

Reporting Rebuild

REPORTING MODULE REDESIGN (2019-2020)

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Full study available by request.

Quick Overview

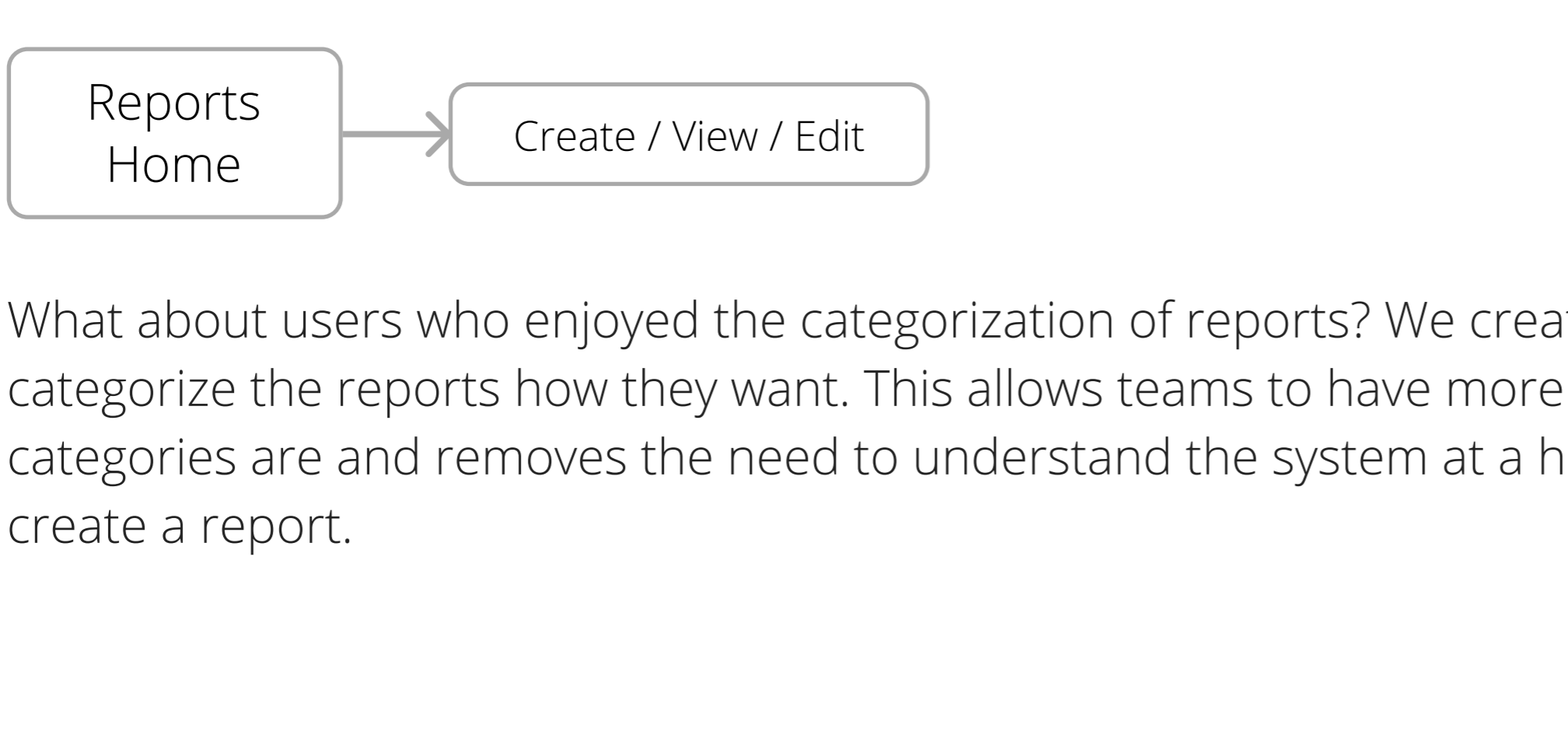
Giving our users a way to create downloadable reports about their assets was satisfactory when it was first introduced. By 2019, as our system expanded, we realized how limited the reporting was for our users.

As the Lead UX Designer, I was part of a large scale project to redesign and build a more robust system for the future.

Changing Perspective

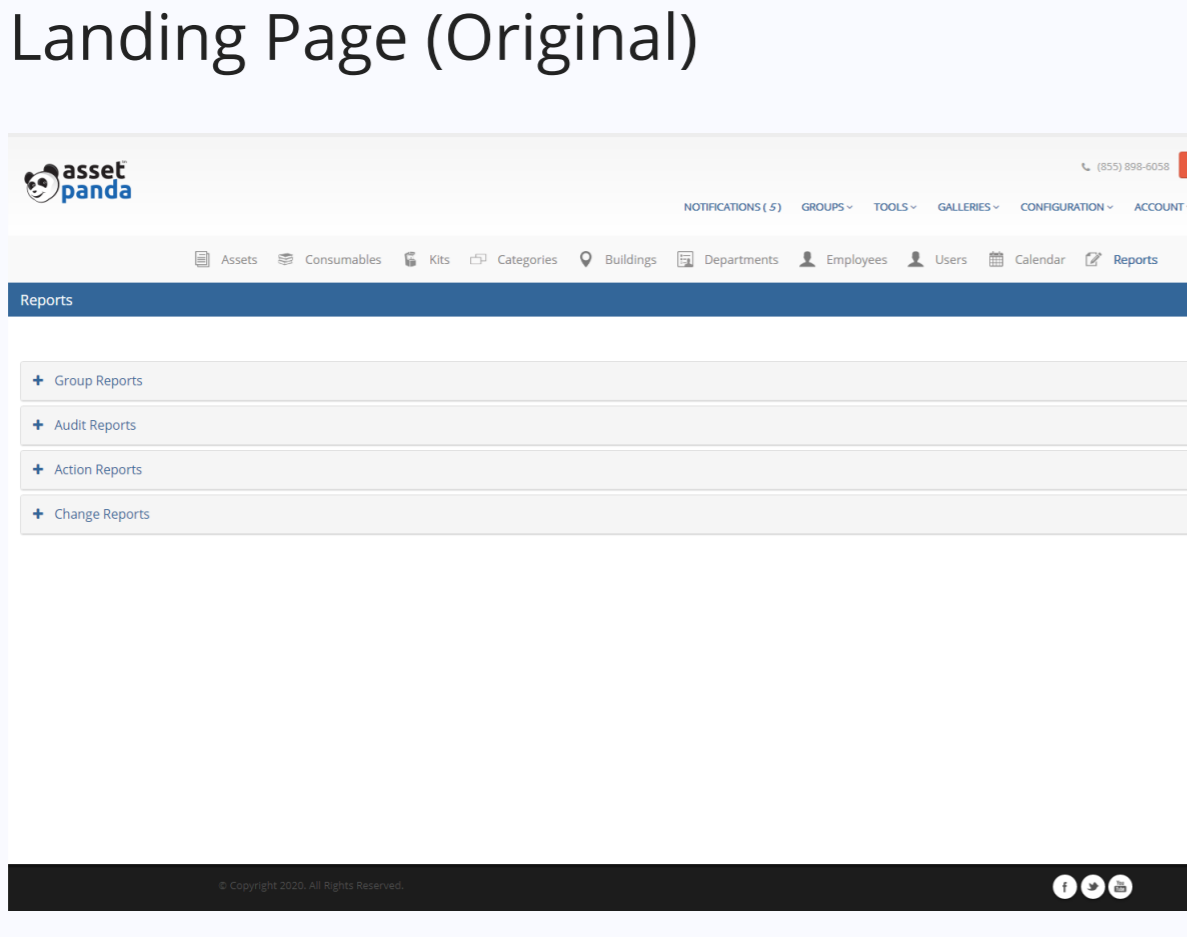
We noticed that new users had issues understanding how to use our reporting system. Because they were fresh into the system, they did not have a great understanding of the terminology used and how items were categorized.

In reporting, we followed the same structure as the site, pre-redesign. Functionality was nested inside individual sections instead of the whole and there was no cross talk.



This structure meant a user had to know what type of report they wanted to build or view when they get to the reports home page. This was one of the biggest barriers to entry for new users. This was made worse due to action and group reports having the ability to produce similar reports.

We attempted to solve this issue by removing these categories. Creating, viewing, and editing would occur at a parent level. This way users can just create a report instead of needing to know what category it belongs to.

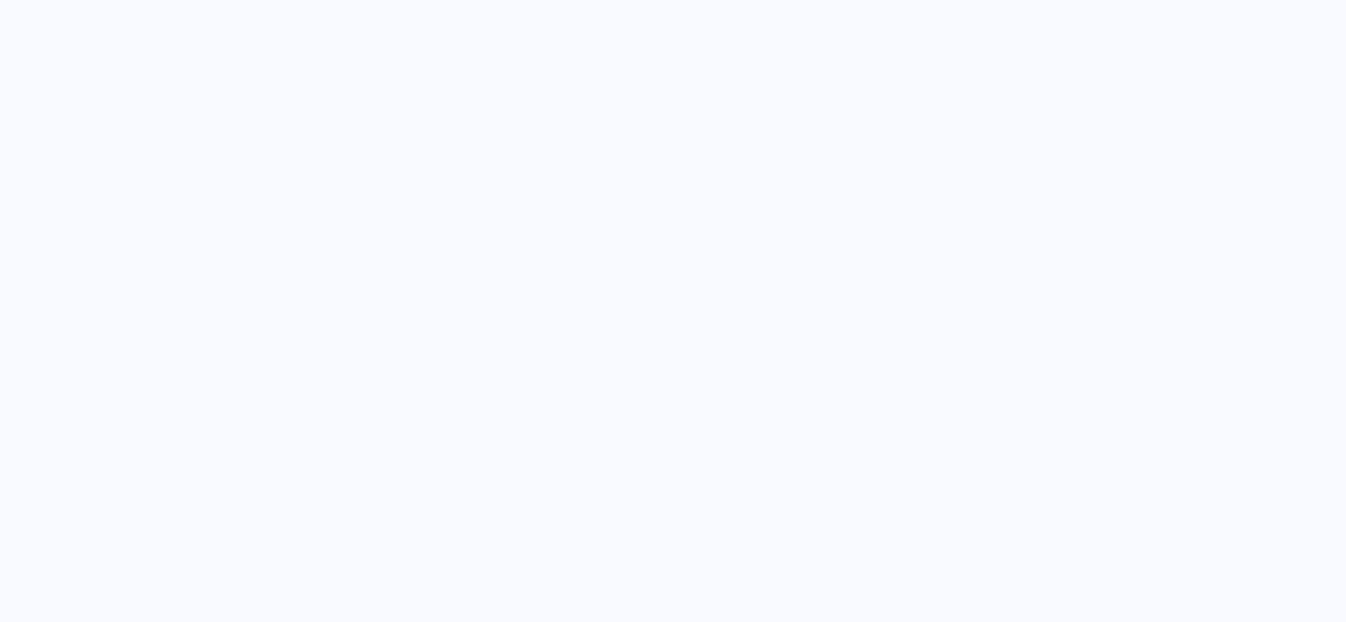
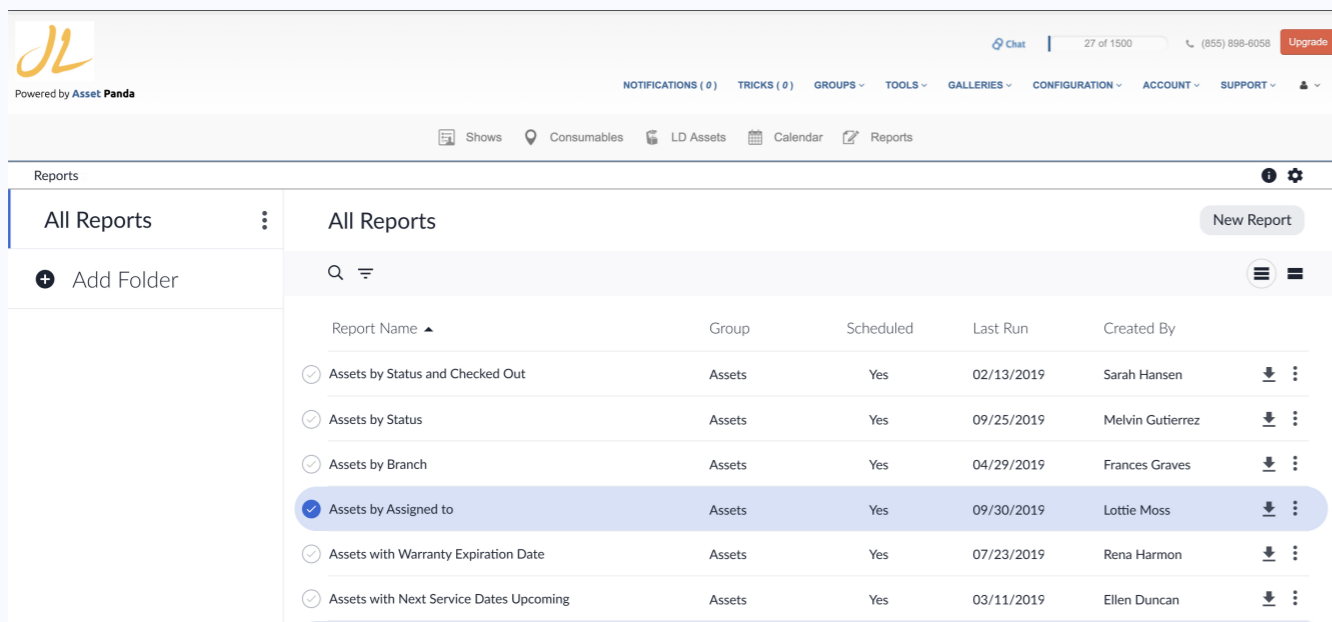


What about users who enjoyed the categorization of reports? We created a folder system for users to categorize the reports how they want. This allows teams to have more control over what their categories are and removes the need to understand the system at a high level before being able to create a report.

Designs

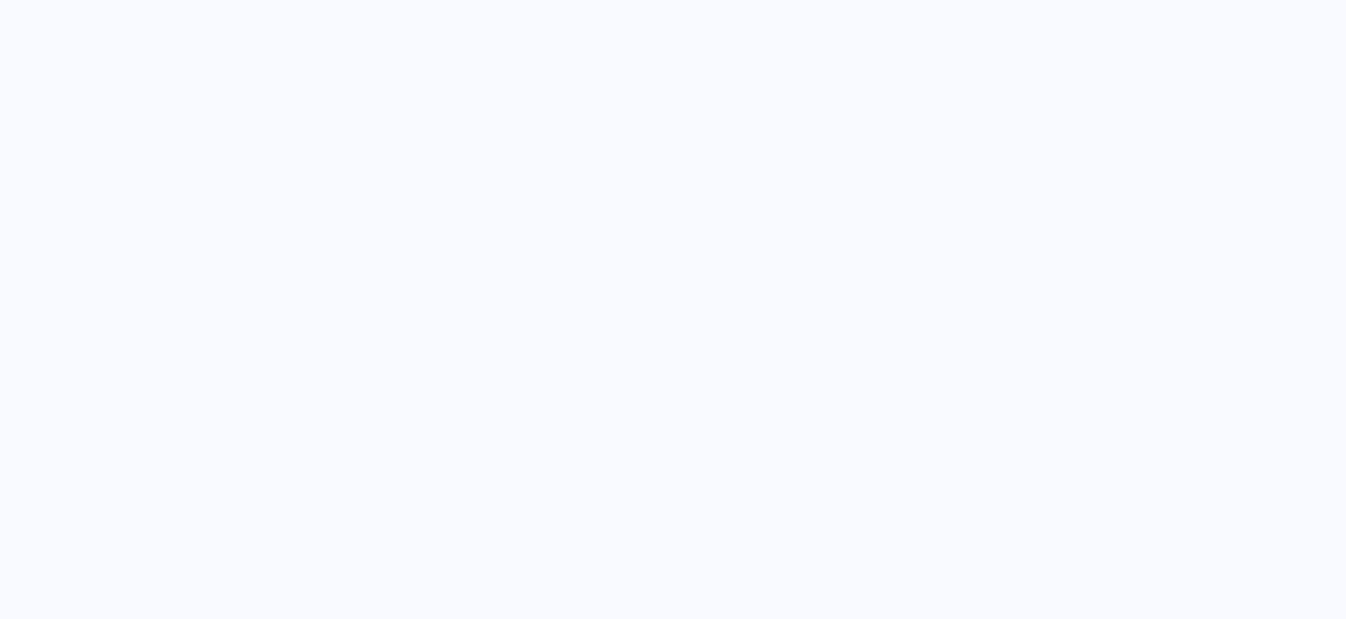
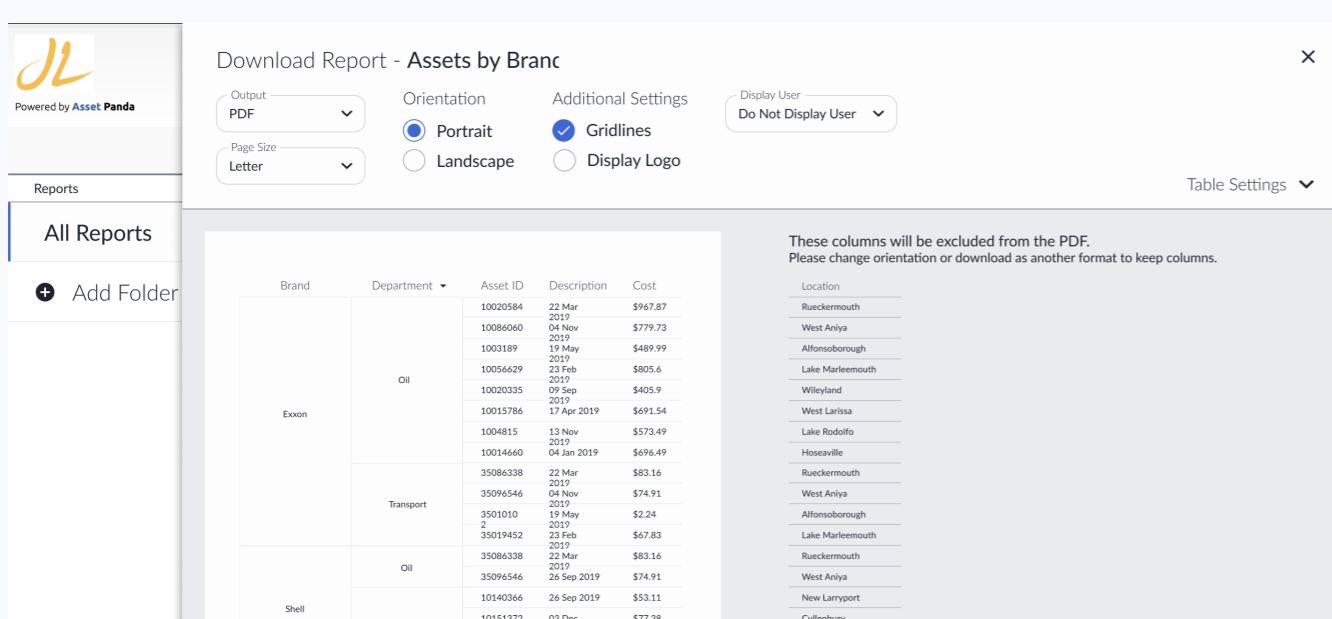
Below are a few select screens from the redesign.

Landing Page (Original)

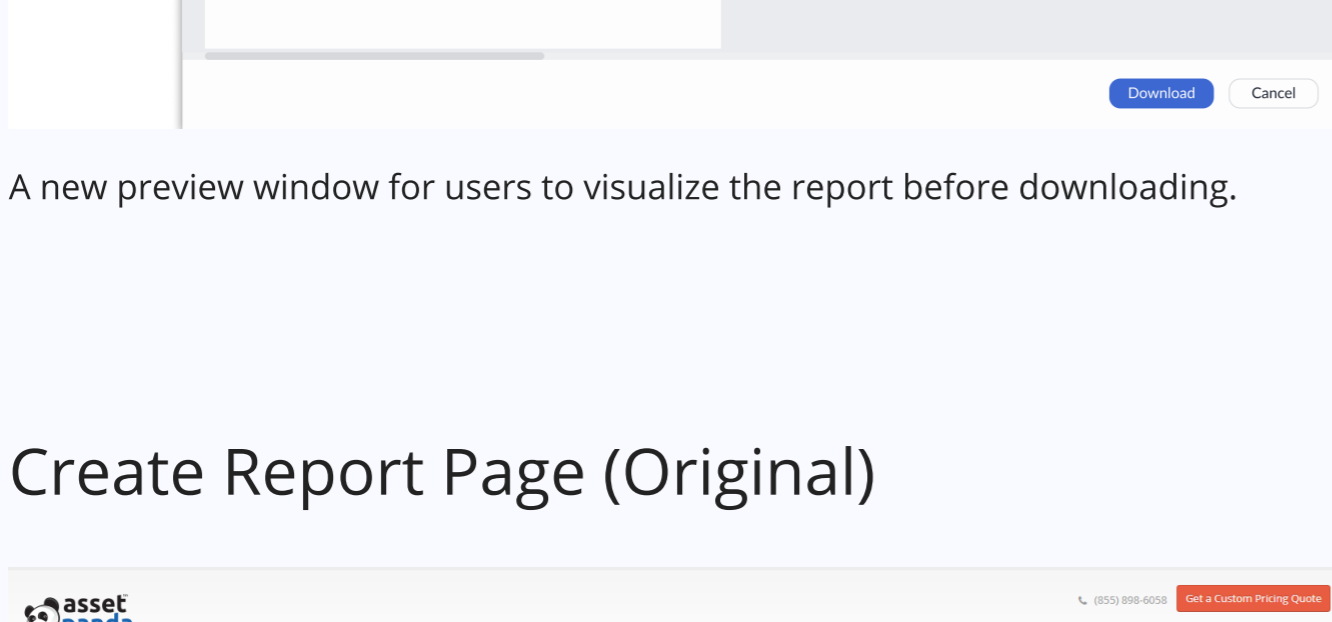


Clicking on the report name will automatically download the report.

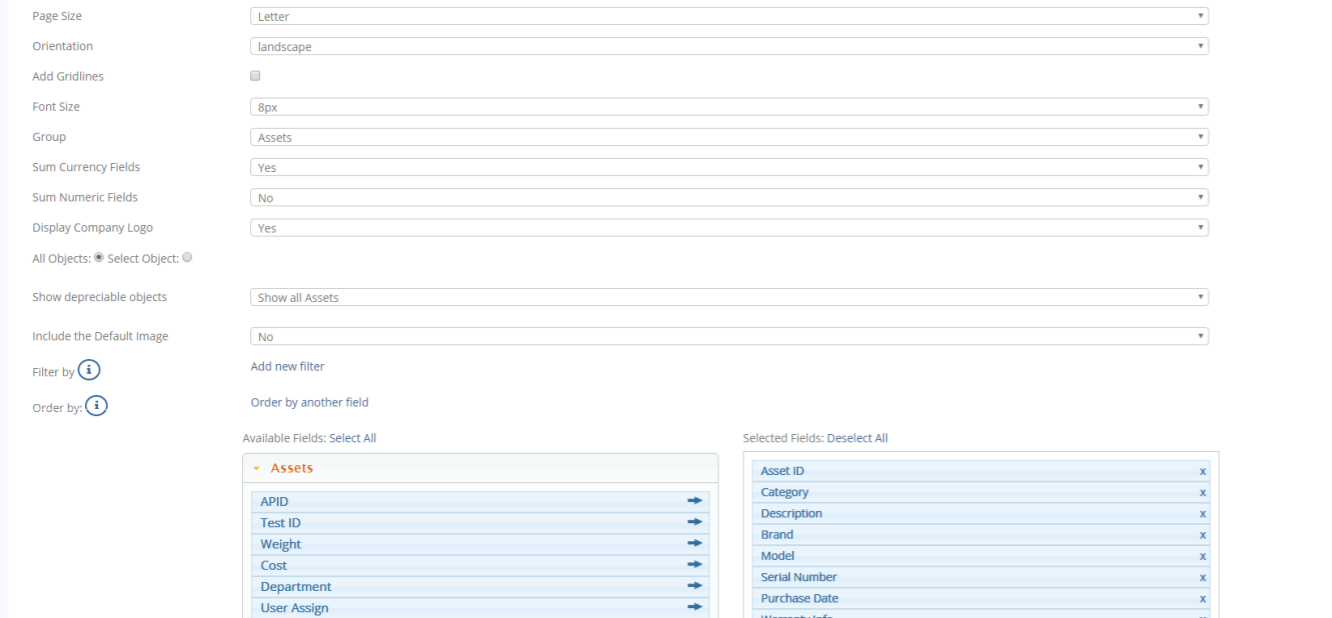
Landing Page (Redesign) + Expanded Functionality



Clicking on the Report Name will open the report to view live. See right photo.

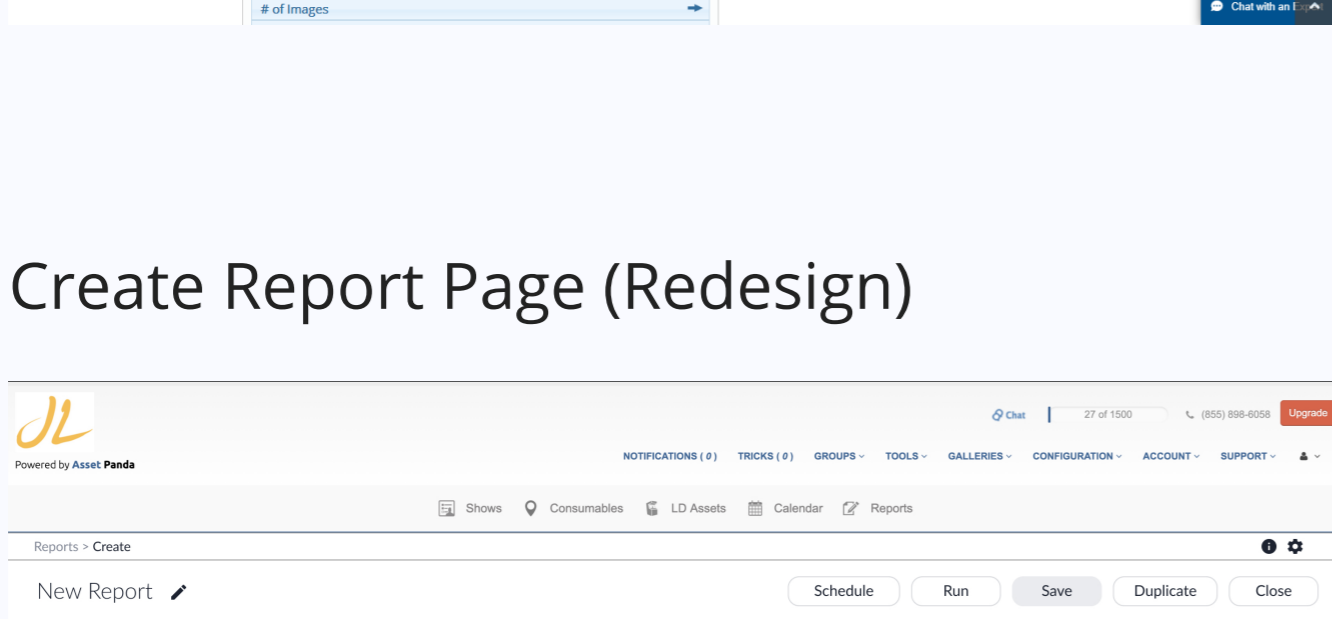


Multi selecting reports via the checkbox will allow you to perform actions for the selected items.

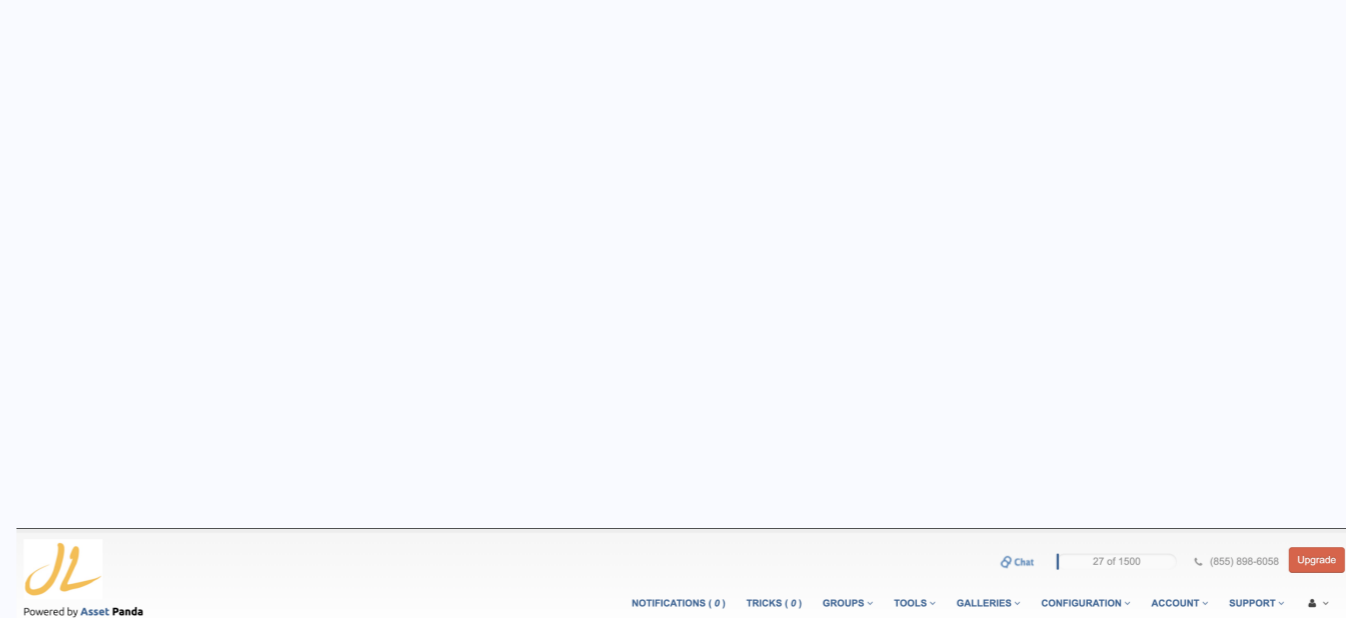
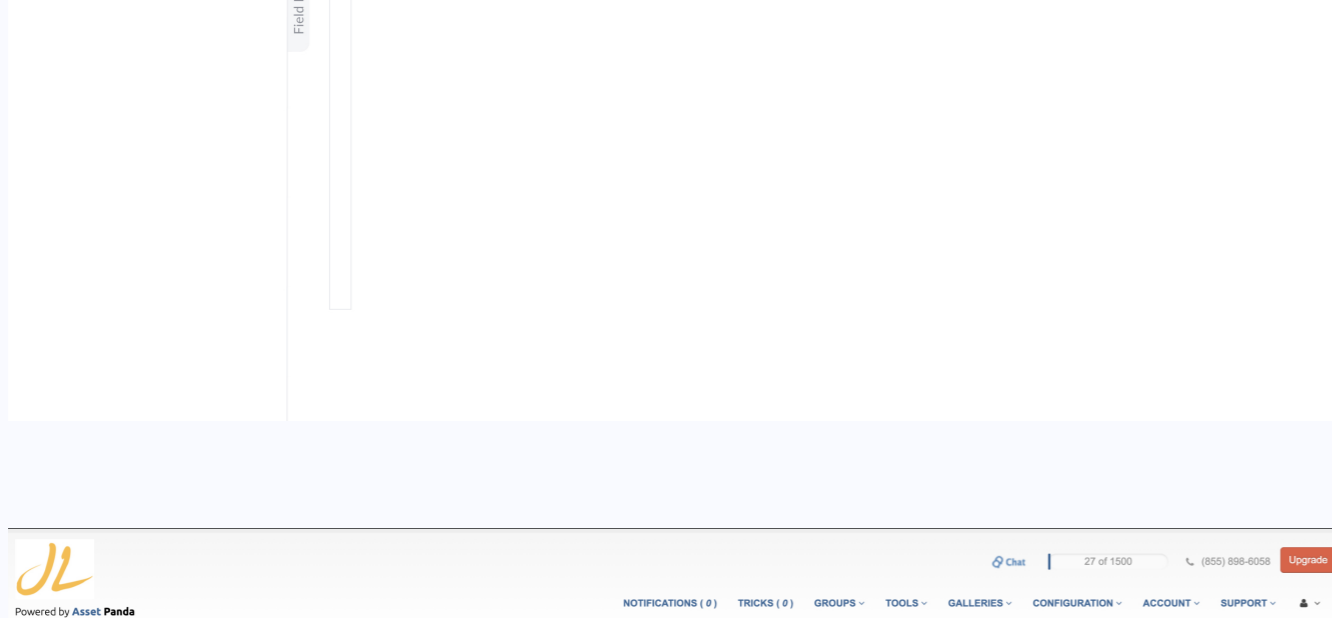


A new preview window for users to visualize the report before downloading.

Create Report Page (Original)

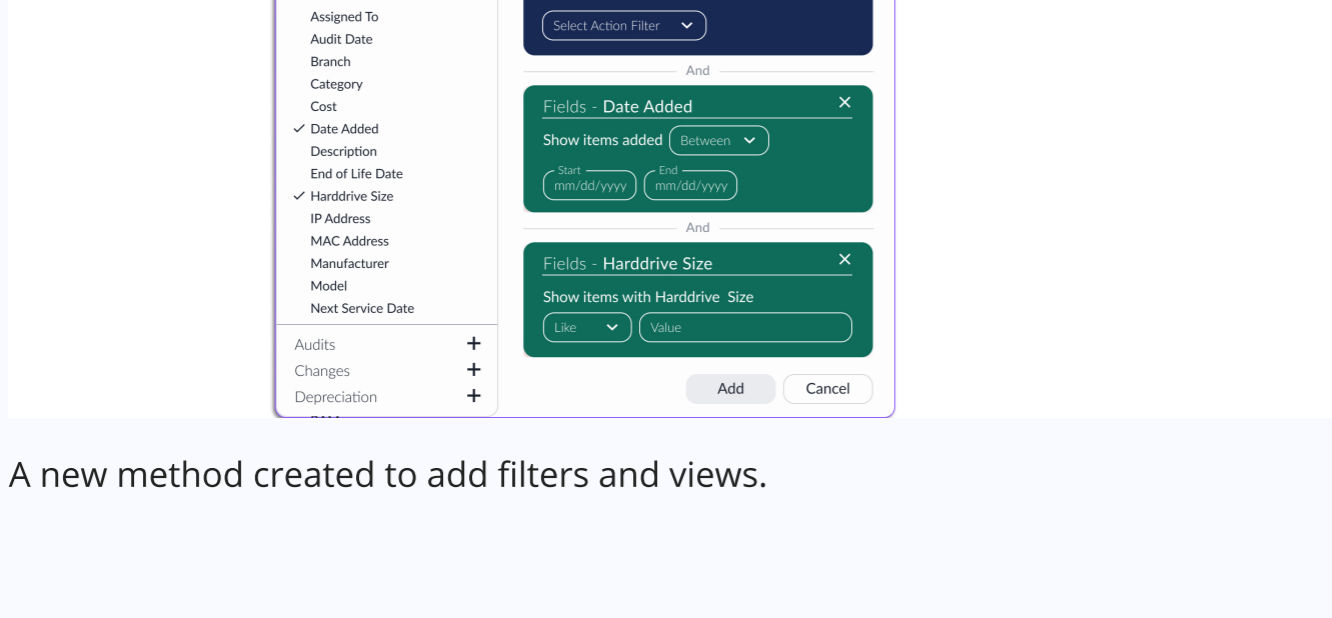


Create Report Page (Redesign)

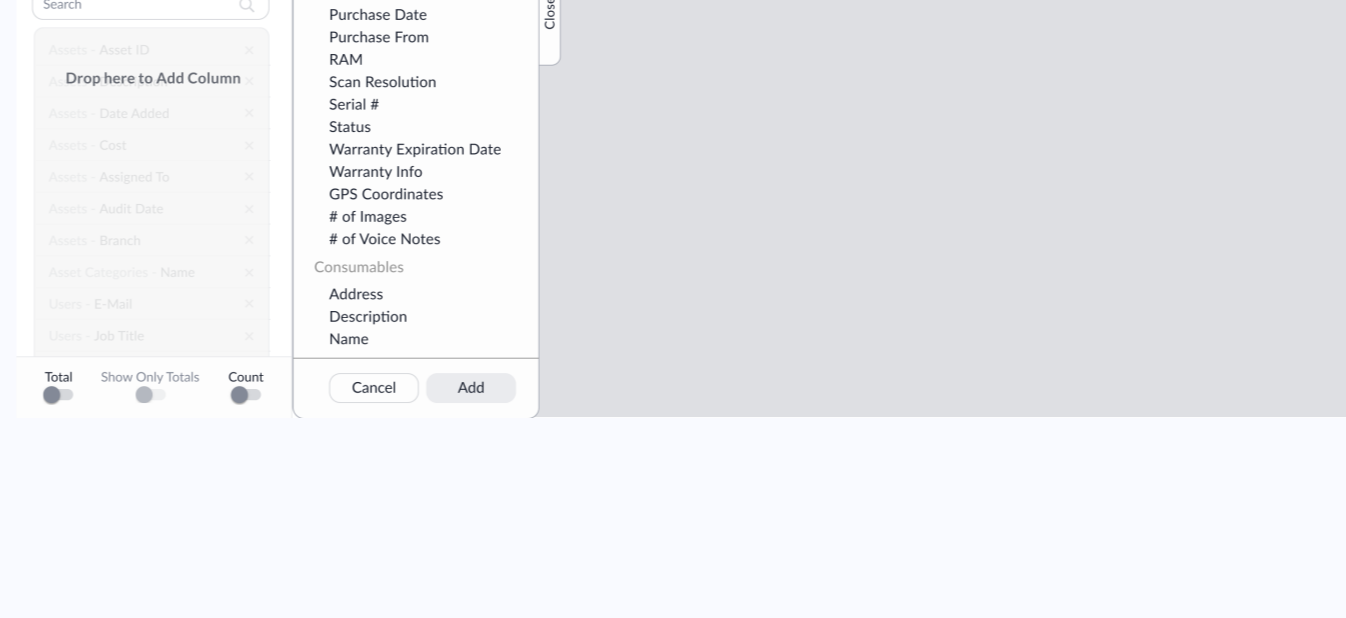


A new method created to add filters and views.

Automated Reports (Original)

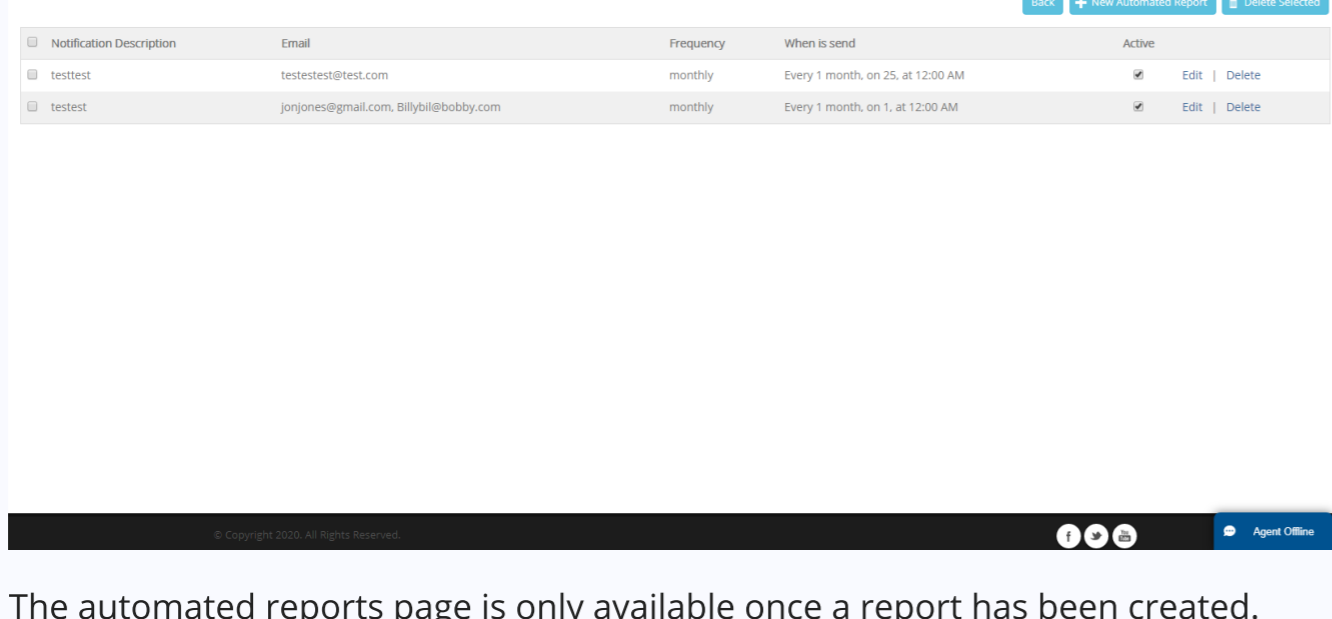


The automated reports page is only available once a report has been created.

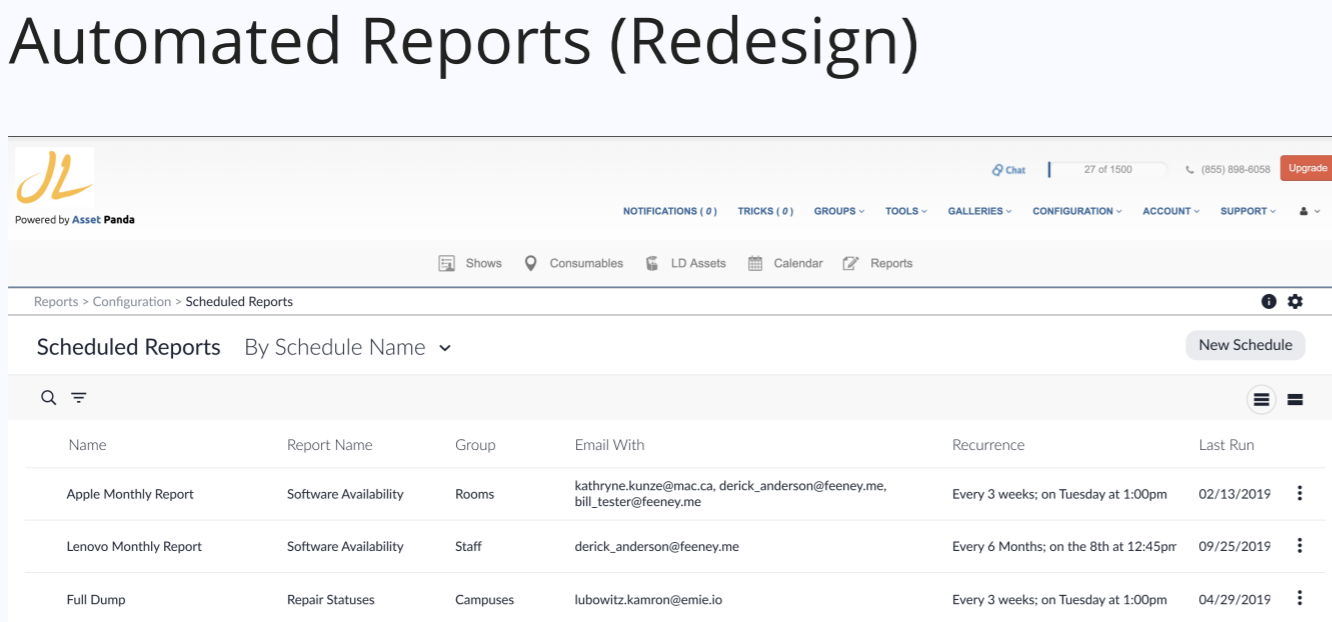


The create automated reports page.

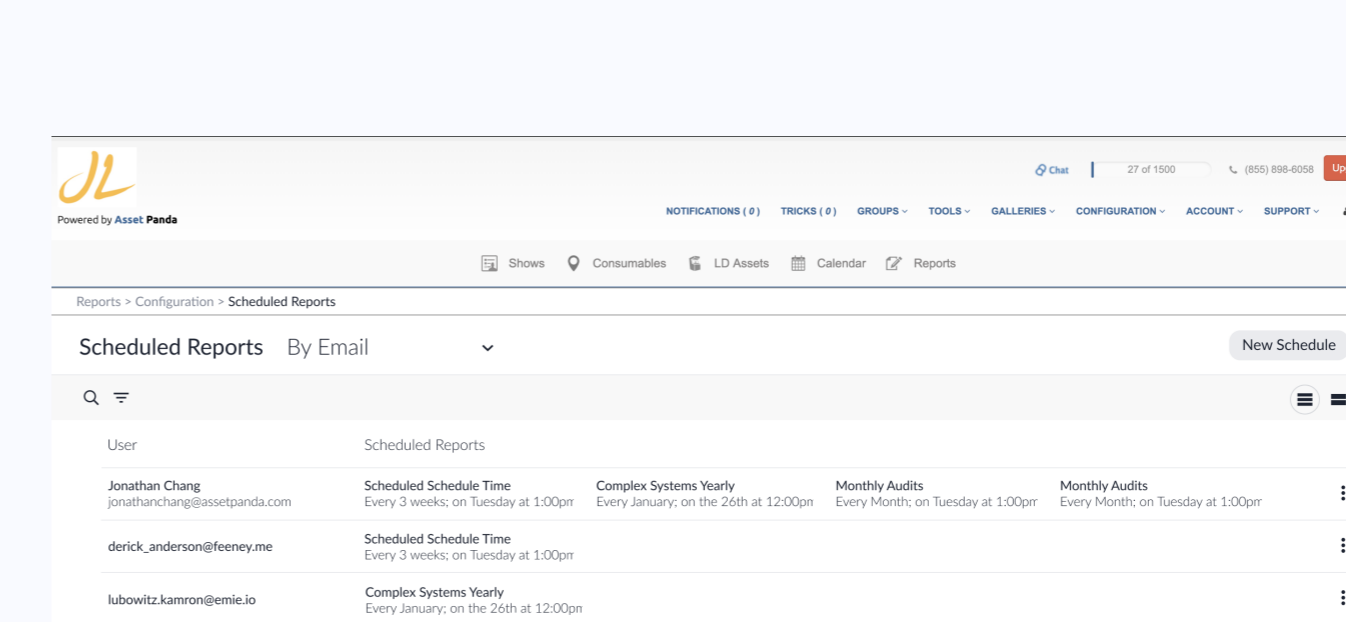
Automated Reports (Redesign)



We rebranded to Scheduled Reports from Automated Reports. We also provide a place for users to view all their schedules in one place.

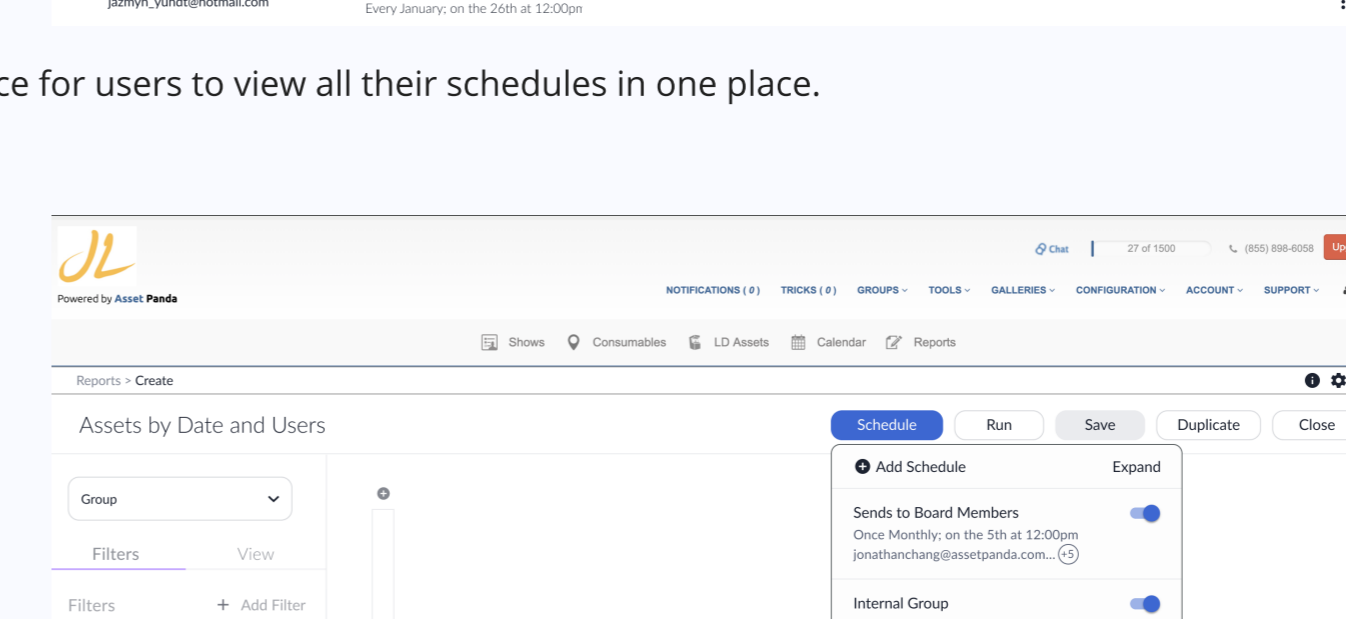
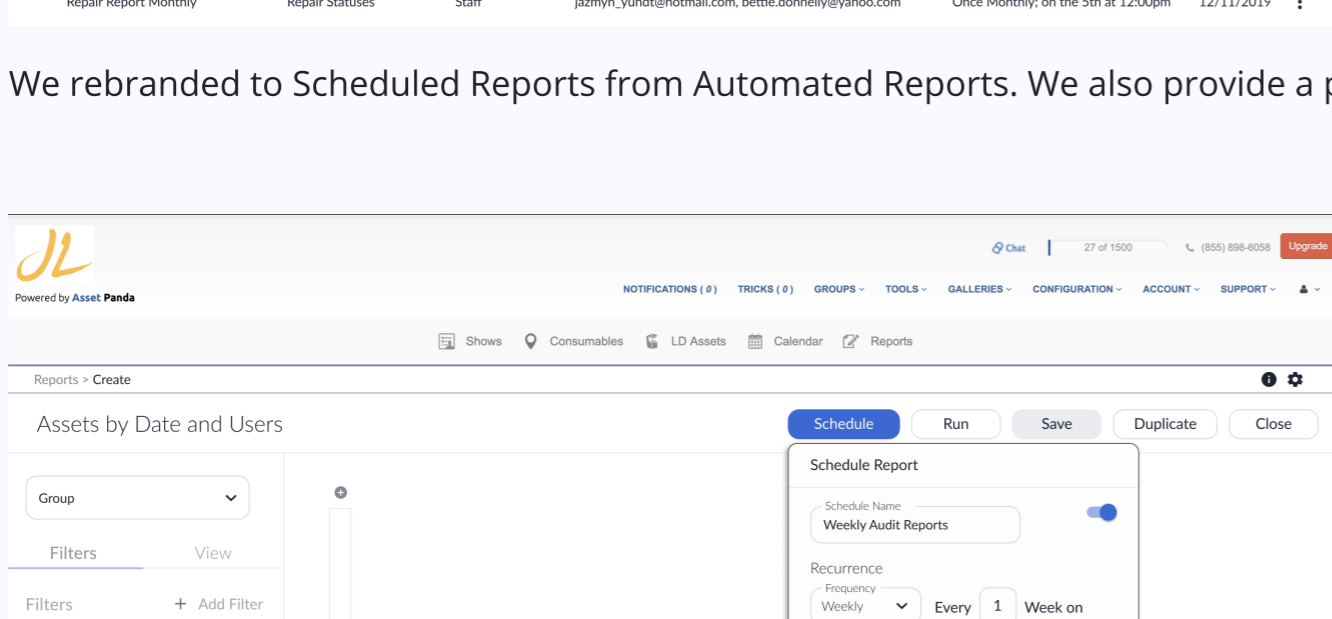


We included the ability to create a schedule during the report creation process.



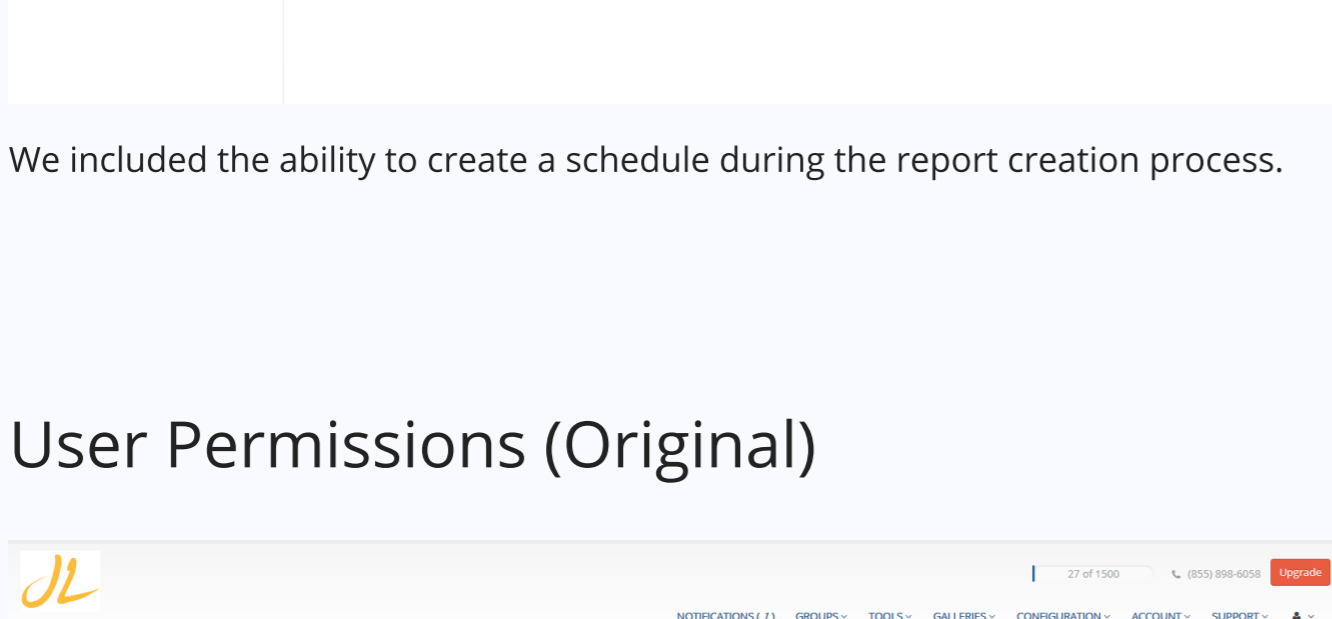
We added functionality to manage their schedule during the create report. This includes enabling or disabling reports.

User Permissions (Original)



In order to manage who can access reports, you must dig through the user permissions page.

User Permissions (Redesign)



We decided to include the ability to edit reporting specific user permissions directly into the module. Users are still able to go to the main user permissions page to see all permissions.

*Full study available by request.