

slate

Built for the **unique**
needs of higher ed



UX Roadmap

8/20/2020

Overview

Throughout the UX process, our consulting team devised a large number of ideas that fell outside the MVP (minimum viable product) scope of the project. This document contains an unprioritized collection of areas for exploration that came out of various phases of research and design. Because they haven't been validated with users or designed, they are not ready for development. Instead, we advocate that after MVP designs are implemented, stakeholders involved review this list, prioritize it by feasibility, importance, scope, or other factors, and carefully consider how to approach these ideas to explore and incorporate into the design. We recommend that additional UX support be brought in for this future work, as in many cases, in-depth research will be required in order to both validate and inform the implementation of these ideas.

Testing

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 – specifically in instances where the recommendations might be more costly or challenging to justify internally. Since the designs were tested with 2 Faculty and 1 Staff, we recommend recruiting at least 5 additional Faculty members to fully validate the performance of these solutions relative to Faculty needs.

Applicant Dashboard

Current design spec:

https://docs.google.com/document/d/13akiteWlvTI_aUxC6gkD3WGUicp_xAOi9SRnSESR2X0/edit#heading=h.ga8bmuv65f5

Program Visibility

Users are interested in seeing only programs they're responsible for. For example, a user would get assigned permission to just their programs, and when they entered Slate to view applicants, it would be filtered to only those who applied for programs they're reviewing. It's recommended to explore more granular program visibility, closing a potential privacy gap where users currently can see the applicants for all programs.

Customizable Graphs

There was no consensus across users on what graphs are most valuable to display. Consider making graphs configurable by program and set by the administrator or by the user.

Make Graph Ranges Customizable

Fixed graph ranges for GPA and TOEFL were received generally well but some users requested to make the ranges customizable by program.

Report Export

Some users construed the graphs as providing value because they can easily provide information on admissions progress to their supervisor. Consider adding a way to export the report through email or other sharing formats.

Customizable Default Columns by Program

Faculty have different opinions about which columns they would like to see displayed by default. Explore making the default set of columns customizable by program.

Search Applicant Packet

Currently, the search bar above the applicant table is only scoped to search first and last name. Consider increasing the scope of search to include the entire application packet, with attention to challenging UX of displaying the context of search results.

Add a Message While Assigning Reviewers

In current designs, when users assign reviewers, the reviewers assigned receive no indication why they got the review request. Consider a feature to add a message box so the reviewer gains context.

Drill-down From Graphs

Consider adding the ability for the user to click on a section of the graph and filter down the list of applicants in the table according to the area they clicked.

Domestic vs International GPA's

Consider providing information on the international GPA scoring systems along with the U.S version to allow faculty to compare and choose their preference in determining the applicant's qualification.

Auto-Evaluate for Large Applicant Pools

Consider features that automatically provide an overall suggested score to large amounts of applications to save faculty time. Ensure this looks different than faculty-assigned scores, which take precedence over automation.

Priority Fields

Consider making certain fields in the table boldable by faculty choice.

Secondary Admissions

Consider reserving an area/status in the applicant dashboard for possible secondary admissions, with relevant features.

Applicant Packet

Current design spec:

https://docs.google.com/document/d/13akiteWlvTI_aUxC6gkD3WGUicp_xAOi9SRnSESR2X0/edit#heading=h.kgl7nrofy31a

Customizable Applicant Packet

Faculty prioritized different parts of the application packet to review first. Consider ways to tailor the applicant packet to the individual's review values through customization.

Review Search Results

Currently the search on the application packet doesn't highlight how many search term hits there are. Explore expanding search to behave similarly to browser search.

Global Application Comments

More research is needed to see if there is value in global (not inline) comments.

Comment Deletion/Edit

Currently, there isn't a way to delete or edit a comment. Users were split in their opinions on this but it's recommended to explore deletion and editing.

Recommend for Another Program Design

In MVP designs, a form is provided for recommending an applicant to another program on the review form, but only as a high-level concept. More research is needed on how the recommendation flows through the system and how to execute the feature.

Comment Sentiment

Consider expanding inline comments by adding the ability to flag sentiments (positive, negative, neutral).

Comment Display in Applicant Dashboard

Some users requested to add a short private comment that is visible in the table to aid in applicant recall, which is recommended to explore.

Remove Recommendation on Review Form

There is some user-perceived overlap between the Recommendation and Rating on the review form, so it's recommended to explore removing the redundancy in some way.

Add Draft Review

Some users had interest in being able to add a draft review without submitting it, in the case that as more information comes in, reviews become normalized prior to submitting a finalized review. It's recommended to explore this.

Move Assign Reviewer in Review Form

Several users expressed a lack of interest in assigning a reviewer during review form completion. Consider if the features should be moved elsewhere or dropped for that step.

Applicant Status Visibility

Consider a way to communicate status within the Reader to reinforce which stage the applicant is currently at.

System Status Visibility

Users have a need to remain apprised of the status quo, so consider providing more visibility/easier access to reviewing functions and adding a message upon user-taken actions.

Queue Hiding

Consider the ability to hide or delete a queue.

Offline Viewing

Consider allowing users to download and view attachments, such as a letter of recommendation, to view offline.

SIR Dashboard

Current design spec:

https://docs.google.com/document/d/13akiteWlvTI_aUxC6gkD3WGUicp_xAOi9SRnSESR2X0/edit#heading=h.j6k8fg31kfka

Test Wording Around SIR Status

UX writing around states (Positive, Negative, Outstanding) for SIR Status was confusing for a few users. It's recommended to further explore terminology.

Add Funnel Stats

Users requested to see how the positive pool compares to the SIRs sent and total applicant pool. It's recommended to add further statistics to see how the faculty are tracking relative to available candidates.

Relevant Columns

More feedback is needed on the list of default columns to ensure they are relevant to faculty.

Emails

Some users requested to utilize Slate email functionality or be able to export multiple emails for bulk notifications. Explore these concepts.

Bins

Applicant Information Preview

Element 451's application interface displays quick info about individual applicants in the bins for a quick look. Explore applying similar ideas to Slate bins to provide quick info as a preview.

Kanban Organizing System

Explore a Trello-like card system where faculty can't move applicants themselves without a two-step process with staff.

Repurposing Bins

Explore changing bins to program/level organizer or other meaningful groups; otherwise hide.

Filter Usability

Remove the SLATE template library

Based on user feedback it's recommended to remove this and other unused parts of Slate, however, if that's impossible, reorganize into dropdown menus or searchable functions to reduce the amount of real estate taken.

In-depth Filter Design Needed

MVP designs provide a high-level view of the filter interface on the Applicant Dashboard but a full research cycle is recommended to define interaction patterns.

Home Page

Swap Icons with Words

Explore updating the menu to word-based section and category descriptors rather than icons.

Reduce homepage Content

Due to lack of use, explore reducing reader home content in favor of SIRs, help, and other

relevant content.

Reviews

Collaborative Reviews

Consider having a central location for seeing outstanding reviews and having asynchronous conversations around applicants.

More Granular Permissions

Consider adding a permissions role for faculty leads who can assign and admit/waitlist/deny applicants.

General Design and Content Improvement

Notifications

Currently, the UCI Slate installation has notifications turned off. To draw people in to complete reviews and see new applicants, consider utilizing notifications.

UI Refresh

Explore updating the interface style to be more up to date with current trends to be easy on the eyes and supporting content through the use of visual hierarchy.

Learning

Explore Tailored Education

A more tailored approach to learning Slate by departmental needs may increase overall mastery and confidence in the platform. Explore teaching methods for imparting this.