



Pearson

Pearson Collections Redesign

UX Share Out

15 March 2018



Share Out Recording

<https://recordings.join.me/OkG1x-8pUU2Q4qxtaeYKNO>

What is Collections?

- Collections is a browser-based tool that enables instructors to build their own course materials.
- Collections are composed of content from one or more Pearson products including textbooks, business cases, and readings. They can also include uploaded content.
- A Collection can be delivered as a printed book or digitally.
- The Collections tool has been in use for several years.
- Collections underwent a major redesign in 2017.
 - Bring into alignment with current branding
 - Incorporate UX Framework components
 - Address user experience issues uncovered by users

The Collections Team



Bhanuka Withana
Development Lead



Craig Marcus
UX



David O'Dey
Prototyping



Deepak Bhagchandani
Prototyping



Drew Edwards
Product Capability



Ganuka Yashantha
QA Lead



Geethanga Amarasinghe
Development Lead



Hawthorn Mineart
UX



Heather Reser
Visual Design



Karen Taxior
UX



Kristianne Lamont
Product Capability



Laura Vlassarev
User Research



Madusanka Dahanayaka
Development Lead



Parthi Jaganathan
Development Lead



Peter LeVon
Product Capability



Rich Brewer
Product Model



Rich Feitelberg
User Assistance



Shenal Silva
Development Lead



Thanuja Fernando
QA Lead



Thilina Siriwardana
Development Lead

The Collections Team

UX: Hawthorn Mineart, Karen Taxier, Craig Marcus

UXR: Laura Vlassarev

UA: Rich Feitelberg

Visual: Heather Reser

Accessibility: Michele Williams, Paul Adam

Prototyping: Deepak Bhagchandani, David O'Dey

Product Capability: Kristianne Lamont, Peter LeVon, Drew Edwards

Product Model: Rich Brewer

Development Leads: Thilina Siriwardana, Geethanga Amarasinghe, Bhanuka Withana, Shenal Silva,

Madusanka Dahanayaka, Parthi Jaganathan

QA Lead: Thanuja Fernando, Ganuka Yashantha

Operations Specialists: Rebecca Coyle

Why is the Collections redesign Share Out worthy?

- Unique Set of Challenges
- Data-Informed Design Process
- Adapted Processes and Tools
- Cross-Team Collaboration
- Overall Product Awesomeness delivered ON TIME!

Unique Challenges: The Design

- **Designing for different needs:** Users included both daily users (internal Pearson employees like the Collections Ops Team & LSAs) and “once a semester” users like Instructors.
- **Differing workflows:** Building a Collection can be a stepped process, but also could be a “hub and spoke” where users could go back and forth between tasks, which affected how we validate and save information.
- **Print Restrictions:** Physical printing and business rules are complex. We needed to shape the experience so that the users didn’t see the complexity. We needed to show alerts at the right time, make sure content that couldn’t be added weren’t options, and to avoid dead-ends or getting to the end without being able to publish the book.

Unique Challenges: The Process

Working with two development teams

- Search and Collections - meant making sure UI information was conveyed to both teams so they could code the same way.

Limitations of Design Tools

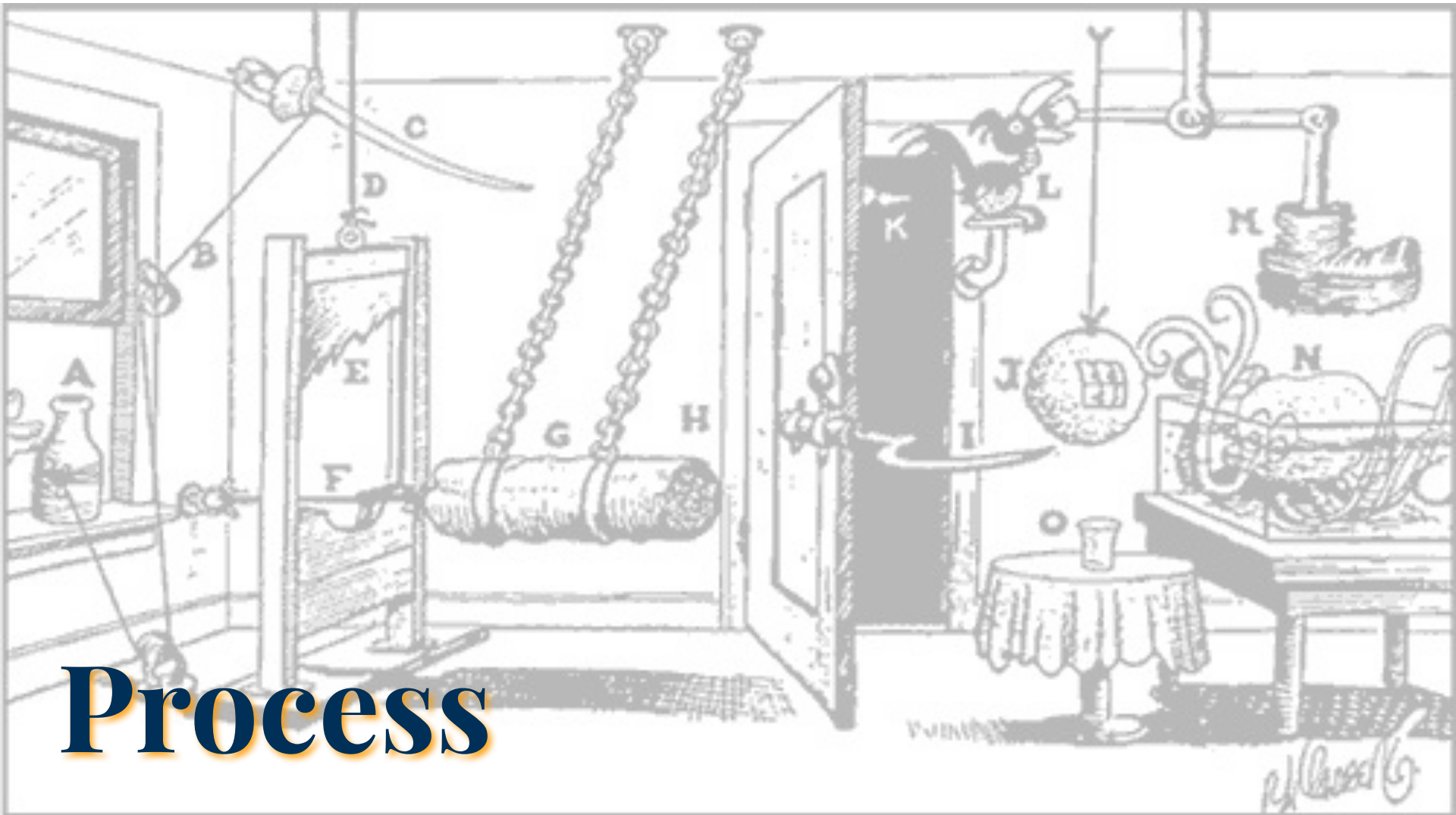
- Sketch + Invision didn't convey drag & drop or animation well.
- We needed a functional prototype of the build page to test it (created by Deepak from Greg Davis' Creative Technologies team.)

The screenshot displays a digital content management interface for a 'My Humanities Collection'. The main area shows a list of six content items, each with a title, subtitle, price (\$3.99), and icons for trash and edit. The items are:

1. **The Rise of Culture: From Forest to Farm**
Chapter 1 - The Humanities: Culture, Continuity and Change, Volume I, 3/e
2. **The Rise and Spread of Islam: A New Religion**
Chapter 2 - The Humanities: Culture, Continuity and Change, Volume II, 3/e
3. **Fieldom and Monastery, Pilgrimage and Crusade: The Early Medieval World in Europe**
Chapter 3 - The Humanities: Culture, Continuity and Change, Volume III, 3/e
4. **The Flowering of Christianity: Faith and Power of Belief in the Early First Millenium**
Chapter 5 - The Humanities: Culture, Continuity and Change, Volume III, 3/e
5. **Emerging Empires in the East: Urban Life in China and India**
Chapter 1 - The Humanities: Culture, Continuity and Change, Volume I, 3/e
6. **The Ancient World and the Classical Past: Prehistory to 200 CE**
Chapter 1 - The Humanities: Culture, Continuity and Change, Volume I, 3/e

Below the list is a 'Create Part' button and an 'Add content here' button with search, heart, and share icons. At the bottom, there is an 'Add More Content' button, a search bar, 'Favourites' and 'Upload' buttons, and a '+ Create a New Part' button.

On the right side, the 'My Humanities Collection' summary shows a price of \$23.94 and 84 pages. It includes 'Preview' and 'Share' buttons, and a navigation menu with 'Build & Organize', 'Project Information', 'Cover & Printing', and 'Review & Submit'. A 'Next Project Information' button is also visible.



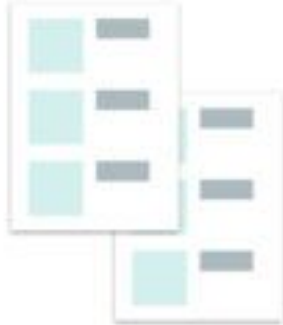
Process

Design Process: Overview

UNDERSTAND



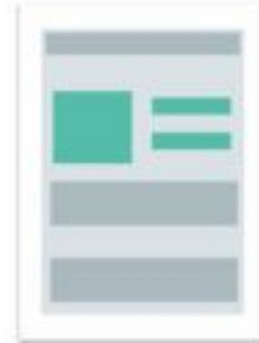
DIVERGE



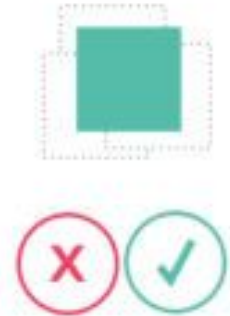
CONVERGE



BUILD



TEST



Spriiiiint?



Design Process: What worked - Phase 1

UNDERSTAND



Upfront Knowledge Dump

- Critical to having a shared understanding of what the problems truly were
- Prevented duplicate research
- Helped the team realize that different users had different goals and expectations of Collections

Design Process: What worked - Phase 1

Committee Instructor Onboarding
The new online new instructor role moved to Collections today using S&S and Access Code.

User Case 1
I am an LSA who is logging into the Exchange or Instructor Resource Center to first teaching materials for the course. I need a custom Collections page that allows me to search for my teaching needs. I click on the blue button.

User Case 2
I am an instructor who is logging into the Exchange with my personal user. I need an instructor's customized dashboard that meets my teaching needs.

User Case 3
I am a Pearson sales rep that is logging into my side with a new instructor. She is interested in creating a custom print product for the course she is teaching. I create a sample Collection and share it with her.

User Case 4
I am an instructor who is a current Collections user. I need the ability to customize my feedback and review a long document. I am using Collections with my colleague, who is also interested in custom booklets.

User Case 5
I am a Pearson employee who is an LSA. One of the main in the history with the FOC is create a Collection. How do I get started with Collections?

User Case 6
I am an instructor who is using MyLab/Now. I only use the digital product, but also need to have a physical textbook that aligns with MyLab/Now, but also the ability to create custom collections that link to the digital content.

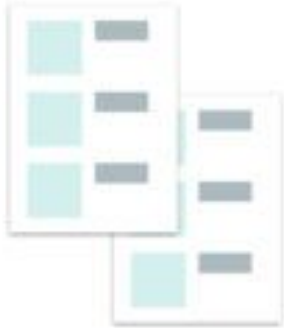
User Case 7
I am a Pearson sales rep that shares a custom Collections from an Exchange PDF with an instructor.

User Case 8
I am an instructor who finds the way into Collections from discussing Pearson/Now cover or the marketing page or an independent EdTech colleague.



Design Process: What worked - Phase 2

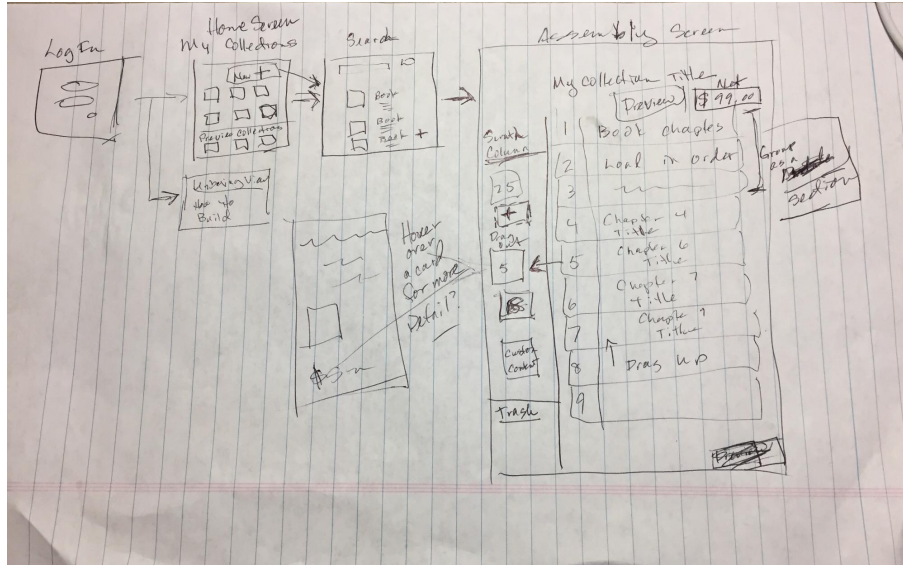
DIVERGE



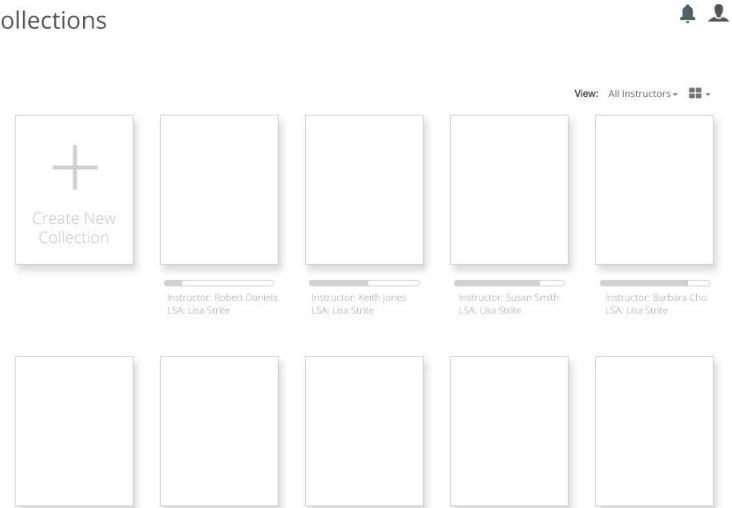
Collaboration is key

- Everyone has to sketch
- Everyone has to share

Sketch! (the other kind)



Collections



Sketch! (the other kind)

	A	B	
1	Sales Rep		
2			
3	On site with Instructor for BTS who wants to create a new book for their course		
4			
5	First time instructor:	Instructor has built w/Collection before, and wants to re-order/update old book:	Instructor f
6	1. Create an account for the Instructor in Collections - Go to collection app, and look up instructor account or register new account	- Look up instructor account (if they forgot credentials) - Log in	- Look up i - Log in
7	2. Log in - see a high level tutorial on how to search/assemble/publish.	- Show them previous books they have built categorized by their course(s) - w/book cover image and book title - Start by making a copy of their previous book - system would show them if new editions are available for their resources - review new editions and accept/use previous for each chapter -- see relevant business cases, recommended resources to add - review/add any OM - default to previous cover - allow selecting other covers - preview pdfs - finalize enrollment, start date, evals, desk copies	- search b - see list o chapters) - review/a - select co - preview - instructor - notifies s - finalize e

Collections

Important Customer Activity Alerts!

- Drew Edwards just published a collection [View More](#) [Dismiss](#)
- A collection was just finalized and is ready for the bookstore to order [View More](#) [Dismiss](#)

I want to:

Create instructor account

University XYZ

<

>

Dr. Craig Marcus

Sort by: Most recent

Psych 102 - Fall 2017
145 pages \$95.00

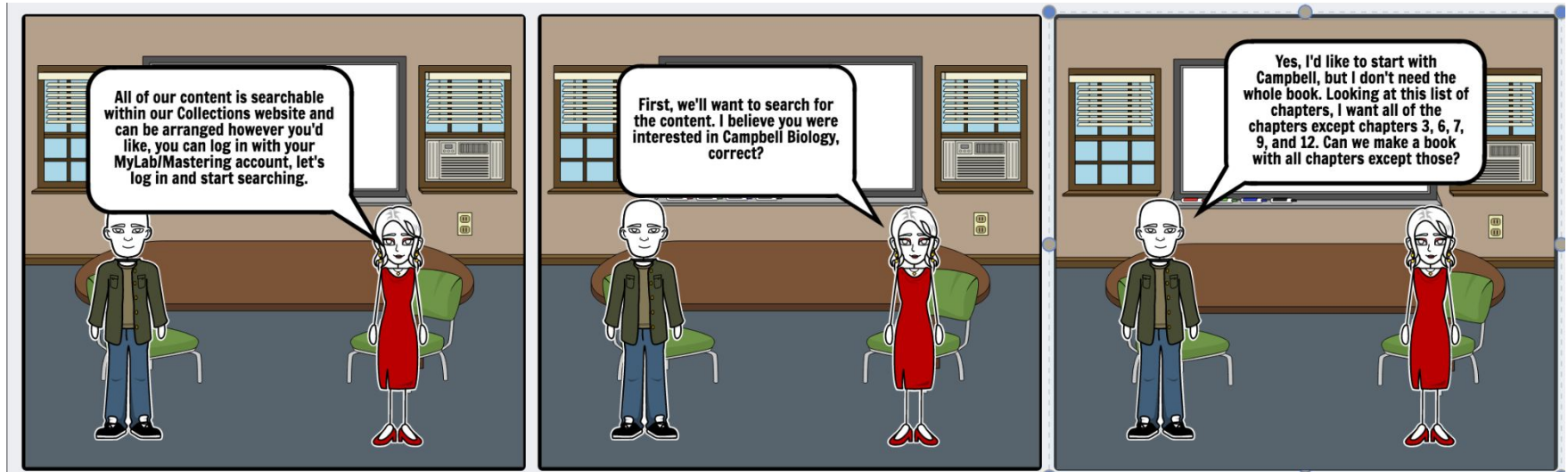
Last Modified: Oct 15, 2017

Current status: *Ready to be published*

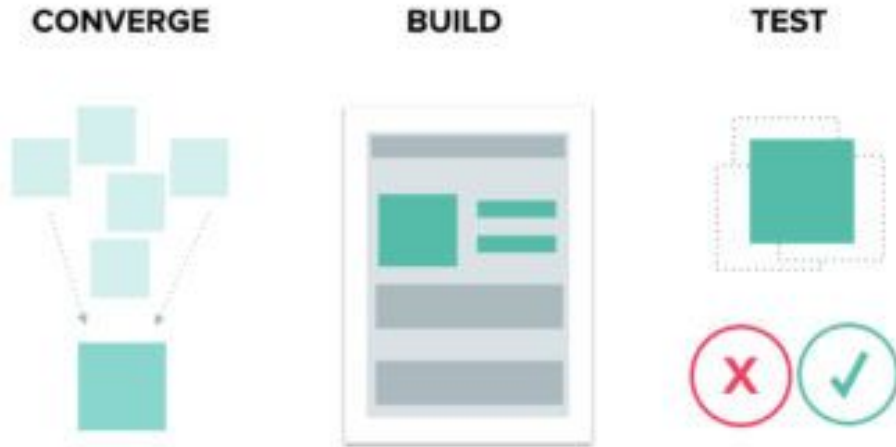
[Click here to see the instructor's book](#)

1 2 3

Sketch! (the other kind)



Design Process: What worked - Phase 3-5



- Leveraging existing feature set in order to provide level of effort estimates
- Keeping things flexible so that schedule could be centered around development availability
- Feature requirements sheets that linked back to JIRA stories
- Iterating on our meetings
Research spikes > Design sprints > Dev Reviews

Research

Research Schedule

- Foundational Interviews - October 2016
- Build Screen (Invision) - November 2016
- Dashboard testing (invision) - December 2016
- Drag and Drop testing with instructors (Invision + Proto) - February 2017
- Drag and Drop testing with Reps/LSA (Invision + Proto) - March 2017

Research Outcomes: Navigation


Cover & Printing

Book Cover Title Page Table of Contents Print Options

Print Options

Binding
Perfect, binder-ready (\$0.50 per book) ▼

Perforations
Yes ▼



A paper spine ready for use in a 3-ring binder

Cost per Book (approximate)
Book Content: \$104.05
Binding Cost: \$0.50
Net Price per Book: \$104.55

Print Settings
Page Size: 8.5 x 11
Text Printing: 4-Color

Desk Copy

I would like a desk copy sent to me

My Biology Collection

\$104.55

509 pages
Binding Type: Perfect, binder-ready
Market: United States
Last saved: 10:53 AM



[Preview](#) [Share](#)

Build & Organize ✓

- Cover & Printing**
- Book Cover ✓
- Title Page
- Table of Contents
- Print Options**
- Course Information
- Review and Submit

Next >
Course Information

Research Outcomes: Drag and Drop AND Move

4	Heating Under Reflux ISBN-13: 9780132413756, This is experiment 4 from Multiscale Oper...	\$0.99	 
5	Addition, Sublimation ISBN-13: 9780132413756, This is experiment 7 from Multiscale Oper...	\$0.99	
6	Boiling Point, Refractive Index ISBN-13: 9780132413756, This is experiment 6 from Multiscale Oper...	\$0.99	

Build & Organize

- Move to Another part >
- Move to Top of this part
- Move to Bottom of this part
- Move to Position

Move Where?

Insert after: Resource Name: Fractional Distillation
This is experiment 6 from Multiscale Operational Organi...

Research Outcomes: User Roles


Instructor Dashboard

Pearson 🔔 ? E. Hearn

My Collections


+


Create New Collection



My Humanities Collection


Course: HM101
In Progress: Sep 22 2016


Options ▾ 



Maritime History


Course: HIS 521
Submitted: Aug 08 2016
Access Code ISBN: 9781398765432


Options ▾ 



Street-Fighting Mathematics


Course: MATH 280
Submitted: May 17 2016
ISBN: 9780192837465


Options ▾ 



Street-Fighting Mathematics


Course: MATH 280
In Progress: May 17 2016


Options ▾ 



Maritime History


Course: HIS 521
No Longer Available

Options ▾ 



Selections from Humanities: Culture, Continuity and Change

Course: HM101
In Progress: Sep 22 2016

Options ▾ 

Ops Team Dashboard

Pearson 🔔 ? E. Hearn

My Collections New Collection

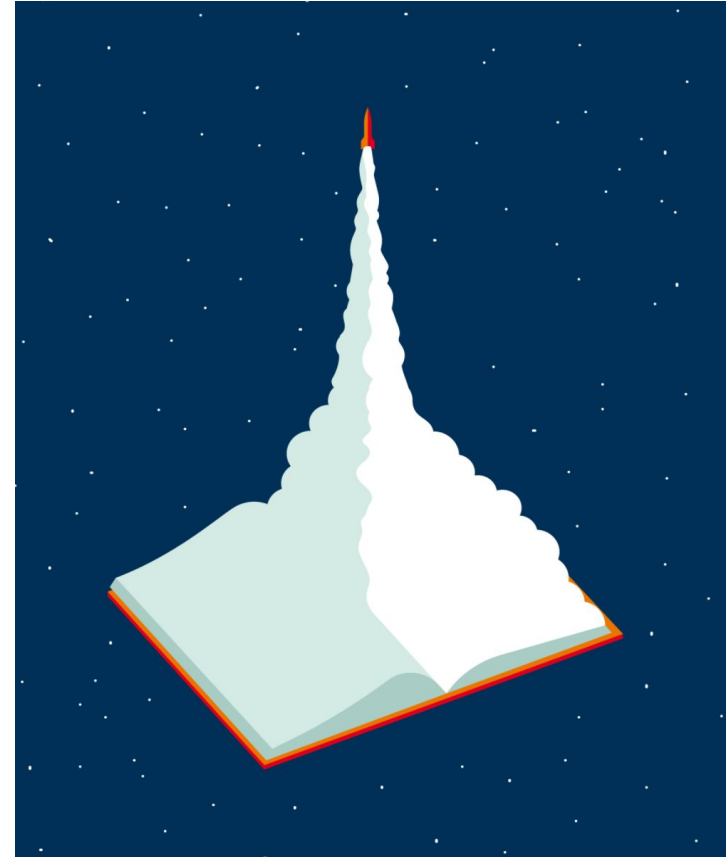
Market: United States ▾

Collection Title	Course	Instructor	Price	Status ▾	Modified ↓	
Introduction to Cell Biology	--	--	\$62.00	🔴	Nov 24 2016	Options ▾
Tree Climbing <small>978-0615112909</small>	AGRC 105	Professor W	\$27.00	✅	Sep 27 2016	Options ▾
My Humanities Collection	--	--	\$7.98	🔴	Aug 18 2016	Options ▾
Street-Fighting Mathematics	MATH 1106	Professor W	\$43.00	🔴	May 17 2016	Options ▾
Language, Culture, and Communication	COMM 112	--	\$80.00	🔴	Apr 1 2016	Options ▾
Maritime History <small>978-1101970355</small>	HIS 300	Professor Y	\$8.00	⚠️	Mar 9 2016	Options ▾
Chemistry: An Introduction to General, Organic...	--	Professor Y	\$58.98	🔴	Feb 2 2016	Options ▾
Garbology <small>978-1583335239</small>	ITA 101	Professor Y	\$110.00	✅	Jan 30 2016	Options ▾

⏪ 1-8 of 52 ⏩

...and Beyond

- 2-way communication line to the Collections Ops Team
- 3 Alpha releases to Internal Users
 - Tested assumptions vs. reality
 - Forced inclusions & printer limitations
 - UX audits
 - Issues and bug fixes prioritized together for next release
- Internal Beta utilizing production!



Evolution: Build Screen


My Bioengineering Collection

Price: --
Pages: 0

Collection Actions ▾

+ Add Stuff!

Search
Favorites
Upload



There aren't any resources here yet.
Select Add to search for or upload content.

Cover

Title Page

Table of Contents

Design Tools

- **Mural** for Journey mapping, User flows
- **Sketch** visual designs from Heather that we used to build more complete pages
- **Invision** with color-coded comments (yellow for component identification, blue for interaction & animation notes, pink for comments) and using Invision's Inspect Tab to grab text and measuring.
- **Slack** for communication with Dev team (time shift between teams)
 - Direct communication with devs = YAY!
- **Keynote** for animation examples
- **Jira** came in as developers started building and we commented and annotated user stories with links to Invision and/or mockups to address specific questions

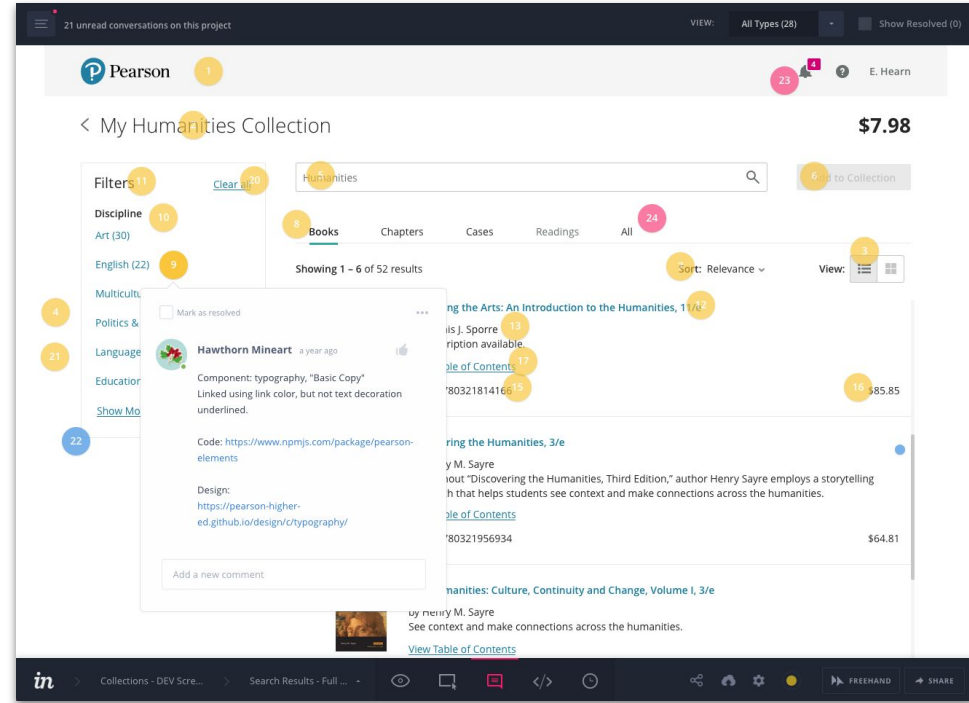
Invision (connect the dots)

Invision Comments as Notation

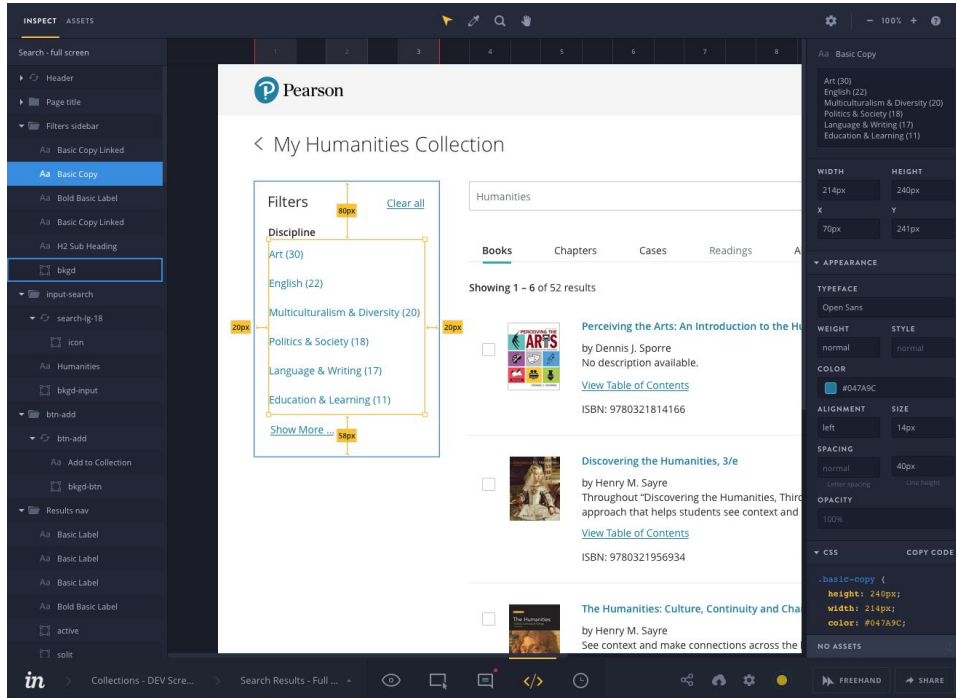
- Pink - Standard back & forth, questions, etc.
- Blue - Indicates a behavior/interaction note
- Yellow - Indicates a framework component (with links to design & code)

Imperfect system

- Commenting up a representative screen in a set is dangerous, things can be overlooked
- Accidental resolution of comments
- Not great for change tracking, adding new notes
- Tedium abounds



Invision (inspect tab)



Invision Inspect

- Sketch layer names need to match up with framework components too
- Text could be copied from this screen
- Redlining built in

Imperfect system

- Layer names needed to be consistent across designers
- Updating mockups mean pixel precision
- Tedium abounds

Keynote can do that?

Build & Organize

1	The Rise of Culture: From Forest to Farm Chapter 1 - The Humanities: Culture, Continuity and Change, Volume 1...	\$3.99
2	The Ancient Near East: Power and Social Order in... Chapter 2 - The Humanities: Culture, Continuity and Change, Volume 1...	\$3.99
3	Golden Age Athens and the Hellenic World: The... Chapter 3 - The Humanities: Culture, Continuity and Change, Volume 1...	\$3.99
4	Rome: Urban Life and Imper... Chapter 4 - The Humanities: Culture, Continuity and Change, Volume 1...	\$3.99
5	Emerging Empires in the East: Urban Life in China... Chapter 5 - The Humanities: Culture, Continuity and Change, Volume 1...	\$3.99
6	The Flowering of Christianity: Faith and Power of... Chapter 6 - The Humanities: Culture, Continuity and Change, Volume 1...	\$3.99
7	The Rise and Spread of Islam: A New Religion Appendix A - The Humanities: Culture, Continuity and Change, Volume 1...	\$3.99

Add more content

Search by title, ISBN, or author

Print Favorites Upload

Selection from Humanities: Culture, Continuity and Change

\$27.93
70 pages

Last used 1:15 PM

Preview Share

Build & Organize

Cover & Printing

Course Information

Review & Submit

Next: Cover & Printing



Collaboration

Collaboration

Collaborative Design from the beginning makes for better collaboration throughout!

Meeting Cadence

- Weekly UX & Product

- Weekly Dev & UX

 - Evolved from Questions to Demos

 - Development team is an active stakeholder in the design

 - Requirements review (Product, Development, and UX)

Outside of meetings

- Slack

- Pictures may equal 1000 words, but videos are priceless!*

- *especially with the time difference

Collaboration: Within UX

Fully staffed Experience team, with almost everyone involved from the beginning

Research

Interaction Designers

User Assistance

Visual Design

Accessibility

Creative Technologists

Collaboration: Within UX

Print

Select the Binding, Paper options, and Page Size for your book. Depending on the resources in the Collection, some options may not be available.

Binding ?

Perfect

Page Options

Standard

Page Size

8.5 x 11

Text Printing

4-Color

Bundled Materials

0

Price breakdown per book

Book Content \$68.24

Perfect \$0.00

Net Price per Book \$68.24

Collaboration: Within UX

Print Options

Binding

- ✓ Perfect
- Perfect, binder-ready (\$0.50 per book)
- Plastic coil (\$1.50 per book)**
- Plastic coil, binder-ready (\$2.00 per book)
- Looseleaf, binder-ready



Paper spine with flexible adhesive

Cost per Book (approximate)

Book Content: \$82.40

Binding Cost: **\$0.00**

Net Price per Book: \$82.40

Print Settings

Page Size: 8.5 x 11

Text Printing: 4-Color

Collaboration: Within UX

The screenshot displays the Pearson 'Build & Organize' interface. At the top left is the Pearson logo. The user's name 'Taxier, Karen' is shown in the top right. The main heading is 'Build & Organize'. Below this is an 'Add Content' section with a search bar containing the text 'Search by title, ISBN or author' and a magnifying glass icon. To the right of the search bar is an 'Upload' button with an upward arrow icon. A light blue tooltip titled 'Adding Content' is positioned over the search bar, containing the text: 'Select an option from above to start adding content to this Collection. The fastest way to locate resources is to search for them.' To the right of the search bar is a summary card for an 'Untitled Collection'. The card shows a price of '\$0.00' and 'Market: United States'. Below this are 'Preview' and 'Share' buttons. A vertical sidebar on the right contains a list of steps: 'Build & Organize' (highlighted with a blue background), 'Cover & Printing', 'Course Information', and 'Review and Submit'. At the bottom right, there is a large blue button labeled 'Next Cover & Printing' with a right-pointing arrow.

Collaboration: Within UX

The screenshot displays the Pearson 'Build & Organize' interface. At the top left is the Pearson logo, and at the top right is the user name 'Taxier, Karen'. The main content area is titled 'Build & Organize' and contains a list of eight biology chapters, each with a price of \$4.99. A light green callout box with a close button (X) is overlaid on the list, containing the text: 'A great start! Once you're done adding content to your Collection, select the Next button to continue. You'll be able to track your progress here as check marks appear by each step you've completed.' To the right of the list is a sidebar for an 'Untitled Collection' with a price of '\$44.91', 230 pages, and a 'Next' button. Below the sidebar is a vertical navigation menu with options: 'Build & Organize', 'Cover & Printing', 'Course Information', and 'Review and Submit'. At the bottom right of the sidebar area is a large blue 'Next' button with a right-pointing arrow.

Pearson

Taxier, Karen

Build & Organize

1	Biology: Exploring Life ISBN-13: 9780134296012, This is chapter 1 from Campbell Biology: C...	\$4.99
2	How Cells Harvest Chemical Energy ISBN-13: 9780134296012, This is chapter 6 from Campbell Biology: C...	\$4.99
3	A Tour of the Cell ISBN-13: 9780134296012, This is chapter 4 from Campbell Biology: C...	\$4.99
4	Patterns of Inheritance ISBN-13: 9780134296012, This is chapter 9 from Campbell Bi	
5	How Genes Are Controlled ISBN-13: 9780134296012, This is chapter 11 from Campbell E	
6	How Populations Evolve ISBN-13: 9780134296012, This is chapter 13 from Campbell E	
7	Tracing Evolutionary History ISBN-13: 9780134296012, This is chapter 15 from Campbell Biology: ...	\$4.99
8	The Evolution of Vertebrate Diversity ISBN-13: 9780134296012, This is chapter 19 from Campbell Biology: ...	\$4.99
	The Evolution of Plant and Fungal Diversity	

Untitled Collection

\$44.91

230 pages
Binding Type: Perfect
Market: United States
Last saved: 10:43 AM

[Preview](#) [Share](#)

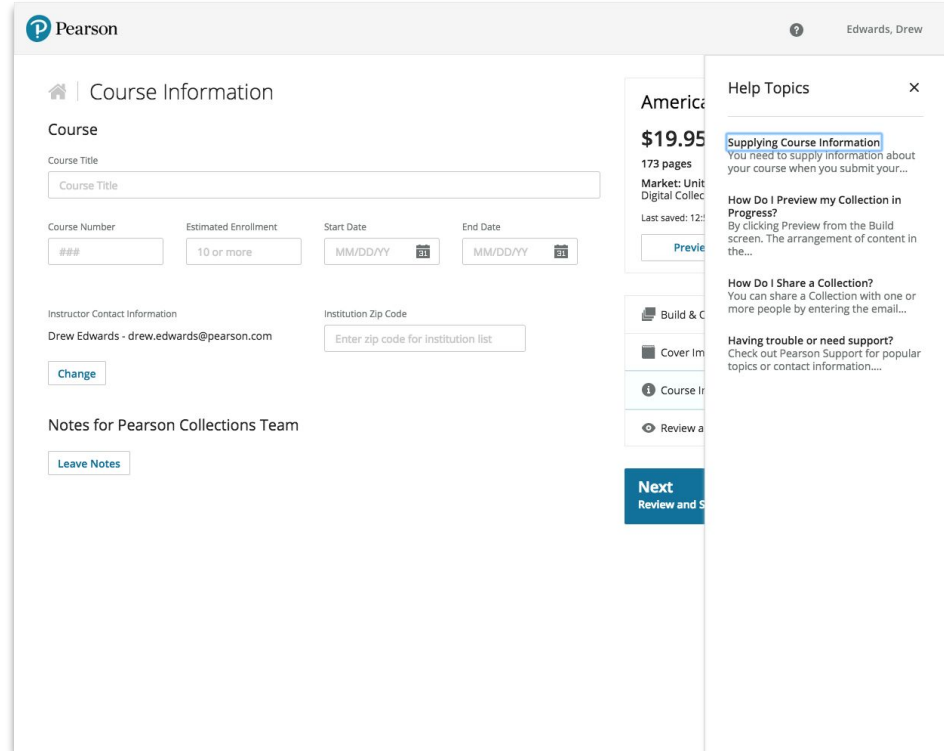
- Build & Organize
- Cover & Printing
- Course Information
- Review and Submit

Next
Cover & Printing

Collaboration: Within UX

The Help Drawer in Collections

- Implemented UX Framework's Help Drawer Component
- Help is contextual per page
- We have to balance what's on the page with limited number of items that can be shown in the drawer.



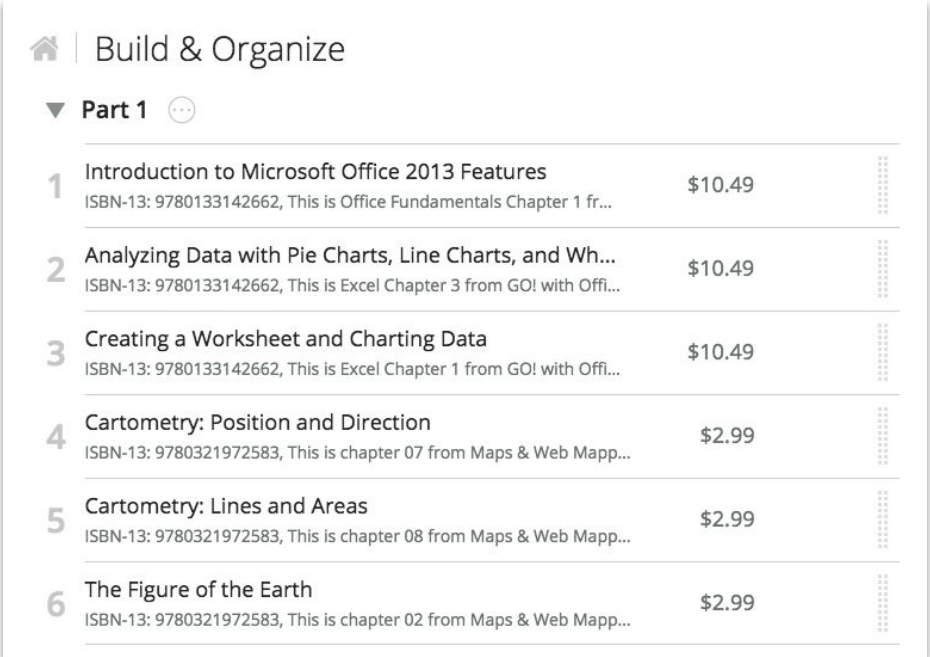


Bumps in the Road

Bumps in the Road

Resource positions within Build screen

- Overdependence on auto-spec tools
- Overconfidence in team collaboration



Build & Organize

▼ Part 1

1	Introduction to Microsoft Office 2013 Features ISBN-13: 9780133142662, This is Office Fundamentals Chapter 1 fr...	\$10.49	⋮
2	Analyzing Data with Pie Charts, Line Charts, and Wh... ISBN-13: 9780133142662, This is Excel Chapter 3 from GO! with Offi...	\$10.49	⋮
3	Creating a Worksheet and Charting Data ISBN-13: 9780133142662, This is Excel Chapter 1 from GO! with Offi...	\$10.49	⋮
4	Cartometry: Position and Direction ISBN-13: 9780321972583, This is chapter 07 from Maps & Web Mapp...	\$2.99	⋮
5	Cartometry: Lines and Areas ISBN-13: 9780321972583, This is chapter 08 from Maps & Web Mapp...	\$2.99	⋮
6	The Figure of the Earth ISBN-13: 9780321972583, This is chapter 02 from Maps & Web Mapp...	\$2.99	⋮

Bumps in the Road

Course Information Form

- Remember that UX is not just UI.
- Field vs. page validation, saving information, and load times are all part of the experience.
- If you can test the actual experience, great!
- If not...

Course Information


Course

Course Title

Course Number

Estimated Enrollment

Start Date

Instructor Contact Information

Karen Taxier - karen.taxier@pearson.com

[Change](#)

Institution Zip Code

Notes for Pearson Collections Team

[Leave Notes](#)

Course Bundles

If you have additional Pearson materials (books or access code cards) that you would like to include with this Collection, enter ISBNs in the fields provided.

A Pearson project specialist will contact you with the bundled pricing.

ISBN

Bumps in the Road

- We were not able to ingest the Framework components in the way that we would have liked, because the framework was in early stages and evolving rapidly.
- We needed more functional prototypes from Creative Technologists than we realized. Deepak built us a functional Build & Organize Page, but it would have been good to have responsive prototypes much earlier from the CT team
- Early prototypes were met with frustration by executives
- Shifting priorities and scope of work meant that we didn't get all the features we wanted (saving favorite chapters, notifications, etc.)
 - Turns out it's not just print only!



Demo!

Sample Collection

The screenshot displays the Pearson 'My Collections' interface. At the top left is the Pearson logo. The top right corner shows a notification bell with a red '4', a help icon, and the user name 'E. Hearn'. Below the header is the title 'My Collections'. The main content area features a large light gray button with a plus sign and the text 'Create New Collection'. To its right is a 'Sample Collection' card. The card has a portrait of a man with curly hair. Below the portrait, it says 'Sample Collection', 'Course: --', 'In Progress: 13 Apr 2017', and 'Options' with a dropdown arrow. A light blue tooltip with a close 'x' button is positioned to the right of the card. The tooltip text reads: 'Let's get started! This is your Collections Home screen. You'll be able to see and access all the Collections you've created and submitted from here. Here's a sample Collection for you to start exploring.'

What's Next for Collections?

- Forecasting \$2 million in growth
- Potential to leveraging Build UI capabilities for other product models in the future
- Digital Collections published as eTexts



Takeaways

Tools

- Get creative with what you have
- Know where the limits are
- Don't be over-reliant on automation

Process

- Knowledge dump is a great way to start!
- Prototype, Test, Iterate, Re-iterate
- UX is more than UI

People

- Collaborative design up front establishes a shared experience ownership and helps design discussions later
- Direct communication whenever possible, however possible (but videos if you can't!)
- Being a real, reasonable human being goes a long way



Questions?