Response to chat, 9-19

Questions are in green

1. **Aren't we cramming a lot of stuff onto the same page?**

Short answer: yes we are.
Long answer: there are 3 patterns for a form:
• One long page. Not that long in our case.
• Accordion. Where sections expand and collapse.
• Wizard. Where you usually see steps on top, like “Step 1”, Step 2” etc., and on the bottom, there are “Previous” and “Next” buttons.

One page form:
Advantages:

• Easy to implement. Easy to update and maintain.

• Easy to add content, take away content. Content can be added to the side, above, below. Very flexible layout. For where we are right now, and that’s constantly evolving, the UX easiest to update may just be the best fit.

• User can see all their selections at once. They don’t have to click back-and-fourth, and remember what they selected where. This is good, especially when the function is new - such as in our case with Entitlements.

• Imagine a user is uploading 20, 50, 100 documents. I assume they can multi-select to upload. Anyway…And they need to also onboard 27 individual users. That’s a lot of work. Now imagine, in the middle of that work, they have to go to a meeting. Or they get a phone call. Or are interrupted in any way. When they come back to this form, it’s all there, in one place. Instead of having to click around to 7 different sections, to weave the story of what’s going on.

Disadvantages:
User needs to scroll.

Accordion:
When the information in each section is independent and users are unlikely to need simultaneous access to multiple sections, accordions can help them quickly access only the section of interest. FAQ pages and product-detail sections are good candidates for accordions.

Wizard:
Wizard is used for long, unfamiliar processes, that users do once or rarely. Onboarding is a good candidate for the Wizard pattern.

Final thoughts on form interaction design pattern choice: Mathias, the form design links you shared are lovely and elegant. But the elegance is achieved in having only (for the most part), 1 form field taking the whole width of the page. The downside of that is - a ton of scrolling.

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Also, the reason for juxtaposing some fields is the fact that we have “either/or” functionality. There’s actually an “OR” word in the UI. That’s an existing pattern, I didn’t invent it. Using “OR” word in the UI is to capture some very particular Entitlements situations. Stacking would not work here, because stacking suggests consecutive order of things, whereas juxtaposing suggests there may be a decision involved.

Now my experience with the user bases, such as ours, is that they absolutely hate to scroll or click unnecessarily, because it wastes their time. On the same hand, between elegance and speed – they usually choose speed.

Final thoughts on the “Delete” Entitlement: above explanations are also in the Figma document.

2. **“Entitlement description” is not a feature.**

You talked about how troublesome it will be, if people start describing their Entitlement, in the name. For search purposes, in particular. On that note, “Entitlement Description” would be handy. If it’s not part of MVP, that’s fine.

That said – how big of a LOE is to add this feature now? And here is why: if you have it from the beginning, than people will use it from the beginning. If you add it in 3 months, no one will go back, to a bunch of their Entitlements, to add “Descriptions”. Just my 2 cents.

3. **I think having link entitlement to newly updated document under the create permission page is also a lot. In my head if you are not creating an entitlement you should go to an upload page to upload new documents to an existing entitlement.**

   a) What Sergio said: “I personally prefer to have a single page to do the happy path -> Create entitlement, add document(s), add ad group. -> DONE. Imagine the case of someone creating dozens of entitlements. If you have to go to a second screen, that adds complexity.”

   b) Please see my answer to your question #1: one page vs several pages.

   c) “Create Permissions” form does not just serve as a single feature. It’s where you create, edit, delete, add, subtract, change things, etc. And it also provides links to relevant other resources (SNOW, a directory of users, etc). So to answer your question – yes, what this page does is a lot. But we want it that way, because of the convenience of it.

   d) FYI, if you look at the evolution of the Entitlements UX, in this Figma document, you’ll see that almost everything you suggest or comment – has been explored before. We considered it carefully, and decided to move past – FOR NOW. But those are valid designs, and when:
   - we are in a more stable place requirements-wise
   - users figure out how Entitlements work
   We may make the Entitlements UX, different. More elegant, more in chunks, etc.

   e) Dan Moulton comment “If we want to add documents to an already existing entitlement and we do it via the entitlements list page, we can add them to multiple entitlements at once.”

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Yelena's response: I designed batch edit UI on August 12. Please see the very first page on this Figma document. All the way at the bottom.

Please note that there are actions that are better suited for the Form view. And actions that are better suited for the Table view. That's why we have both, and we've always had both.

4. **Responsive design.**

Sections would stack on top of each other. If a section has 3 items, juxtaposed on desktop, they would also stack on top of each other. I can put that design together. It's just not a priority for the MVP.

That said, I am so glad you raised this. Donna and Yimei, can we at some point, please start tracking, what device and / or screen size, Copilot users, use Copilot on?

If there are any more questions, please let me know.

Thank you,

Yelena

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