Workflow: Routing Packages 1

1 The way these choices are laid out and highlighted make it very confusing to know which one is actually selected. In addition, there has been no prior convention set for black versus white selections in the interface.

2 The terms "routed packages" and "workflow templates", at the second level of navigation, seem unclear and hard to understand in relation to the overall "Workflow" area. Are these places to review status or to take action, or both? What is a workflow template? Is it a template for routing? Are these groups of routed assets called packages? Workflow- routing-packages-templates- all new terms here for the user. Terminology needs to be clearer and some context needs to be set.

Most importantly, if a user comes here and just wants to route some assets, it is not clear what they would do to accomplish this task. Do I need to set up a template to do this? Am I creating a workflow, or a template, or a routed package? Where is "create new x?"
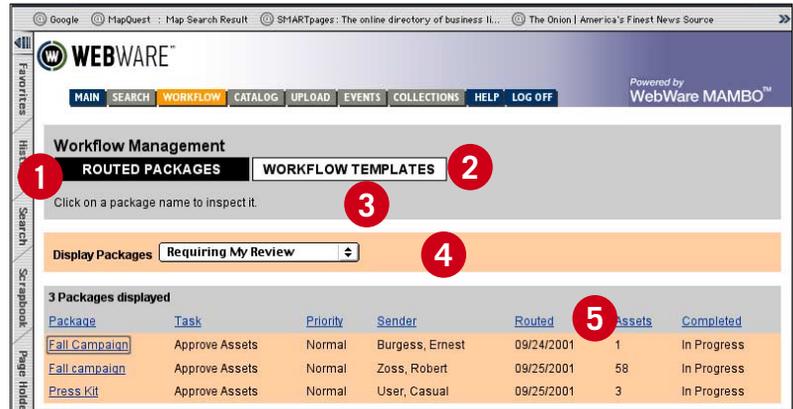
3 This directive "Click on a package name to inspect it." looks visually like it is grouped with the 2 options above, instead of being associated with the actual "package" lists below. The listing is where the user would actually click on a package. Directives, help or indications of what to do, have to be clearly associated with the task they are referencing.

4 "Display Packages" is on an orange bar which implies that it is related to the list below. But it's far enough away that it seems a bit random.
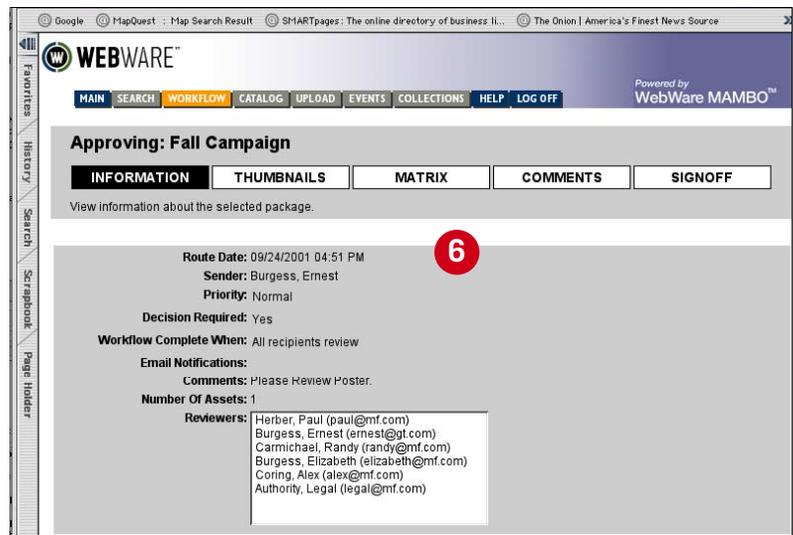
5 Links imply going to another location, or showing a new view, not an action like resorting the list. Lots of sites do this - use links for everything - but it does confuse the convention of when to use links and when to use buttons to initiate actions.

6 At this point, it becomes clearer how these black and white buttons work. There are now five options or views on the project available to select. This page is basically black, grey and white. What happened to the color that was used as background in the previous screens?
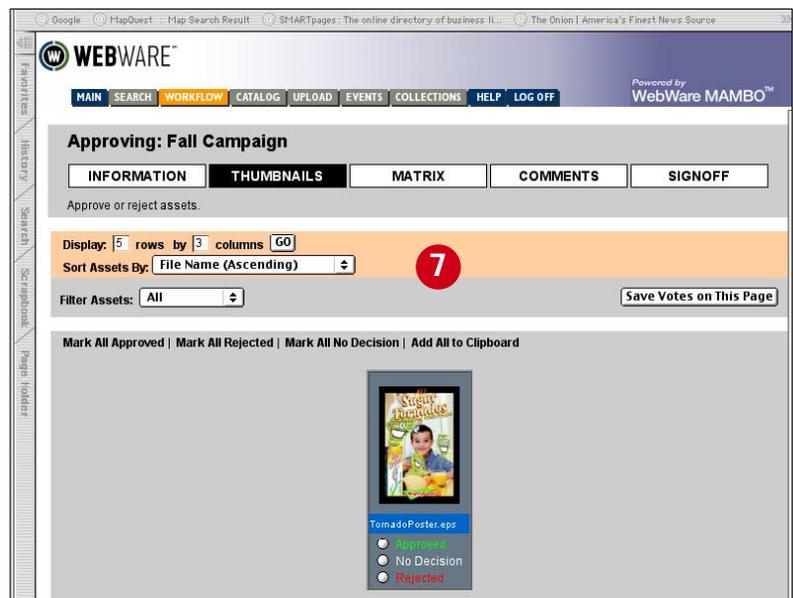
7 All these options to "organize" the content should be laid out in ways that minimize the valuable real estate above the fold and clearly delineate a group of controls that will be used consistently across a number of views.

Routed packages

Routed package: Information view

Routed package: Thumbnail view

Workflow: Routing Packages 2

1 Terminology - the word "Matrix" doesn't tell me what this view really is. Matrix of what? It seems that it is really the "approval status" for the project.

2 When I "Save Votes on this Page", what happens? Right now, it just appears to refresh the page. There is no confirmation that the "save" actually took place. What has actually happened here and how long will it be saved? How do I retrieve these saved votes in the future?

3 If there are a lot more people who are part of this approval process, how will they be displayed in this list?

4 Once I vote, when does this tally get refreshed? Do I care? How do I "Submit" my votes? When do I get confirmation that my votes have become part of the total?

5 While all the functionality to add and view "Comments" is here, there is a tremendous amount of wasted space that will force the user to scroll to see valuable information. Consistent layout will help take advantage of this space.

The "Comments" section is extremely important. Graphics and some potential icons which indicate "comments" throughout the system would help here. This is a part of the application which takes advantage of the web and the web-based ability to communicate and collaborate easily... this should the emphasized in the interface.

6 "Sign Off" has the function of giving the user his or her current approval status and, in addition, presenting a report of how other have responded. The use of color and layout here to indicate actions that are still pending, how people "voted", and what to do next, is critical to facilitating the potential success of the workflow amongst this group.

Routed packages Matrix view
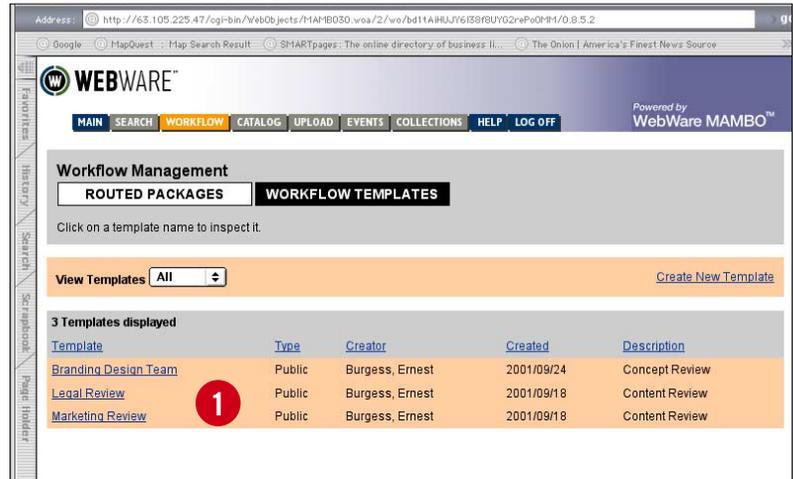

Routed package: Comments view

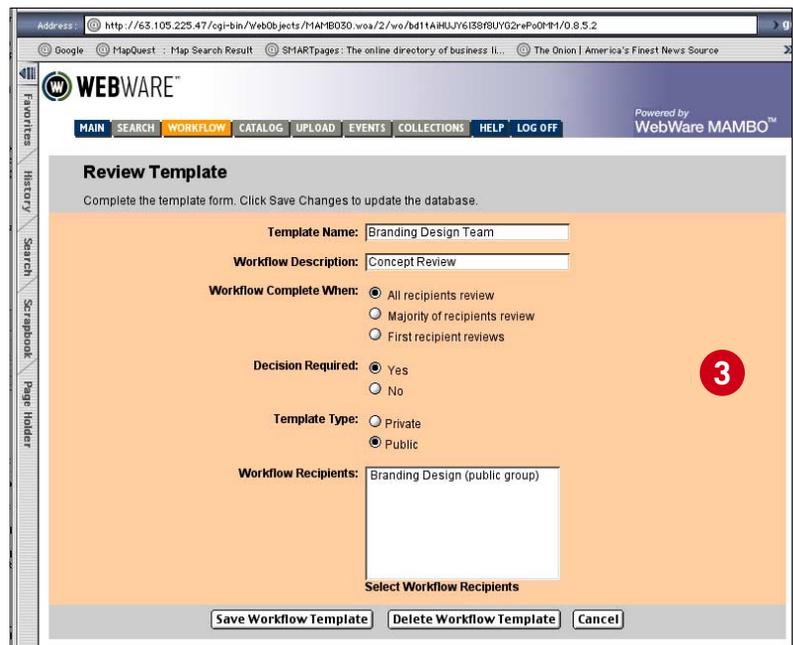*Routed package: Sign off view*

Workflow: Workflow templates

1 When a user clicks on an existing template to view it and decides to make a variation on that one, does this replace the existing one or is this a "Save As" activity? It is unclear what the consequences of saving a different version of an existing template are.

2 Is this Pop-up necessary? Could the additional functionality for adding and removing from a list just appear on the same screen adjacent to the "Workflow Recipients:" box?
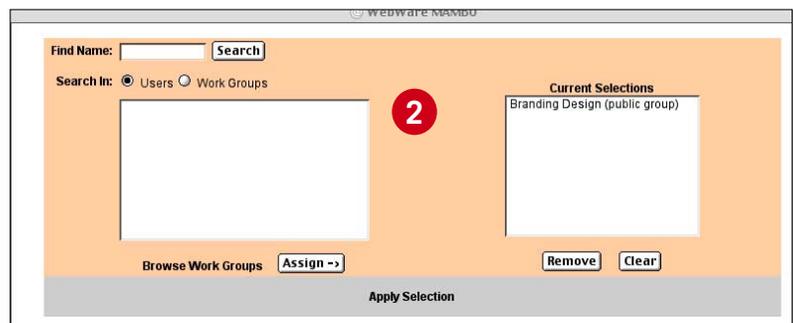
3 Once the user saves a new template, or uses an existing one, what do they do to initiate the new workflow? How do they associate assets with this Workflow Template? How does it get sent? I have no idea what to do next! This is serious.

Workflow templates: current list

Workflow templates: create new

Workflow templates: create approval list