



Lexis+ Alerts Presentation

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Table of contents



Understanding the problem.

Who are the users.

User Pain-points.

Alert User Flow Chart.

Modal Evaluation.

Deliver V. Share.

Impact and Effort Matrix.

Modal Redesign.

Next Steps.

Data - LA Power Users

92% of alerts created by **732** users

REMEMBER: This means 8% of all alerts are created by the majority of users.

Survey - Alert Users

98% of users did not send alerts outside of their company



CONSIDER: Removing outside email separate view or making workflow agnostic.

87% of users prefer alerts received via email VS in LN apps



The biggest reason for this was because it is easier and saves more time than having to log in

Survey - Alert Users

Alert Ownership / Sharing

95 participants

Creator & Recipient

I set up Alerts for my own use only 41%

I set up Alerts for my own use and for the use of others, i.e. Alert notifications are received by me and also emailed and/or collaborated with others 46%

10 participants

Creator Only

I set up Alerts for the use of others only 9%

4 participants

Recipient Only

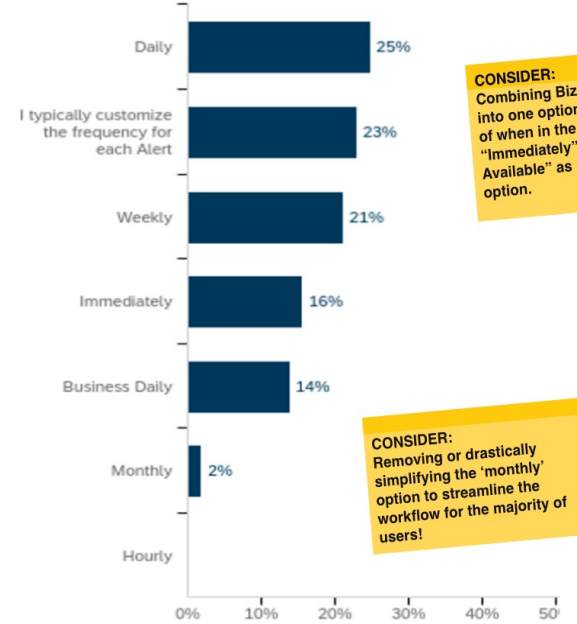
I do not set up any Alerts but I do receive Alert notifications 4%

I do not set up Alerts AND I do not receive Alert notifications

CONSIDER: Keeping email sharing as part of the 'happy path' until better data is collected.

REMEMBER: Make sure the new workflow is instrumented for analytics so we can prove/disprove this assumption

Alert Notification Frequency



CONSIDER: Combining Biz Daily and Daily into one option with a control of when in the day. "Immediately" or "As Available" as part of that option.

CONSIDER: Removing or drastically simplifying the 'monthly' option to streamline the workflow for the majority of users!

Deliver VS Share

"I would just do one long simple form with no tabs, just sections."

"Actually have to admit that I'm not sure of the difference between these two"

"Share is fine but it should only be used to share an alert with someone. Could have all share functionality on this tab, including frequency of alert."

"Share has been confusing to me, I don't use it. Not sure what term to use. (this exercise has been helpful to understand the difference.)"

Power Users

Power users make the majority of Alerts

According to the research **46%** of these users both create alerts for others and receive alerts. **98%** of those alerts being share internally.

However when asked if they were satisfied with the Alerts+ system now as is **51%** of users said they were only **some what satisfied**.

LA Power Users

92% of alerts

732 users

But Why?

Digging Deeper →

Digging Deeper

Design decisions that are impacting usability

Power User Pain-Points

Main Issues with Creating an Alert

- Creating alert modal tabs are irritating, many fields unnecessary.
- Only informative, not editable fields
- Share vs. Deliver is confusing, even help indicates you should enter email in both locations

Alerts Issues

- Alert Creation UI control may not be intuitive
- Alert manager isn't easily found

Recipient Pain-Points

Main Issues with Receiving an Alert via Email

- Email Audience can't change the frequency of alerts.
- No clear indication of where the alert is coming from.
- In order to unsubscribe users need to contact Customer Support.

Create an Alert Workflow →

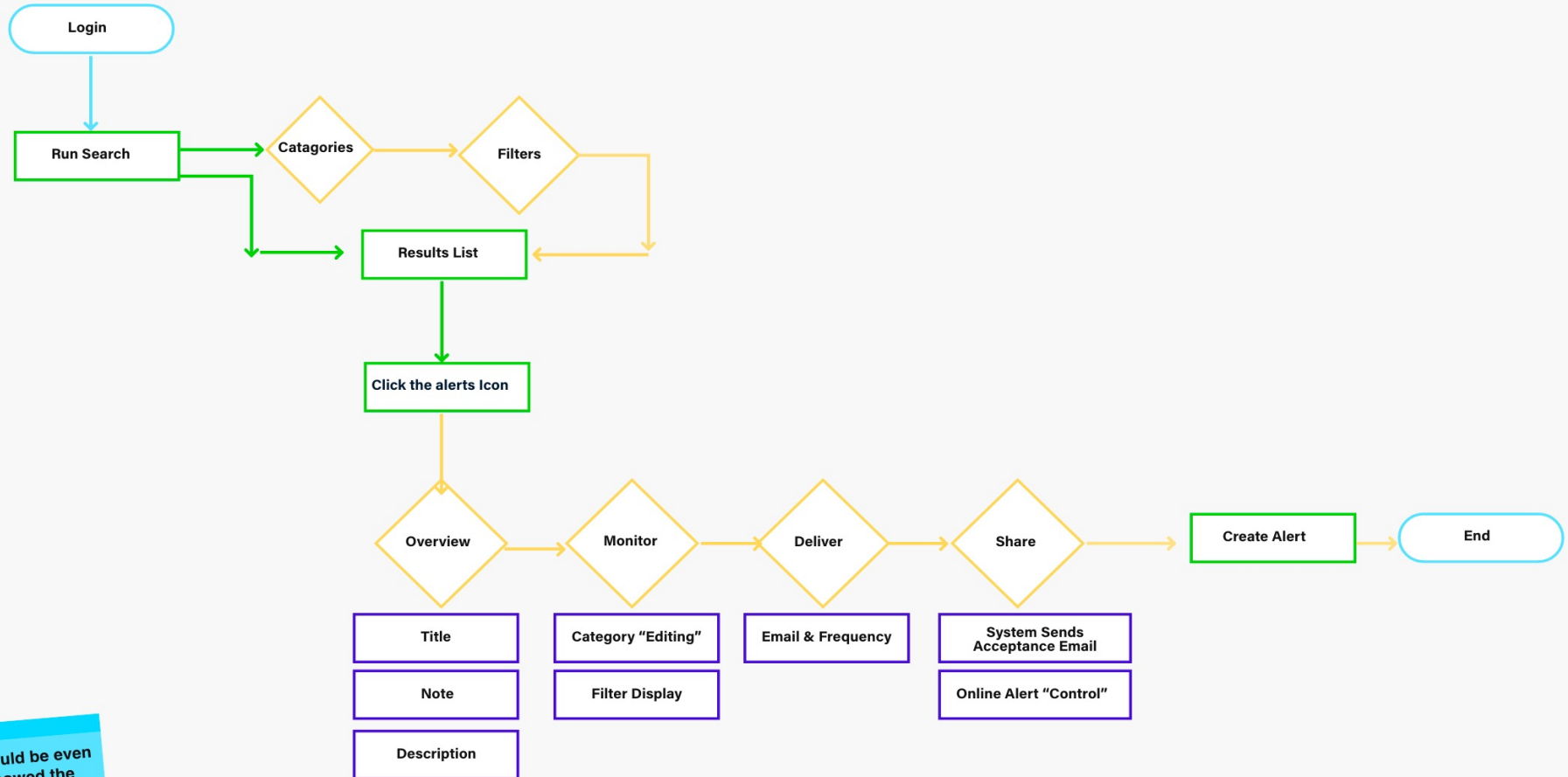
Alert User Flow Chart: Complex View

This diagram represents an in-depth look at the alerts user flow from start to finish.

24 March 2020

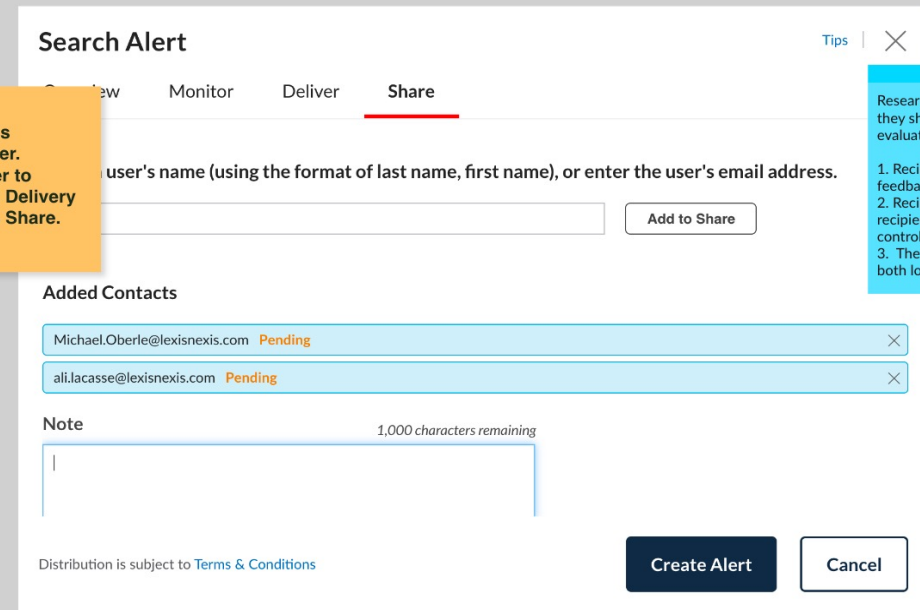
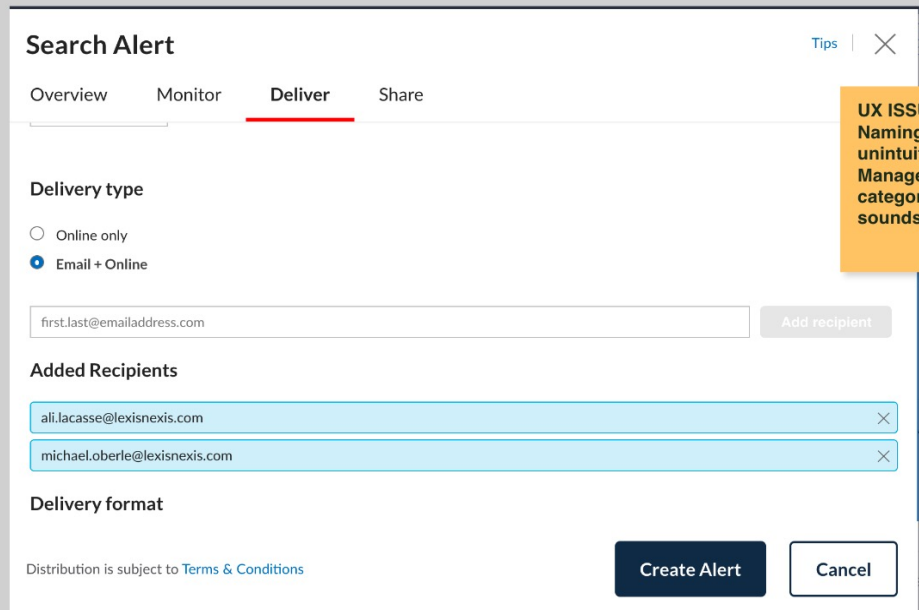
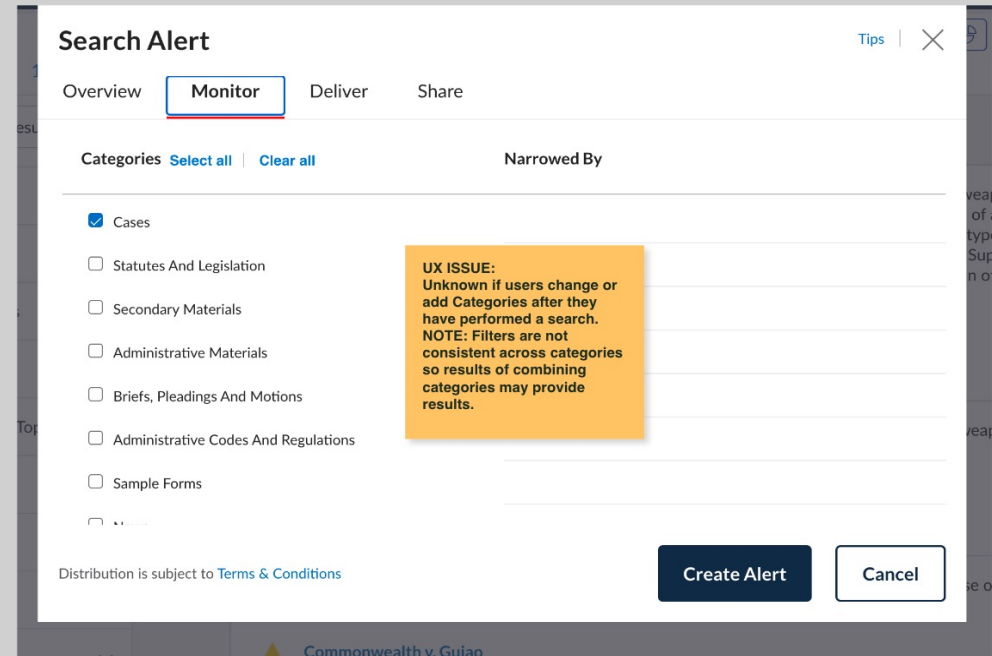
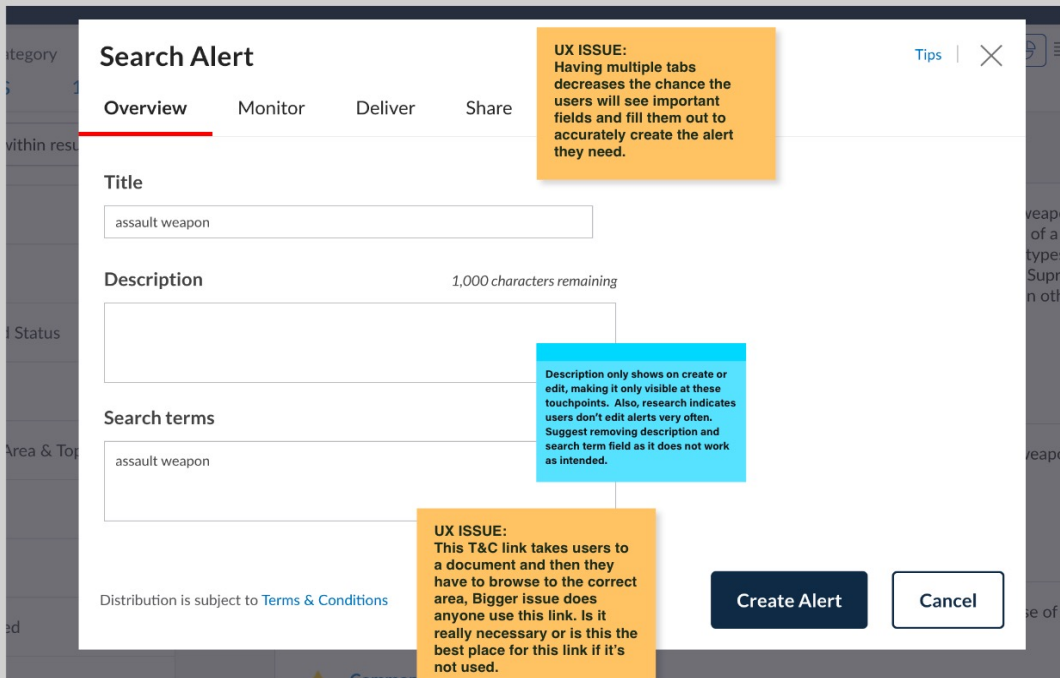
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Legend



When digging deeper into the decisions that users need to make in order to create an alert, We find multiple inconsistencies that disrupt the user flow.

I think this would be even better if we showed the entire share process and user acceptance as well.



Action/Experience	Delivery Recipient	Shared Recipient	Owner
Receives Email Summaries of Alert	✓	✓	✓
Receives "Accept Alert" Email, including sender name	✗	✓	✓
Can Accept, Decline, or Ignore Alert	✗	✓	✓
Can unsubscribe to an Alert	✗	✗	✓
Can see Alert on their Alerts Page	✗	✓	✓
Can control delivery (Online v. Online and Email)	✗	✓	✓
Can control frequency of the Alert	✗	✗	✓
Can Pause and Delete an Alert	✗	✗	✓
Can edit the title, terms, client, monitoring categories	✗	✗	✓

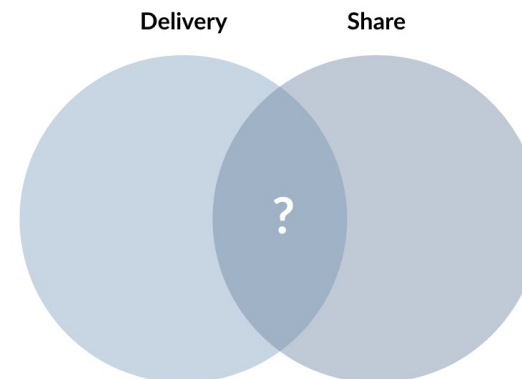
What control do Alert RECIPIENTS want?

Technically how do we allow users to change ownership?

Conclusions and UX Recommendations for Actions

Combining "Share" and "Delivery" tabs are low risk to the creator/owner, and adds value to the recipient. The ability to receive an invitation to accept or decline an alert is beneficial, as is the ability to change delivery to online or online and email. Enhancements could also include providing the recipient the ability to change their own delivery schedule, and the ability to unsubscribe without contacting support. (Ideally this would reduce CS costs)

Enhancements are also recommended for phase 2 of improvement to the Alerts interface to improve User Experience for creator and recipient.

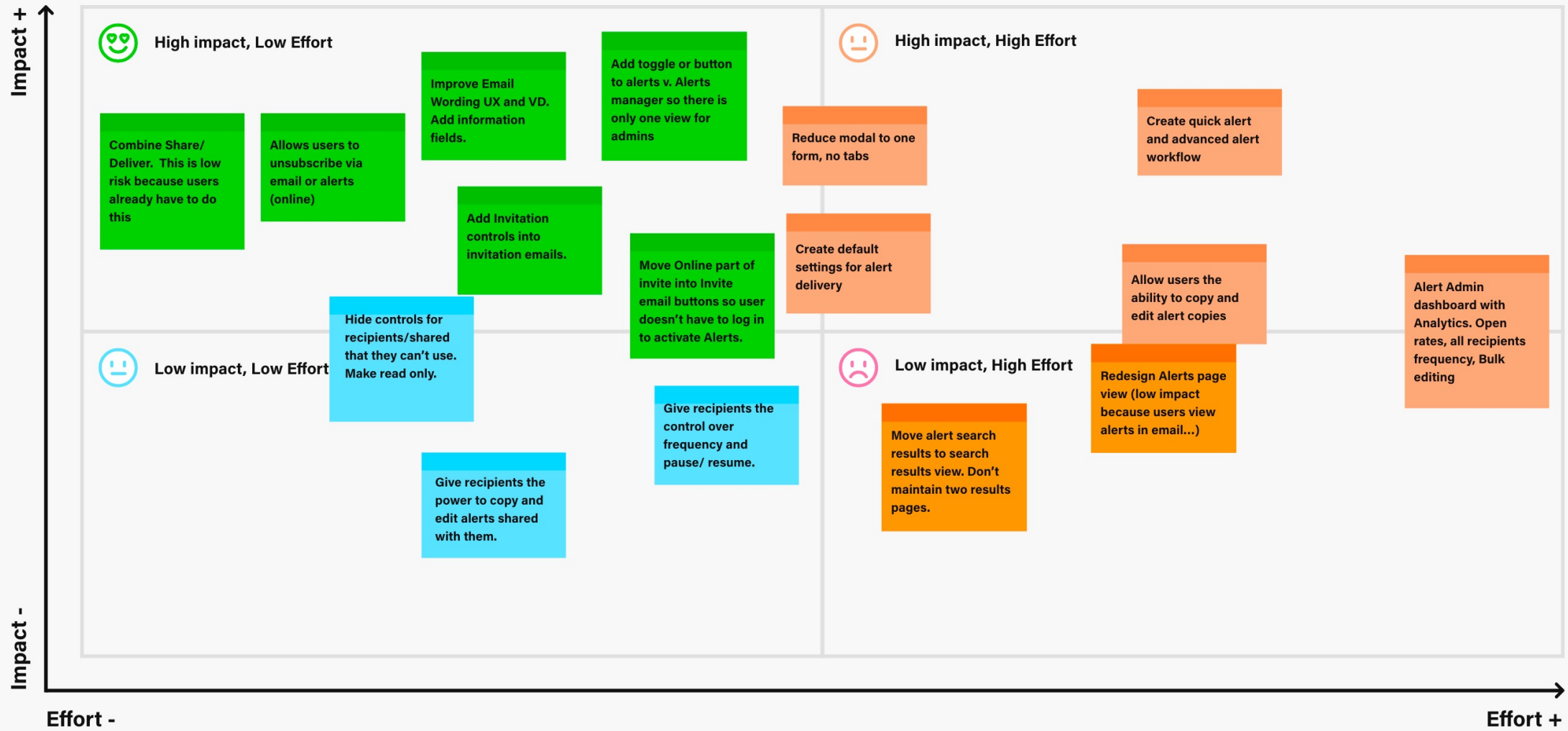


Impact and Effort Matrix

Categorizing ideas along impact and effort lines is a useful technique in decision making, as it obliges contributors to balance and evaluate suggested actions before committing to them.

24 March 2020

Project Name



Recommendations for Create Alert Modal

Methods: three UX team members went through the process of setting up and receiving alerts. After setting up alerts we tested the ability to successfully edit the alert as an owner and shared recipient. We found the following:

- 1 Delivery and Share** tabs and fields were combined to reduce confusion and double entry. Other tabs were combined into one view.
- 2 Edit / Remove Fields** that weren't useful or had no apparent use, such as search type and filters according to monitor categories created noise. They were removed until more research can be conducted to support usefulness. Removed confusing duplicate fields.
 - A. Make "Search Terms" read only.
 - B. Remove Description. Not shown in current workflow. Duplicative of "Note". (Now 'Message' which is clearer to purpose.
 - C. Consider making Categories read only and default entered from originating search.
- 3 Re-order choices** to match user preferred order, e.g. Alert Delivery putting email first.

NOTE: There may have to be adjustments for other types of documents, content or alerts.

Email Redesign →

Additional Modals

Search Alert Help ✕

Title

2 Search Terms
"Vaccination" "Exemption"

Categories to Monitor
 Cases ✕

3 Alert Delivery
 Email AND Online (in Lexis)
 Online Only

Your Frequency
 As Available
 Scheduled

Client (for billing)

1 Alert Recipients
AL Alline Lacasse (owner)
 Add Recipient

Message (Optional)

* Recipients of a shared alert will set their delivery and frequency preference upon acceptance.

Create Alert Cancel

Search Alert Help ✕

Title

Search Terms
"Vaccination" "Exemption"

Categories to Monitor
 Cases

Alert Delivery
 Email AND Online (in Lexis)
 Online Only

Your Frequency
 As Available
 Scheduled Digest

Client (for billing)

Recipient(s)
 Alline Lacasse (owner) John Oswald ✕

Add Recipient

Message (Optional)

* Recipients of a shared alert will set their delivery and frequency preference upon acceptance.

Create Alert Cancel

Search Alert Help ✕

Title

Search Terms
"Vaccination" "Exemption"

Categories to Monitor
 Cases ✕

Alert Delivery
 Email AND Online (in Lexis)
 Online Only

Your Frequency
 As Available
 Scheduled Digest

Client (for billing)

Owner
 Alline Lacasse

Share with
 John Oswald ✕

Add Recipient

Message (Optional)

* Recipients of a shared alert will set their delivery and frequency preference upon acceptance.

Create Alert Cancel

Quick Alert ✕

Title

Client (for billing)

Save Cancel



Next Steps (not ordered)

Biggest Bet or Risk to test.

1. Test Quick Alerts versus advanced alerts with the new Create Alert Modal

1a. Do users normally change the setting of an alert between alerts?

1b. Do alert creators change the recipients of each alert they create? How often are they changed. Do they prefer to control the delivery?

Team needs to build or design quick alerts and create workflow.

What problems does quick alert solve? Do you need to change the settings often? Do you send each alert to a different recipients?

2-3 Interviews first? Before survey.

2. User Test the combination of delivery and share.

2a. Do Alert recipients want to control their delivery format & frequency?

Would they rather have the alert Owner control format & frequency?

Does alert ownership go beyond controlling format & frequency?

Discuss with PMs and Engineers.

What are the hurdles to users going to Alerts view page?

Are librarians being asked constantly to edit recipients

3. Test the redesign of the alerts email. Understand pain points associated with the current email recipient workflow

4. Assess the scope of redesigning the recipient emails and development effort to add control to the email, acceptance page or alert manager screen.

Test time to create alert, ease of use,

5. Consider next phase of Alert redesign, including the redesign of Alert and Alert Manager feature, possibly with Alert Settings.



Phased Approach

What is Phase 1?

- improve invite email
- improve invite acceptance screen
- eliminate multiple contact entry

What do we want to target for next year?

- Quick Alerts
- normalize other alerts (not search alert)