



Collections Feature Design Recommendations

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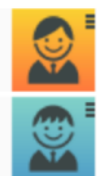
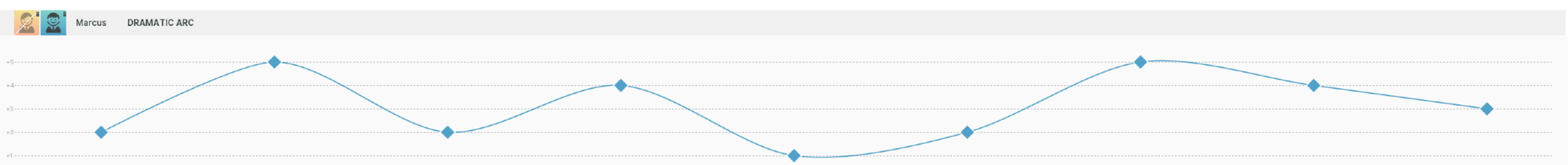
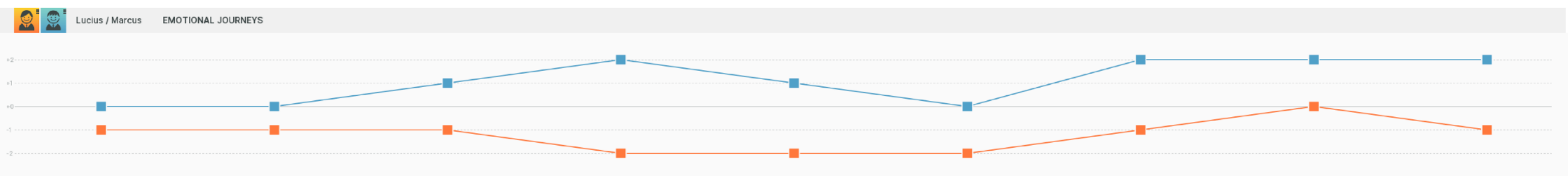
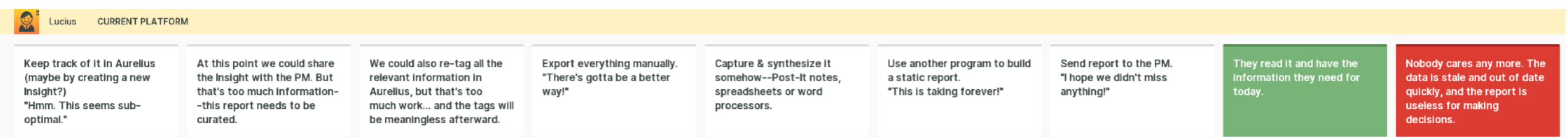
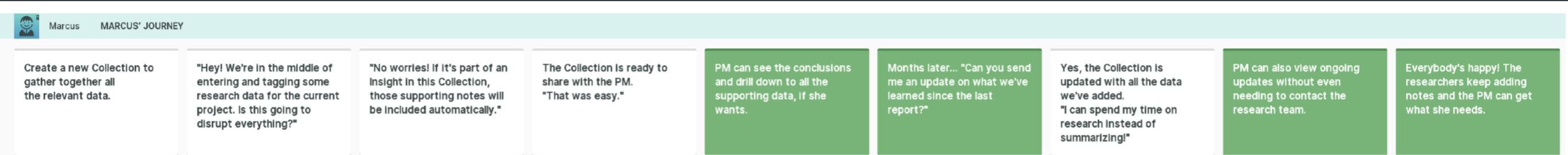
Current Status & Goal

The Collections feature is envisioned as an internal, curated, cross-project presentation tool that removes the need for users to go outside Aurelius for reporting. The goal is to allow researchers to spend more time figuring out what they have learned, and less time summarizing.

The current process involves manually exporting data from Aurelius and preparing a report in another program (e.g. Word, PowerPoint).

My proposed process will support easy report generation and sharing via web and file export.

User Journey Map



"Lucius," a user of the current system. Frustrated by extra effort and uncertainty of creating reports now.



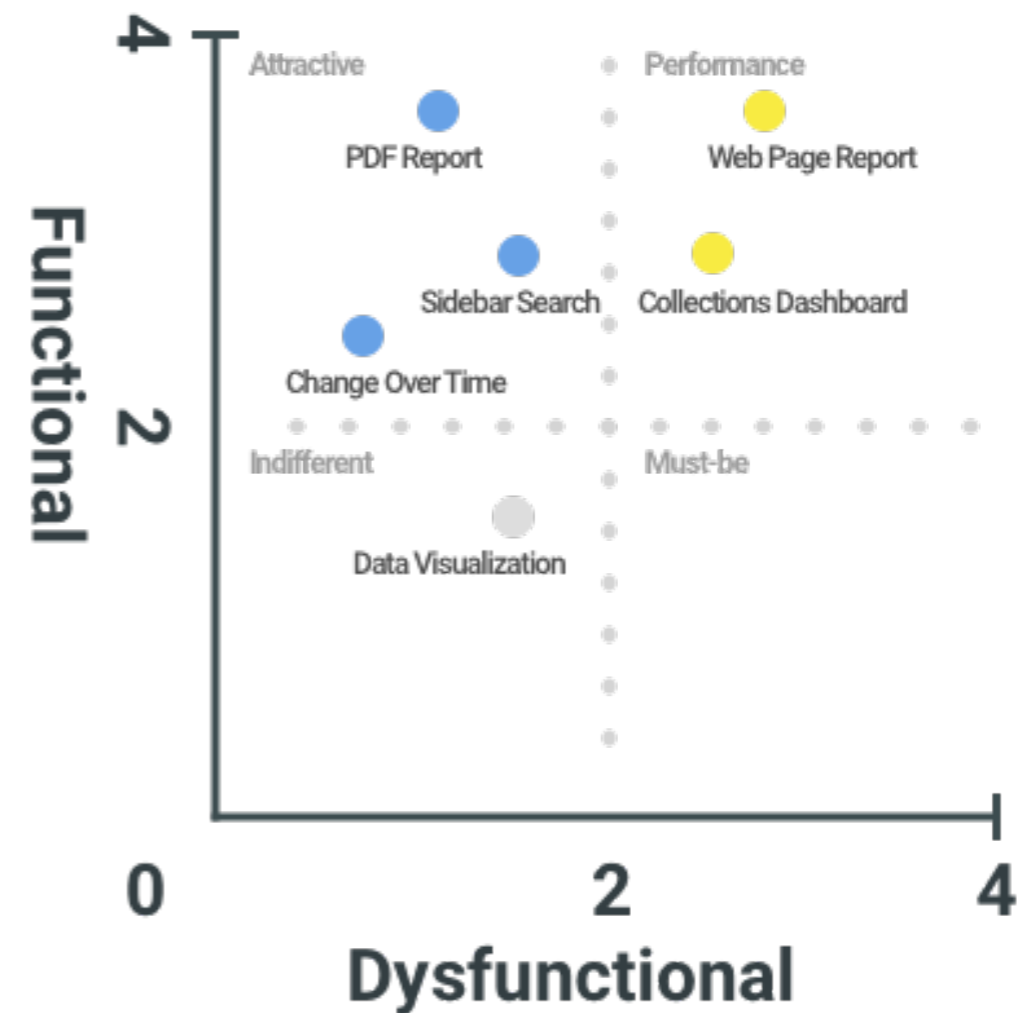
"Marcus," a user of the new Collections feature. He's pleased that it's easy to use and saves him time.

Kano Analysis

Aurelius surveyed current users about nine proposed features related to Collections.

I recommend prioritizing development of the most desirable features (those in the “Performance” and “Attractive” categories). The appendix includes more details of the analysis and descriptions of each category.

New Feature Kano Analysis



Feature Prioritization

The primary features to develop next are:

<u>Feature</u>	<u>Development Hours</u>
1. Collections Landing Page & Dashboard	28
2. Collections Reporting	
• Builder	20
• Share to email	8
• Export to PDF	14
• Summary text field	2
3. Search functionality	
• Select/deselect all	4
• Sort by (alpha, data, tag)	10
4. Notes prioritization	
• "Fave" functionality	8
• Rating/evaluation	<u>12</u>

TOTAL: 106 hours

Collections Landing Page

The screenshot shows the Aurelius Insights interface. The top navigation bar includes the Aurelius Insights logo, the text 'AURELIUS INSIGHTS', and the user 'Signed in as: Andy Krueger (Sign Out)'. The left sidebar contains navigation items: 'Scuttlebug LLC', 'PROJECTS', 'ALL TAGS', 'INSIGHTS', and 'COLLECTIONS' (highlighted in blue). The main content area is titled 'All Collections (2)' and features a 'Create New Collection' button. Two collection cards are displayed. The first card, 'Aurelius is great', has a callout '2' pointing to its title and a callout '3' pointing to its summary text. The second card, 'Collections are the best', has a callout '4' pointing to its title. A large orange callout box at the bottom right contains the text: "I'd want to be able to put a description under the name of the collection."

Scuttlebug LLC

PROJECTS

ALL TAGS

1 INSIGHTS

COLLECTIONS

AURELIUS INSIGHTS

Signed in as: Andy Krueger (Sign Out)

All Collections (2) Create New Collection

Aurelius is great

Our research conclusively shows that Aurelius is the best UX research tool online.

2 Insights 13 Notes 1 Document

0 Tags: - no tags -

Collections are the best

Supporting evidence that Collections are an amazing new feature that makes Aurelius even better.

1 Insight 37 Notes 3 Documents

0 Tags: - no tags -

"I'd want to be able to put a description under the name of the collection."

1. New “Collections” section added to sidebar navigation.
2. Button to create a new Collection based on “Create New Project” functionality.
3. Existing Collection summaries mimic the look of “All Insights” landing page.
4. Descriptions assist with identifying and selecting Collections.

Collection Dashboard

The screenshot shows a web interface for a 'Collection Dashboard'. At the top left, there is a logo and a sidebar with navigation links: 'Scuttlebug LLC', 'PROJECTS', 'ALL TAGS', 'ALL INSIGHTS', and 'COLLECTIONS' (highlighted). The main header area shows 'Signed in as: Andy Krueger (Sign Out)'. The main content area is titled 'Aurelius is great' with an 'Edit' link. Below the title is a description: 'Our research conclusively shows that Aurelius is the best UX research tool online.' There is an 'Edit Description' link and a '0 Tags: - no tags -' status with an 'Add/Remove Tags' link. A search bar and a 'Sort by' dropdown (set to 'Date Added') are in the top right. The main content is divided into two sections: '2 Insights' and '13 Notes'. The '2 Insights' section contains two cards: 'Aurelius is great' and 'Collections are the best', each with '13 Notes 1 Document' and '0 Tags: - no tags -' and 'Project: Aurelius UX'. Below the insights is an 'Add/Remove Insights' link. The '13 Notes' and '1 Document' sections are partially visible at the bottom.

1 This Collection:

Aurelius is great [Edit](#)

Our research conclusively shows that Aurelius is the best UX research tool online.

[Edit Description](#)

0 Tags: - no tags - [Add/Remove Tags](#)

Search

Sort by

2 Insights:

Aurelius is great

13 Notes 1 Document

0 Tags: - no tags -

Project: Aurelius UX

[Add/Remove Insights](#)

Collections are the best

13 Notes 1 Document

0 Tags: - no tags -

Project: Aurelius UX

13 Notes:

1 Document:

1. Sidebar displays quick links to each type of content included in this Collection.
2. Collection name and description field can be edited.
3. Users can also tag the Collection itself.
4. Each content section footer includes link to modify contents.

Collections Search Page

The screenshot shows the 'Aurelius Insights' interface. The top navigation bar includes the company logo, 'AURELIUS INSIGHTS', and the user 'Signed in as: Andy Krueger (Sign Out)'. A left sidebar contains navigation options: 'Scuttlebug LLC', 'PROJECTS', 'ALL TAGS', 'ALL INSIGHTS', and 'COLLECTIONS' (highlighted). The main content area is titled 'This Collection: Aurelius is great' and displays search results for the term 'imperatoris'. A search bar and a 'Sort by' dropdown (set to 'Date Added') are located in the top right. The search results are grouped under 'Aurelius UX (4 out of 90 notes) SELECT ALL'. Four annotations are present: 1. A circle around the search bar and results text. 2. A circle around the 'SELECT ALL' link. 3. A circle around a selected note. 4. A circle around the 'Sort by' dropdown and 'Add to Collection' button. A quote box on the right contains the text: '“Being able to sort is huge - that is what takes it to that next level - being able to do that above the project level is ideal!”'

1. Search terms, results, and available actions are clearly displayed.
2. “Select All” link accelerates user actions.
3. Selected items are highlighted (as with similar searches).
4. Search/Sort fields are pushed left when sidebar opens to preserve visibility.

Report Landing Page

The screenshot shows the Aurelius Insights interface. At the top, the header includes the company logo, the name 'AURELIUS INSIGHTS', and the user's name 'Signed in as: Andy Krueger (Sign Out)'. On the left, a dark sidebar contains navigation links: 'Scuttlebug LLC', 'PROJECTS', 'ALL TAGS', 'ALL INSIGHTS', and 'COLLECTIONS'. The 'COLLECTIONS' section is expanded to show a list of options: 'This Collection:', 'Notes', 'Tags', 'Documents', 'Projects', 'Key Insights', and 'Reports'. The 'Reports' link is highlighted with a blue bar and a white circle containing the number '1'. The main content area is titled 'Reports' and features an orange button labeled 'Create New Report' with a white circle containing the number '2' next to it. Below this, a grey report card is displayed with a white circle containing the number '3' in its top right corner. The report card has the title 'UX Project Update for Zack', a subtitle 'Here's a summary of what we have learned about Aurelius from March 6-10', and metadata '0 Tags 2 Notes 1 Document 1 Insight'. At the bottom of the card, it says 'Report Creator: Andy Krueger'.

1. “Reports” link leads to this landing page.
2. Initially, page is empty and the only available action is “create new report.”
3. Grey blocks display existing reports with a summary of contents.

Report Builder

The screenshot shows the 'Report Builder' interface. At the top, there's a header with 'AURELIUS INSIGHTS' and a user profile 'Signed in as: Andy Krueger (Sign Out)'. On the left, a sidebar contains navigation options: 'Scuttlebug LLC', 'PROJECTS', 'ALL TAGS', 'ALL INSIGHTS', 'COLLECTIONS' (highlighted), 'Key Insights', and 'Reports'. The main content area is divided into two sections. The top section is titled 'UX Project Update for Zach' with an 'Edit' link and a callout '1'. Below the title is a summary: 'Here's a summary of what we have learned about Aurelius from March 6-10.' and options to 'Edit Description', 'Add/Remove Tags', and '0 Tags: - no tags -'. A search bar and a 'Sort by Date Added' dropdown are on the right. The bottom section is titled 'Report Builder' with a callout '2'. It shows '1 Insight:' and a preview of a report card titled 'Collections are the best' with a star icon. The report card includes '13 Notes 1 Document', '0 Tags: - no tags -', and 'Project: Aurelius UX'. A callout '3' points to the 'Add Insights to Report' link. On the right, a 'Preview Report' button is highlighted with a callout '4'. The bottom of the page shows '13 Notes:' and '1 Document:'.

1. Report name and description field can be edited.
2. Upon creation, a Report includes only Collections content that has been starred.
3. The footer in each section allows for curated selection of additional content.
4. “Preview” button displays the report as it will be seen by recipients.

Report Preview

The screenshot shows the Aurelius Insights interface. At the top, the user is signed in as Andy Krueger. The main header displays the collection name 'UX Project Update for Zach' and a summary: 'Here's a summary of what we have learned about Aurelius from March 6-10.' Below this, there are two callouts: '1' points to the sharing and export options (Web View: Copy Shareable Link, Send to Email; Print View: Export to PDF, Send to Email), and '2' points to the 'Key Insights' section. The 'Key Insights' section features a highlighted insight: 'Collections are the best' (marked with a star), which includes 13 notes and 1 document, and is associated with the project 'Aurelius UX'. Below this are 'Key Notes' and 'Key Documents' sections. The 'Key Notes' section contains two notes, each with a star and associated tags like #Tags, #Data, and #FTW. The 'Key Documents' section shows a document thumbnail with a star.

1. Preview page includes multiple sharing and exporting options depending on preferences/needs of the recipient.
2. Editing options have been removed, but links to content are retained so that recipients can view supporting materials within Aurelius.

Report Guest View

AURELIUS INSIGHTS

Signed in as Guest

1

This Collection: UX Project Update for Zach

Notes

Tags

Documents

Projects

Key Insights

Reports

Here's a summary of what we have learned about Aurelius from March 6-10.

Key Insights

Collections are the best ★

13 Notes 1 Document

0 Tags: - no tags -

Project: Aurelius UX

2

"I would want the option to set editing permissions or have view-only share links so people don't need to login. I really like featuring a report-like view as the primary point of entry to set context for link recipients (and LOVE the proposal to highlight key findings and recommendations), and then the option for them to dig deeper into the data."

Key Notes

★ I'm so happy now that I have a bucket where I can store

★ I'm going to tell all my friends about Aurelius. I don't

Key Documents

1. The shared Report page allows access to data inside the Collection only. This would allow sharing with external clients as well.
2. Permissions can be set when the link is generated. Guest access avoids the need to log-in and sets context for viewers (as noted by user, above).

PDF Report

1

“I want a way to share Aurelius Collections with stakeholders who won't log in, and the PDF piece is nice for offline viewing and archiving reports on our server so they're accessible as a reference.”

The screenshot shows a web interface for 'AURELIUS INSIGHTS'. The main heading is 'UX Project Update for Zach' with a subtext: 'Here's a summary of what we have learned about Aurelius from March 6-10.' Below this is a 'Key Insights' section featuring a card for 'Collections are the best' (marked with a star), which includes '13 Notes 1 Document' and '0 Tags: - no tags -'. The 'Project: Aurelius UX' is noted at the bottom of the card. To the right is a 'Key Documents' section with a thumbnail image of a classical bust, also marked with a star. The 'Key Notes' section contains three note cards: 1) 'I'm so happy now that I have a bucket where I can store all my data!' with tags #Tags and #Data; 2) 'I'm going to tell all my friends about Aurelius. I don't know how I ever lived without it.' with tags #Tags and #FTW; 3) 'Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua...' with tags #Lorem and #Ipsum. Two other note cards contain Latin text and the tags #MARCUS ANTONINI and #IMPERATORIS.

1. A PDF is generated from the contents of the Report Preview.
2. Links allow recipients to view supporting materials within Aurelius.

Future Development

Sidebar search with drag-and-drop

Users rated the concept of a WYSIWYG editor as highly desirable. However, this feature may be difficult to implement and impractical in execution.

Display size determines the number of elements that can be displayed at a given time, which limits the functionality of this feature. However, a well-designed search/sort/filter system may help to alleviate these shortcomings.

Prioritize research into this feature to determine feasibility.

Future Development

Fully-Developed “Changes Over Time” Feature

In response to this feature, one user stated “This is exactly what I want!” Another noted it would be “great” but more useful for senior leadership or stakeholders.

I proposed implementing sorting by date to allow for this type of access within the current system infrastructure. However, it is worth exploring whether this is useful elsewhere, especially once Collections are capable of automatic updates.

Future Development

Additional Sharing Options

In response to the PDF Report sharing feature, one user commented, “PDF is fine.. but Excel might be better,” noting that this is how teams work at Thomson Reuters.

Other customers may have their own preferences for output format(s). After releasing the online and PDF options, it may be worthwhile to survey users about this functionality.

On the other hand, one benefit of a PDF is that it maintains links back into Aurelius. This may be more challenging or impossible to implement with some file types.



Thank You!

Questions? Contact Andy Krueger:
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612-210-9896

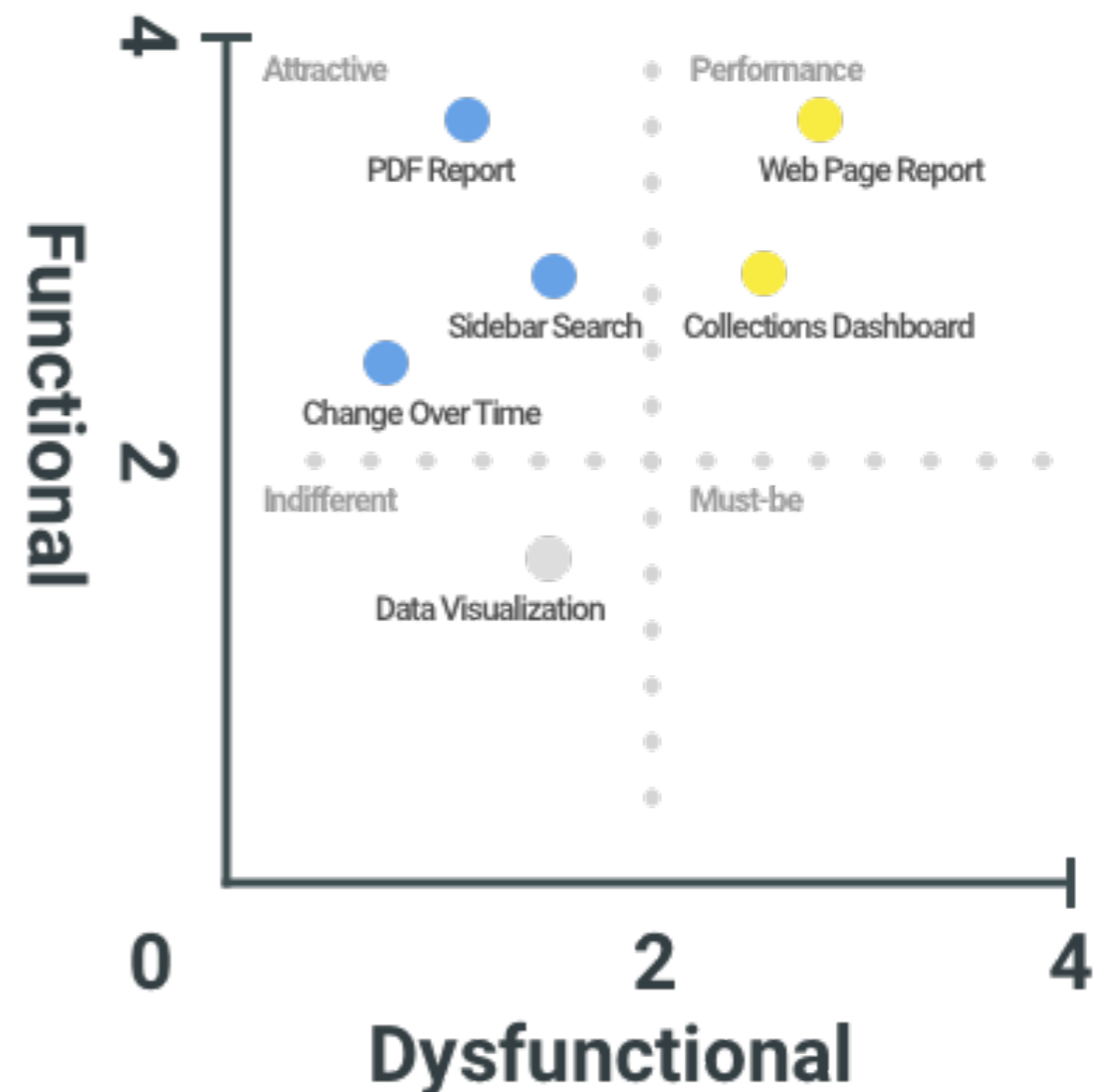
Appendix: Kano Analysis

Aurelius surveyed current users about the desirability of nine proposed features related to the Collections section.

I used quantitative Kano Analysis to categorize the average results. The most desirable features appear in the figure on the right.

Categories are discussed in detail on the following slides.

New Feature Kano Analysis



Kano Analysis Categories: Performance

The more you have of these, the greater your satisfaction.

1. Web Page Report

- Report from Aurelius on a web page sent via email/link or email/log-in to a dashboard.

2. Collections Dashboard

- Main functional area for Aurelius users to edit, sort, and summarize Collections data. Similar to Insights layout.

Kano Analysis Categories:

Attractive

Unexpected features which cause a positive reaction ranging from mild attractiveness to absolute delight.

1. Build in Sidebar

- Search in the side bar. Drag and drop each item into the builder space.

2. PDF Report

- Collections data stored in an exported PDF file.

3. Changes over time

- Highlight additions or changes since the previous viewing.

Kano Analysis Categories:

Must-be (none found)

Adding them won't make users happy, but their absence would make users angry towards the product or service.

Indifferent

No matter how much effort put into it, users won't care. Developing this feature as-is would be a money sink.

1. Data visualization

- An interactive document that sorts key findings into clumps of evidence by insight. Notes vary in proximity and size based on tag & favorite status.

Kano Analysis Categories:

Negative Ratings

Users indicated an active dislike for these features. They do not want them, and may even be upset if they were added.

1. Department icons
 - Search for projects created by different departments, indicated by icons.
2. Customizable Presentation
 - Populate a template with key insights/notes. You can change presentation colors, add voice narration, shapes and lines.
3. Diagram to Outline Tour
 - Automatically generated diagram and outline of the collection's contents.
4. Mobile App
 - Limited function App to make quick changes on a presentation.