

Genesis UX Review

Eikon Trial Set-Up Process

Yooch Wan

Financial & Risk UX Team

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Summary of Findings

- **Workflow seems over-complicated and/or may not match users' mental model**
- **Over-complicated and inefficient user interface (UI)**
- **Too many steps**
- **Unnecessary manual tasks**
- **Lack of clear sign-posting of where users are in the process and what to do next**

Genesis UX Review – Eikon Free Trial Set-Up Process

Workflow seems over-complicated and/or may not match users' mental model

Users forced to step through workflow using sales-heavy terminology and sales-oriented mental model

Genesis UX Review – Eikon Free Trial Set-Up Process

Over-complicated and inefficient user interface (UI)

Salesforce UI is visually cluttered and shows navigation options that aren't required for the task to onboard a user for a Trial, resulting in cognitive overload

Examples:

“Submit to Fulfillment” should not be visible or enabled if the step “Submit for Approval” hasn't been actioned. Likewise, if the Quote Status is “Approved”, the “Submit for Approval” button should be disabled or no longer be visible, as it is no longer required/relevant.

Quote Status needs to be visually more prominent and not be buried several rows down

Group common form elements –

e.g. Enterprise License

Managed by TR

Manager

Genesis UX Review – Eikon Free Trial Set-Up Process

Too many steps

Users are required to follow too many complicated and non-intuitive steps –

e.g. New Sale Opportunity > Opportunity > Change Price Book > Add Product > Validate > Save > Manually Refresh Screen > Associated Opportunity > New Quote > > > etc.

Unnecessary manual tasks

- If a specified trial period is less than 60 days, why does user need to manual click “Submit for Approval” only for the system to immediately show it’s been approved?
- When within the SAP view for product selection, what does the Validate button do? If it is an optional action, why is it there? It seems an unnecessary step.
- Why does user need to manually initiate a manual refresh of screen after system takes user back to Opportunity Detail view from SAP’s product selection view? Why can’t system do that automatically when the view is changed anyway?

Genesis UX Review – Eikon Free Trial Set-Up Process

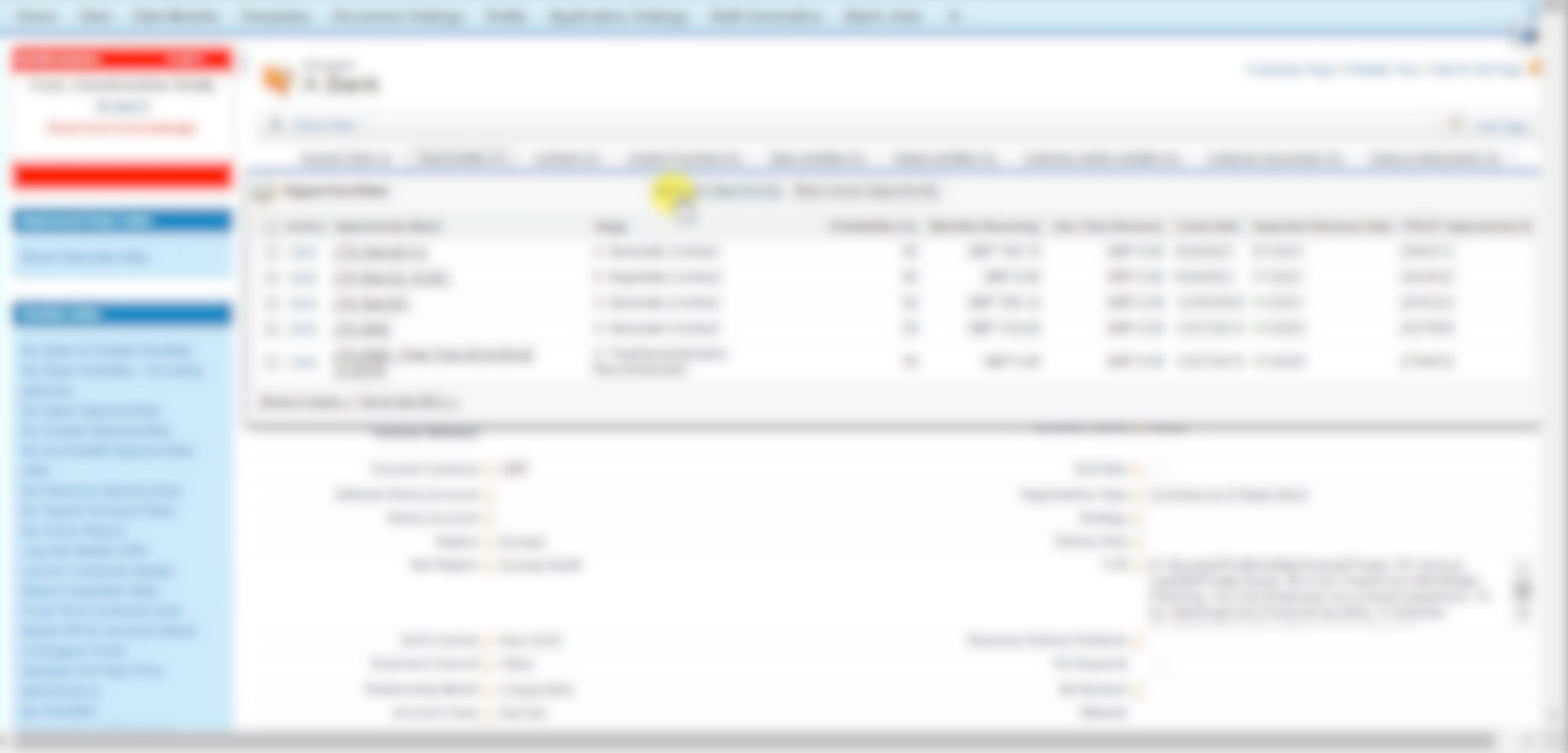
No clear sign-posting of where users are in the process and what to do next

Using Salesforce as the UI:

- there is no visual indicator to show how many steps there are
- the user doesn't know where they are in the process and
- what next steps to take



Salesforce UI. Account View



Opportunities Tab > New Sale Opportunity



New Opportunity screen.



New Opportunity screen. Mandatory fields populated. User hits "Save"



Opportunity Detail screen.



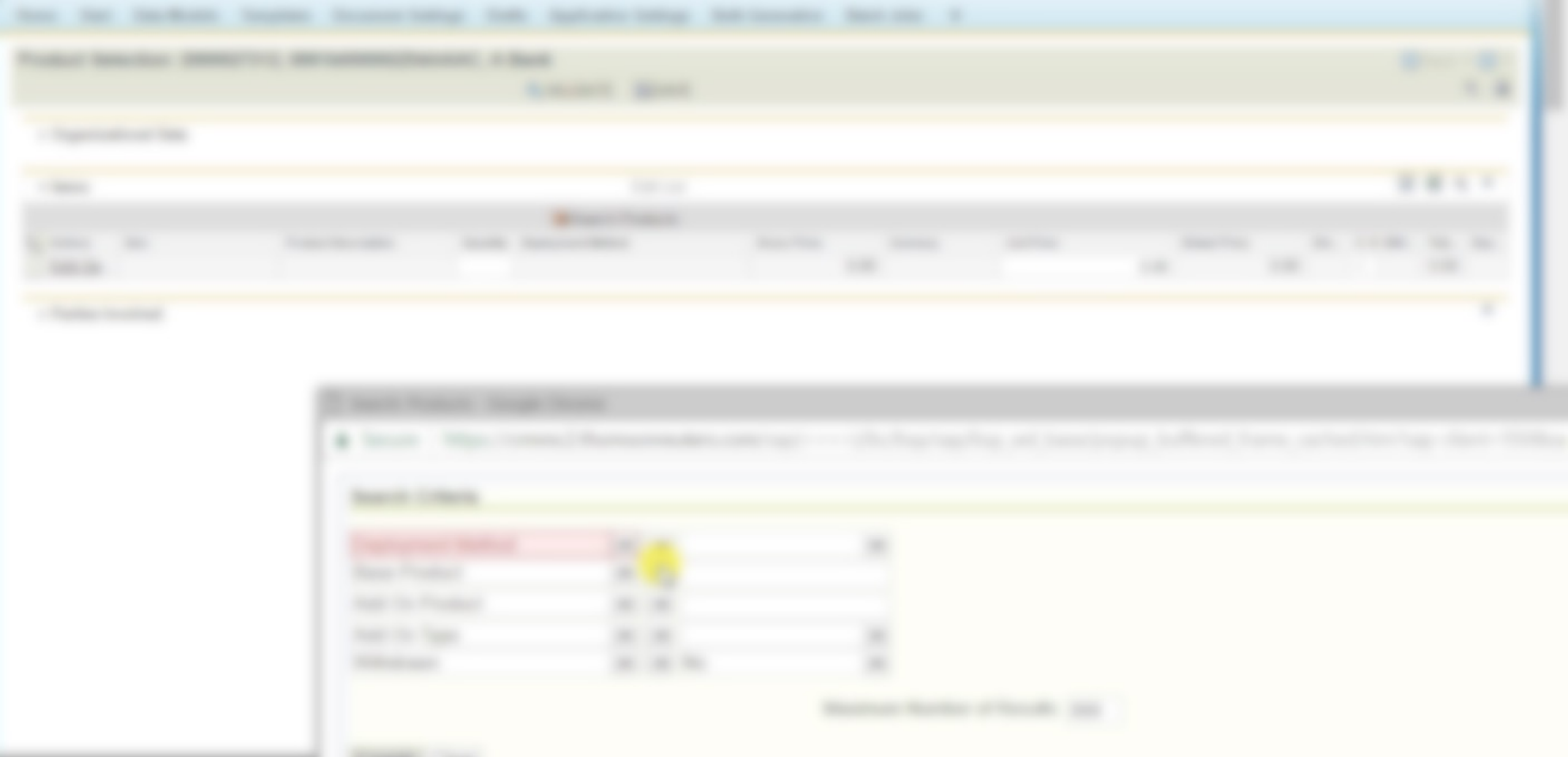
Opportunity Detail screen > Products (Standard Price Book) > Choose Price Book



“Choose Price Book” screen.



Opportunity Detail screen > Products (Genesis Pricebook) > Add Product



SAP UI. Product Search & Selection

Menu

Item 1	Value 1	Value 2	Value 3
Item 2	Value 1	Value 2	Value 3
Item 3	Value 1	Value 2	Value 3
Item 4	Value 1	Value 2	Value 3

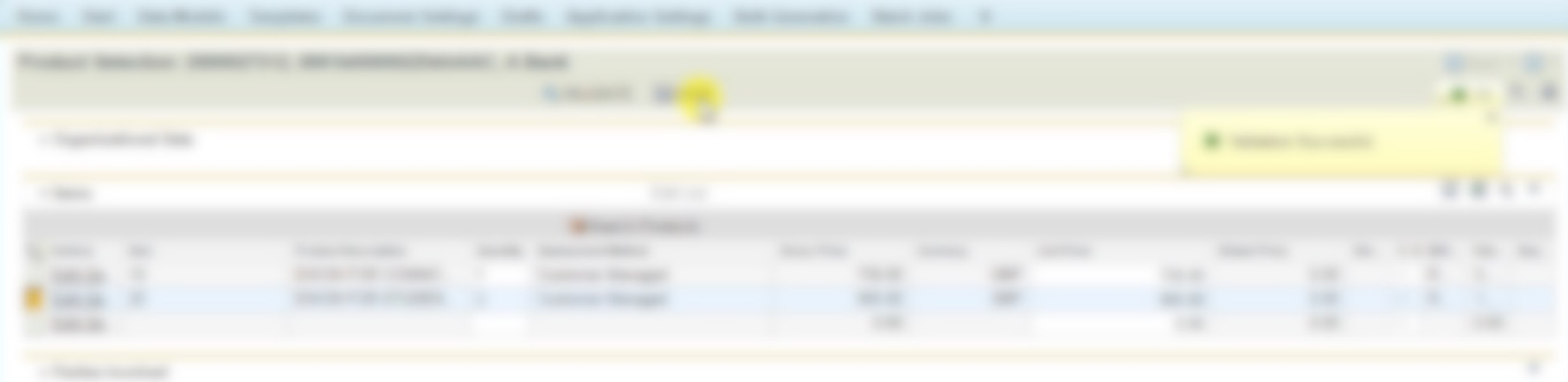
Navigation button

Menu

Menu

Item	Value 1	Value 2	Value 3	Value 4
Item 1	Value 1	Value 2	Value 3	Value 4
Item 2	Value 1	Value 2	Value 3	Value 4
Item 3	Value 1	Value 2	Value 3	Value 4
Item 4	Value 1	Value 2	Value 3	Value 4
Item 5	Value 1	Value 2	Value 3	Value 4
Item 6	Value 1	Value 2	Value 3	Value 4
Item 7	Value 1	Value 2	Value 3	Value 4
Item 8	Value 1	Value 2	Value 3	Value 4
Item 9	Value 1	Value 2	Value 3	Value 4
Item 10	Value 1	Value 2	Value 3	Value 4

Lovely SAP UI from the 1990s.



SAP UI > Product Search & Selection > Validation & Save



Return to Salesforce UI. Opportunity Detail View. User needs to manually refresh view



Salesforce UI. Opportunity Detail screen. Number on Products (Genesis Pricebook) tab is updated.



Opportunity Detail screen. Associated Opportunity > Associate Opportunity



Opportunity Detail screen. Associated Opportunity > Associate Opportunity > Genesis/GRS Trial Opportunity > OK

Navigation sidebar with blue header and list of items.

Main content area with a table and a highlighted row.

Item 1	Item 2	Item 3	Item 4
Row 1	Row 1	Row 1	Row 1
Row 2	Row 2	Row 2	Row 2
Row 3	Row 3	Row 3	Row 3
Row 4	Row 4	Row 4	Row 4
Row 5	Row 5	Row 5	Row 5
Row 6	Row 6	Row 6	Row 6
Row 7	Row 7	Row 7	Row 7
Row 8	Row 8	Row 8	Row 8
Row 9	Row 9	Row 9	Row 9
Row 10	Row 10	Row 10	Row 10



Opportunity Detail screen. Quotes tab > New Quote



New Quote screen.

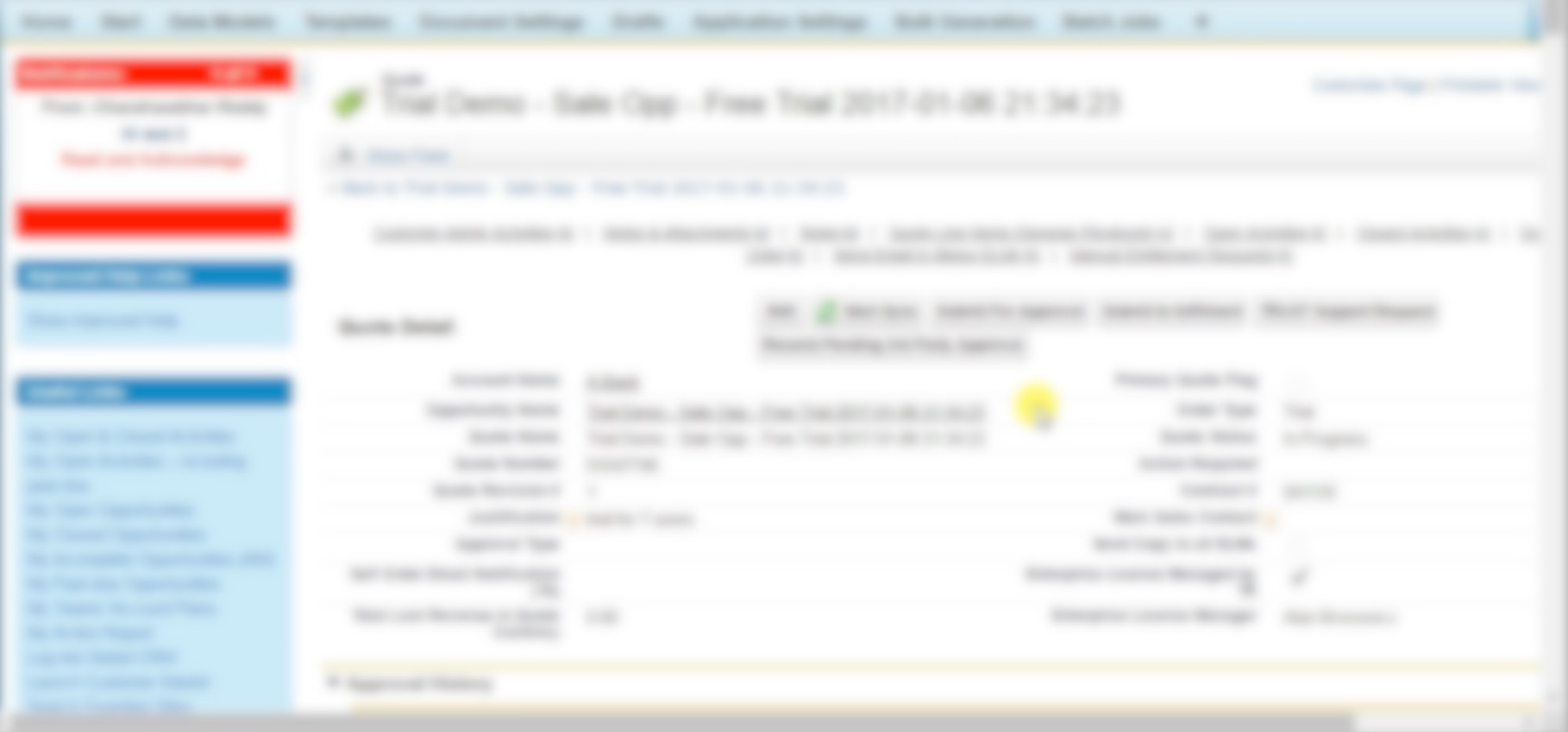


New Quote screen. Enter Quote Name, Justification, Check “Managed by TR” if applicable > Save

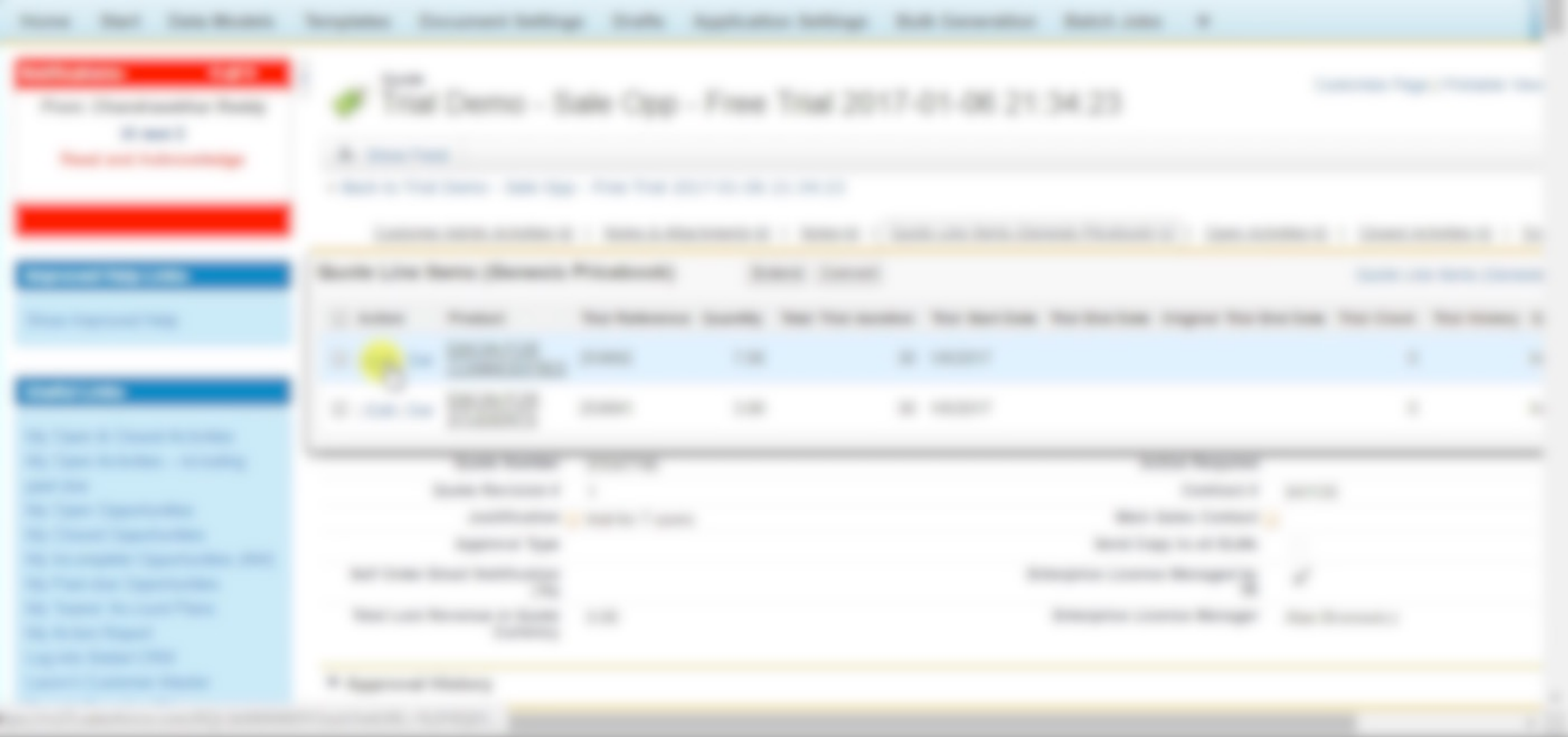
Navigation sidebar with various menu items and a red header bar.

Form titled "New Quote" with multiple sections for data entry, including a large text input field.

New Quote screen. Saving...



Return to Quote Detail screen.



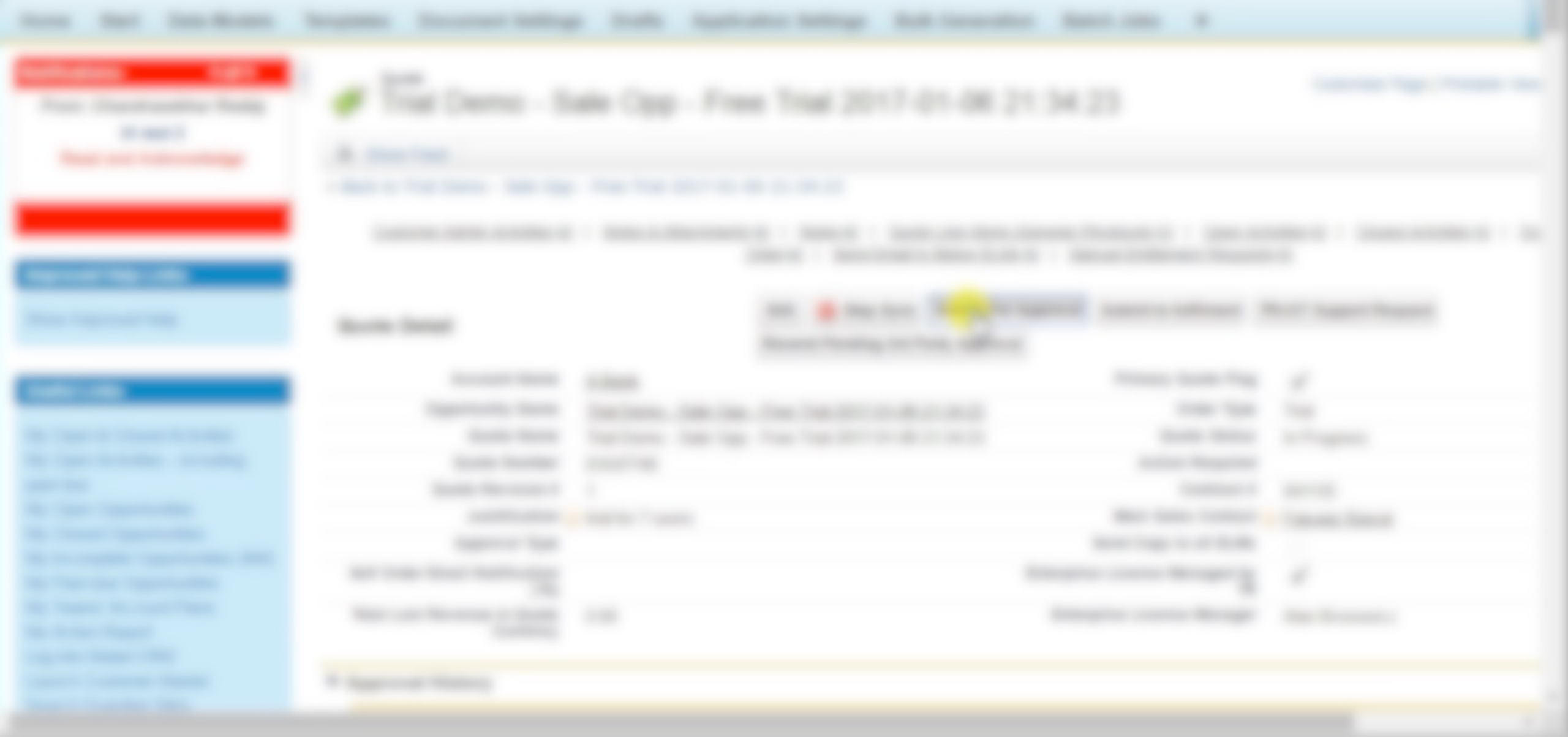
Quote Detail screen. "Quote Line Items" tab > Quote Line Item row > Edit



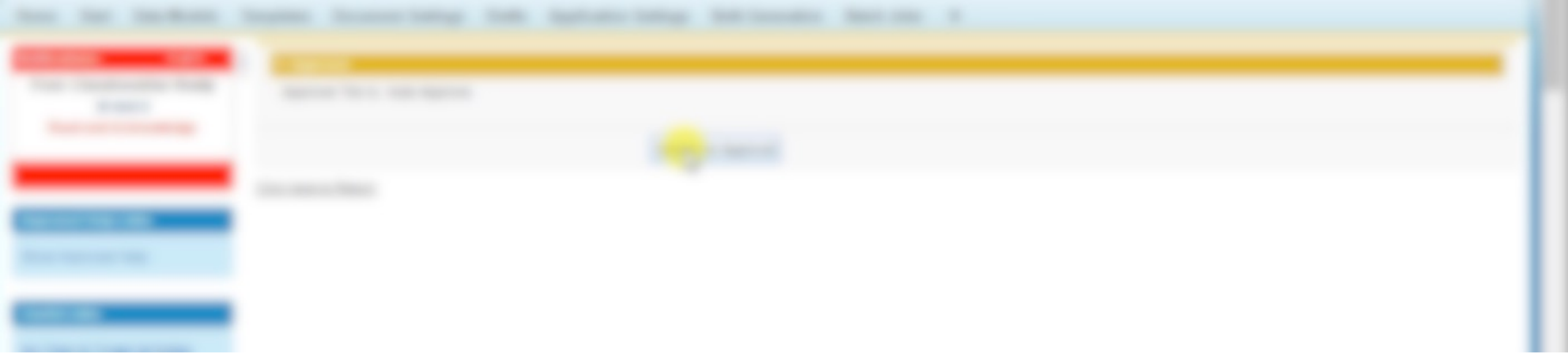
Edit "Quote Line Item" screen.



Edit "Quote Line Item" screen. User scrolls to bottom of page to change Total Trial duration. Save.



Return to Quote Detail screen. Finally.... "Submit for Approval"



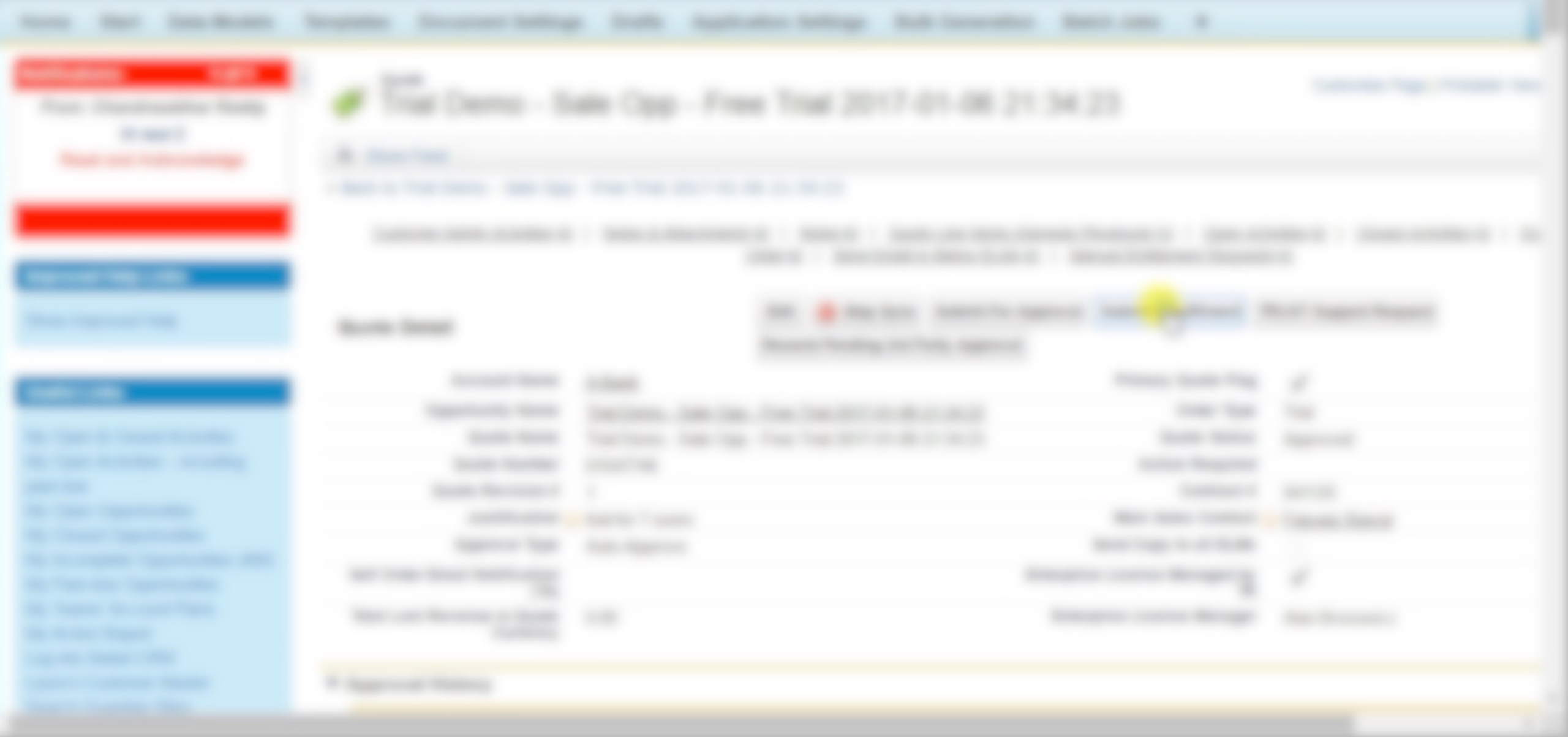
This seems like overkill: a dedicated Approval screen with just one “Submit for Approval” button.

Note, there was a “Submit for Approval” button on the previous screen leading the user here.

Due to the requested product trial duration(s), approval is automatic, so why force user to “submit for approval”?



Return to Quote Detail screen. Quote Status field updated to "Approved". Difficult to see amongst other content. "Submit for Approval" button is still enabled/visible!



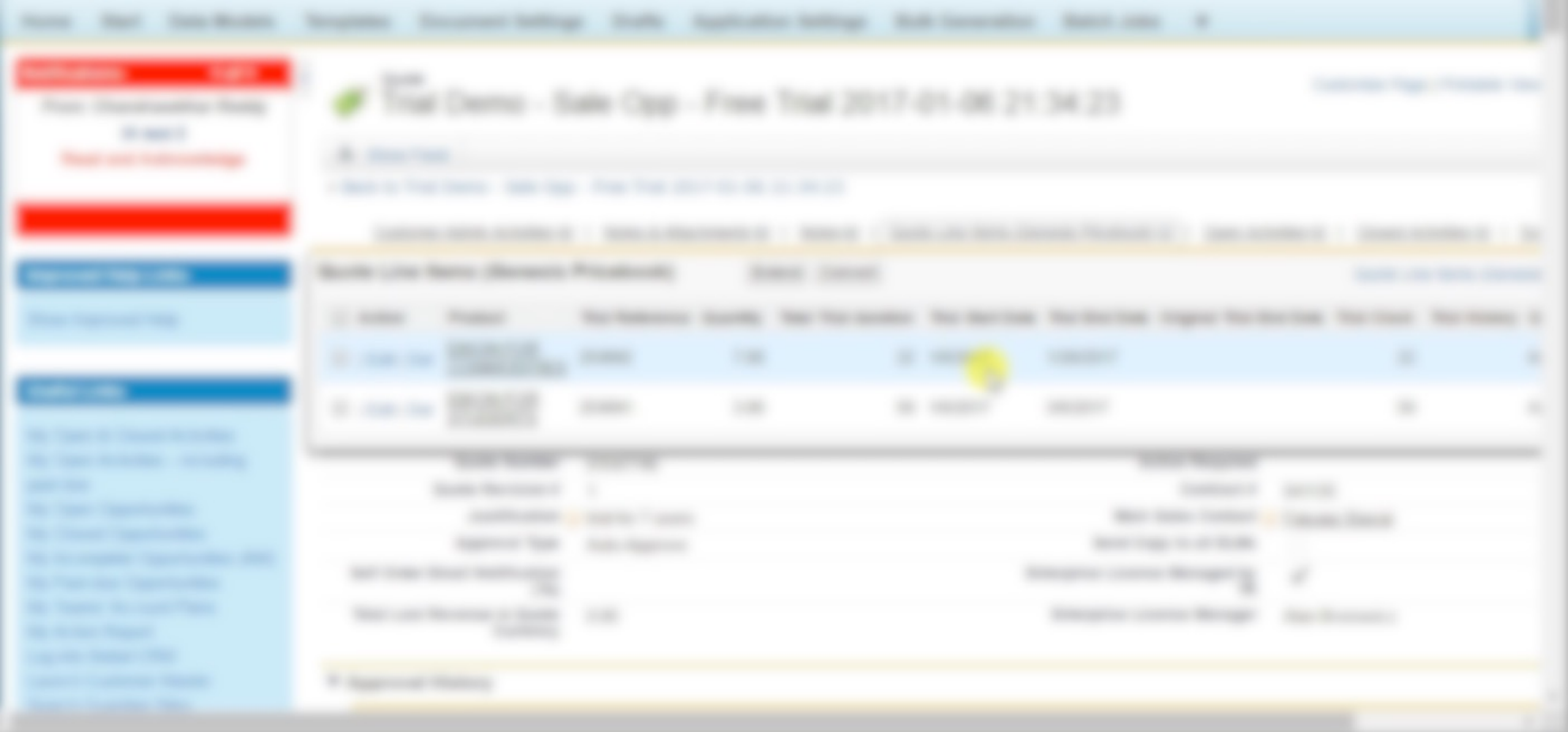
Quote Detail screen. "Submit to Fulfilment"



Quote Detail screen. Quote Status field updated to “Fulfilment in Progress”.
“Submit for Approval” and “Submit to Fulfilment” buttons still enabled/visible!



Quote Detail screen. Quote Status field updated to “Complete” after manual refresh. “Submit for Approval” and “Submit to Fulfilment” buttons still enabled/visible!



Quote Detail screen. "Quote Line Items" tab > Quote Line Items now show Trial Start & End Dates and Trial Clock countdown timer.



Quote Detail screen. Hover over Account Name to reveal pop-up panel showing Account details. User copies Account Number for use within another UI to continue workflow.



User loads Eikon Administration Services UI in a new browser tab. User pastes Account Number to view license details for that account.

Rest of license assignment workflow not documented here.

Genesis Current Process - Across 3 UIs (Salesforce, SAP, Eikon Administration Services)

Process	UI	Step	UI State or View Change	User Action	System Action	Comments	
Setup Elkon Trial Process	Salesforce UI	0	Account View				
Create New Sale Opportunity		1			Hover over Opportunities text link / tab		
		2	Show "Opportunities" pop-over panel				
		3			Click "New Sale Opportunity" button		
		4	Replace current "Account View" screen with "New Opportunity" screen. Account Name is pre-populated				
		5			Enter "Opportunity Name" - e.g. Trial Demo		
		6			Enter "Opportunity Type" - e.g. New User		
		7			Enter "Close Date"		
		8			Enter "Expected Revenue Date"		
		9			Select "Stage" - e.g. "3. Trial/Demo/Solution Recommended"		
		10			Save		This creates the Sale Opportunity
Change Price Book & Trigger Genesis Process		11	Replace current "New Opportunity" screen with "Opportunity Detail" screen				
		12			Hover over "Products (Standard Price Book)" text link / tab		
		13			Click "Choose Price Book" button		
		14	Pricebook Selection Screen. Shows dropdown with: None, FXall, GRC, Genesis, Standard		Select "Genesis Pricebook" from dropdown		
		15			Save		Triggers Genesis Process
		16	Replace current "Price Book Selection" Screen with "Opportunity Detail" Screen. Products text link is updated to show "Genesis Pricebook" in brackets.				
	17			Hover over "Products (Genesis Price Book)" text link / tab Click "Add Product"			

Genesis Current Process - Across 3 UIs (Salesforce, SAP, Eikon Administration Services)

Process	UI	Step	UI State or View Change	User Action	System Action	Comments
Add Products (Eikon Trial)	SAP UI (Embedded within Salesforce UI)	18	Replace current "Opportunity Detail" screen with Product Selection Screen (SAP UI) and spawn pop-up window with Product Search UI			
		19		User selects "Customer Managed" for "Deployment Method"		
		20		User types in "Eikon" for "Base Product"		
		21		User clicks "Search"	System performs search	
		22	Results List is populated			
		23		User selects product(s) by ticking against products listed		
		24		Confirm selection by clicking Select button		
		25	Product Search & Selection UI pop-up closes			
		26	Main SAP Product Selection Screen is refreshed with chosen products			Product quantities can be changed with in-line editing
		27		User clicks "Validate"		Optional step
		28	Display "Validation Successful" message			
		29		User clicks "Save"		Saves selected product data back into Salesforce
		30	Replace SAP Product Selection UI with Salesforce Opportunity Detail Screen in Salesforce	User NEEDS to manually refresh the screen		
		31	Products (Genesis Pricebook) text link / tab updated to show number of items (selected products)			
Create Trial Opportunity		32		Hover over "Associated Opportunity"		
		33	Associated Opportunity popup appears			
		34	Salesforce message appears: "Processing. Please wait - it may take a few seconds. If you wish to	User clicks "Genesis/GRC Trial Opportunity"		

Genesis Current Process - Across 3 UIs (Salesforce, SAP, Eikon Administration Services)

Process	UI	Step	UI State or View Change	User Action	System Action	Comments
Create a Quote		34	Salesforce message appears: "Processing. Please wait - it may take a few seconds. If you wish to Proceed further please click on OK"			
		35		User has to click OK		Copies information from Sale Opportunity to Trial Opportunity
		36	Opportunity Detail screen no longer partially obscured as Salesforce message disappears. Opportunity Information updated.			
		37		Hover over "Quotes" text link / tab		
		38	Quotes popup panel appears	Click "New Quote"		
		39	New Quote Screen. Quote name is pre-populated			
		40		User enters Justification if required		
		41		User checks "Enterprise License Managed by TR" checkbox		
		42		User clicks "Save"		
		43	Return to "Quote Detail" creen from "New Quote" screen. "Quote Line Items" text link / tab is updated to show number of selected products.			
Change duration of Trial Period (Optional)		44		Hover over to see popup panel showing Quote Line Items in tabular format with a row for each selected product.		
		45		Click "Edit" by Quote Line Item		
		46	Replace "Quote Detail" screen with "Edit Quote Line Item" screen			
		47		User scrolls down to bottom of screen for Trail Details form fields. Change Total Trial Duration.		

Genesis Current Process - Across 3 UIs (Salesforce, SAP, Eikon Administration Services)

Process	UI	Step	UI State or View Change	User Action	System Action	Comments
Submit for Approval		48		Click "Save"		
		49	Return to "Quote Detail" screen			
		50		User clicks "Submit for Approval"		
		51	Approval screen appears with Approval Tier info (e.g. Auto-Approve") and yet another "Submit for Approval" button			
		52		User clicks "Submit for Approval" (again!)		Why can't this screen be removed and functionality incorporated into the previous screen?!
Submit to Fulfilment		53	Return to "Quote Detail" screen. "Quote Status" updated to "Approved"			
		54	"Quote Detail" screen refreshes, Quote Status updated to "Fulfilment in Progress"	User clicks "Submit to Fulfilment"	Salesforce now talks to proprietary License Management Tool	
Copy Account Number for use in License Tool		55		User NEEDS to manually refresh the screen		
		56	Current Quote Detail screen is refreshed with updated Quote Status "Complete"			From Salesforce perspective, we have a completed Quote, an active Trial. Hovering over "Quote Line Items (Genesis Pricebook) text link / tab will reveal panel with Trial Duration, Trial Start, End Dates and Trial Clock (Countdown?) for each Quote Line Item.
		57		Hover over Account Name to reveal Account Details pop-up panel.		
Setup Eikon Trial Process Complete		58	Account Details pop-up panel appears			
		59		Select and copy "Account Number"		
Setup Eikon Trial Process Complete	2 UIs			40 User Actions		

40 User Actions

to setup an Eikon Trial

by navigating through
Salesforce and SAP UIs...

BUT... the process continues

With the user now having to use another UI

(Eikon Administration Services)...

Genesis Current Process - Across 3 UIs (Salesforce, SAP, Eikon Administration Services)

Process	UI	Step	UI State or View Change	User Action	System Action	Comments
Assign License to User		60		User navigates to TR Eikon Administration Services Web-App (Separate UI)		
Refresh screen (optional depending on circumstances)	Eikon Administration Services (License Management Tool)	61	License Management View within Eikon Administration Services screen	User manually refreshes the screen		
		62	Screen Refreshes			
Load Account Details within Eikon License Management Tool		63		User clicks "Change" to change account		
		64	"Change View Scope" Dialog appears			
		65		User enters or pastes Account Number		
		66		Click OK		
		67			System searches for matching records	
		68	Search results shown			
		69		User selects account by clicking on row		
		70	"Change View Scope" Dialog closes			
		71	License Management View (Trial Licenses) gets updated with list of products and corresponding license details			
	72		User clicks on double-chevron (<<) button to reveal navigational side-bar			
Identify User & Assign License to User		73		Within the side-bar, click on "Users"		
	74	"Users" View appears with list of users				
Create User		75		Click on "Create User"		New User scenario
	76	Create User screen appears				
	77		User populates form (9 mandatory fields)			
	78		User clicks "Create" button			

Genesis Current Process - Across 3 UIs (Salesforce, SAP, Eikon Administration Services)

Process	UI	Step	UI State or View Change	User Action	System Action	Comments
		79	"Assign Licenses" popup dialog appears with message: "Your request has been received. Do you now want to assign licenses to this user ID?"			Alan Bronowicz states (in his video walk-through) at this stage the user has been created. If so, shouldn't the message state this instead of "Your request has been received"?
		80		User clicks "Yes"		
Assign licenses to user		81	"Assign Licenses" dialog disappears to reveal "Manage License Assignment" screen with list of licenses.	User selects which licenses to assign to user		
		82		Click "Next"		
License Agreement details		83	Bottom half of screen refreshes to hide the licenses list and show "License Assignment" info for the selected product. Fields include: Welcome Email and Notes			
Change recipient email address for Welcome Email Enter license agreement notes		84		Change email address		Optional
		85		Enter license agreement notes		Optional
		86		Click "Confirm button"		
		87	Modal panel appears with heading: "License Agreement" and message: "Your request has been submitted"			
		88		User clicks "OK" to close message panel		Last user action before automatic processes
		89	Modal closes		Systems will automate permissioning, set up user in back-end systems, send welcome email to the user, from which they can click on it and log in to access the product	

Genesis Current Process - Across 3 UIs (Salesforce, SAP, Eikon Administration Services)

Process	UI	Step	UI State or View Change	User Action	System Action	Comments
Refresh Users screen with license assignment details		90	"Users" screen appears with updated list of users. Assignment of the product against the user can be determined seeing if the "License" and "End Date" fields are populated.			
License Assignment Process Complete	1 UI			18 User Actions		
Genesis Process Complete	Total 3 UIs			Total 58 User Actions (across 3 UIs)		
Key:						
Mandatory						
Optional						

18 User Actions
to complete the License Assignment Process

- Set up an Eikon Trial 40 User Actions
- assign license to a user 18 User Actions

Total:
58 User Actions

by navigating through 3 UIs
(Salesforce, SAP & Eikon Administration Services)

Simplify the User Journey & UI

Create a dedicated Genesis User-Interface

That:

- guides the user through a series of steps,
- exposes only the controls the user needs to achieve their goal
- removes as much of the manual process as possible
- removes the clunky user journey that the user currently experiences when navigating various screens within Salesforce

Genesis UX Review – Eikon Free Trial – Simplified Genesis UI for Setting-Up Eikon Trial

First-draft of a simplified UI for the Eikon Trial setup process.

Setup Eikon Trial

Account [View Account](#)

Trial Name

Opportunity Type

Trial Close Date

Expected Revenue Date

Enterprise Licence Managed by TR

Products

Product	Field	Field	Field	Qty	Trial Duration (Days)	
Eikon for Commodities				<input type="text" value="1"/>	<input type="text" value="30"/>	<input type="button" value="X"/>
Eikon for Students				<input type="text" value="2"/>	<input type="text" value="30"/>	<input type="button" value="X"/>

Validated Auto-Approved

Note:

UI is based on the required (mandatory) user input within the current Salesforce-driven workflow.

More work is required to further optimize/rationalize the proposed UI.

Genesis UX Review – Eikon Free Trial – Simplified Genesis UI for Setting-Up Eikon Trial

Setup Eikon Trial

Account: A-00866557 [View Account](#)

Trial Name: Eikon Trial - 01-MAY-2017 Can be pre-populated

Opportunity Type: New User Can be pre-populated

Trial Close Date: 31-May-2017 Can be pre-populated

Expected Revenue Date: 01-Jun-2017 Can be pre-populated

Enterprise Licence: Managed by TR Can this be determined from the account itself or is this defined at the Salesforce "Sales Opportunity" level? If at the Account level, this form field can be removed, simplifying the UI even further

Products

[Add Product](#)

Product	Field	Field	Field	Qty	Trial Duration (Days)	
Eikon for Commodities				1	30	✘
Eikon for Students				2	30	✘

Validated Auto-Approved Can validate in real-time

[Contact Support](#) [Cancel Trial Setup](#) [Send to Fulfilment](#)

- This simplified UI removes the many steps currently required to navigate between the various Salesforce screens as the system can populate the data across the various systems (Salesforce and SAP) in the background via a central API.
- Unnecessary actions requiring manual intervention removed, as this can be performed by the system, hence reducing number of steps required to complete task.
- With the user selecting “Set up Eikon Trial” within a dedicated Genesis UI, the system knows what PriceBook to select and various fields can be pre-populated with default values, such as Trial Close Date, Expected Revenue Date if the standard trial period is 30 days, for example, hence reducing manual user input.
- Validation and approval checks can be carried out in the background in real-time instead of requiring user to initiate the tasks.
- “Send to Fulfilment” will spawn a pop-up confirmation with a button to launch the separate Eikon Administration Services (EAS) UI with account number passed as a parameter so that the user does not have to manually copy the account number and paste it into EAS.

Genesis UX Review – Eikon Free Trial – Simplified Genesis UI for Setting-Up Eikon Trial

UI with no “Justification” field
as trial duration is less than 60 days

Setup Eikon Trial

Account: A-00866557 [View Account](#)

Trial Name: Eikon Trial - 01-MAY-2017

Opportunity Type: New User

Trial Close Date: 31-May-2017

Expected Revenue Date: 01-Jun-2017

Enterprise Licence: Managed by TR

Products

[Add Product](#)

Product	Field	Field	Field	Qty	Trial Duration (Days)	
Eikon for Commodities				1	30	✘
Eikon for Students				2	30	✘

✔ Validated ✔ Auto-Approved

[Contact Support](#) [Cancel Trial Setup](#) [Send to Fulfilment](#)

UI shows “Justification” field
as trial duration for one of the products exceeds 60 days

Setup Eikon Trial

Account: A-00866557 [View Account](#)

Trial Name: Eikon Trial - 01-MAY-2017

Opportunity Type: New User

Trial Close Date: 31-May-2017

Expected Revenue Date: 01-Jun-2017

Enterprise Licence: Managed by TR

Products

[Add Product](#)

Product	Field	Field	Field	Qty	Trial Duration (Days)	
Eikon for Commodities				1	30	✘
Eikon for Students				2	90	✘

✔ Validated ⓘ Approval Required

Justification for Trial Duration

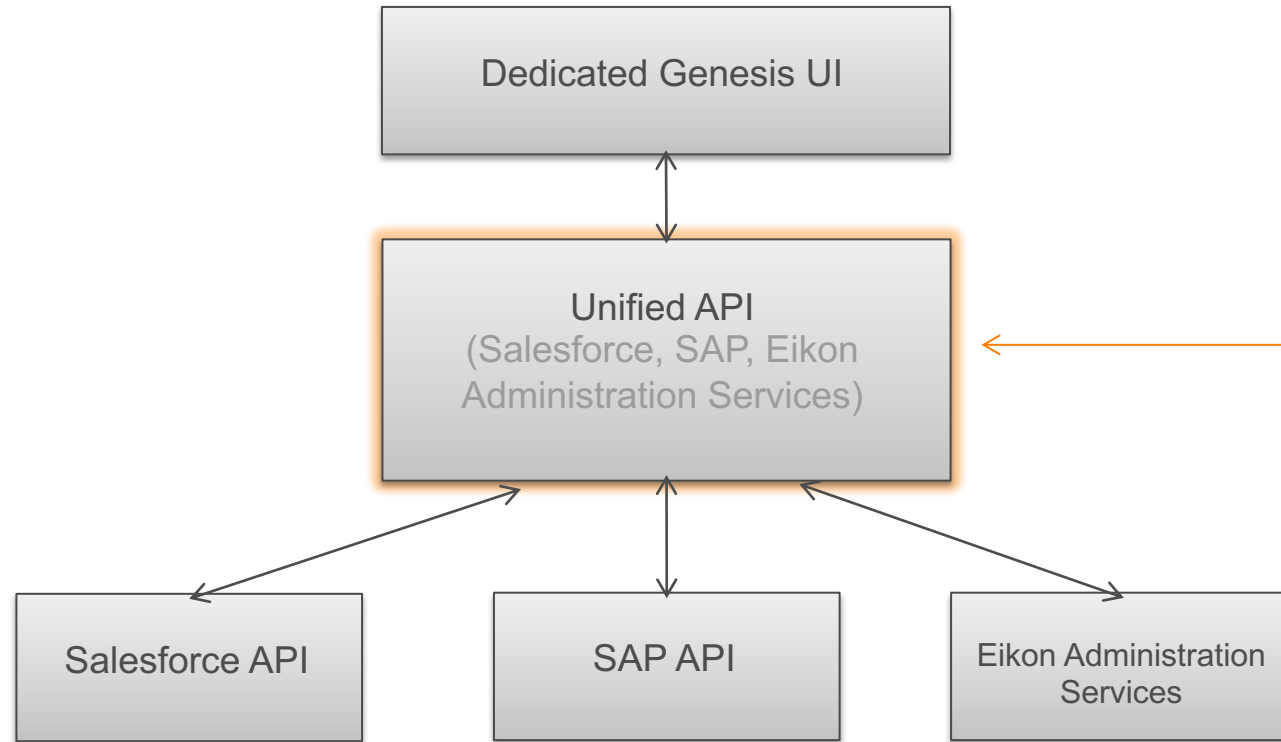
Enter justification if requested trial period is more than 60 days

[Contact Support](#) [Cancel Trial Setup](#) [Request Approval](#)

Genesis UX Review – Eikon Free Trial – Simplifying the UX/UI

API Dependency

A simpler UX/UI for the task of setting-up an Eikon Trial depends on a unified API connecting to Salesforce, SAP and maybe even Eikon Administration Services.



This will be vital for other “Pivot-to-Platform” project initiatives

Hides the complexities of the Salesforce UI, its sales-oriented data model and user journeys within Salesforce itself and between SAP and Eikon Administration Services

Workflow Audit

Of proposed Dedicated Genesis UI

Genesis Simplified UI - A dedicated front-end that only exposes the information and navigational items a user needs to initiate an Eikon Trial Period

Process	UI	Step	UI State or View Change	User Action	System Action	Comments
Setup Eikon Trial	Genesis Simplified UI	0	Genesis Simplified UI			
Tell Genesis you want to set up Eikon Trial		1		User clicks on "Setup Eikon Trial" from navigation	Initiate "New Sale Opportunity"	
		2	Set-up Eikon Trial Screen appears	User enters Account Number		
		3	"Trial Name" is pre-populated with today's date appended - e.g. "Eikon Trial - 01-May-2017"		System saves into Salesforce Opportunity object/entity	"Trial Name" is pre-populated with Eikon Trial - DD-MMM-YYYY, where DD-MMM-YYYY is date format. This maps directly to "Opportunity Name" in Salesforce. Date format is unambiguous.
Enter Trial details		4	"Opportunity Type" is pre-populated with "New user"	Enter "Opportunity Type" (optional)	System saves into Salesforce Opportunity object/entity	This could be preset by the system but also user to change if necessary
		5		Enter "Trial Close Date" (optional)	System saves into Salesforce Opportunity object/entity	Trial Close Date could be preset to 30 days by default so this field would be pre-populated by the system, saving the user from having to manually entering it
		6		Enter "Expected Revenue Date" (optional)	System saves into Salesforce Opportunity object/entity	Expect Revenue Date could also be preset by the system based on Trial Close Date
		7		Check "Managed by TR" (if applicable)	System saves "Stage" - e.g. "3. Trial/Demo/Solution Recommended" into Salesforce object/entity	
This is information required within Salesforce		8			System changes Price Book to "Genesis Price Book" in Salesforce object/entity	
		9	Show Product Search & Selection UI (use TR custom UI to show data from SAP)		"Eikon" is pre-populated for SAP's "Base Product" field	
		10		Click "Add Product"		
	11	Modal panel appears with Product Search & Selection UI				
Enter Required Product(s)						

Genesis Simplified UI - A dedicated front-end that only exposes the information and navigational items a user needs to initiate an Eikon Trial Period

Process	UI	Step	UI State or View Change	User Action	System Action	Comments	
	Genesis Simplified UI	12		User selects "Customer Managed" for "Deployment Method"			
		13		User clicks "Search"			
		14				System performs search	
		15	Results List is populated				
		16			User selects product(s) by ticking against products listed		
		17			Confirm selection by clicking Select button		
		17	Product Search & Selection UI pop-up closes. Products table generated/updated with selected products.			System auto-validates in real-time and auto-approves if trial duration is less than 60 days	
Change Product Quantities		18		Product quantities can be changed with in-line editing	System auto-validates in real-time with any change and auto-approves if trial duration is less than 60 days		
Enter Trial Period Justification		19	Justification field appears if trial duration for any selected product is for more than 60 days				
		20		User enters justification		Saves selected product data back into Salesforce	
Send for Approval or Send to Fulfilment		21	If Products have been validated and auto-approved, show "Send to Fulfilment" button. If Products have been Validated but requires approval due to trial duration required, show "Request Approval".		System initiates Salesforce "Associated Opportunity" process		
		22			"Genesis/GRC Trial Opportunity"		
		23			Copies information from Sale Opportunity to Trial Opportunity		
		24			System initiates Salesforce "New Quote" process		
		25			Quote name is pre-populated into New Quote object/entity in Salesforce		

Genesis Simplified UI - A dedicated front-end that only exposes the information and navigational items a user needs to initiate an Eikon Trial Period

Process	UI	Step	UI State or View Change	User Action	System Action	Comments
		26			System saves Justification (Step 20) into New Quote object/entity in Salesforce	
		27			Save checkbox value of Enterprise Licence - Managed by TR" into New Quote object/entity in Salesforce	
		28			Salesforce now talks to proprietary License Management Tool	
		29			Confirmation Panel appears to inform user status of task - provide button "View account in Eikon Licence Manager" for user to proceed to ELM without having to manually copy the account number from current UI and manually pasting it into ELM	
Setup Eikon Trial Process Complete	1 UI (Replacing Salesforce & SAP)			9 Mandatory User Actions, upto an additional 5 optional user actions		

9 User Actions

to complete the Eikon Trial Set-up Process

BUT... the process continues

With the user now having to use another UI

(Eikon Administration Services)...

Genesis Simplified UI - A dedicated front-end that only exposes the information and navigational items a user needs to initiate an Eikon Trial Period

Process	UI	Step	UI State or View Change	User Action	System Action	Comments
Assign License to User						
Refresh screen (optional depending on circumstances)	Eikon Administration Services (License Management Tool)	30	License Management View within Eikon Administration Services screen	User manually refreshes the screen		
		31	Screen Refreshes			
Load Account Details within Eikon License Management Tool		32		User clicks "Change" to change account		
		33	"Change View Scope" Dialog appears			
		34		User enters or pastes Account Number		
		35		Click OK		
		36			System searches for matching records	
		37	Search results shown			
		38		User selects account by clicking on row		
		39	"Change View Scope" Dialog closes			
		40	License Management View (Trial Licenses) gets updated with list of products and corresponding license details			
		41		User clicks on double-chevron (<<) button to reveal navigational side-bar		
Identify User & Assign License to User		42		Within the side-bar, click on "Users"		
		43	"Users" View appears with list of users			
Create User		44		Click on "Create User"		New User scenario
		45	Create User screen appears			
		46		User populates form (9 mandatory fields)		
	47		User clicks "Create" button			

Genesis Simplified UI - A dedicated front-end that only exposes the information and navigational items a user needs to initiate an Eikon Trial Period

Process	UI	Step	UI State or View Change	User Action	System Action	Comments
		48	"Assign Licenses" popup dialog appears with message: "Your request has been received. Do you now want to assign licenses to this user ID?"			Alan Bronowicz states (in his video walk-through) at this stage the user has been created. If so, shouldn't the message state this instead of "Your request has been received"?
		49		User clicks "Yes"		
Assign licenses to user		50	"Assign Licenses" dialog disappears to reveal "Manage License Assignment" screen with list of licenses.	User selects which licenses to assign to user		
License Agreement details		51		Click "Next"		
		52	Bottom half of screen refreshes to hide the licenses list and show "License Assignment" info for the selected product. Fields include: Welcome Email and Notes			
Change recipient email address for Welcome Email Enter license agreement notes		53		Change email address		Optional
		54		Enter license agreement notes		Optional
		55		Click "Confirm button"		
		56	Modal panel appears with heading: "License Agreement" and message: "Your request has been submitted"			
		57		User clicks "OK" to close message panel		Last user action before automatic processes
		58	Modal closes		Systems will automate permissioning, set up user in back-end systems, send welcome email to the user, from which they can click on it and log in to access the product	

Genesis Simplified UI - A dedicated front-end that only exposes the information and navigational items a user needs to initiate an Eikon Trial Period

Process	UI	Step	UI State or View Change	User Action	System Action	Comments
Refresh Users screen with license assignment details		59	"Users" screen appears with updated list of users. Assignment of the product against the user can be determined seeing if the "License" and "End Date" fields are populated.			
License Assignment Process Complete	1 UI			17 User Actions		
Genesis Process Complete	Total 2 UIs			Total 26 Mandatory User Actions across 2 UIs (Genesis Simplified UI and Eikon Administration Services)		
Key:						
Mandatory						
Optional						

17 User Actions

to complete the License Assignment Process

- Set up an Eikon Trial 9 User Actions
- assign license to a user 17 User Actions

Total:
26 User Actions

by navigating through 2 UIs
(Genesis Dedicated UI & Eikon Administration Services)

Workflow Comparison

to set up an Eikon Trial and assign license to a user

Current Salesforce-driven Workflow

Salesforce, SAP &
Eikon Administration Services

58

User Actions

Proposed Workflow

Dedicated Genesis UI
& Eikon Administration Services

26

User Actions

Improve existing Salesforce UI

1. Improve existing Salesforce and SAP UIs:
 1. Reduce visual clutter by:
 1. Removing superfluous UI controls and text links
 2. Hide or disable controls that aren't required until needed
 3. Improve layout and positioning of UI controls
 2. Organise navigation and controls better – into groups
 3. Provide visual signposting of where the user is in the process and where to navigate to next. Maybe utilise real-estate within the sidebar.
 4. Provide a more seamless experience by styling the Salesforce and SAP UIs in the same visual style
 5. Remove / Improve quirky UI behaviours – e.g.
 1. Save & Cancel buttons update their text labels to show “Saving...” when Save is clicked
 6. Apply the following design best practices (next slide)

General Design Best Practices

Efficiency

- Limit distractions
- Present few choices
- Use constraints appropriately
- Use appropriate defaults
- Provide feedback

Display

- Group related objects together
- Create visual hierarchy matching the user needs
- Less is more
- Be consistent
- User familiarity

Content

- Provide strong information scent
- Provide signposts and cues
- Provide context
- Avoid jargon / unnecessary text

Appendix

Workflow too complicated or doesn't match user's mental model

Some user feedback to reaffirm independent findings from UX Team:

“
Most of the time it doesn't work or becomes confusing...in those instances, we either have to raise a Case, go the route of a traditional CAA or at the very least, ask a Genesis expert.
”

“
It's too complicated. Too many steps”

“
Some of the processes don't seem straightforward”

“
The process is not very straightforward, we never know where to click”

“
I do not find it completely intuitive and I struggle to find my way around”

“
Too confusing and buggy...”

Source: Sales Survey Results Globally 2016_December.pdf

Appendix

Overly-complicated and inefficient User-Interface (UI)

Some user feedback to reaffirm independent findings from UX Team:

“

Nothing intuitive to create
2 opportunities for a FT is too complicated”

“

Quite often there are
interface issues between Trust,
ELM and SAP. Also system
issues”

“

I think we could make it
simpler, in that one click for
trials, trial conversions and
document creation”

“

Interface issues”

“

The process is not very
straightforward, we never
know where to click”

“

Sometimes when you get
stuck you need to take help from
other colleagues”

“

Interface issues have
recently become more
prominent”

“

...and is not very intuitive, too
many levels to get to [information]
that you're looking for instead of
having full visibility [of] all info on
one screen”

Source: Sales Survey Results Globally 2016_December.pdf

Appendix

Too many steps

Some user feedback to reaffirm independent findings from UX Team:

“I think we could make it simpler, in that one click for trials, trial conversions and document creation”

“Still too many steps to remember and still a lot of support required especially on orders that are not straightforward”

“Currently there are a lot of clicks and steps within the process (from Opp via trial opp via quote via ELM etc.)”

Source: Sales Survey Results Globally 2016_December.pdf

Appendix

Unnecessary manual tasks

Some user feedback to reaffirm independent findings from UX Team:

“...There are far too many clicks to make something happen”

“Limiting the number of steps when creating an Order Form and processing a sale”

Source: Sales Survey Results Globally 2016_December.pdf

Appendix

Lack of sign-posting of where users are in the process and what to do next

Some user feedback to reaffirm independent findings from UX Team:

“Make it more ‘guided’
-> Which step has to be done first, which one is the next one”

“The process is not very straightforward, we never know where to click”

“For the moment I do not find it completely intuitive and I struggle finding my way around”

Source: Sales Survey Results Globally 2016_December.pdf

Additional early wireframes of Genesis UI

Included to encourage discussion for the proposal of a unified UI.

Common Genesis Tasks

Set-up Eikon Trial

Set-up xxxx

Set-up xxxx

Set-up xxxxxx xxxxxx

Trials

Pending Trials

39

Active Trials

4

Completed Trials

14

Pending Cancellations

5

Cancelled Trials

2

Setup Eikon Trial

Account

A-00866557

[View Account](#)

Trial Name

Eikon Trial - 01-MAY-2017

Opportunity Type

New User

Trial Close Date

31-May-2017



Expected Revenue Date

01-Jun-2017



Enterprise Licence

Managed by TR

Products

Add Product

Product	Field	Field	Field	Qty	Trial Duration (Days)	
Eikon for Commodities				1	30	✘
Eikon for Students				2	30	✘

✔ Validated

✔ Auto-Approved

Contact Support

Cancel Trial Setup

Send to Fulfilment

Genesis UI with sidebar for navigation

Common Genesis Tasks

Set-up Eikon Trial

Set-up xxxx

Set-up xxxx

Set-up xxxxxx xxxxxx

Trials

Pending Trials

39

Active Trials

4

Completed Trials

14

Pending Cancellations

5

Cancelled Trials

2

Trials

New Trial

Active Trials

Account	Trial Product	Trial Start Date	Trial Progress	Trial End Date	Trial Duration (Days Used / Total)
A-00866557	Eikon for Commodities	01-May-2017	<div style="width: 75%;"></div>	31-May-2017	22 / 30
A-00866557	Eikon for Students	01-May-2017	<div style="width: 25%;"></div>	30-Jun-2017	40 / 60
A-00866534	Eikon	02-May-2017	<div style="width: 95%;"></div>	23-May-2017	20 / 21
A-00866526	Eikon for xxxxx	24-Apr-2017	<div style="width: 60%;"></div>	24-May-2017	20 / 30

Trial Statuses shown on the sidebar.

Clicking on an item will update the main pane with a details view.

Trial Progress can be visualized with a progress bar placed between the trial start and end dates.

Review conducted by F&R UX Team:

Yooch Wan

March 2017