Usability Study Summary Report LandSafe CMS 2.E

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High Priority Usability Recommendations / Productivity Affecters

The following high priority recommendations were based on the entire testing cycle: the pre-study surveys, the actual testing, the post-study surveys and notes from the usability issues log.

These recommendations are considered "High Priority" due to a.) the recurrence of the issue throughout the user testing; b.) the severe affect the issue has on user productivity; and c.) the general failure to pass basic usability principles and guidelines.

High Priority Recommendations for ALL USERS *(Regardless of Role)*

Post Login

1. Post login, respondents would like to **default to "My orders"**. While this may need to be role specific, as to which orders, most users would prefer to see some sort of list of their orders consisting of orders that are already in their queue (WIP) or that have been recently assigned or escalated to them.

    a. **14 / 15 respondents** listed this as an issue
    b. a minimum of four clicks is currently required in order to search and get to an order which is affecting productivity
    c. by general rule, the user should be first presented with some usable information before having to make an action

Searches

2. The **space above the search criteria** fields is nonexistent. Too often, users are accidentally rolling over the menus while trying to access the fields. The resulting drop-down menu causes them to have to (again) roll off and then attempt to enter data again. Simply adding more space between the menu options and the search criteria fields would eliminate this issue. Additionally, once a search type is selected, the cursor should default to the first field or criteria option.

    a**. 10 / 15 respondents** listed this as an issue
    b. frequent roll over, roll off and extra clicks wastes excessive time in the long run
    c. there should be adequate space to prevent users from accidentally rolling over menus when performing another action

Search Results

3. A **results count** & **refresh button** would help determine the amount of orders in the queue and allow for manual refreshing to check for new assigned or updated orders without having to run the same search over and over again.

    a**. 11 / 15 respondents** listed this as an issue
    b. refresh feature will prevent manual refreshing via running a new search
    c. such lists should always display the number of results and a clear indication of how those results are navigated

4. **Additional Icons** in the results rows to indicate new information or action required. Currently, users are actively clicking orders in the queue to check for updated information. Such indicators readily visible in the results would allow them to quickly determine if action is required without having to load every order.

    (Recommendations: Additional/New File added, Duplicate Record, Order in Escalation)

    a. **10 / 15 respondents** listed this as an issue

b. users are currently loading orders just to check if action is required, additional icons would save that time

c. relative iconography, when used appropriately, can save users time, alert them to issues and clarify items

5. Add **Borrower Name** to list of columns in search results and make it a primary column – so user does not have to scroll to the right to see it.

    a. **9 / 15 respondents** listed this as an issue

    b. for quick reference, sorting, prevents users from having to open files for that info

    c. any primary information required for completing a task should be represented prominently

6. Move **Address** information in columns to the left so it is a primary column – so user does not have to scroll to the right to see it.

    a. **7 / 15 respondents** listed this as an issue

    b. for quick reference, sorting, prevents users from having to open files for that info

    c. any primary information required for completing a task should be represented prominently

System Wide Assignment/Re-assignment Picker

7. **Assigning individuals** to orders, tasks, etc. is cumbersome and currently may require up to 17 keystrokes or more (for some users and roles) to submit. This is the product of some basic usability flaws and client process decisions.

    When assigning a reviewer, appraiser, etc. a standard "picker" window opens allowing the user to input a first name, last name and at times several fields of additional information, including the ability to uncheck several, pre-checked , disabled boxes.

    Issue 1 – **Default the Cursor to the first text field** so the user does not have to tab to it (4 keystrokes) or mouse over and click the field. This will allow them to enter data as soon as the window opens.

    Issue 2 – **Allow the user to uncheck the checkbox options without entering data in the search fields**. Currently, the checkboxes are disabled until some criteria are entered into the text fields.

    Issue 3 – **Uncheck the check boxes by default.** Currently, most respondents are un-checking all of the boxes every time. And for those who may check a few, it would be easier to check the ones they need rather than to uncheck them all and then make a selection each and every time.

    a. **10 / 15 respondents** listed this as an issue

    b. extra keystrokes or extra clicks wastes excessive time in the long run

    c. disabled options becoming active is confusing, excessive clicks is not productive, defaults should be standards for all users not just a few

High Priority Recommendations for PROCESSORS

Associated Files

1. Respondents would like the **ability to Delete or Re-name associated files**. It is common an incorrect file is uploaded or updated and the file needs to be removed and replaced with a new one. At least, they would like the ability to differentiate the files by renaming them. Some respondents felt they were not trusted due to losing this feature and responsibility.

   a. **5 / 5 PROCESSORS** listed this as an issue
   b. this will make identifying multiple files easier
   c. at least, there should be a way to auto-differentiate the older files from the newer ones

Complete History Pro Order

2. The **Complete History Pro Order interface** varies slightly from that of Core Logics and is more cumbersome to use. A few minor adjustments will allow the respondents to work with this interface exactly as they did before. This will yield faster results and more productivity.

   Issue 1 – **Subject Area –** Rearrange the lines so they appear like the following and in this order:
   Line 1: Address, City, Square Feet, Appraisal Value, Appraisal Year, Appraisal Month
   Line 2: State, Zip

   Issue 2 – **Comp Areas –** Rearrange the lines so they appear like the following and in this order:
   Line 1: Address, City, Square Feet, Sale Value, Sale Year, Sale Month
   REMOVE the following fields from the comp areas: State, Zip

   Issue 3 – **Auto populate** the **Appraisal Year and Month**, as well as the **Sale Year and Month** with the current Year and Month. For example, if it is currently September 2007, populate all those fields with September and 2007.

   Issue 4 – Once the user enters **the Zip Code** in the subject area, **Auto populate the city in the comp** areas.

   a. **4 / 5 PROCESSORS** listed this as an issue
   b. saves time by not having to re-enter similar information on each comparable
   c. automating routine tasks is good practice, simplifying the interface speeds workflow

High Priority Recommendations for REVIEWERS

Order Summary

1. Add/Show **Appraiser Phone #** more prominently in summary.

   a. **2 / 10 REVIEWERS** listed this as an issue
   b. for quick reference
   c. any primary information required for completing a task should be represented more prominently

Calendar Tool (Date Picker)

2. Respondents would like, in addition to the Month/Year Dropdown, previous and next arrows to allow them to one click to the previous or next month. Similar to the old system – this issue also came up during training.

    a. **5 / 10 REVIEWERS** listed this as an issue
    b. having both options gives them more flexibility for choosing dates and speeds the process
    c. following normal conventions (web, applications, etc) for basic elements is a good practice to follow

SiteX and Value Finder Pop-up Windows

3. Respondents would like the SiteX and Value Finder pop-up windows to work like they did in the old system – allowing new SiteX and Value Finder documents to repopulate the existing pop-up windows over currently loaded SiteX and Value Finder documents.

In the old system, the user could position the two windows where and to what size he/she preferred and leave them that way throughout the day. Each time they opened a new SiteX or Value Finder file, it would simply load in the appropriate window without them having to remove and resize a new window each time.

In the new system, when loading a SiteX or Value Finder file, a new window is opening for every occurrence, thus creating an abundant amount of windows and forcing the user to move and reposition them each and every time – the new, minor, difference is causing major productivity issues. The current system also prevents window resizing. This issue also came up during training.

    a. **8 / 10 REVIEWERS** listed this as an issue
    b. repopulating existing, preset windows per the users preferences will lead to greater productivity
    c. re-using predefined space for similar functionality will become familiar and decrease congestion on the screen

Review Form

4. Respondents would like a **Spell Checker feature on the review form** as well as more room to type (a taller text box). Also, a few respondents commented that the current spell checker (in other areas of the system) does not seem to be very accurate or use an up-to-date dictionary – in one instance, when the user misspelled "appears" as "apepars", the only alternative word suggested, was "joypopper."

    a. **4 / 10 REVIEWERS** listed this as an issue
    b. would be quicker than the current copy and paste into another checker they are doing now, need to update dictionary
    c. spell checker is valuable tool when large amounts of entry is required

5. Respondents would like the **"Appraisal Value" to Auto-populate the Final Opinion of Value field** in the review form **IF THEY SELECT THE ACCEPTABLE RISK AS Three, Four or Five**. Unlike the old system, they would first need to select one of those three options before it populates.

    a. **6 / 10 REVIEWERS** listed this as an issue
    b. automating this routine task may speed workflow
    c. automating routine tasks is good practice – **HOWEVER**, user may rely too much on this data rather than own opinion

6. Respondents would like the **Appraiser Score to default to 3**. In most cases it, 3, will be entered for this value and it is easier to only use this field when 3 is not appropriate rather than always having to enter a value.

a. **3 / 10 REVIEWERS** listed this as an issue

b. automating this routine task with a relative default value may speed workflow

c. automating routine tasks is good practice – **HOWEVER**, user may rely too much on this data rather than own opinion

7. Respondents would like **Reviewer Decision to Default to "Agree with Original"**. It is easier to only use this field when that default is not the case, rather than always having to enter a value.

a. **2 / 10 REVIEWERS** listed this as an issue

b. automating this routine task with a relative default value may speed workflow

c. automating routine tasks is good practice – **HOWEVER**, user may rely too much on this data rather than own opinion

8. Several respondents would like the **"Review Type" (Lara 4, Lara 3, etc)** to be repeated on the form closer to the risk conclusion or review details area – since this information will affect their decisions. Currently users, at times, have to scroll up in order to remember the type of review form. If this was repeated here, they would not have to. This information could also be placed in the Title Bars of the browser.

a. **3 / 10 REVIEWERS** listed this as an issue

b. for quicker reference

c. any primary information required for completing a task should be represented prominently

9. Window titles need to be more descriptive of the page content. When several windows are open, the title bars let the user know which is which. If no specific information is in the title bar – several "http…" values become harder to navigate through.

Either name the review form "Review Form" or the review type (Lara 4, Lara 3, etc.). This should be the case for all pop-up windows – use some sort of descriptor so users can quickly identify the content.

a. **2 / 10 REVIEWERS** listed this as an issue

b. for quicker reference

c. Descriptive Title Bars is standard practice

Medium Priority Usability Recommendations

The following medium priority recommendations were based on the entire testing cycle: the pre-study surveys, the actual testing, the post-study surveys and notes from the usability issues log.

These recommendations are considered "Medium Priority" due to a.) the recurrence of the issue throughout the user testing; b.) the affect or lack of affect the issue has on user productivity; and c.) the general failure to pass basic usability principles and guidelines.

ALL USERS *(Regardless of Role)*

Search Results

1. Remove, or move to the right, **Processor** from the list of columns in search results. Respondents suggest they do not use this information often enough or at all.

   a. **5 / 15 respondents** listed this as an issue
   b. space could be utilized for more important user information
   c. non-primary information can be accessed through additional key or mouse strokes

2. Remove **Doc ID** from the list of columns in search results. Respondents suggest they do not use this information often enough or at all.

   a. **3 / 15 respondents** listed this as an issue
   b. space could be utilized for more important user information
   c. non-primary information can be accessed through additional key or mouse strokes

3. Move **Branch #** to the left so it is a primary column – so user does not have to scroll to the right to see it.

   a. **3/ 15 respondents** listed this as an issue
   b. for quick reference, sorting, prevents users from having to open files for that info
   c. any primary information required for completing a task should be represented prominently

4. More **detailed navigation/pager tool** that tells the user the number of records listed per page, better indication of which page they are on and multiple ways to advance through the pages – for example, clicking the page number, or using previous and next arrows.

   a. **4 / 15 respondents** listed this as an issue
   b. seamless navigation through necessary lists of information will increase workflow
   c. such lists should always display the number of results and a clear indication of how those results are navigated

Order Summary

5. Add **Borrower Name** to summary for quick reference.

   a. **3 / 15 respondents** listed this as an issue
   b. for quicker reference
   c. any primary information required for completing a task should be represented prominently

6. In the address line, there needs to be some sort of **identifier for Apt or Unit** - even a "#" sign. Currently there is just a number added onto the end of the address – it is not clear if that is a unit number or something else. Additionally, there should be a comma or commas, between the address, the city and state.

    a. **2 / 15 respondents** listed this as an issue
    b. clarity purposes
    c. vague information can confuse the user

Orders

7. **Integrate User and Loan Information** screens into one page.

    a. **3 / 15 respondents** listed this as an issue
    b. for faster access to commonly used pads
    c. any primary or related should be represented prominently and as a group

Associated Files

8. Respondents would like to both **upload Multiple Files** at a time or, after uploading a file and on page refresh, automatically **book-mark back down to the "Add File" pad** so they don't have to scroll down after refresh to add another file.

    a. **3 / 5 respondents** listed this as an issue
    b. quicker access to repetitive tasks or ability to batch-task
    c. book-marking is always good practice when considerable amounts of content is present

System Wide

9. Several respondents were unaware they could **sort the columns** in tables and lists. It is not obvious the column headers are clickable (ability to sort) because of the default blue color.

    Change sort link color, underline sort link or show by default up and down SORT arrows next to sorted column.

    a. **4 / 15 respondents** listed this as an issue
    b. allows for ability to sort records, sometimes eliminates need for more focused searches
    c. any link or action needs to be clearly identified and distinguished from general content

Medium Priority Recommendations for PROCESSORS

User Information Page

1. **Auto set the "Due from Vendor" Date and time** to 2 (two) hours prior to "Due to Customer". Respondent suggests this is their current standard practice.

    a. **2 / 5 PROCESSORS** listed this as an issue
    b. saves time entering this standard on every order
    c. automating routine tasks is good practice

2. **Auto change the processor name** if a new processor opens and edits a file, or auto remove the previous entry, forcing the new processor to add that information.

    a. **1 / 5 PROCESSORS** listed this as an issue
    b. if its common to change the processor in this scenario, automating the process would be more efficient
    c. automating routine tasks is good practice

Order Summary

3. Add **Branch** # to Order Summary for quick reference.

    a. **2 / 5 PROCESSORS** listed this as an issue
    b. for quicker reference
    c. any primary information required for completing a task should be represented prominently

Orders

4. **Move the "Comments" pad** to the User Information page and locate next to assignment pads.

    a. **2 / 5 PROCESSORS** listed this as an issue
    b. for faster access to commonly used pads
    c. any primary or related information should be represented prominently and as a group

Medium Priority Recommendations for REVIEWERS

Review Form

1. Some users suggested having the **Due date on the Review Form** – preventing them from having to go back-and-forth to view it and taking more time.

    a. **2 / 10 REVIEWERS** listed this as an issue
    b. for quicker reference
    c. any primary information required for completing a task should be represented prominently

2. Respondents would like the ability to **Compose Messages on the review form**, and have them post to the log. Perhaps locate this feature below the comments boxes.

    a. **2 / 10 REVIEWERS** listed this as an issue
    b. for quicker access
    c. any main tools required for completing a task should be readily accessible

Low Priority or Non Issues

The following low priority recommendations were based on the entire testing cycle: the pre-study surveys, the actual testing, the post-study surveys and notes from the usability issues log.

These recommendations are considered "Low Priority" due to a.) the recurrence of the issue throughout the user testing and b.) the general failure to pass basic usability principles and guidelines. These issues are not considered productivity issues.

ALL USERS *(Regardless of Role)*

Confirmations – Upload File Confirmation

1. In general, when an action is taken, like saving a file, some sort of confirmation would be nice. Respondents are comfortable relying on browser progress bars and refreshing of pages on most actions. However, after uploading a file, a confirmation that the file successfully uploaded would be helpful – even a refresh of the screen to show the file is there.

   a**. 1 / 15 respondents** listed this as an issue
   b. in general, confirmations of similar actions are good practice, especially if consistency is an issue

Search Results

2. Move **Date** (Due date and Order Date) information in columns to the left so it is a primary column.

   a. **2 / 15 respondents** listed this as an issue
   b. any primary information required for completing a task should be represented prominently

3. Add **Reviewer Team** to search results.

   a. **1 / 15 respondents** listed this as an issue
   b. Any predominantly helpful information should be listed as a primary item

4. Add **Sales Price** to search results.

   a. **1 / 15 respondents** listed this as an issue
   b. Any predominantly helpful information should be listed as a primary item

5. Add **Appraised Value** to search results.

   a. **1 / 15 respondents** listed this as an issue
   b. Any predominantly helpful information should be listed as a primary item

6. Toggle **Show Results** and **Hide Results** buttons. Rather than have two buttons, have the text switch back and forth on one button depending on view state.

   a. **1 / 15 respondents** listed this as an issue

7. Manually **allow user to drag bar between results and order information** (similar to old CMS). Similar to the Show Results and Hide Results buttons but rather the user can control the mount of height for each area.

   a. **1 / 15 respondents** listed this as an issue

8. Respondent would like the ability to **print all the results in the search queue**. Perhaps put a print button next to the show and hide results buttons.

   a. **1 / 15 respondents** listed this as an issue

Orders

9. **Order Locked By** – Because the order is not actually locked, which is misleading, respondents suggest another term, perhaps "Order In Use by".

   a. **2 / 15 respondents** listed this as an issue
   b. misleading representation

10. **Save** buttons on individual pads is nice, but when multiple pads are edited, it would be nice to have a single **master save button** rather than having to edit & save each pad resulting in more clicks and page reloads.

    a. **2 / 15 respondents** listed this as an issue
    b. this issue is a product of predefined functionality and may not be addressable.

11. Allow user to select a link (tab in the old system) and then **load new orders by default to that Link (tab)**.

    For example. If the user opens an order and clicks "Log & Message" – from that point on, open all orders to the "Log & Message" tab first, if user switches to "Property" tab and clicks a new order, open that new order with the "Property" tab displayed first – and so forth and so on.

    a. **1 / 15 respondents** listed this as an issue
    b. this issue is a product of predefined functionality and may not be addressable.

Order Summary

12. Some respondents mentioned they do not use/need to use the Feedback or Engagement buttons. Suggested access rights determine whether those buttons show up or not – saving space for some users.

    a. **2 / 15 respondents** listed this as an issue
    b. in general, items not used or accessible by certain users should not show up

13. Make **Order #** and **Loan # larger in size or bold** for better visibility and more prominence.

    a**. 2 / 15 respondents** listed this as an issue
    b. any primary information required for completing a task should be represented more prominently

14. When an order is in the process of "locking", the **page shifts** before and after there is an icon displayed.

a. **1 / 15 respondents** listed this as an issue
b. any site feature, content, etc. causing unnecessary user focus is an issue.

15. There are **two (2) spaces between the address # and the address** in the orange order summary bar. This may be due to hard-coded spaces put in place to account for a street direction, for example: Southeast. Respondent often cuts and pastes the address information into other applications and is having to delete the additional space.

a. **1 / 15 respondents** listed this as an issue

16. Similar to Interact, would like to see entire message log (including duplicates) on first page – moved to "User Information" page.

a. **1 / 15 respondents** listed this as an issue

Log & Message

17. Auto-populate the subject line, similar to the way the old system did it.

a. **1 / 15 respondents** listed this as an issue
b. this issue is a product of predefined functionality and may not be addressable.

Streamline

18. Upon completion of **Streamline**, user suggests they are presented with a blank screen (on close order?). Would like to be taken somewhere, like the same order but perhaps the Log & Message or Associated Files tab because it is common to upload more than one file.

a. **1 / 15 respondents** listed this as an issue
b. this may be a semantics issue - perhaps streamline is not the best term for this feature

19. **Add File layout** in Streamline is not consistent with Add File layout in Associated Files. These should be consistent, at least with similar fields. Respondent is aware one has more options than the other but feels the basic, similar components should have identical layouts.

a. **1 / 15 respondents** listed this as an issue
b. consistency issue

System Wide

20. "Online" should be replaced with "**On Vacation**", and unchecked by default. Many times respondents assign jobs to people gone for the day – they prefer to know who is on vacation. If this feature differentiates the two and only includes "On Vacation" statuses, all the more reason to simply say On Vacation and avoid confusion.

a. **1 / 15 respondents** listed this as an issue
b. possibly a confusing choice of words

Low Priority or Non Issues for PROCESSORS

User Information Page

1. Add **a "Compose Message" pad or box to the User Information page** for quicker adding of messages, great for repeat outsourcing.

   a. **1 / 5 PROCESSORS** listed this as an issue

Low Priority or Non Issues for REVIEWERS

Review

1. Non-matching scores for "Score" and "Appraiser Score" are causing certain reviews to fail even though they technically have not. Although the review goes through, the reviewer is getting a negative score recorded. Make the scores match automatically, or have the product reviewer only have access to a single score, but not both scores. Additionally, the difference between "Score" and "Appraisal Score" is not obvious.

   a. **1 / 10 REVIEWERS** listed this as an issue

2. On the review form, can users have the ability to get Comparable Sales Data on the subject property independent of the Appraisal in the case that the Appraisal Value is not valid.

   a. **1 / 10 REVIEWERS** listed this as an issue

3. On the review form, can users have links to SiteX or other data providers if manual search is required.

   a. **1 / 10 REVIEWERS** listed this as an issue

4. On the review form, add the ability to add associated files.

   a. **1 / 10 REVIEWERS** listed this as an issue

Review - Signatures

5. Respondent was curious why the "Title" field was not auto-populated since their title should be in their profile.

   a. **1 / 10 REVIEWERS** listed this as an issue

6. On escalated reviews, remove the previous reviewer's signature information

   a. **1 / 10 REVIEWERS** listed this as an issue