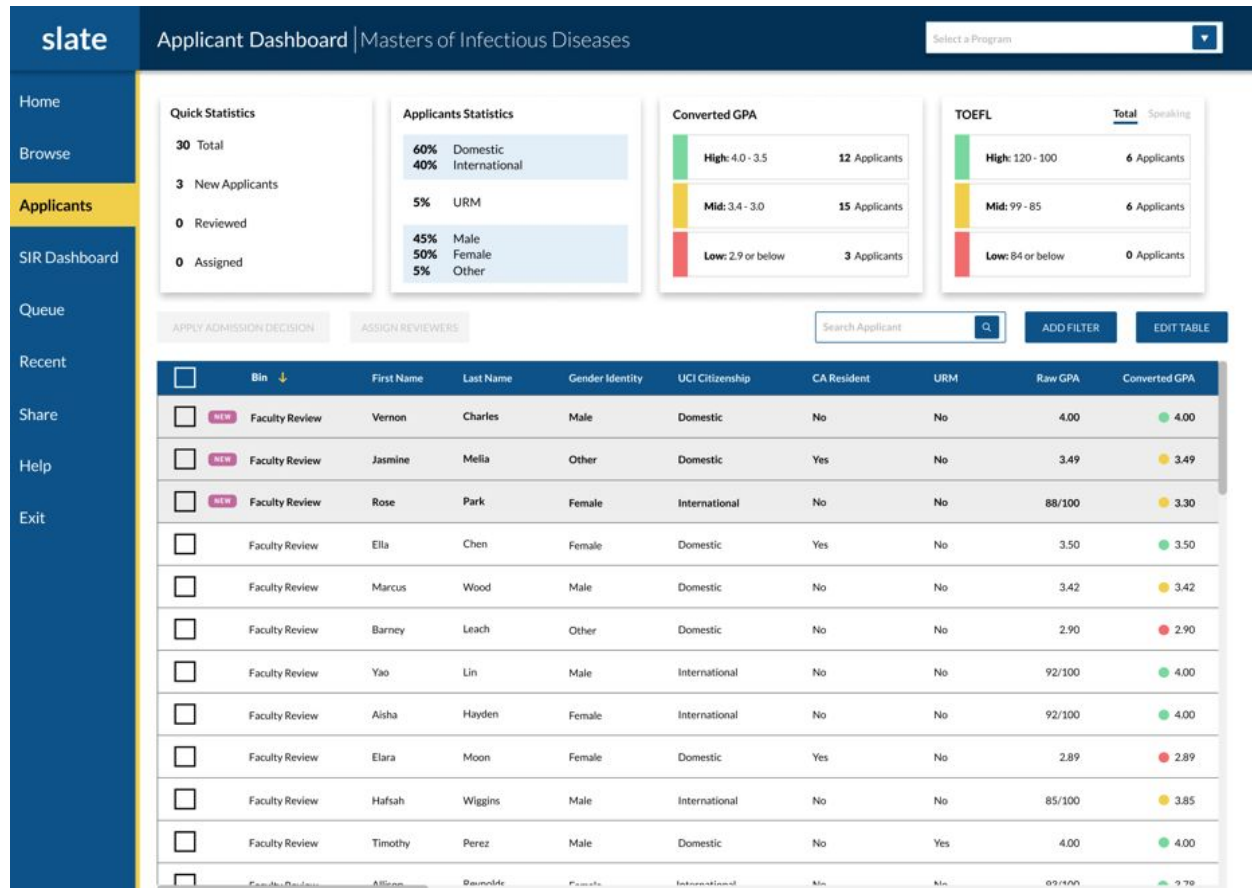
	<ul style="list-style-type: none"> <li>● Roadmap: explore future default/customizable ordering of applicant packet materials</li> </ul>
<b>Reader: Drop-down Materials Navigation</b>	<ul style="list-style-type: none"> <li>● Move forward with the drop-down materials navigation, build out actual drop-down functionality</li> </ul>
<b>Reader: Inline Comments</b>	<ul style="list-style-type: none"> <li>● Move forward with inline commenting functionality, along with general comments via the segmented review form</li> <li>● Move forward with adding a timestamp to the published comments, both personal and public</li> <li>● Move forward with increasing the size of the inline comment box</li> <li>● Roadmap: explore adding comments via the comment button to understand use cases for inline comments vs. general comments</li> </ul>
<b>Reader: Comment Visibility</b>	<ul style="list-style-type: none"> <li>● Move forward with private default for inline comments</li> <li>● Move forward with post-submission reviewer comment visibility via the Reviews Overview section of the review form</li> <li>● Roadmap: explore whether using comments to flag specific categories (e.g., “bad”) is helpful to users, and subsequent ways to improve commenting functionality to serve these needs</li> <li>● Roadmap: perhaps related to the above, explore whether there’s a need around personal comments made within the Reader to also be displayed in the Applicant Dashboard</li> </ul>
<b>Reader: Search</b>	<ul style="list-style-type: none"> <li>● Move forward with search in the Reader navigation</li> </ul>

<p><b>Reader: Back to Applications Button</b></p>	<ul style="list-style-type: none"> <li>● Move forward with the back to applications button</li> </ul>
<p><b>Reader: Review Form</b></p>	<ul style="list-style-type: none"> <li>● Move forward with the review form as-is, with one addition to make the comment box optional, ensuring the optionality vs. required is explicitly stated for all form components</li> <li>● Move forward with adding a timestamp to the published comments</li> <li>● Move forward with adding individual Faculty rating to Reviews Overview section</li> <li>● Roadmap: explore removing the recommendation option, instead using the rating to infer recommendation</li> <li>● Roadmap: explore adding the ability to save the review prior to submitting the review form</li> <li>● Roadmap: explore comment permanence and use cases for accessing applicant files at future states</li> <li>● Roadmap: explore where to move assign faculty function in the review form</li> </ul>
<p><b>SIR Dashboard, Program Selection</b></p>	<ul style="list-style-type: none"> <li>● Move forward with auto-populating a program based on applicant dashboard if possible.</li> <li>● Move forward with revisiting design to distinguish selector from general search bar.</li> <li>● Roadmap: exploring alternative locations for program selector such as settings or home.</li> </ul>
<p><b>SIR Dashboard, Tabs</b></p>	<ul style="list-style-type: none"> <li>● Retain as is.</li> </ul>
<p><b>SIR Dashboard, Terminology</b></p>	<ul style="list-style-type: none"> <li>● Ensure SIR acronym is spelled out in the user's first encounter with it.</li> <li>● Roadmap: listen for feedback on clearer terms for positive/negative/outstanding.</li> </ul>

<b>SIR Dashboard, List View</b>	<ul style="list-style-type: none"><li>● Retain as is.</li><li>● Roadmap: exploring figures for totals or other categories outside SIR positive.</li></ul>
<b>SIR Dashboard, Graphs</b>	<ul style="list-style-type: none"><li>● Retain columns, prioritizing name, email, faculty rating, and gender.</li><li>● Roadmap: exploring additional columns such as date and interest areas.</li><li>● Roadmap: further research around relevant columns.</li></ul>
<b>SIR Dashboard, Contact</b>	<ul style="list-style-type: none"><li>● Retain as is.</li><li>● Roadmap: exploring multiple copy, auto-generated emails, batch emails, and tracking emails.</li></ul>

# FINDINGS DETAIL

## Applicant Dashboard



### Top Section

- Program Selection
  - Need to make sure that users can find new “Applicants” navigation
  - Liked ability to quickly switch between programs
  - Not sure if participants were aware that they would only see this screen once
  - One participant wanted to only see programs that they are responsible for
- Statistics
  - Participant wanted to be able to hide the top section while reviewing applicants
  - Different participants wanted different graphs
  - Desire to click graphs to filter table
  - Lack of understanding of how Reviewed and Assigned would work
  - For larger programs, a % is more valuable than a count

- Quick stats are helpful to provide daily updates to wider audience
- Gender and URM useful
- Would like to have a graph that displayed keyword searches

## Test Scores

- GPA
  - A mix of feedback on whether or not to include GPA
  - GPA displayed is for their undergraduate degree
  - Interested in seeing GPAs from all degrees
  - Need to clarify that 2.99 and below is red and requires an exception
  - Concern that color-coding the GPA will bias reviewers
  - Concern over the accuracy of converted GPA
- GRE
  - GRE is no longer required for some programs
  - Percentile and not raw GRE score would be better
- IELTS/TOEFL
  - Some programs don't admit international students
  - IELTS and TOEFL are both required

## Grid List

- Filtering
  - Filter terminology confused a participant but they got it after clicking the button
  - Concern over the complexity of filters
  - Participants understood Standard vs. Advanced
  - Might use sort instead of filter if the column is available
- Columns
  - Mix of columns that faculty would use
  - Bin is potentially confusing to put in table
  - Request to set columns on a program level then allow customization
  - Need to add the ability to sub-sort columns
- New
  - Interest in seeing new applicants but confused how it would work
  - Participants were very task-oriented
  - Desire to click on "New" in quick stats to filter table
  - Request to add application date in the table with a default sort on newest
- Multi-select
  - Selection and de-selection was intuitive

## Buttons

- Apply Admissions Decision
  - Liked the Bulk Admit feature to deny low GPA applicants

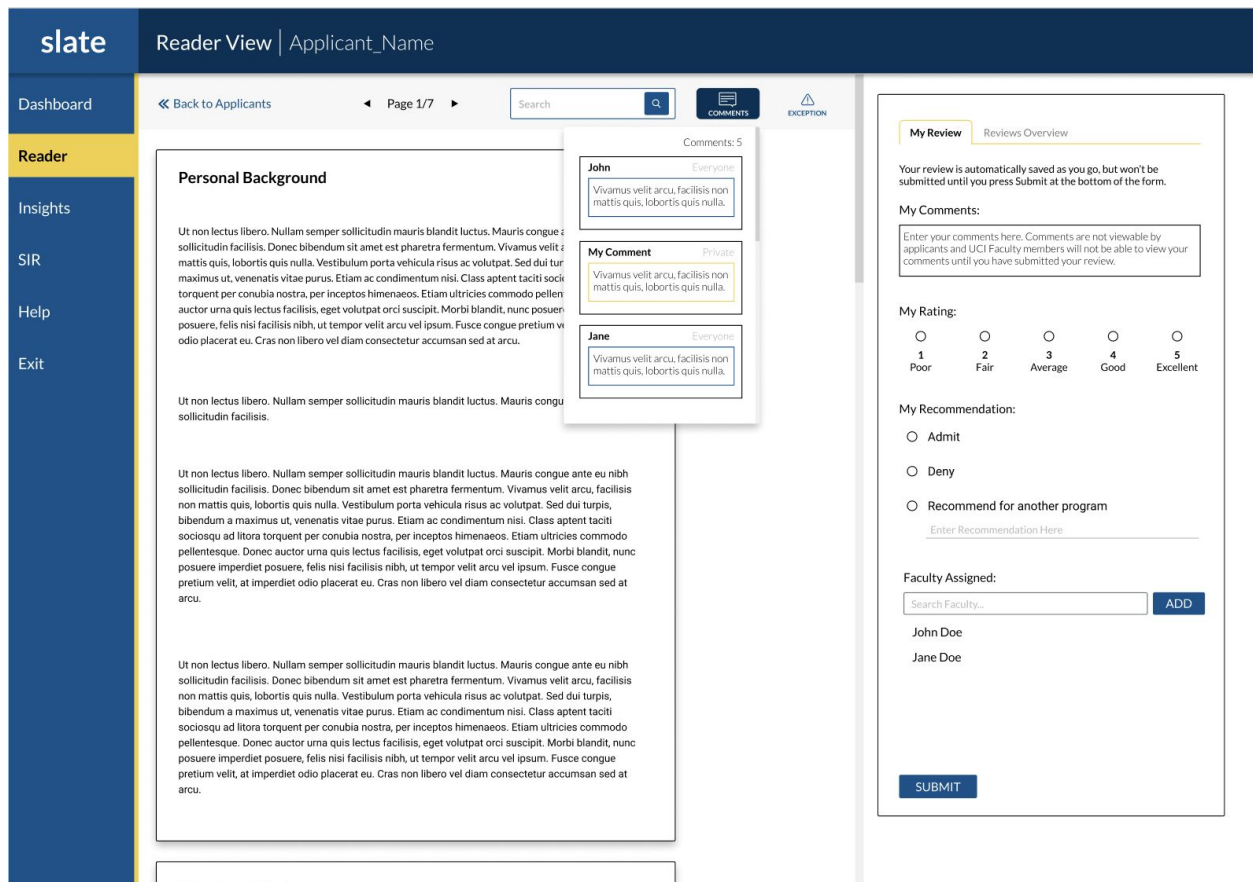
- Should be limited to Program Director only
  - One participant thought that the “Edit” button would remove them
- Assign Reviewers
  - Assign Reviewers flow was intuitive and useful
  - One participant wanted to be able to add a comment while assigning
  - Concern over lack of notifications on assign
  - Would want to see a summary of outstanding reviews
- Search
  - Some participants want it to just search name and others wanted it to search the entire packet
  - Need to define flow of what happens after you search
- Edit Table
  - Participants really like the Edit Table functionality to tune it for their own process

## Other

- Bias
  - Concerns around bias in the way that data gets displayed
  - Need to be sensitive to colors and groupings of applicants



# Reader



## Application Packet – Overall

- Ordering of materials within the packet was important to all participants, although their preferences varied
  - One stated a familiarity with the “overview” page, although the utility this provided to them was unclear
- The packet as a whole continued to perform well relative to participant mental models
- Confirmation dialogue box/modal once review is submitted was received very well

## Drop-down Materials Navigation

- This addition performed very well across participants
- Users understood that they could either scroll manually or use the drop-down navigation to access various sections of the applicant packet

- One participant mentioned indifference between the drop-down and the dual sidebar navigation that exists in Slate currently

## Inline Comments

- Users desired distinction between inline comment functionality and the general comments made available in the review form
  - By and large users continued to understand the distinction between these two functionalities
- One user expressed a lack of desire to use the inline commenting function, stating they preferred general comments for their use cases
- With the addition of the comment button in the upper navigation of the reader, some users expressed an expectation that they be able to add comments here
  - We will need to explore this further to understand use cases for inline comments vs. general comments through the comment button
- The flow for inline commenting was largely understood, performing well, although one participant mentioned not wanting to highlight specific portions of the application
  - This could be correlated with the desire to comment more generally vs using inline commenting for specific call outs
- Users were used to the conceptual model, largely due to experience with other software such as Microsoft Word
  - There was concern from one participant, stating that they weren't sure that their colleagues would be able to use commenting for dialogue – stating that their peers do not know how to “reply” to comments in this context
- Existing comment discovery was also intuitive for users, with all able to find comments by either manually scrolling through or via the comments button in the reader navigation, if not both
- Two requests for improvement, both from the same participant were to:
  - Increase the inline comment box size
  - Add a timestamp to published comments

## Comment Visibility

- Concerns from concept testing around comment visibility were largely quelled through the addition of the private default setting for comments
  - This setting was easily discoverable by all participants and widely understood
- Users felt encouraged by the delineation between public and private comments
- The use cases for public and private are still driven by point-in-time, with many participants continuing to express that once their review was submitted/completed, then they would like to view others' comments
  - Review overview access once review submitted fit this mental model and continued to generally be understood and useful

- One use case arose for using comments to flag “students who are bad,” although this concept was not further explored
- One participant expressed a desire to have their personal comments made within the Reader to also be displayed in the Applicant Dashboard

## Search

- Searching the application materials through the search box within the reader navigation was intuitive for participants, with users claiming this would largely provide utility to their workflows
- One note from a number of participants was that they would expect that the search functionality would not be progressive in nature; they would expect the search command to take place only once they’ve executed the search via a specific action (enter, click search, etc.)

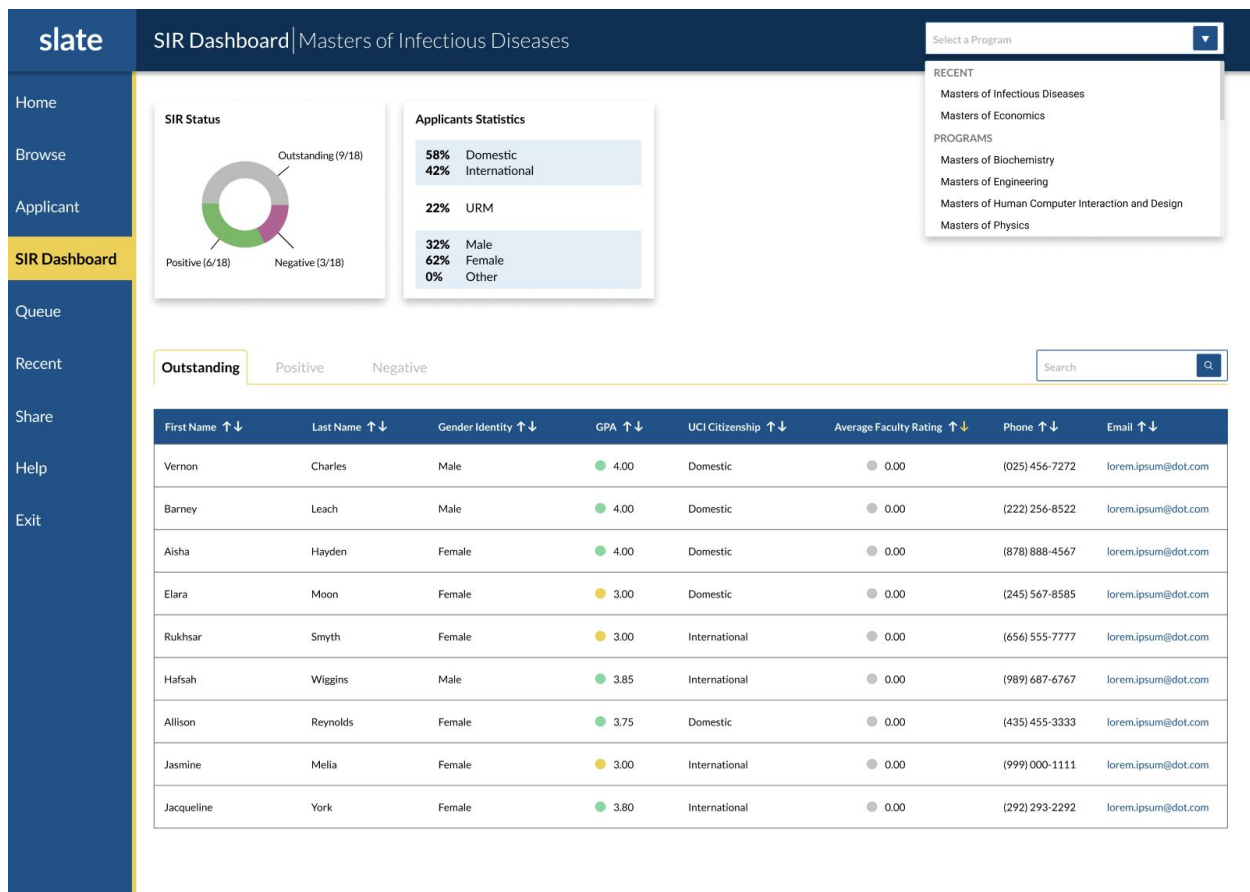
## Back to Applications Button

- Users understood the back the applications button and where it would take them
- One user mentioned that they’d still prefer a tabbed navigation, although this also felt intuitive to them and would work fine

## Review Form

- The persistent review form continued to be received positively by participants
- The flow to fill out the form was intuitive for users, although a few did express that the form could be improved by further simplifying it
  - Removing the recommendation option, instead using the rating to infer
  - Making the comment function optional – one participant shared that unless a candidate stands out in a major way, they’d prefer not to write a comment, even for positive recommendations
- One user was adamant about the need to save prior to submitting the review form
  - Their review flow was such that they would review a number of applicants, save their tentative recommendation, and then submit later
- Sentiment that reviewing comments of other faculty members would be desired post their own recommendation submission continued
  - Users stated that they would be interested to see what others had to say about the same student
- One user expressed that they wanted to ensure that comments were permanently attached to that candidate and their file for the future, although the use cases for this expressed need were not thoroughly explored

# SIR Dashboard



## Program Selection

- Users had difficulty changing programs with the selector, stating they felt unsure how to do so or initially missing the selector on the upper right. One user mistook the selector for a search bar. One user expected the program to be remembered from the previous applicant dashboard selection.
- Users expected to change programs by clicking on the SIR dashboard in the navigation bar or from the home page, or even from the browse page.

## Tabs

- Users had generally positive reactions to the 3-tab schema, finding them clear and useful.
- One user shared that depending on the situation he might prefer the outstanding or positive tab first.

## Terminology

- Users had mixed reactions to the terminology around positive/negative/outstanding. Some users found it intuitive, while others struggled with it, with one pointing out that a previous system used accepted, declined, and waiting.
- One user had difficulty with the term SIR, pointing out that it wasn't obvious what it stood for.

## List View

- Users had positive reactions to the charts, finding them helpful overall and particularly good in their association with the table.
- One user pointed out that he didn't know what the status chart meant, likely due to the terminology.
- One user requested to see figures for totals and not only SIR positives.

## Graphs

- Users had mixed reactions to the SIR table, with some positive feedback for gender, URM, name, email, and faculty rating. Some negative feedback was heard for gender, citizenship, URM, and phone number.
- Some users requested additional features such as date SIR was received and student interest areas.

## Contact

- Users had generally positive reactions to the copy email function, finding it understandable and useful. Some users found it to be a logical place to exit Slate, given that back and forth emailing happens frequently between faculty and students, and they wouldn't want it within Slate.
- Some users had minor questions around its articulations, such as expecting clicking on emails to allow for emailing within Slate or their preferred email client, or wondering if there's an easy way to copy all emails.
- Some users had further feature questions and requests around auto-generated emails, batch emails, and tracking emails.

## Other

- Users highlighted that the SIR stage is where collaboration often happens with program directors and administrators.

## GOAL

To qualitatively assess the fine details of prototyped designs across 3 key product areas for fit with user admissions processes and mental models, with the end goal of fine-tuning the prototype according to user needs.

## METHODOLOGY

Each 45-minute session was spent on structured concept testing of the user based on scenarios they'd likely encounter using the redesigned Slate, with attention to usability. Half of the session was dedicated to assessing the Applicant Dashboard, a quarter to the Reader, and a quarter to the SIR Dashboard. Users were asked how they would approach scenarios, how they felt about the proposed solution, and how they would improve it.

## USERS

2 faculty and 1 staff member who are current active users of Slate for graduate admissions, ranging in school and department.

*A note on sample size:* In order to increase the confidence in the final design recommendations outlined in our high-fidelity concept testing report, we recommend conducting additional concept testing with UCI Graduate Faculty members. We recommend recruiting at least 5 additional Faculty members to fully validate the performance of these solutions relative to Faculty needs.

## RAW MATERIALS

Discussion guide, recordings, raw notes, and synthesis data available on request.