Scheduling Sprint UX Feedback - [redacted]

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Problem Area: Start & High Level Flow

Why It's A Problem:

Currently it's not obvious where to begin and decisions that live at the top of the sidebar are not ones that necessarily impact availability. As a user I could get towards the end of the process only to find out that a necessary resource is not available.

Possible Solutions:

- The starting point in the scheduling process should be as clear as possible and guide the user throughout via defined steps.
- Scheduling/reserving space would be easier to navigate and make decisions on if it were presented in a deliberately planned, staged process.
- Present the user with the most important decisions first; as in the ones that will impact overall availability.
- Explore real time search interfaces based on user defined parameters. The idea would be that you are not allowing the user to begin reserving something that could eventually become unavailable in the first place, reducing errors and workload. Users define essential parameters first and then the system supplies them with options based on this input (*not sure if this is feasible for MVP, see page 6 for a bit more detail here*).
- Explore portions of wizard and steps left UI patterns. This allows the process to be divided into clearly labeled sections, guiding user decisions with a perceived simplicity. It also makes the sections where the user "drills down", such as the location selection, much easier to manage.

Example of steps left UI pattern

- One thing to keep in mind with this approach, however, is to never rely on user memory. So it becomes important to show the user what selections they have made in previous steps as they progress in the process.
- It's also important that the user can revisit steps when scheduling conflicts arise.

- Potential breakdown of steps:
  1. Select Location
     - *Select building, room*
     - *Informed decisions based on given address, room capacity, layout*
  2. Select Day/Time
     - *Is this event reoccuring? Allow specified recurrence details*
  3. Select Resources
     - *If this creates a conflict with the previous steps communicate the exact issue to the user with guidance on resolution*
  4. Select Staff
  5. *Comments & Other*
     - *Not clear as to what if anything would need to live here yet*
  6. Submission & Verification of Completion
     - *Confirmation and specify any next steps and help procedures*

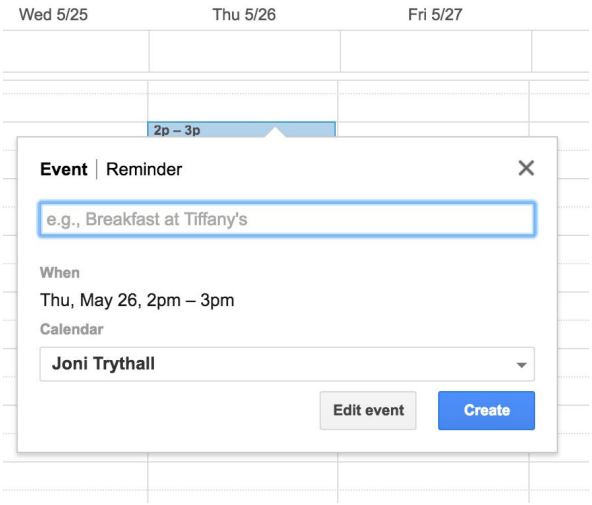
Problem Area: Scheduling Action Flow

Why It's A Problem:

Currently the user actions all live within the sidebar with the exception of selecting a day/time; which if I understand correctly is not the initial step in terms of primary use case. It can prove disorienting to know where to start and not know when it would be appropriate to block out a time. It breaks the chance of a natural process flow and introduces a new pattern.

Possible Solutions:

- I suggest having all the decisions be made within a single large component; so either all outside of the calendar (as suggested previously) or all within the calendar.
    - If the process exists outside of the calendar the decisions made could still be reflected within the calendar but the user actions are separate.
    - In terms of keeping the actions within the calendar it might be helpful to consider this in terms of Google's calendar. When you block out a time you can add details via a modal or double click and be taken to a page where you specify all details:



Example of Google Cal event modal

- Above all else the main focus here is consistency in terms of the experience within the system itself as well as following established usability conventions of scheduling/reservation programs.
- *General Note: This is a major component and the flow is especially important. If you have access to users for testing/discussions it should prove very beneficial. Even if just to use the existing system, it's helpful to know the current state of any pain points to better position the project for innovation going forward.*

Problem Area: System Status & Feedback

Why It's A Problem:

- It's not clear whether or not there is communication to the user about the status of their reservation. If a reservation in progress becomes unavailable due to the specific resources selected the system should let the user know this as well as include language on how to resolve.
- Currently as conflicts arise this appears to be denoted through color. Color blindness and difficulty deciphering hues is very common and many users may not pick up on this messaging at all.

Possible Solutions:

- Make sure the user always knows what is going on.
- Color alone should not be used to communicate something to the user. Any use of color to denote a state should always be accompanied by supportive text.
- Develop a plan for error and success messaging.

Problem Area: Error Prevention

Why It's A Problem:

Users are often distracted when performing tasks which can lead to mistakes or the generation of not ideal usage scenarios.

Solution:

- Errors should be communicated to the users gracefully, actionably, and clearly; with the ultimate goal of preventing them from making errors in the first place.
- Never include language that places blame on the user as errors are most often created due to flaws in design.
- Focus on error prevent from the start.
    - Make sure the user cannot enter nonsensical date/time formats/ranges.

    - Require the user to specify important details, such as an end time.
    - Choose good defaults; is it more common for events to be scheduled far in advance or within the same week? Use this data to determine initial starting points for day/time selection.
    - Utilize forgiving formatting; this may or may not be relevant depending on the final decision of how to allow users to input certain details but keep in mind to be forgiving of various date and time formats, for example.
    - Consider including logic that would trigger a confirmation to the user if they attempted to schedule a very unlikely event; perhaps something lasting several days.

Problem Area: Notes

Why It's A Problem:

It's unclear as to what happens when the user includes text in the "Notes" section. As a user I wouldn't know what to put here or whether or not anyone will review it before my scheduled module.

Possible Solutions:

- It would be helpful if there was some supportive text here that, for example, explained that someone will review and answer any questions/concerns within a given timeframe, if that is in fact what happens.
- Consider an alternate, more descriptive title.
- The main concern here is making sure the user isn't unsure of what happens with these notes and if anyone ever reads them. Who are these notes for? Are they necessary? Do people currently use this field and how are they using it?

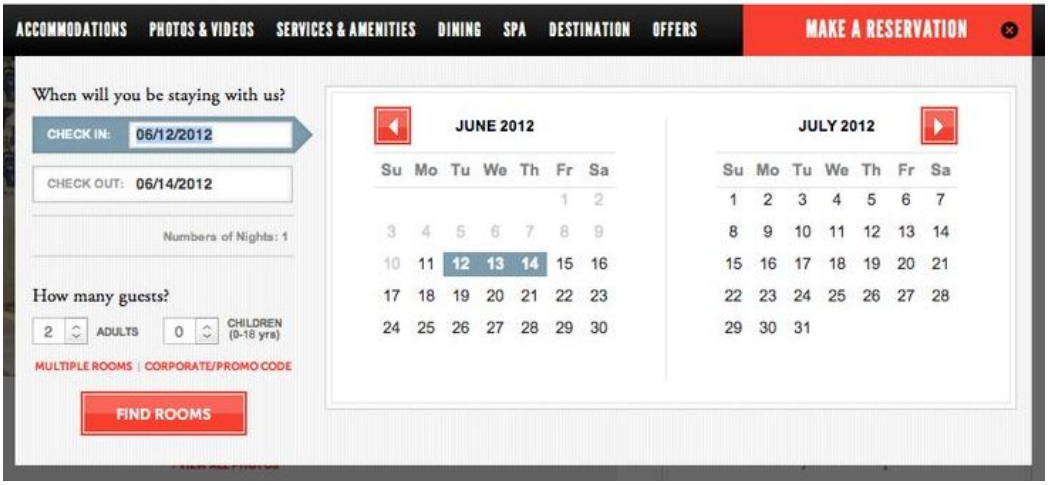
Potential Problem Area: Resource Management & Communication

Why It's A Problem:

It's unclear how unavailable resources will be displayed within the list. If they are not available and not shown that could lead to confusion over whether or not it's even something that is available for use at *any* point. If it's unavailable and listed and marked accordingly the user may still be left wondering about when it *will* be available.

Possible Solutions:

- If a resource is an option but just not available within the specified time it would be helpful to still list it but include language around it being unavailable within the time provided.
- One approach to solving the problem of the user not knowing when resources are available is designing the process to take user input on what the exact needs are (specific location, specific number of hours/timeframe, specific resources, specific staff) and then having the system then suggest available blocks. This pattern can often be seen in reservation software:



Example of reservation software accepting user defined parameters

Potential Problem Area: Help

Why It's A Potential Problem:

It's not clear whether or not there will be help documentation easily accessible to the user during the scheduling process which could lead to confusion or an increase in help related emails.

Possible Solutions:

- As the project develops and suggests that a help section will be needed be sure to plan for this within the navigation.
- Consider an FAQ section if feedback justifies one.

Potential Problem Area: Autosave

Why It's A Potential Problem:

It's unclear how many buttons will be required to complete a reservation or if some or all selections are autosaved which can lead to confusion and distrust on behalf of the user.

Possible Solutions:

- Always let the user know when something has been saved, it's very reassuring.
- Review autosave patterns.

Potential Problem Area: Confirmation Communication

Why It's A Potential Problem:

If the user can do something fairly drastic, like exit the scheduling process altogether once it has begun, not having confirmation prompted can lead to mistakes and time wasted.

Possible Solutions:

- Make sure more drastic decisions like exiting scheduling and removing an existing reservations prompt a confirmation before follow through.
- Review confirmation patterns.
- *Related note: "undo" and "redo" actions are also actions to consider for less impactful decisions and can greatly reduce usability frustrations.*

General Unknowns:

- FLOW: It was unclear in the video how the user gets to the calendar scheduling view. This will impact the content, for example: if the user is coming from a specific module they should not have to define it again (reduce redundancies), otherwise they should be prompted to complete the course/module details for scheduling.
- STAFF: It was unclear if an admin would always be listed as staff for the module they are scheduling time for. If so it may be an awkward scenario for them to add themselves when booking staff.
- STAFF: It was unclear if the system alerts staff when they have been scheduled for a module and if so if they can decline or are supplied contact information.
- PRIVATE EVENT: I wasn't sure if private scheduling is common.
    - Do they still show up in the calendar and if so is there at least a contact person associated with the event in case of questions?
- EVENTS: The exact intentions of the "Events" model in the requirements document has not been discussed but it would seem as if these listed requirements could be split amongst the other existing models.
- EVENT STATUS: The role of "confirmed" vs "tentative" is unclear in this context.
    - What is the process of marking something as "confirmed" and what impact will "tentative" have on the ability of others to schedule confirmed events at this time?
- RESOURCE MANAGEMENT: We hadn't discussed what happens when a user manually adds a resource to the list. Does it prompt someone to make sure it's there or if it's simply making note that the instructor will have that item; does the user know what this action will mean?

- ADMIN NAV: The intentions here were not discussed yet so it’s lacking context. It’s unclear if this is strictly a scheduling nav and what the Reports item is.