UCI Graduate Division

Slate Research Report

Quarter 1 Major Deliverable

AGENDA

EXECUTIVE SUMMARY

EXECUTIVE SUMMARY

In March 2020, our team of MHCID graduate students kicked off a **user experience evaluation** initiative in partnership with UC Irvine's Graduate Division.

Our focus was on the Graduate Division's admissions software program: Slate. Launched in 2018, the Slate program has since received mixed reviews, and it is now an imperative to improve the program to provide a better user experience during the annual admissions cycle.

For the project's first of two phases, we conducted **four research methods** to understand the landscape and to uncover opportunities for improvement. We then created **three design artifacts** to help visualize and bring our findings to life.

Given the breadth of our approach, we were able to uncover a robust number of insights, which are distilled into the **key recommendations we'd like to address** with the UCI Graduate Division Team prior to moving into our second project phase.

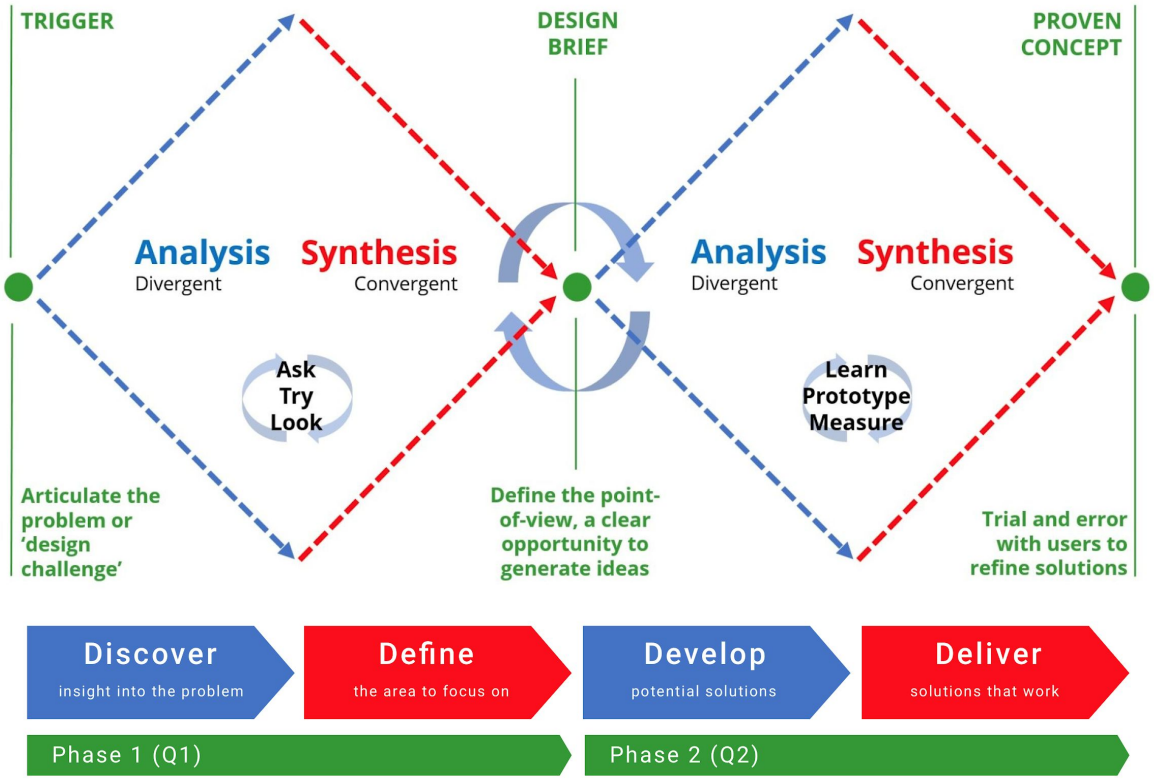
Strategic Recommendations

- Incorporate applicant pool insights
- Improve overall visibility into the applicant lifecycle
- Incorporate more robust collaborative functionalities
- Overall design and content revamp

Tactical Recommendations

- Improve Filters capabilities
- Usability improvements to the Reader View
- Provide increased visibility into applicant SIR status

DOUBLE DIAMOND



INTERVIEWS & CONTEXTUAL INQUIRIES

KEY FINDINGS

OVERVIEW

INTERVIEWS & CI

GOAL

To gain detailed qualitative insight into how users handle graduate admissions, comprising how they see and interact with UCI Slate (focusing on pain points and positives), as well as outside processes and workarounds (focusing on utility and rationale for adopting them), for a comprehensive understanding of their mental model and workflows.

METHODOLOGY

Half of the allotted 1-hour time was spent on a semi-structured interview of the user based on a selection of areas of interest, including usage and perceptions of Slate, challenges and workarounds, other admissions tools, collaboration, and training. The other half of each session was spent on a contextual inquiry-type exploration where the user shared their screen and talked through their workflow, focusing on the areas of home, browse, queue, reader, and review process.

USERS

9 faculty who are current active users of Slate for graduate admissions and our primary user group. They range in school and department but most have 2 years of experience with Slate, corresponding with the length of time it has been implemented at UCI.

KEY INSIGHTS

INTERVIEWS & CI

- Partitioning is confusing and off-putting
- Real-time collaboration is central
- Admissions is relativist, not absolutist
- The larger the program, the more they struggle
- There are two review stages--macroscopic and microscopic
- Macroscopic stage comprises high-level weighting across many applicants to eliminate and sort
- Heavy reliance on admissions processes, workarounds, and communications outside Slate at the macroscopic phase
- Slate is a database of information to query and extract from
- Microscopic phase comprises drilling down into select individual applications to seek detailed information

KEY INSIGHTS

INTERVIEWS & CI

- Output of the combined phases is an admit/waitlist/deny list
- There's complexity around estimating the target numbers of applicants to admit
- Users have difficulty finding key features, believe they don't exist. Often multiple possible paths exist for a single action
- UX writing and design elements do not match user expectations and don't evoke actual usage
- Flexibility of Slate is lacking
- Users are forced to do a multitude of limited actions in a set order, incurring repetitive stress
- Privacy concerns around protecting data from being seen
- Slate takes a maximalist design philosophy

USER ACTIONS TABLE

INTERVIEWS & CI

Admissions step	Slate "happy path" actions based on conceptual model	User actual actions based on mental model
Getting started	• Open Slate bookmark • Log in • Look at home page • Go to reader • Look at reader home	• Google UCI Slate and open URL • Log in • Go to reader
Seeing applicant list	• Open faculty review or other appropriate bin	• Run query • Export query to CSV/Excel
Selecting which applicants to review	• Select applicants at random or by memorized criteria • Add to queue	• Filter/sort/conditional format appropriate applicants • Add notes and rank columns in spreadsheet • Assign to faculty
Looking at application materials	• Open applications one by one from queue • Scroll through reader pages • Make notes/highlights	• Look at spreadsheet for majority • Only when needed, look at application by searching name and looking through search preview at reader
Leaving review	• Fill out reader sheet	• Fill out rank and comment box in spreadsheet • Adjust if needed based on applicant pool and faculty review
Collaboration with faculty	• (optional) pass to colleagues by recommending in reader sheet	• (done above)
Making admissions decisions	• Submit reader sheet • (no further visibility into actual status)	• Meet to decide admit list • Pass list to staff
Seeing SIRs	• Open appropriate bin • Filter if needed	• Get list from staff
Secondary admissions	• (no formal process)	• Look through spreadsheet for top candidates not accepted in first pass and pass to staff

USER MOTIVATIONS TABLE

INTERVIEWS & CI

Admissions step	As a faculty reviewer, I want ___ (what) so ___ (why)	
Getting started	Find my relevant page quickly	Save time and effort for the actual application review
Seeing applicant list	See all applicants by program and degree level regardless of stage	Keep tabs on applicant volume and status
Selecting which applicants to review	Filter/sort top applicants to fast-track and bottom-tier to mass deny	Focus decisions on middle tranche of applicants who are hardest to assess
Looking at application materials	Only look at relevant areas of applications in a user-friendly, scrollable, searchable, jumpable way	Efficiently look for qualitative aspects that make up for lower quantitative aspects for a better overall picture
Leaving review	Fill out a rank and comment and be able to see my colleagues' ratings concurrently; change my mind easily	Comparatively rank applicants against each other on a high level with a number and minutely with dialogue
Collaboration with faculty	Have consistent connection with colleagues, working together simultaneously	Coordinate complex department admissions processes while facilitating visibility, and without blocking anyone
Making admissions decisions	Come up with an admit/waitlist/deny list in concert with colleagues and easily submit it	Be on the same page as colleagues and conclude the primary admissions process
Seeing SIRs	See positive SIRs as they come in and always be aware of the count	Track SIRs to see if I need to pursue secondary admissions
Secondary admissions	Efficiently admit the top "maybes" in case of a shortfall	Hit the target for program attendance

CHANGE PRIORITY TABLE

INTERVIEWS & CI

Admissions step	Priority
Getting started	low
Seeing applicant list	moderate
Selecting which applicants to review	high
Looking at application materials	high
Leaving review	high
Collaboration with faculty	moderate
Making admissions decisions	low
Seeing SIRs	moderate
Secondary admissions	low

SLATE FACULTY SURVEY

KEY FINDINGS

OVERVIEW

SLATE FACULTY SURVEY

GOAL

To understand the scale and magnitude of the insights uncovered during our interview and contextual interview phase, as well as validate various hypotheses centered on the utility, frequency of use, and overall satisfaction of Slate's most prominent applicant review features: Widgets, Bins, Queue, Review Form, and Queries.

METHODOLOGY

Our survey was designed and administered through Qualtrics, using a series of predominantly closed-ended questions and Likert scales. The survey included a total of **30 questions** (including an optional email address collection question at the survey close), and was broken into sections centered on feature use and out-of-Slate workarounds. These process-based questions (three in total) were not captured in our initial survey deployment, but will be analyzed separately in the coming weeks. We received a total of **43** completed responses, with as many as 57 recorded responses for questions at the beginning of the survey. The completion rate was 75%.

USERS

43 faculty who are current active users of Slate for graduate admissions and our primary user group. The plurality of respondents worked within the Information & Computer Sciences department, although 11 schools in total were represented.

TOP-LINE FINDINGS

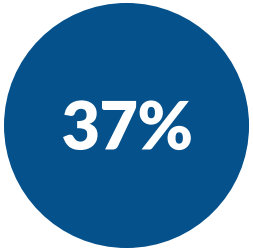
SLATE FACULTY SURVEY

Dissatisfaction

70% of respondents had a **less than favorable experience** with Slate for the 2020 admissions cycle. **Zero** respondents reported being very satisfied.

Mastery

37% of respondents felt ***somewhat to highly confident*** **in their mastery of Slate**.



Learning

Learning by doing was the most valuable educational resource for Faculty learning Slate.

KEY INSIGHTS

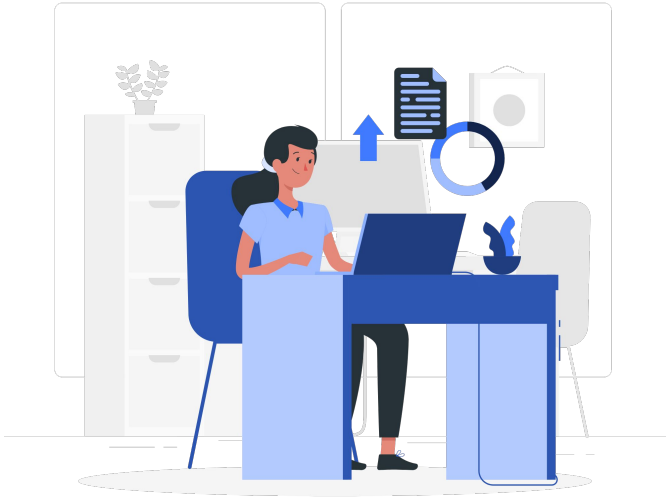
KEY INSIGHTS

SLATE FACULTY SURVEY

1 Contextual Learning

Regarding respondents' Slate learning process, **learning by doing was their most valuable resource**, with attending training and working with departmental staff tied for second.

This could indicate that ***a more tailored approach to learning Slate by departmental needs may increase overall mastery and confidence in the platform***.



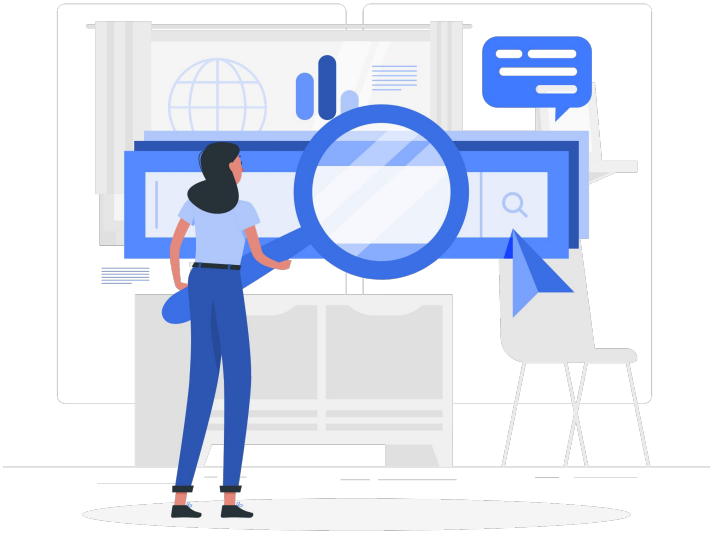
KEY INSIGHTS

SLATE FACULTY SURVEY

2 Frequency as a Magnifier

Lack of feature utility is strongly correlated to lack of overall satisfaction with Slate for the 2020 admissions cycle. In particular, beliefs that Filters, Bins, and Widgets were **not useful** to respondents applicant review process were most strongly tied to diminishing satisfaction with Slate.

When combined with usage metrics, this data could indicate that ***features which are accessed more frequently (even if by necessity) should require increased utility over other features.***



KEY INSIGHTS

SLATE FACULTY SURVEY

3 Don't Know *How* to Use & Workarounds

Respondents who had **"no opinion" of the features are strongly correlated to lack of use** (either never or rarely). For Queries and Bins this was 100% and 71%, respectively. In addition, there's a secondary **correlation between never using a feature and finding it very unuseful**.

Together, these data could indicate that ***respondents either don't know how to use the feature or that they've found another workaround that suits their needs***.

KEY INSIGHTS

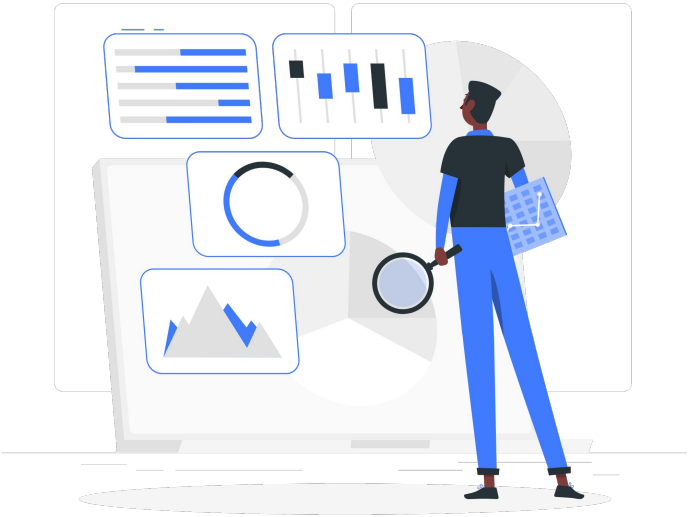
SLATE FACULTY SURVEY

4 Don't *Need* To Use

Respondents who had **"no opinion" of the features are strongly correlated to lack of use** (either never or rarely). For Queries and Bins this was 100% and 71%, respectively. In addition, there's a secondary **correlation between never using a feature and finding it very unuseful**.

There could be a lack of perceived "need to know" how to use the feature in question.

For example, respondents who had "no opinion" of Queries were most likely to **never** have used the Queries feature, and in turn were more likely to be somewhat satisfied with Slate. Departmental roles and permissions likely plays a role here.



KEY INSIGHTS

SLATE FACULTY SURVEY

5 Efficiency & Process Challenges

The following feature ***challenges*** were most strongly correlated with **lack of overall satisfaction** (neutral to negative sentiment) with Slate for the 2020 review cycle:

- The **Queue's lack of support for cross-faculty collaboration** (58%)
- **Having to reset Filters** with every browse or search activity (76%)
- **Review Forms do not reflect the departmental ratings criteria** used by faculty (74%)

The Slate system's conceptual model doesn't reflect Faculty needs for efficiency, collaboration, or ratings within the applicant review process.

HEURISTIC EVALUATION

KEY FINDINGS

OVERVIEW

HEURISTIC EVALUATION

GOAL

To discover and understand any potential issues behind the user experience and user interface design of Slate. By doing so, we can provide recommendations on how to improve these issues and create a better environment for users.

METHODOLOGY

A heuristic evaluation is a method for finding usability problems in a user interface. The method involves user experience experts to evaluate and examine the interface based on usability principles. This method allows us to find both major and minor problems within the user interface of Slate.

EXPERTS

We ran a four person individual heuristic evaluation of Slate. After the individual sessions; we gathered, reviewed, and compiled our findings to narrow down the key usability issues of Slate.

PROCESS

HEURISTIC EVALUATION

10 Usability Heuristics for User Interface Design

- #1: Visibility of system status
- #2: Match between system and the real world
- #3: User control and freedom
- #4: Consistency and standards
- #5: Error prevention
- #6: Recognition rather than recall
- #7: Flexibility and efficiency of use
- #8: Aesthetic and minimalist design
- #9: Help users recognize, diagnose, and recover from errors
- #10: Help and documentation

[10 Heuristics for User Interface Design by Nielsen Norman Group]

FINDINGS

HEURISTIC EVALUATION

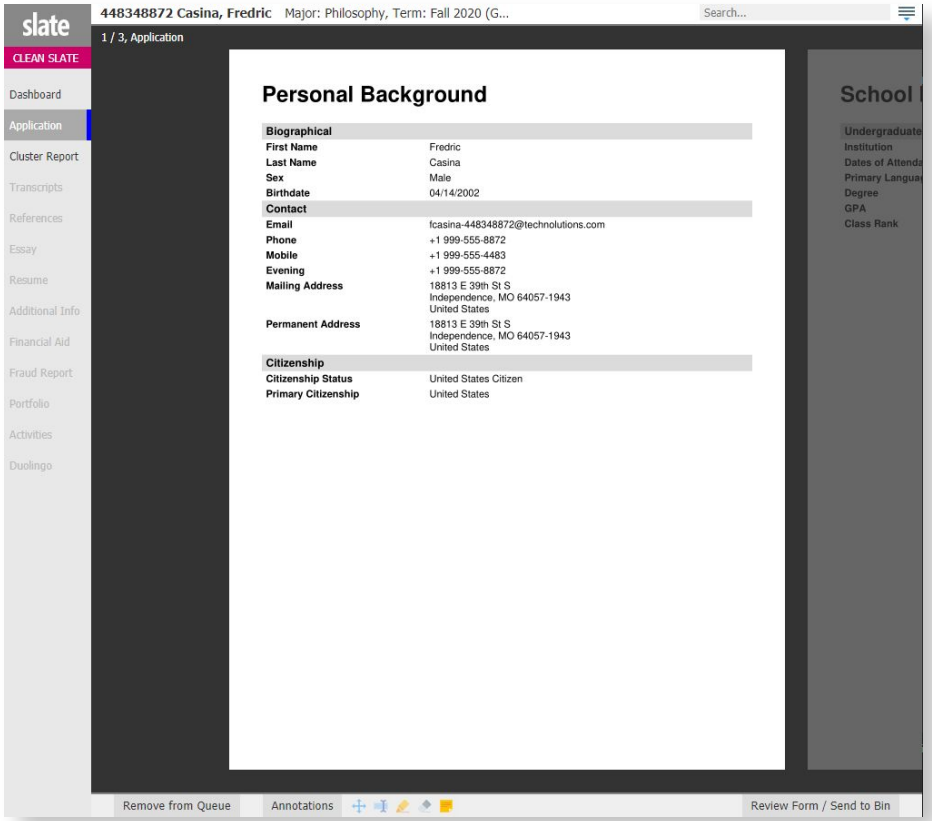
There were a total of 64 findings across the different pages of Slate.

- Application Review: 21 issues
- Filters: 11 issues
- Home: 3 issues
- Queue : 12 issues
- Reader: 10 issues
- Universal: 4 issues

Application Review

Key Insight

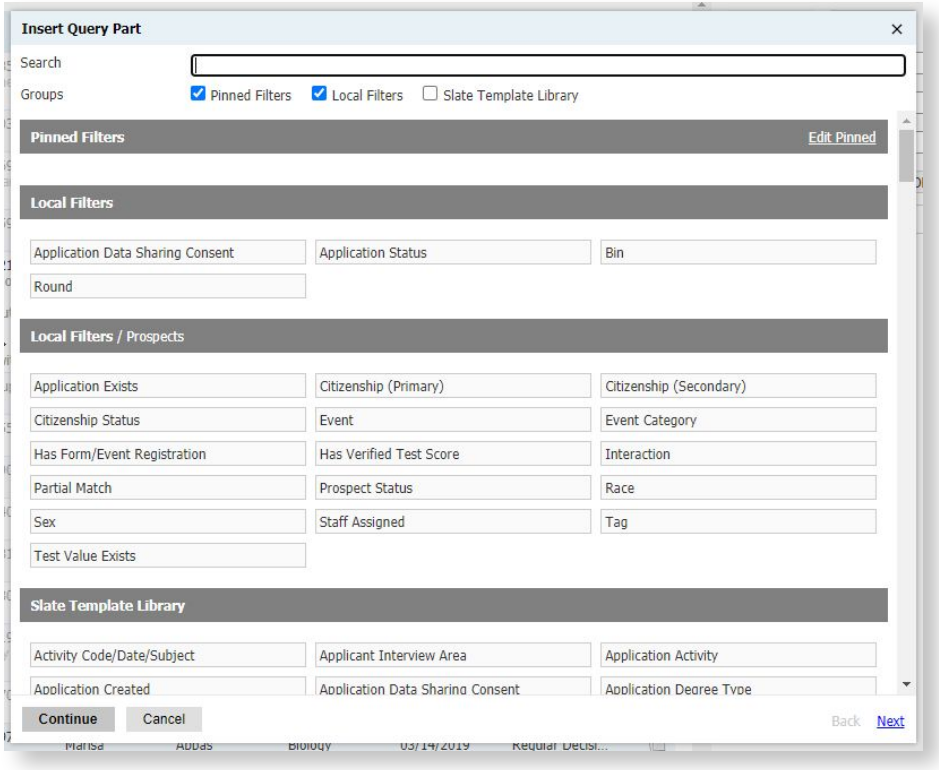
Most of the issues in Application Review relates to problems with the **navigations, interactions with the annotations, and other documentations.**



Filters

Key Insight

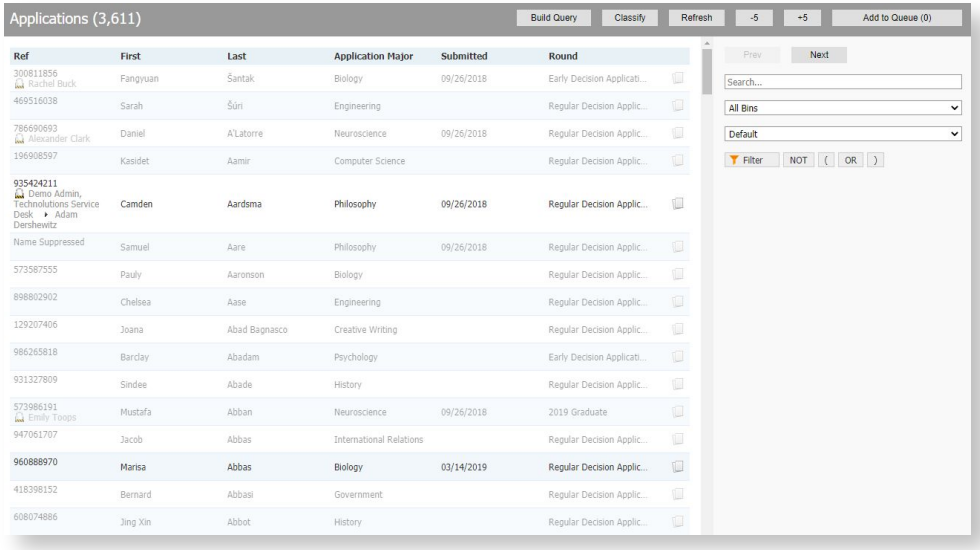
Most of the issues in Filters relates to problems with **visibility, search, and list of the available filters.**



Queue

Key Insight

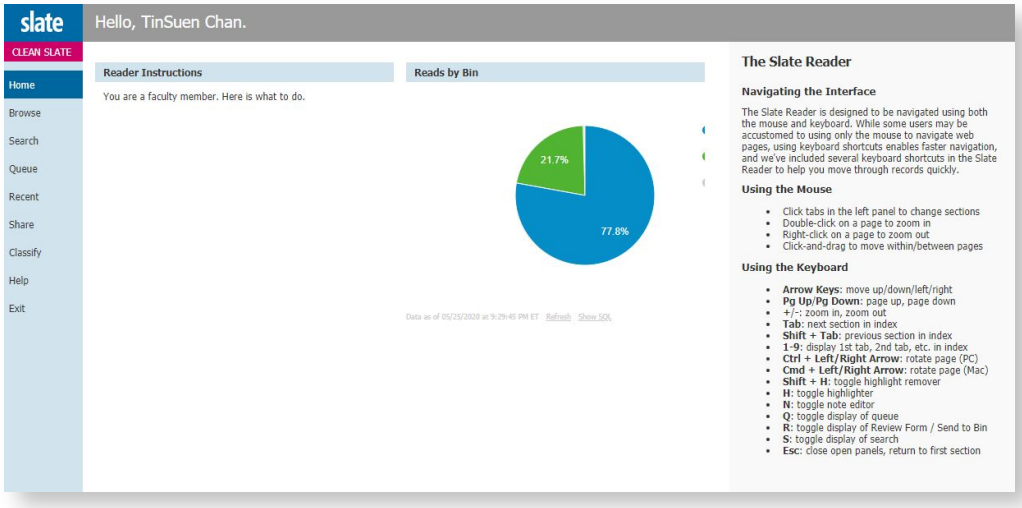
Most of the issues in Queue relates to problems with **the user experience of the queue: the way it works and the functionality of it.**



Reader

Key Insight

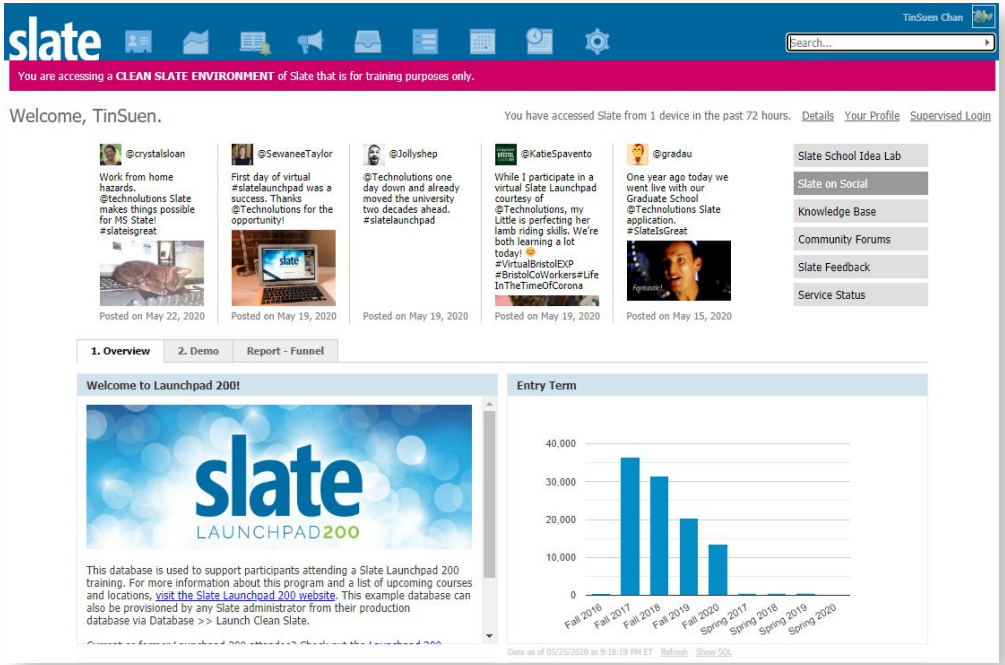
Most of the issues in Reader relates to problems with **the visibility and controls of the interface.**



Universal

Key Insight

The main issues that pertain to Slate overall relates to problems with **the difficulties of collaboration and communications.**



COMPETITIVE ANALYSIS

KEY FINDINGS

OVERVIEW

COMPETITIVE ANALYSIS

GOAL

To understand the pros and cons of certain features and implementations to help make informed decisions when improving the Slate platform.

METHODOLOGY

A competitive analysis is a strategy where we identify the major competitors and understand their approach to the same type of product. We evaluated 1 home grown platform, 2 direct competitors, and 3 other schools who are using Slate. Within each evaluation, we looked at their existing features, user interface, and structure.

1

HOMEGROWN

GATS

2

DIRECT COMPETITORS

Target X
Element 451

3

SCHOOLS USING SLATE

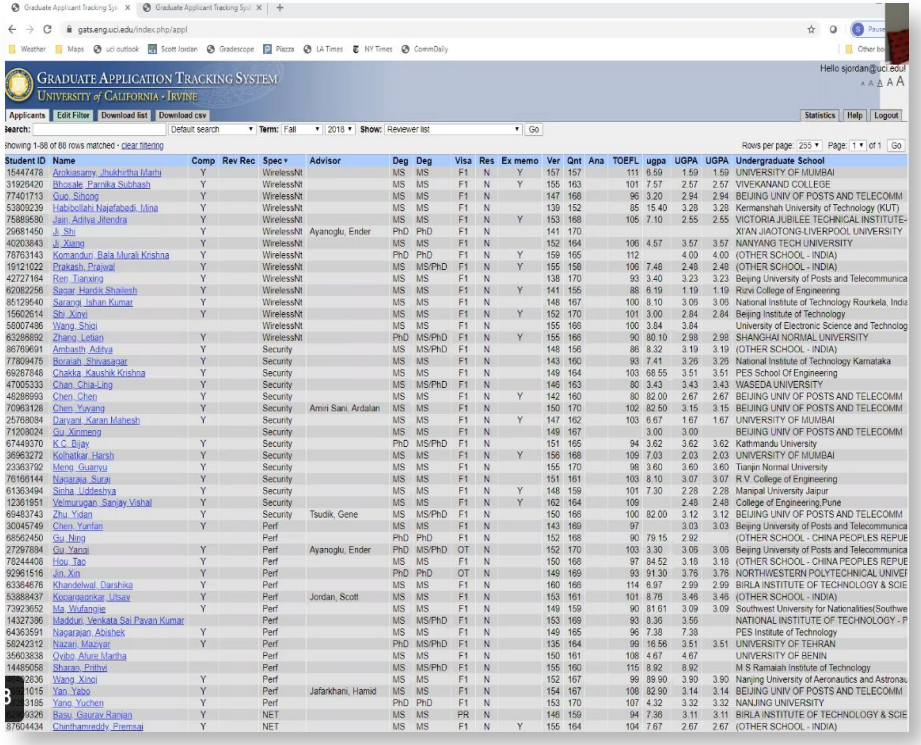
UC Merced
Baylor University
Johns Hopkins University

GATS

HOMEGROWN

GRADUATE APPLICATION TRACKING SYSTEM
UNIVERSITY of CALIFORNIA • IRVINE

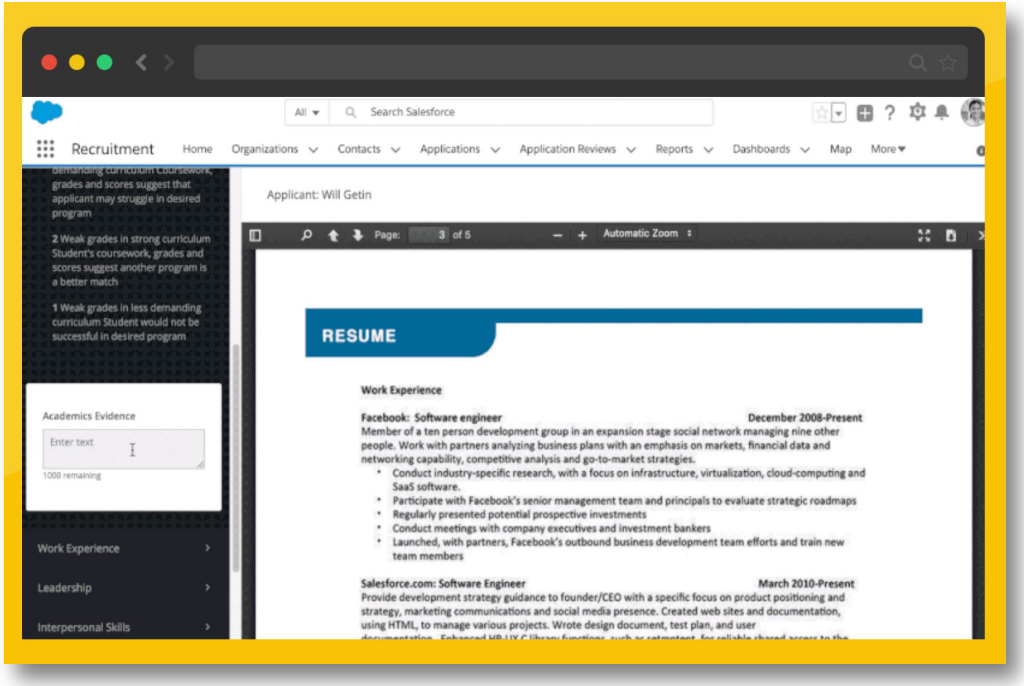
The system allows users to compare applicants' information in batches. Having a spreadsheet style interface allowed users to sort and rank applicants on a high level.



TARGET X

DIRECT COMPETITOR

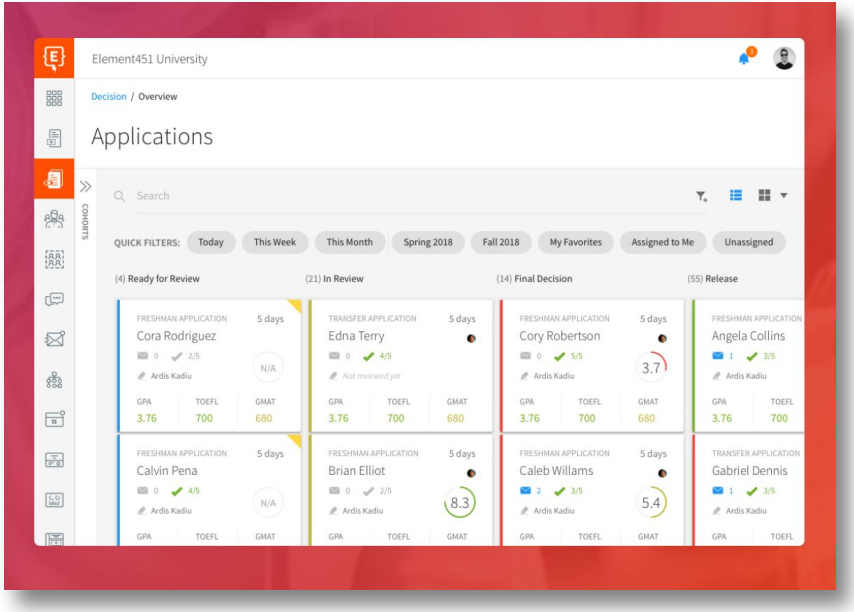
One of the packages that Target X offers to schools is called the Target X Recruitment Suite. Most of the features focus on recruiting and communicating with applicants; however, they also offer a feature that allows users to review the applications. It has a similar style as Slate but with a modern user interface.



ELEMENT 451

DIRECT COMPETITOR

Element 451 allows admissions and enrollment teams to work more efficiently with their cloud-based system. The most important features are their automation and analytics tools along with their clean user interface design , which uses up to date design trends to display the information.

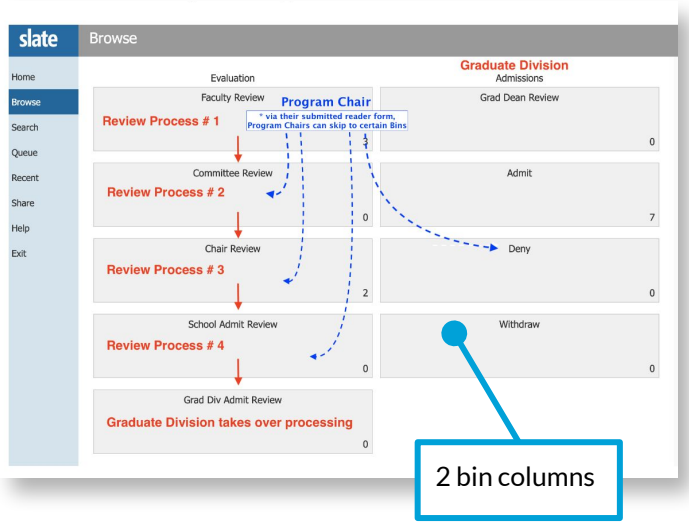


UC MERCED

OTHER SCHOOLS USING SLATE

UNIVERSITY OF CALIFORNIA
MERCED

Baylor University and Johns Hopkins University implemented their Slate platform similarly to UCI. On the other hand, UC Merced made interesting implementations that stood out amongst the rest of the schools.



Faculty members can only view the applications submitted to the graduate groups that they are members of. Faculty users can view their applications at all stages of review and admission. **However, the information and functions available to users depend on their assigned roles.** The roles for faculty are:

- **Regular Faculty** reviewers can add comments and input at the Faculty Review stage only. They cannot move applications through the review stages.
- **Admissions Committee** reviewers can add comments and input for applications in Faculty and Committee Review stages. **They cannot move applications through the review stages.**
- **Admissions Committee Chair** reviewers can add comments as above, and they can move applications into Committee Review and Chair Review.
- **Graduate Group Chair** reviewers can do all of above, and also add comments and input at Chair Review, as well as move applications into School Review for administrative

Within the faculty role, it is divided into 4 different sub roles.

KEY TAKEAWAY

KEY TAKEAWAY

COMPETITIVE ANALYSIS

1. User interface update would **enhance** the presentation of information.

2. GATS was working well due to the simplicity of it. Slate has more features but **failed t**o capitalize on them by not catering to the users and their needs**.**

3. Other competitors have a **clearer** organizational structure for displaying list information compared to Slate.

4. UC Merced broke down their faculty role into 4 sub-roles to assign specific Slate permissions into **finer detai**l.

ARCHETYPES, JOURNEY MAP, & USER FLOWS

KEY FINDINGS

ARCHETYPES

Faculty A : Assigners

"I'd rather do it manually, I don't trust the system to do it properly due to previous mistakes."

"Slate needs to be more efficient; it's a too many step process."

"Too much time is spent on figuring out the BIN structure in Slate."

Goals & Actions

- View applicant information quickly
- Assign applicants to faculty members to review
- Review applicants after approval of faculty members
- Filter/sort top applicants to fast-track and bottom-tier to mass deny
- Use filters to sort out applications based on departments and specialization
- Come up with an admit/waitlist/deny list in concert with colleagues and easily submit it
- Communicate with other faculty members

Needs

- Access to high-level applicant information
- Ability to compare applications
- Decide among faculty members on applicants
- Ability to sort and filter applications
- Sort applicants by faculty review scores

Pain Points

- Too many applications to review, no roles or permission levels to sort out different applicants
- Comparison between applications in Slate is difficult
- Lots of features but are not useful, like Queue - too many steps

ARCHETYPES

Faculty B: Reviewers

"If there's too many steps, I give up and assume I can't do it or it's too hard to do."

"Slate has a deep learning curve. I have to re-learn it each year due to gap in use."

"I think it was designed with the mindset that there are few students applying and few faculty reviewing...not realistic for us"

Goals & Actions

•Find revelant pages quickly

• Fill out a rank and comment and be able to see my colleagues' ratings concurrently

• Build and run query to export applicant list to CSV/Excel

• Creates own way to filter/sort/conditional format appropriate to applicants in spreadsheet

• Look through spreadsheet for top candidates and forward to staff rather than submitting in reader

• Look through queue and review applications

Needs

• Save time and effort for the actual application review

• Comparatively rank applicants against each other

• See all applicants by program and degree level regardless of stage

• Easier access to statistics and reporting

• Coordinate complex department admissions processes while facilitating visibility, and without blocking anyone

Pain Points

• Slate features are too complex and is not easy to understand or use

• The flexibility of Slate is lacking, often tied to the fact that permissions are opaque, and not granular or customizable

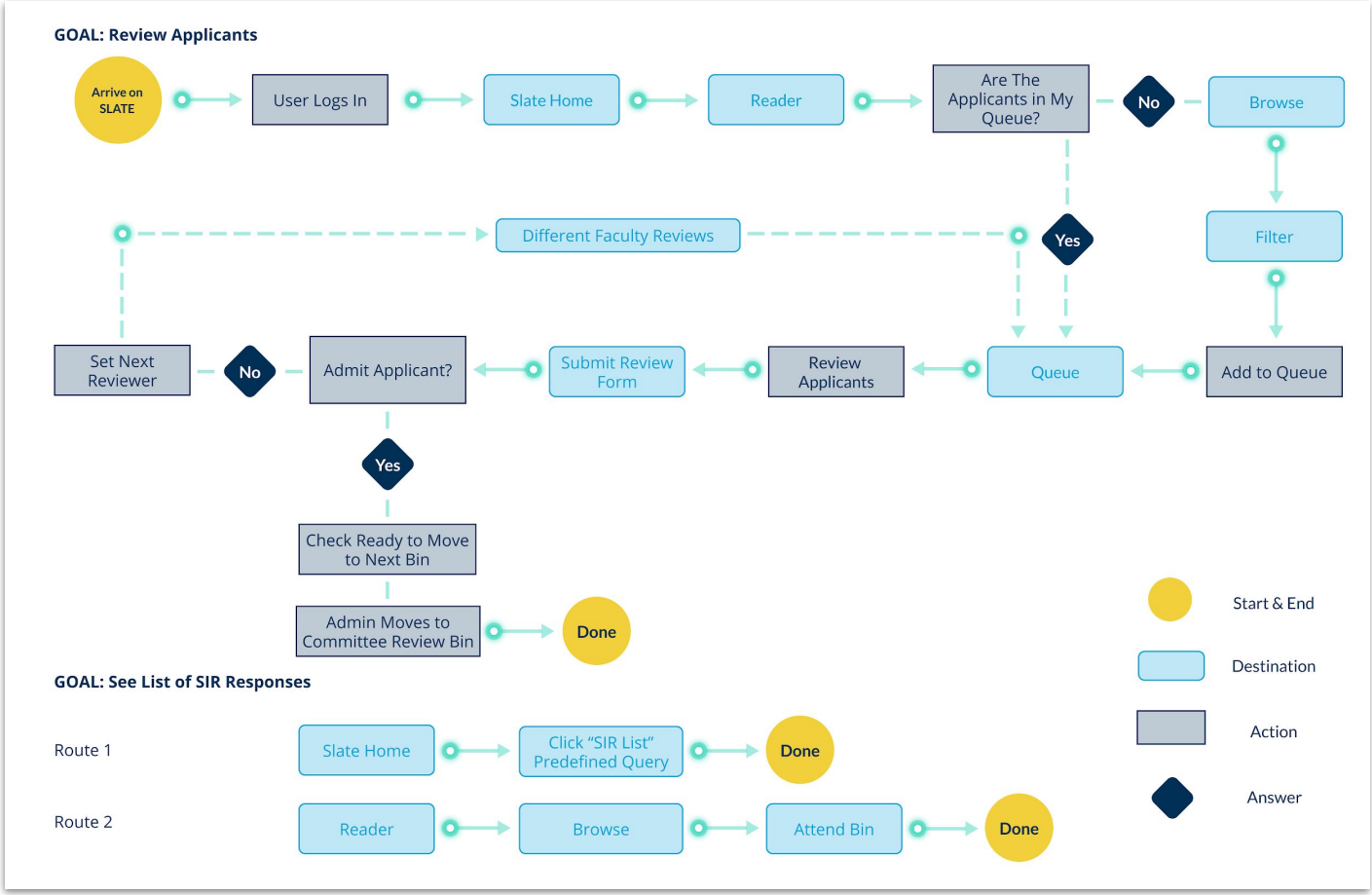
• Hard to look through applications when there are more than 50 applicants and even over 300 applications is possible

JOURNEY MAP

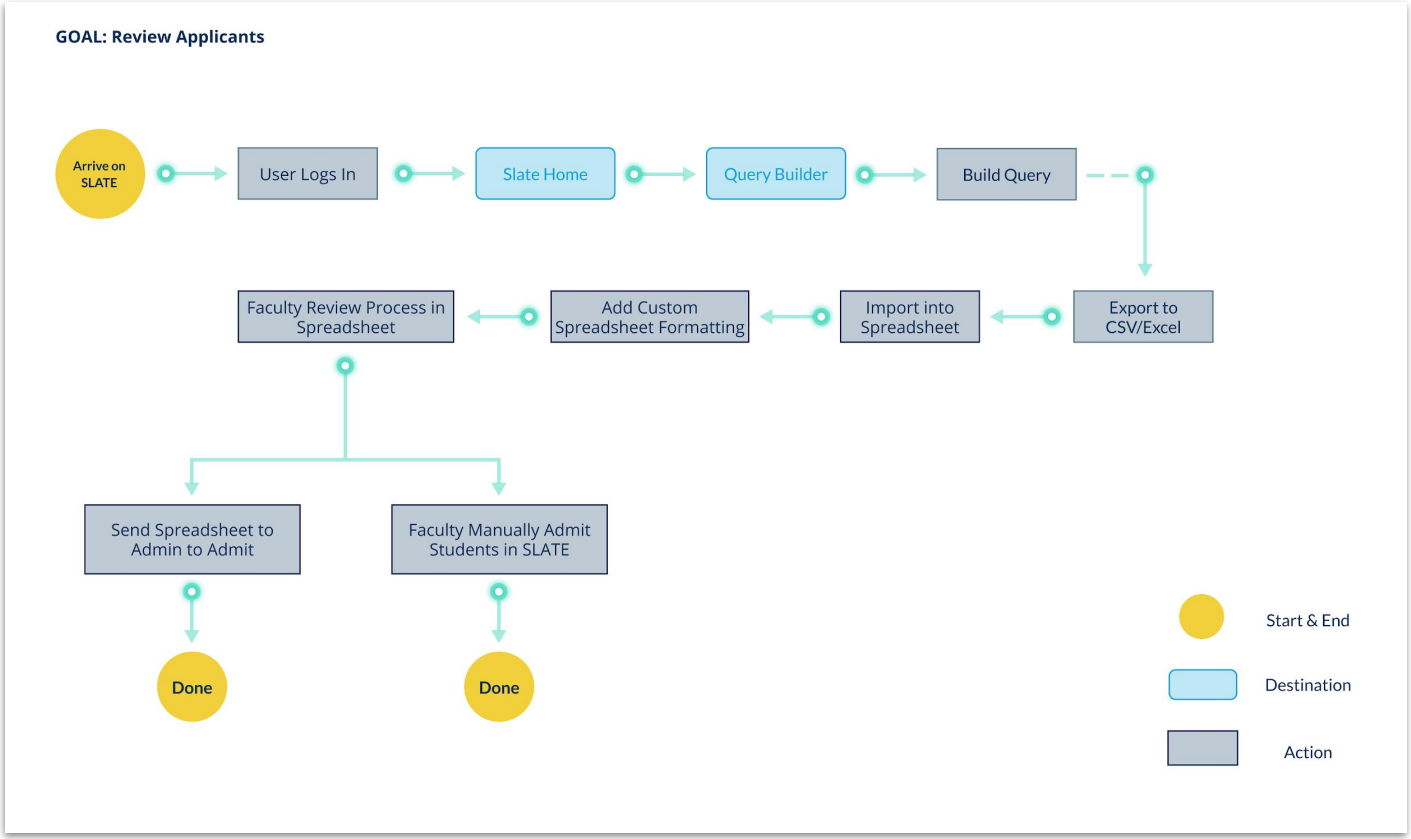
USER'S EXPERIENCE USING SLATE

GETTING STARTED	VIEWING APPLICANT LIST	SELECTING APPLICANTS TO REVIEW	LOOKING AT APPLICANTS MATERIAL	LEAVING A REVIEW	MAKING ADMISSION DECISIONS	VIEWING SIR STATUS
SLATE'S CONCEPTUAL MODEL						
• Go to Reader.	• Open Faculty Review / Bins.	• Select by random or memorize filter criteria then add to Queue.	• Scroll through Reader Page.	• Fill out Review Form.	• Submit Review Form.	• Open appropriate bin or Filter if needed.
MOTIVATIONS						
• Find the relevant page quickly to save time and effort for the actual application review.	• See all applicants by program and degree level regardless of the stage to keep tabs on applicant volume and status (bird's-eye view).	• Filter/sort applicants to deny in bulk and focus decisions on applicants who are hardest to assess.	• Look at relevant areas of applications that is scrollable and searchable. • To efficiently review an applicant's qualitative criteria.	• Have the ability to see colleagues' ratings at the same time and change ratings easily. • Rank applicants against each other on a high level.	• Collobration: Come up with a list that shows admit, waitlist, and deny applicants together with colleagues.	• See positive SIRs in order to be aware of the volume. • Track SIRs to see if secondary admissions are needed.
PAINPOINTS						
• N/A	• Bins are not organized in a way that makes sense. • Not being able to see where the applicants are in their review process.	• List of filters is not organized in a way that makes sense. • Need to reset filters each time when browsing or searching. • Cannot simultaneously review applicants and keep track of where they are in the process.	• Difficult to view applicants in batches.	• Available ratings don't reflect how department score applicants. • Limitations of system feature to work collaboratively with colleagues.	• Cannot edit submitted comments without filling out a new Review Form.	• Difficult to see SIR status. • Unsure if viewing by SIR status functionality even exist. • Desire to track positive SIRs to make personal contact with admitted students to motivate them to accept their SIR.
WORKAROUND						
• Google UCI Slate and open URL.	• Run Query in Slate then export Query to CSV/Excel.	• Look at majority of applicants on the spreadsheet by filtering/sorting through appropriate applicants. • Collegues add notes and rank columns in spreadsheet and then assign to faculty to review.	• If needed, look at application by searching applicant's name and look through search preview in Reader.	• Fill out rank and comment column in spreadsheet. • Adjust if needed based on applicant pool and faculty review.	• Set up meetings to decide on admin list or pass list to staff to review.	• Receive a list from staff to see if the amount of positive SIRs is met.

USER FLOW - SLATE'S SUGGESTED



USER FLOW - FACULTY'S FLOW



RECOMMENDATIONS

OVERVIEW

RECOMMENDATIONS

GUIDING PRINCIPLES

- Design for the user and their needs
- Simplification and focus over flexibility
- Limit the need for per-user customization
- Balance strategic and tactical recommendations

STRATEGIC VS. TACTICAL

The following recommendations are a mix of both **Strategic** and **Tactical** which allow the Slate team to create a path forward of continuous improvement. Inside of each **Strategic** recommendation we will identify opportunities for immediate benefit to take steps towards the larger vision.

APPLICANT POOL INSIGHTS

RECOMMENDATIONS

Problem Statement

With a large number of applicants it becomes untenable to manually review each candidate. Faculty export the applicant list to a spreadsheet and review outside of Slate to get a birds-eye view of the applicants.

Recommendation

Provide analytic insights on a per applicant basis that can be viewed, filtered, and sorted at a high level.

Faculty Benefit

Reduce the need to leave Slate to review applicants.

APPLICANT LIFECYCLE VISIBILITY

RECOMMENDATIONS

Problem Statement

The separation of applicants into bins makes it difficult to get a holistic view of the applicant pool from initial application through to SIR response.

Recommendation

Add visibility into the application process from initial application through to SIR response.

Faculty Benefit

This visibility would allow faculty to track applicants through the entire application lifecycle.

COLLABORATIVE REVIEWS

RECOMMENDATIONS

Problem Statement

The process of collaborative reviews in Slate has limited functionality and faculty tend to rely on spreadsheets and email for collaboration.

Recommendation

Create collaborative review functionality in Slate including the ability to assign reviews, see the status of reviews, not see other reviews until you have completed your own, and to provide a consistent rating mechanism for sorting.

Faculty Benefit

Collaborative reviews will add transparency into the review process and give faculty coordinators more confidence that they are picking the right applicants.

DESIGN AND CONTENT IMPROVEMENTS

RECOMMENDATIONS

Problem Statement

Although the Slate interface is powerful, that power adds complexity that can overload users with unused functionality.

Recommendation

Perform an audit and update of all heavily used areas of Slate with the goal to reduce complexity and increase the quality of the user experience.

Faculty Benefit

Reducing the interface load of Slate will allow faculty to confidently achieve their goals.

FILTER USABILITY REVIEW

RECOMMENDATIONS

Problem Statement

The existing filter functionality has many usability issues that cause confusion and frustration with users.

Recommendation

Improve the filter user experience with a goal to decrease complexity and streamline the functionality. This could include implementing filter stickiness and a UI redesign of field selection.

Faculty Benefit

Reduce the need to leave Slate to filter applicants.

USABILITY OF READER VIEW

RECOMMENDATIONS

Problem Statement

Although most faculty appreciated that all the applicant data was in a central location, they consistently were frustrated by the user experience of reviewing applicant information.

Recommendation

Improve the Reader View by bringing it closer to modern standards and user expectations. This could include converting the reader sheets from horizontal scroll to traditional vertical scroll, making search more prominent, and removing unused fields.

Faculty Benefit

By improving the Reader View, the faculty will be better equipped to do in-depth reviews of candidates.

SIR STATUS VISIBILITY

RECOMMENDATIONS

Problem Statement

The applicant's SIR status in Slate is difficult to find is not generally trusted by faculty. Many faculty request a list of their SIR positive applicants from an admin.

Recommendation

Create an SIR dashboard that provides transparent SIR status and statistics. This could include outstanding SIRs, SIR positive vs. negative, latest SIR responses, and summarized applicant statistics of SIR positives.

Faculty Benefit

Adding this dashboard would reduce load on the admins and provide more direct visibility into an important part of the application lifecycle.

APPENDIX

DETAILED REPORTS

APPENDIX

DETAILED REPORTS

- Interview & Contextual Inquiries
- Slate Faculty Survey Report
    - Slate Faculty Survey Design
- Competitive Analysis
- Heuristic Evaluation Overview
    - Heuristic Evaluation Compilation Sheet
- Ten Usability Heuristics by Nielsen Norman Group

Note: Google documentation editor permissions have been provided to Audra M. Hansen (amhansen@uci.edu) and Ruth Quinnan (rquinnan@uci.edu). They will be the contacts for access going forward.

UCI Graduate Division

Slate Design Report

Quarter 2 Major Deliverable

AGENDA

EXECUTIVE SUMMARY

EXECUTIVE SUMMARY

For our project's second phase, we took the key recommendations that were identified in the first phase and turned them into design concepts. Our design process started off broad and became more refined throughout the quarter. We created low-fidelity and then high-fidelity wireframes for the following areas:

Applicant Dashboard

- A central hub that provides a birds-eye view of the applicant pool, with the flexibility to sort and filter the candidates based on user needs

Applicant Packet

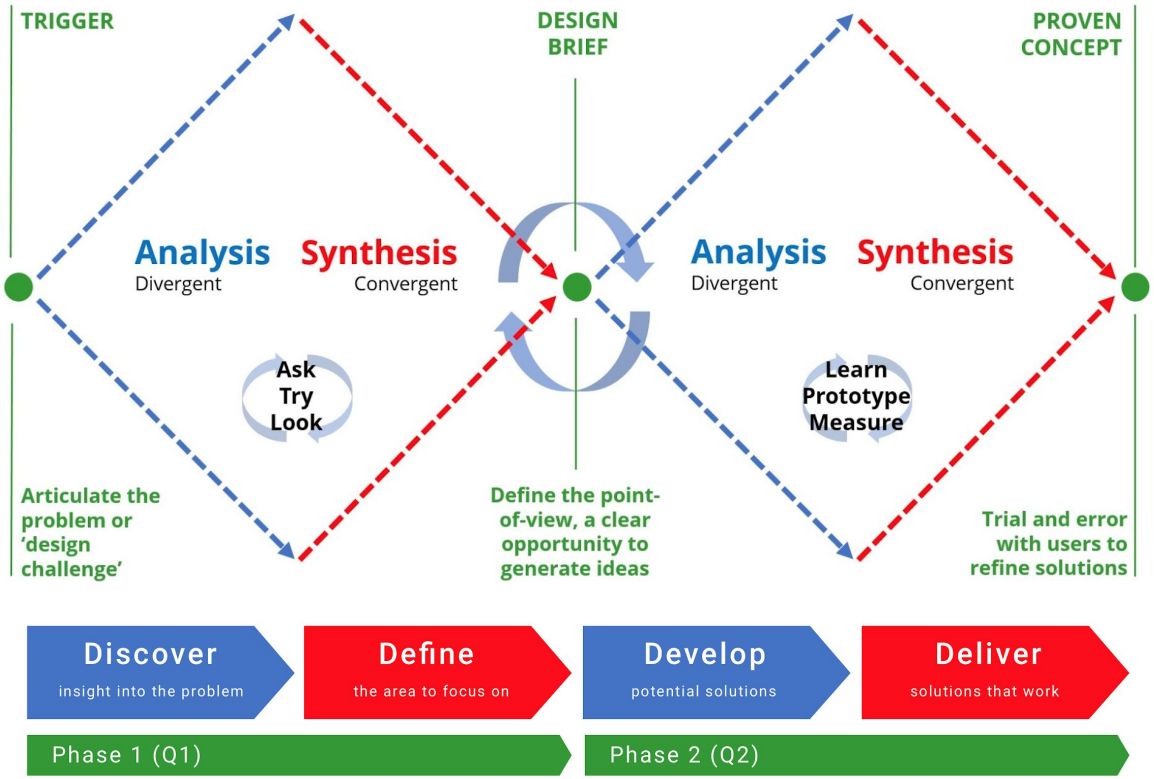
- A redesign of the Reader that allows Faculty to more efficiently review, comment, and make applicant decisions

SIR Dashboard

- A central hub that provides easy access to SIR information to improve positive admissions yields at the final stages of the admissions cycle

These designs concepts went through 2 rounds of design testing to get users' validation and feedback on our design solutions. We were able to uncover a robust number of insights, which are distilled into the final designs and roadmap.

DOUBLE DIAMOND



RECOMMENDATIONS REFRESHER

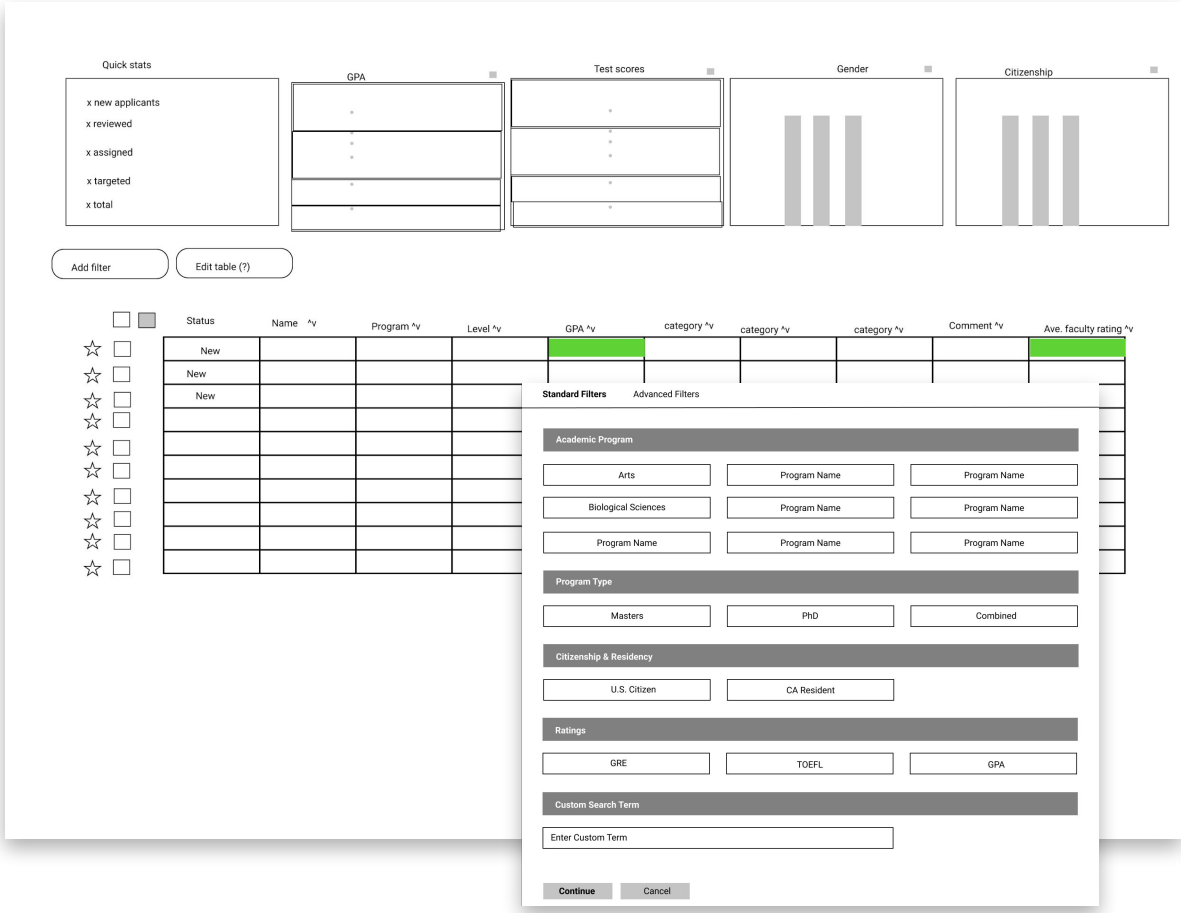
Applicant Pool Insights	Provide analytic insights on a per applicant basis that can be viewed, filtered, and sorted at a high level.
Usability of Reader View	Improve the Reader View by bringing it closer to modern standards and user expectations. This could include converting the reader sheets from horizontal scroll to traditional vertical scroll, making search more prominent, and removing unused fields. We now call this view the Applicant Packet.
Collaborative Reviews	Create collaborative review functionality in Slate including the ability to assign reviews, see the status of reviews, not see other reviews until you have completed your own, and to provide a consistent rating mechanism for sorting.
Applicant Lifecycle Visibility	Add visibility into the application process from initial application through to SIR response.
SIR Status Visibility	Create an SIR dashboard that provides transparent SIR status and statistics. This could include outstanding SIRs, SIR positive vs. negative, latest SIR responses, and summarized applicant statistics of SIR positives.

FROM RESEARCH TO INITIAL DESIGNS

INITIAL IDEA TO SKETCH

The group explored early ideas and features that can improve the Applicant Dashboard and filter experience:

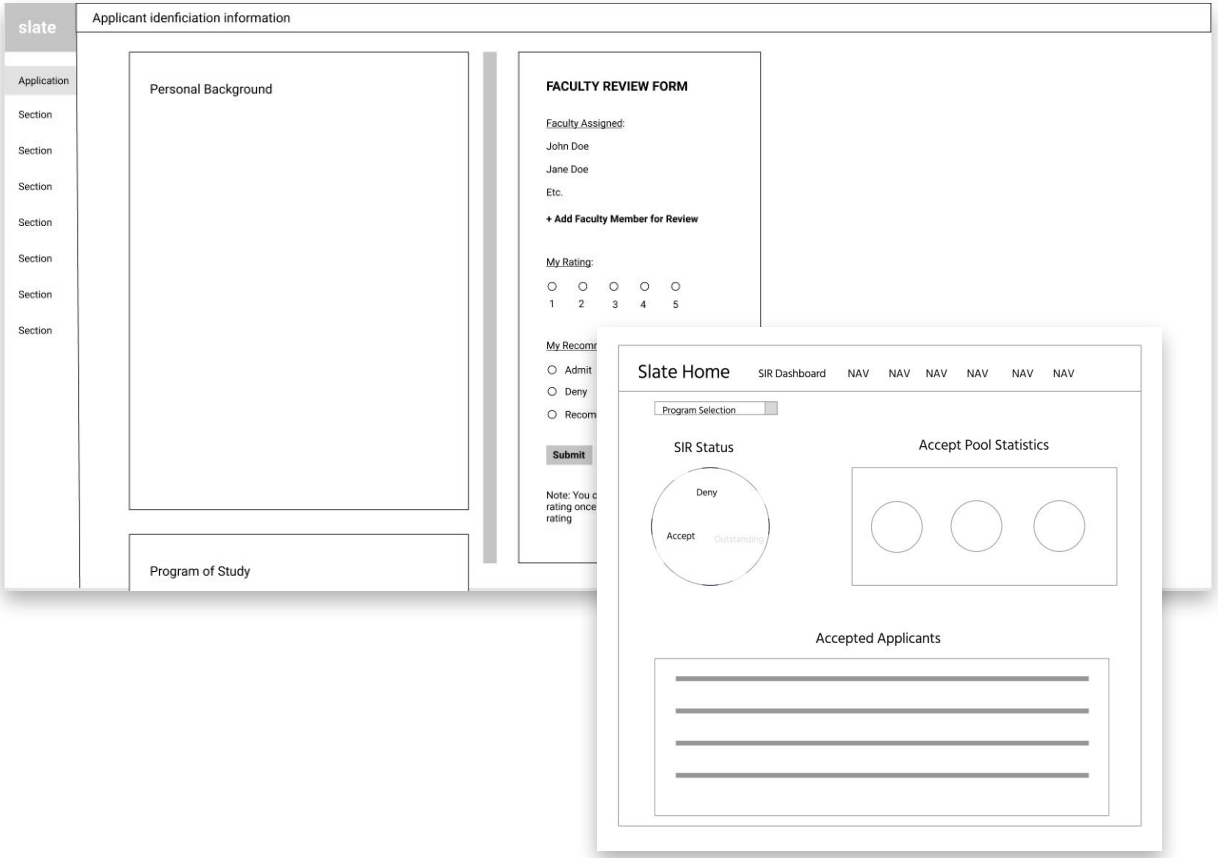
- Color coding the grid list
- Graphs to indicate applicants
- Ability to favorite or select applicants
- Simplified filter



INITIAL IDEA TO SKETCH

The group explored early ideas and features that can improve the Applicant Packet and SIR Dashboard:

- Vertical scrolling of packet
- Easy review form experience
- Graphs to display accepted applicants in the SIR dashboard
- A quick statistics of applicants



REDESIGN FOCUS

Applicant Dashboard

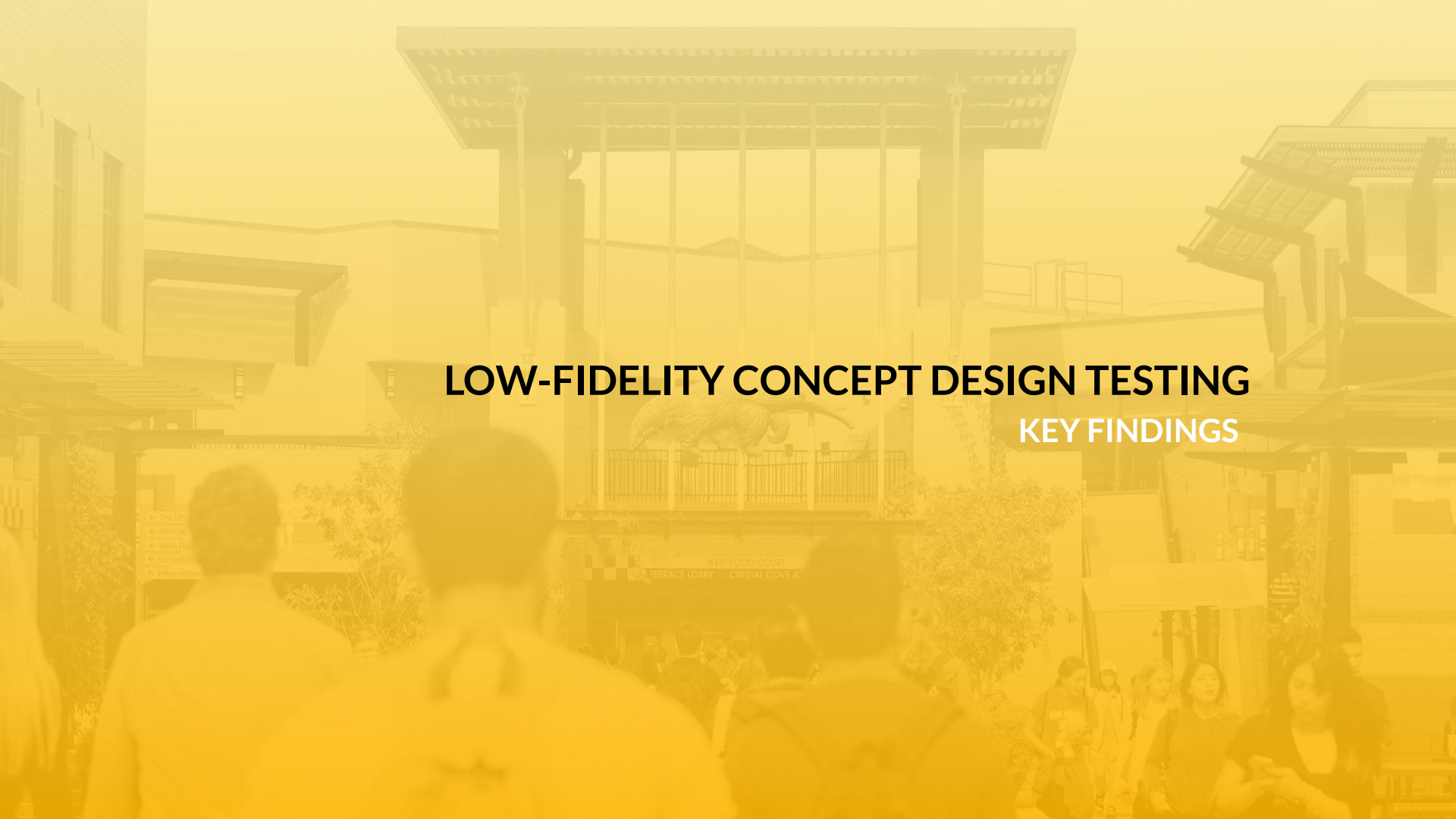
This was a large focal point in our design efforts. We designed a dashboard from scratch to serve as a central hub for Faculty to view, filter, and compare applicant information at a glance.

Applicant Packet

We completely redesigned the Applicant Packet to create a smooth experience in reviewing, commenting, and making applicant admissions decisions.

SIR Dashboard

The SIR Dashboard was also designed from scratch, with the goal of providing a simplified and informational tool through which Faculty can view the status of accepted applicants.



LOW-FIDELITY CONCEPT DESIGN TESTING

KEY FINDINGS

OVERVIEW

LOW-FIDELITY DESIGN CONCEPT TESTING

GOAL

To qualitatively assess the broad concepts of prototyped designs across 3 key product areas for similarity to user admissions processes and mental models, with the end goal of aligning the prototype according to user needs.

METHODOLOGY

Each 30-minute session was spent on semi-structured concept testing of the user based on scenarios they'd likely encounter using the redesigned Slate, with attention to utility. Half of the session was dedicated to assessing the Applicant Dashboard, a quarter to the Applicant Packet, and a quarter to the SIR Dashboard. Users were asked how they approach relevant stages of their current application process, how they felt about various design concepts, how proposed designs would affect their processes, and shortfalls and unanswered questions in the concepts.

USERS

3 faculty and 2 staff members who are current active users of Slate for graduate admissions, ranging in school and department.

KEY FINDINGS

LOW-FIDELITY DESIGN CONCEPT TESTING

APPLICANT DASHBOARD

Most of the broad concepts proposed were well-received by users (quick stats box, summary statistics and graphs, applicant table, color-coding, filters). However, users struggled with articulations around default columns and data graphed. Users had mixed reactions to button-enabled actions such as marking applicants.

APPLICANT PACKET

Users had generally positive reactions to the bi-columnar design with applicant details on the left and a persistent review form on the right, in addition to vertical scroll, assigning reviewers, and inline commenting. However, users had mixed reactions to the idea of public vs. private comments.

SIR DASHBOARD

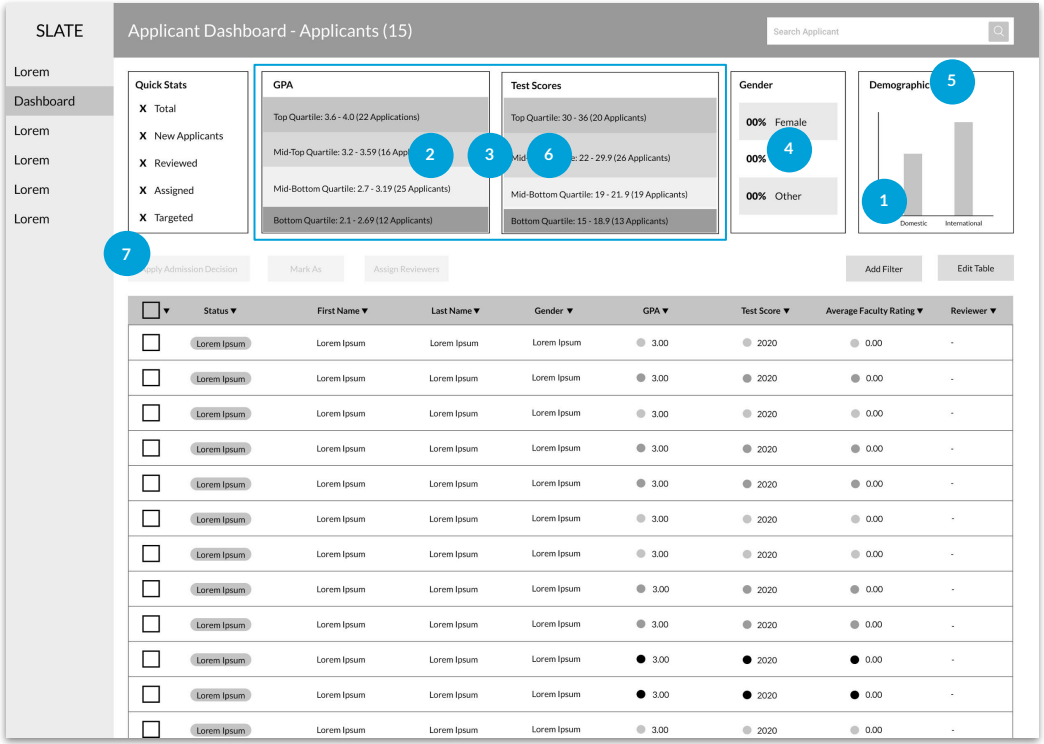
Many users shared positive reactions to graphs, contact information, switching programs, the 3-tab division, and the general concept of an SIR dashboard. However, users had mixed conceptions of the terminology, targets, and downloading.

APPLICANT DASHBOARD

LOW-FIDELITY DESIGN CONCEPT TESTING

Conceptual Applicant Dashboard improvements include:

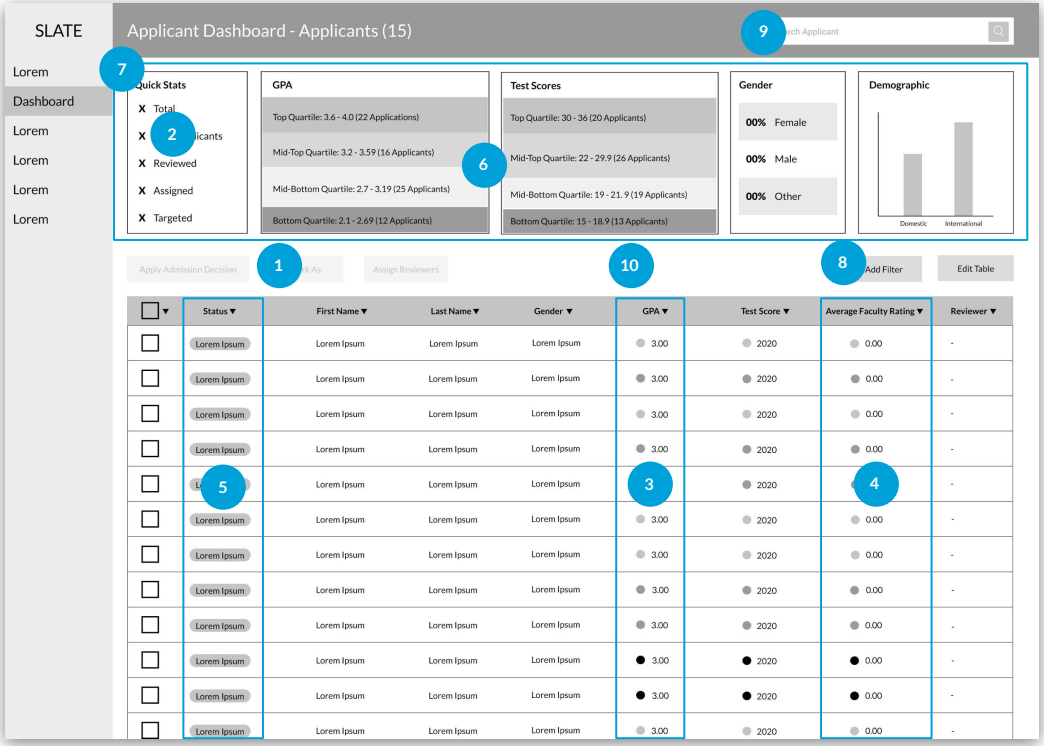
1. Ensure that X/Y axes on graphs are appropriate
2. When mousing over a dot on a scatter graph, display the applicant's name and related figures
3. When clicking on a dot on a scatter graph, open the applicant packet in a new tab
4. Ensure that all locations that display gender have an "Other" category
5. Change "Demographic" to "Region"
6. Ensure graph colors and scales match table color coding
7. Move forward with "apply admissions decision" and "assign" buttons/functionalities



APPLICANT DASHBOARD

LOW-FIDELITY DESIGN CONCEPT TESTING

1. Remove the “mark as” button for now
2. Remove ability to select top X applicants
3. Display both Raw and Unconverted GPAs
4. Remove Average Faculty Rating
5. Update the column “Status” to match the Slate term “Bin”
6. Ensure color coding in the table matches graphs
7. Ensure that graphs update with filter use
8. Add filter for status, i.e. awaiting materials
9. Separate out filter by program and add to top of page
10. Move keyword search from filter to search bar

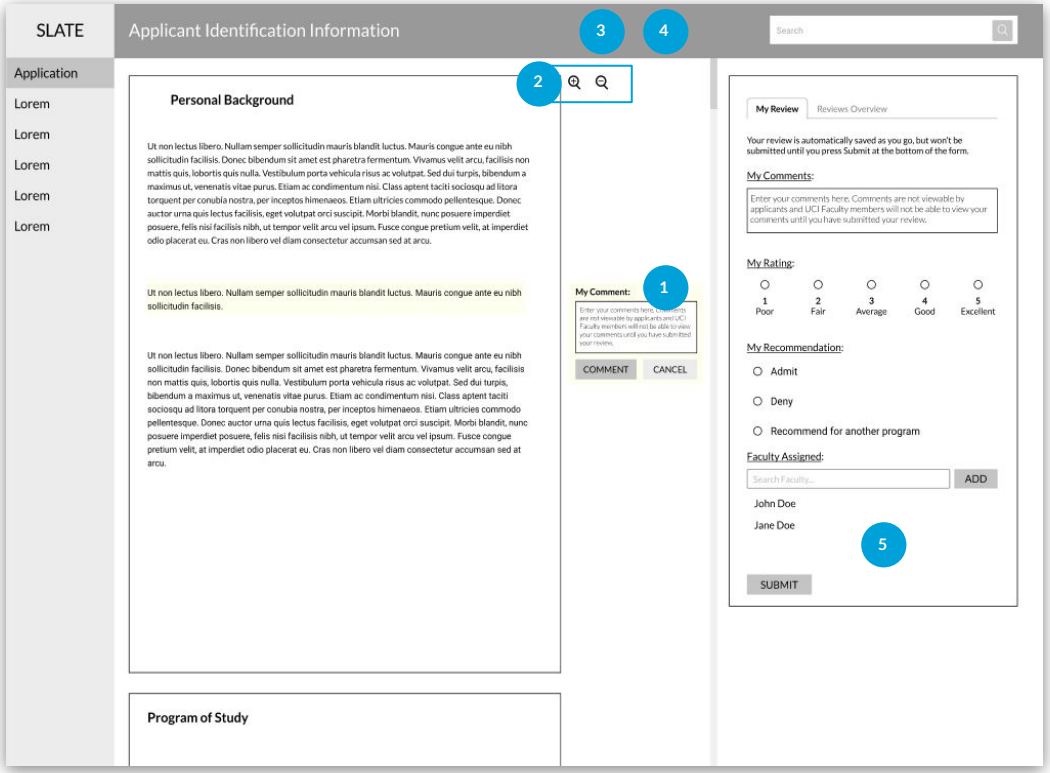


APPLICANT PACKET

LOW-FIDELITY DESIGN CONCEPT TESTING

Conceptual Applicant Packet improvements include:

1. Disambiguate whether comments are public or private
2. Remove visible zoom buttons
3. Add search bar
4. Explore allowing programs or departments to control public or private modes, either in the Reader or in Settings
5. Explore adding exception request functionality

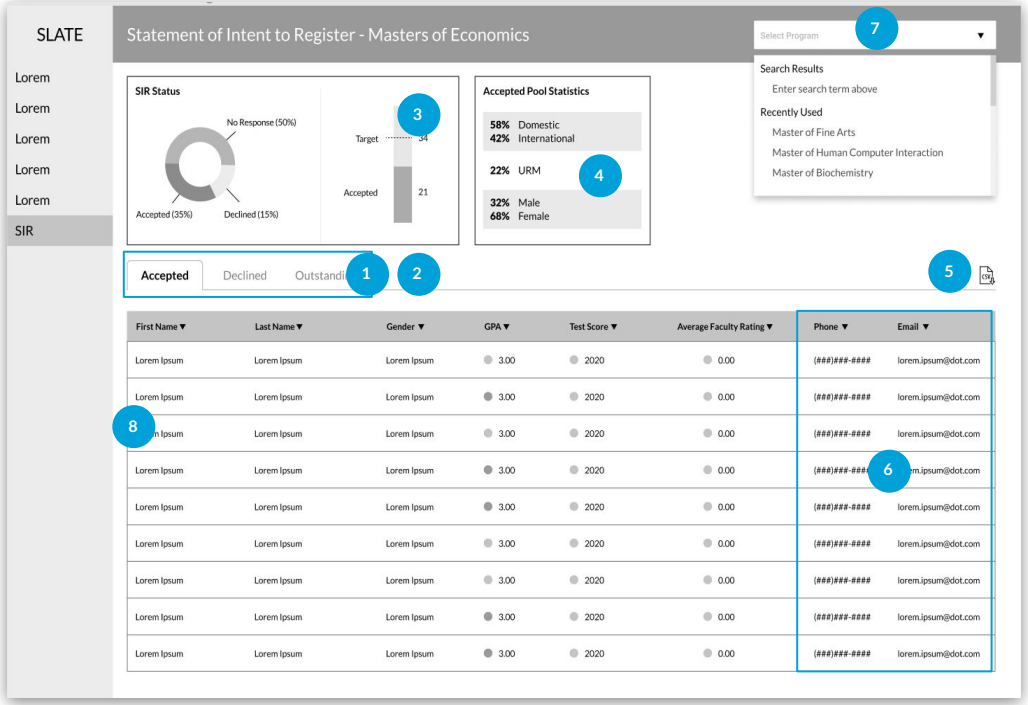


SIR DASHBOARD

LOW-FIDELITY DESIGN CONCEPT TESTING

Conceptual SIR Dashboard improvements include:

1. A positive-negative SIR binary with outstanding option
2. Switch ordering to Outstanding, Positive, Negative
3. Remove target for now
4. Explore adding in yield stats to compare offers relative to SIR status
5. Update CSV icon button to a standard rectangular button, aligned with other action-based CTAs
6. Move forward with both email and phone number data in the table
7. Move forward with program search function, with PhD and Masters default for MVP
8. Move forward with table columns as-is



HIGH-FIDELITY CONCEPT DESIGN TESTING

KEY FINDINGS

OVERVIEW

HIGH-FIDELITY DESIGN CONCEPT TESTING

GOAL

To qualitatively assess the fine details of prototyped designs across 3 key product areas for fit with user admissions processes and mental models, with the end goal of fine-tuning the prototype according to user needs.

METHODOLOGY

Each 45-minute session was spent on structured concept testing of the user based on scenarios they'd likely encounter using the redesigned Slate, with attention to usability. Half of the session was dedicated to assessing the Applicant Dashboard, a quarter to the Applicant Packet, and a quarter to the SIR Dashboard. Users were asked how they would approach scenarios, how they felt about the proposed solution, and how they would improve it.

USERS

2 faculty and 1 staff member who are current active users of Slate for graduate admissions, ranging in school and department. Additional testing is recommended to increase confidence before implementation.

KEY FINDINGS

HIGH-FIDELITY DESIGN CONCEPT TESTING

Across our designs, we narrowed our focus to updates centered on design and information polish. As such, our final conceptual designs will move forward largely as-is, with many recommendations added to our UX Roadmap for further exploration. High-level insights are as follows:

APPLICANT DASHBOARD

- Users continued to respond favorably to the Applicant Dashboard concepts, although feature benefits were sometimes constrained by continued concerns around permissioning and customization (e.g., assigning faculty, filters)
- We narrowed the scope of our designs in instances when execution would require additional research and deep design exploration

APPLICANT PACKET

- Concepts such as the ordering of packet content and paring down the review form fields arose, although pursuing additional articulation of the needs surrounding these requests is recommended
- Updates are focused on completing the build out of functionality for exploratory designs that performed well (e.g., the drop down navigation)

SIR DASHBOARD

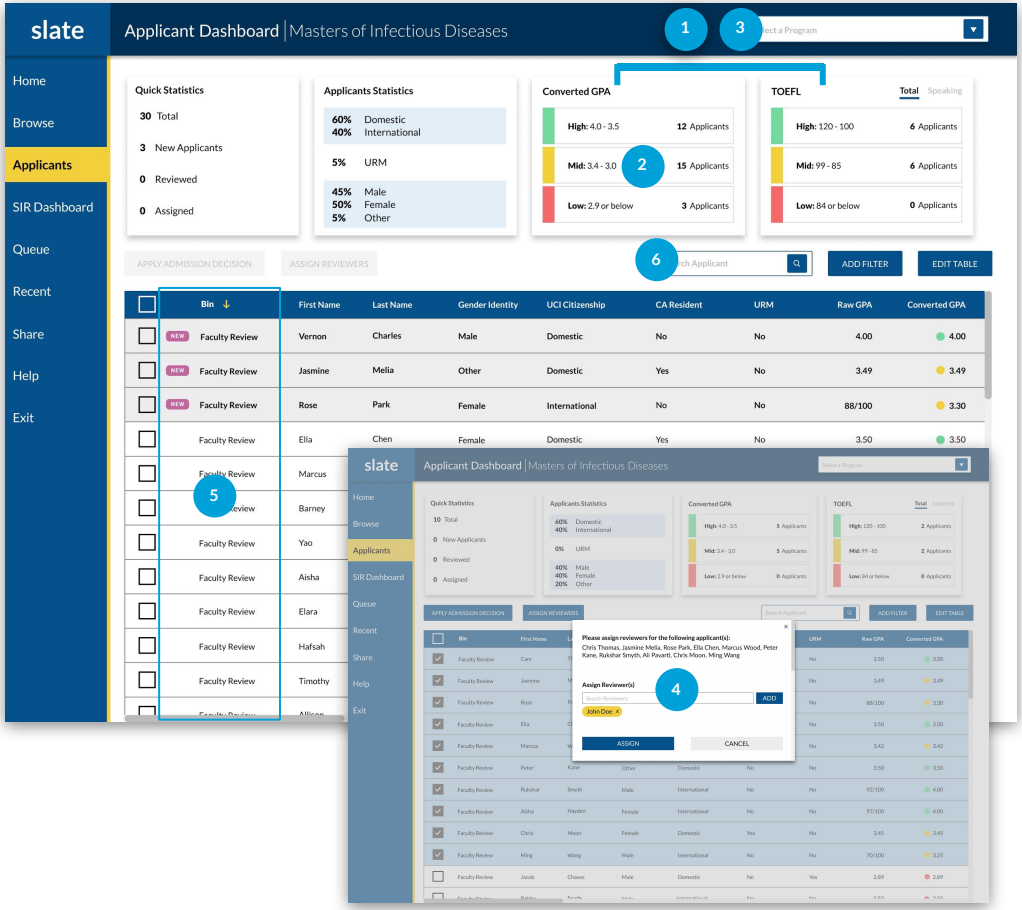
- Roadmap items include design and information polish in instances in which mental models require additional validation, for instance email functionality within Slate and statistics that include a broader funnel, from *could have* applied through acceptance decision

APPLICANT DASHBOARD

HI-FI DESIGN CONCEPT TESTING

Conceptual Applicant Dashboard improvements include:

1. Move forward with adding percent to graphs
2. Move forward with updating graph range precision to display hundredths (e.g. 2.99)
3. Move forward with adjusting the ordering of graphical ranges from low to high
4. Move forward with creating confirmation notification after assigning reviewers that states that the assignees will get notified
5. Move forward with replacing Bin column with “Application Date” column as default column
6. Move forward with name-based search functionality

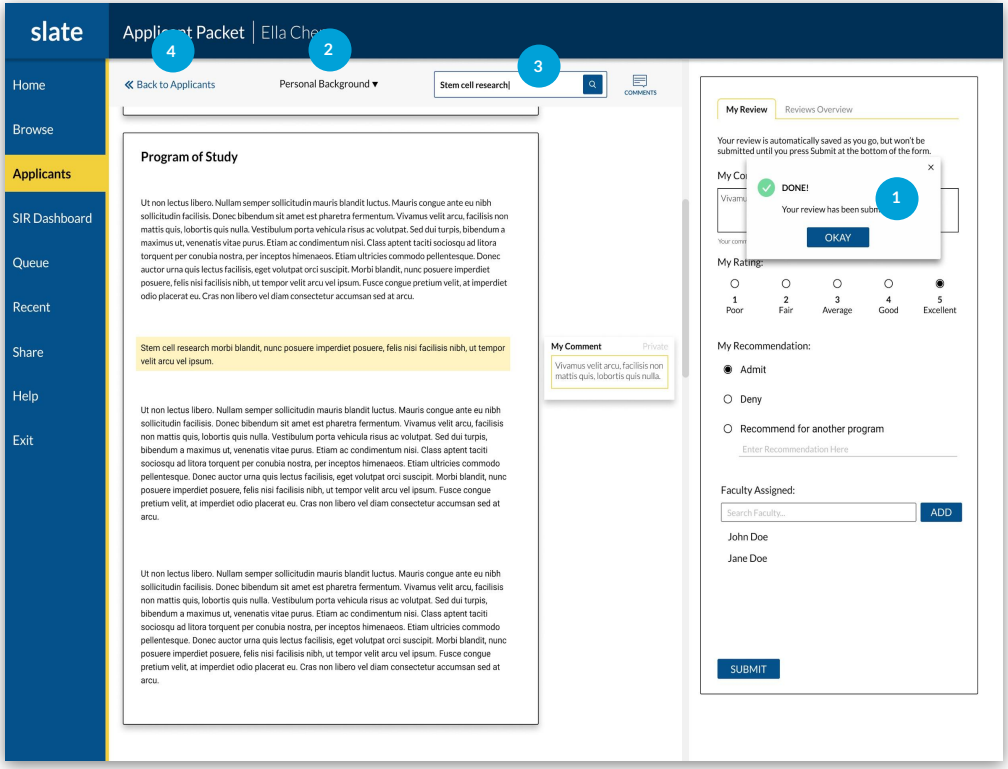


APPLICANT PACKET

HIGH-FIDELITY DESIGN CONCEPT TESTING

Conceptual Applicant Packet – Overall improvements include:

1. Move forward with confirmation modal once review submitted
2. Move forward with the drop-down materials navigation, build out actual drop-down functionality
3. Move forward with search in the Applicant Packet navigation
4. Move forward with the back to applications button

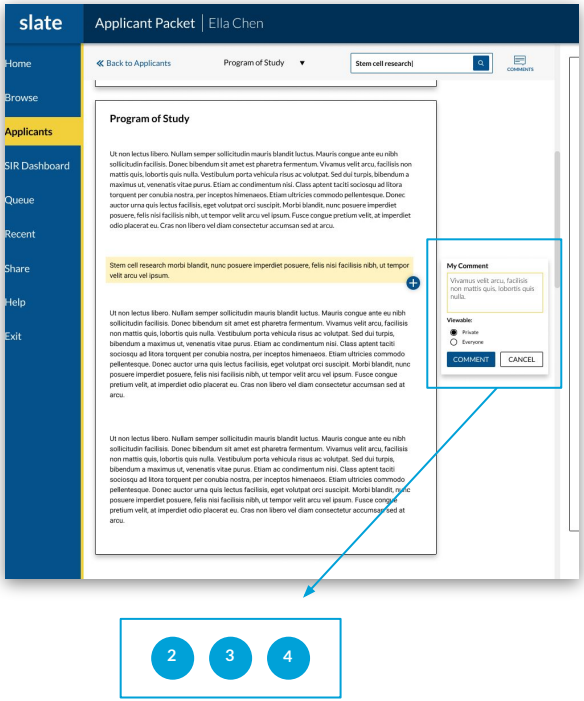


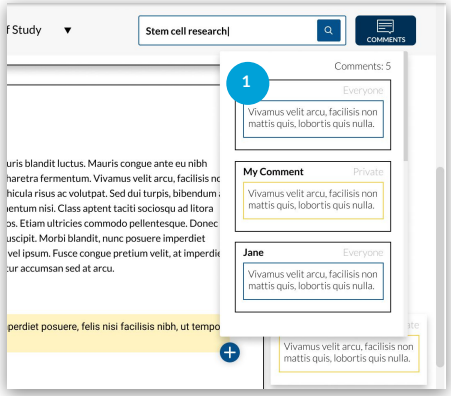
APPLICANT PACKET

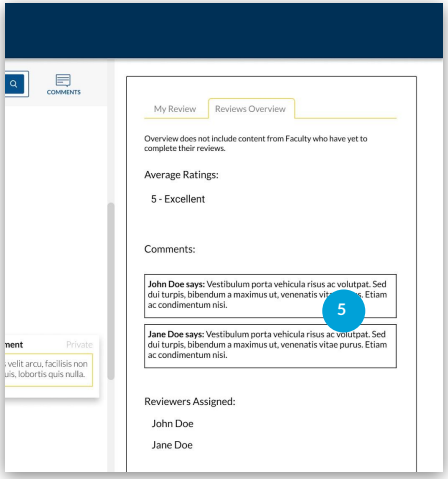
HIGH-FIDELITY DESIGN CONCEPT TESTING

Conceptual Applicant Packet – Commenting improvements include:

1. Move forward with inline commenting functionality, along with general comments via the segmented review form
2. Move forward with adding a timestamp to the published comments, both personal and public
3. Move forward with increasing the size of the inline comment box
4. Move forward with private default for inline comments
5. Move forward with post-submission reviewer comment visibility via the Reviews Overview section of the review form







APPLICANT PACKET

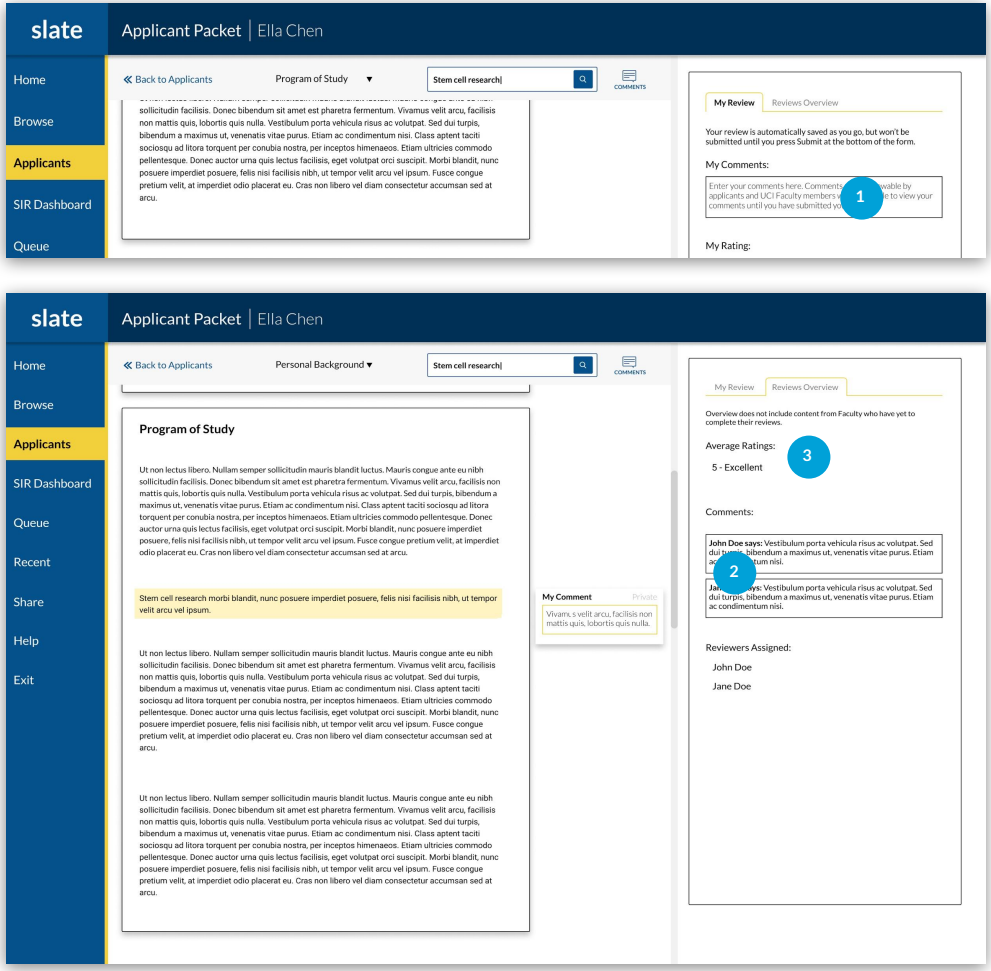
HIGH-FIDELITY DESIGN CONCEPT TESTING

Conceptual Applicant Packet – Review Form improvements include:

1. Move forward with making the comment box optional, ensuring the optionality vs. required is explicitly stated for all form components

2. Move forward with adding a timestamp to the published comments

3. Move forward with adding individual Faculty rating to Reviews Overview section

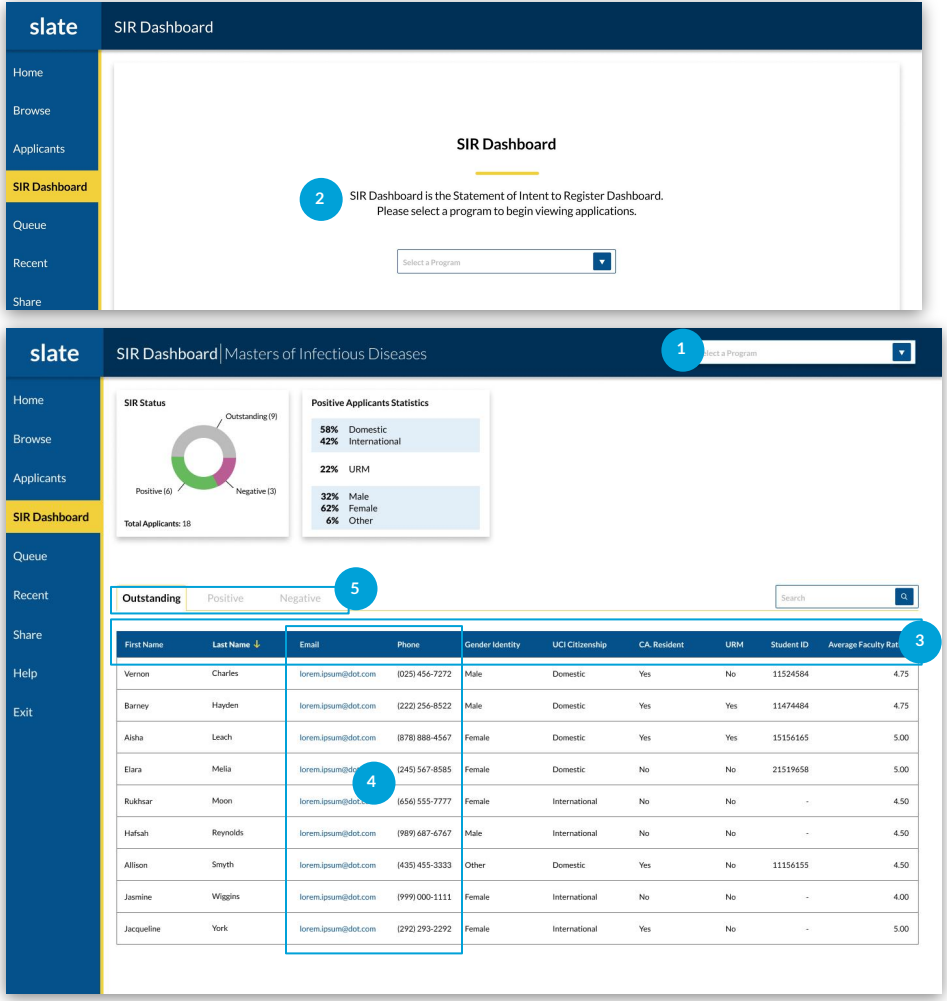


SIR DASHBOARD

HIGH-FIDELITY DESIGN CONCEPT TESTING

Conceptual SIR Dashboard improvements include:

1. Move forward with revisiting design to distinguish selector from general search bar
2. Move forward with ensuring SIR acronym is spelled out in the user's first encounter with it
3. Move forward with list view as-is
4. Move forward with contact information as-is
5. Move forward with status tabs as-is

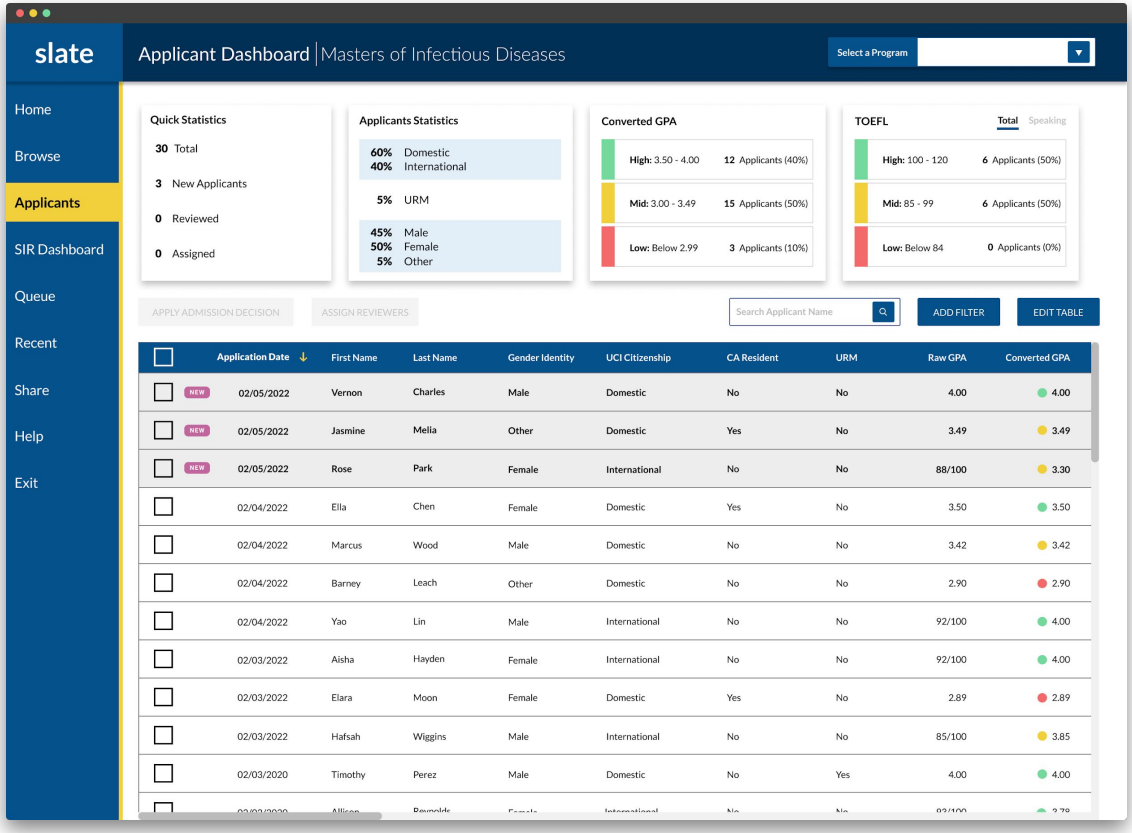


FINAL DESIGNS

APPLICANT DASHBOARD

FINAL DESIGNS

A birds-eye view of the applicant pool, with the flexibility to sort and edit the data based on user needs.



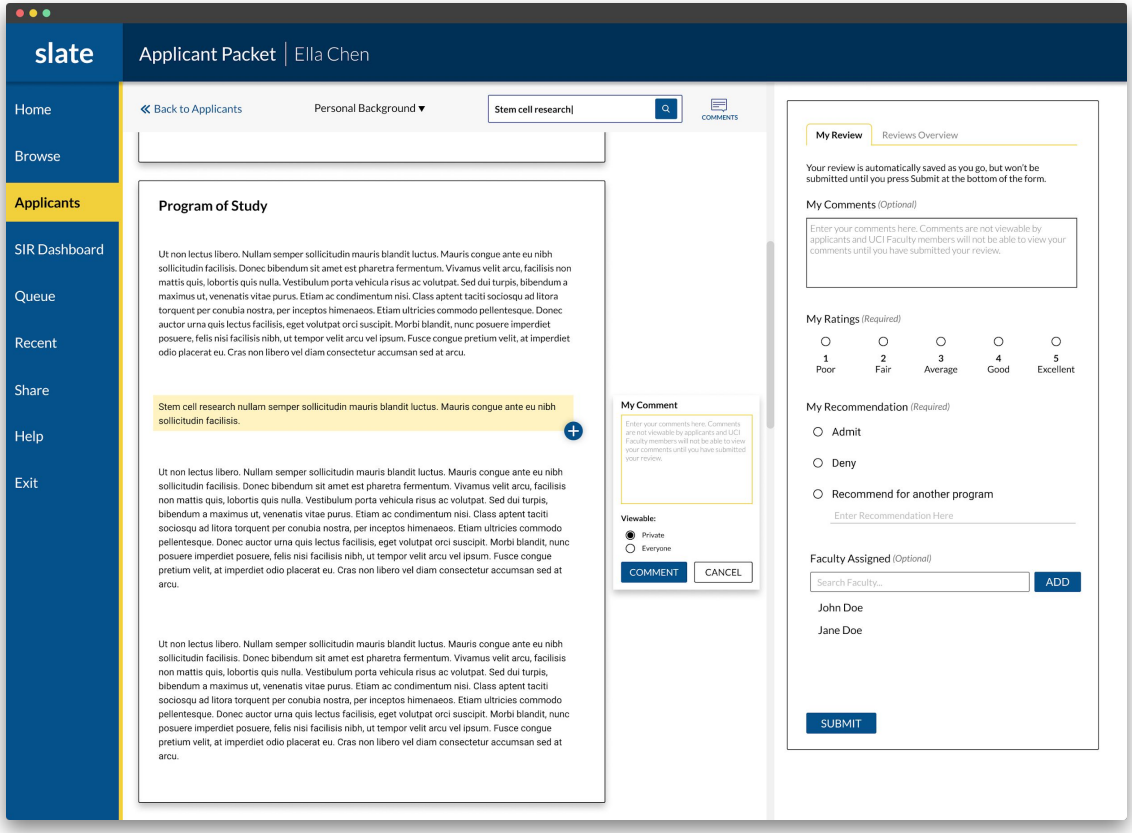
APPLICANT DASHBOARD VIDEO

FINAL DESIGNS

APPLICANT PACKET

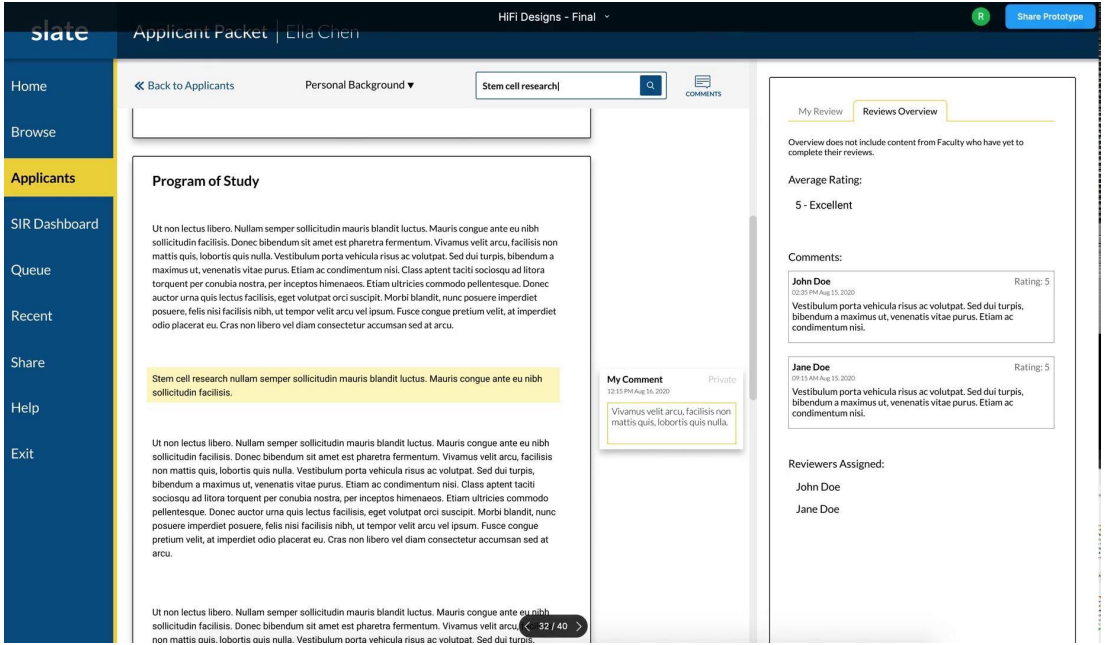
FINAL DESIGNS

Allows Faculty to annotate applicant materials through a revamped Commenting feature with the *privacy and control* they need. Faculty are also now able to Assign Faculty to applicant reviews at different stages within the process, to enable collaboration and visibility within and across departments.



APPLICANT PACKET VIDEO

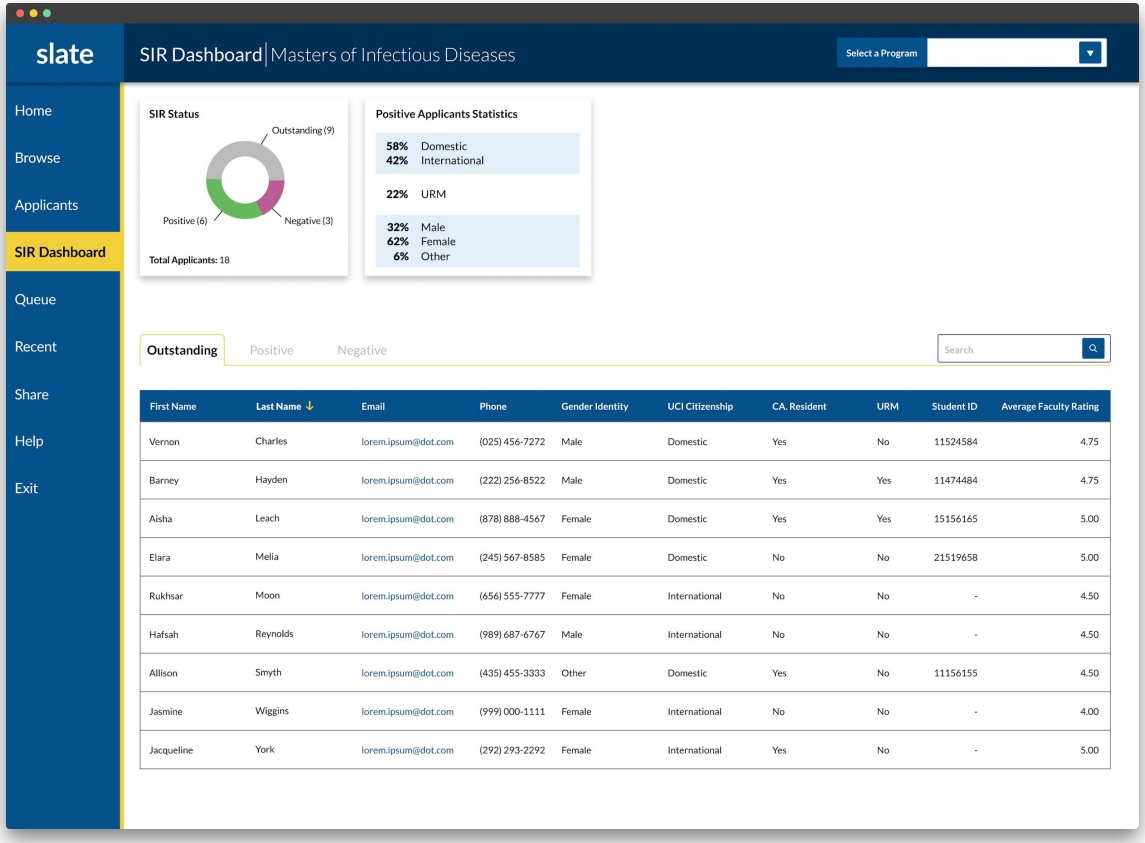
FINAL DESIGNS



SIR DASHBOARD

FINAL DESIGNS

Provides Faculty with easy access to the information they need to improve positive admissions yields at the final stages of the admissions cycle.



SIR DASHBOARD VIDEO

FINAL DESIGNS

DESIGN DOCS

DESIGN SPECIFICATIONS DOCUMENT

DOCUMENTATION

OVERVIEW

The “Slate Improvements - Design Specifications Document provides a set of detailed requirements to deliver to engineering for development. The next steps are to have engineering perform a detailed technical feasibility assessment on the features and come up with an actionable implementation plan. The designs have been tested with users so modification to the designs should be limited without additional user testing.

LINK: https://docs.google.com/document/d/13akiteWIvTI_aUxC6gkD3WGUicp_xAOi9SRnSESR2X0/edit?usp=sharing

UX ROADMAP

DOCUMENTATION

OVERVIEW

The “Slate UX Roadmap” document provides a list of future-looking innovation that builds on the features detailed in the Design Specification and recommends new areas of exploration. These features are the output of various ideation sessions and conversations with users. None of these ideas have been tested with users and would require in-depth business prioritization and UX research to become actionable.

LINK: https://docs.google.com/document/d/1mOdnrYywAJs2WfujMwvXQJKKexkqSDoQdsObqyNIAZ8/edit?usp=sharing

APPENDIX

DETAILED ARTIFACTS

APPENDIX

DETAILED ARTIFACTS

- Lo-fi Concept Testing Report
- Hi-fi Concept Testing Report
- Figma Hi-fi Designs
- Figma Hi-fi Prototype
- Slate Staff Survey Design
- Design Specifications Documentation
- UX Roadmap Documentation

Note: Google documentation editor permissions have been provided to Audra M. Hansen (amhansen@uci.edu) and Ruth Quinnan (rquinnan@uci.edu). They will be the contacts for access going forward.