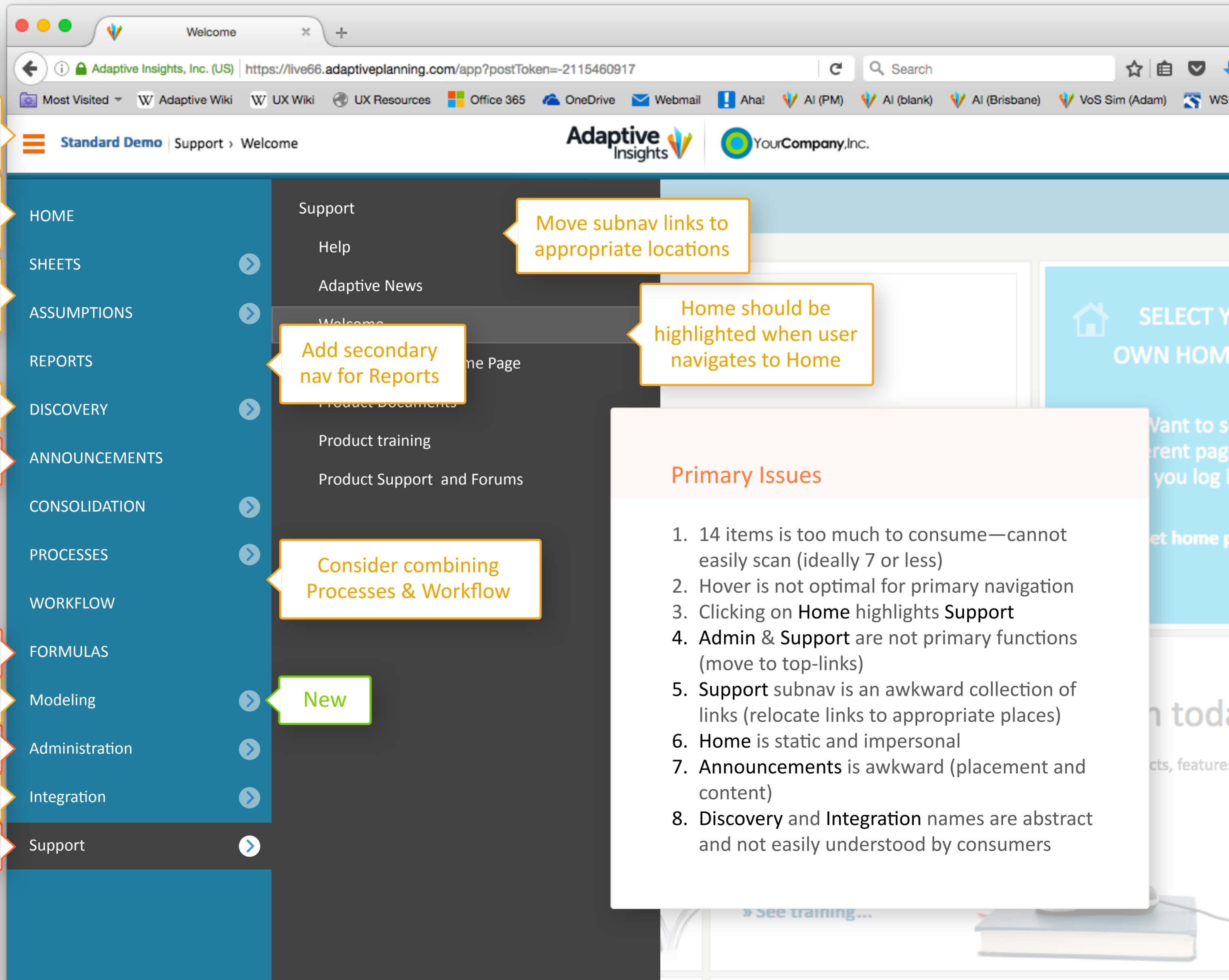


Evaluation: Navigation

1. Current & Proposed
2. Primary Issues
3. Proposal: Model 1
4. Other Considerations
5. Model 2 (vertical, 8 tabs)
6. Model 3 (vertical, 4 tabs)
7. Model 4 (horizontal, 4 tabs)
8. Model 5 (vertical, no tabs)
9. Related Proposals

Current Navigation Model

Current Navigation Model



Replace hover with on-click

Make Home configurable

Combine Sheets & Assumptions

Rename

Remove

Move subnav links to appropriate locations

Home should be highlighted when user navigates to Home

Add secondary nav for Reports

- ### Primary Issues
1. 14 items is too much to consume—cannot easily scan (ideally 7 or less)
 2. Hover is not optimal for primary navigation
 3. Clicking on Home highlights Support
 4. Admin & Support are not primary functions (move to top-links)
 5. Support subnav is an awkward collection of links (relocate links to appropriate places)
 6. Home is static and impersonal
 7. Announcements is awkward (placement and content)
 8. Discovery and Integration names are abstract and not easily understood by consumers

Consider combining Processes & Workflow

Remove

Rename

Remove

Rename

Remove

New

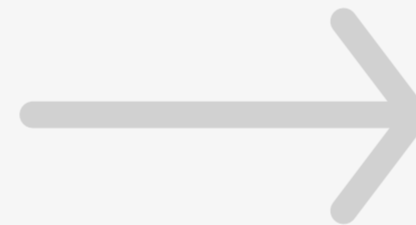
Proposal: Model 1

Minimal change to current model

Model 1: Proposal

Current (14 items)

HOME	
SHEETS	>
ASSUMPTIONS	>
REPORTS	
DISCOVERY	>
ANNOUNCEMENTS	
CONSOLIDATION	>
PROCESSES	>
WORKFLOW	
FORMULAS	
Modeling	>
Administration	>
Integration	>
Support	>



Proposed (8 items)

HOME	
SHEETS	>
REPORTS	>
ANALYTICS	>
CONSOLIDATION	>
PROCESSES	>
MODEL	>
DATA	>

1
Less clutter,
easy to scan

2
Verbiage is
simple & obvious
(no kitchy terms)

3
On-click is
easier to use
than hover

Model 1: Summary

The image shows a browser window displaying the Adaptive Insights application. The browser's address bar shows the URL <https://live66.adaptiveplanning.com/app?postTok>. The page header includes the Adaptive Insights logo and "YourCompany, Inc.". A navigation menu on the left lists: HOME, SHEETS, REPORTS, ANALYTICS, CONSOLIDATION, PROCESSES, MODEL, and DATA. A summary overlay is positioned in the center, and several callout boxes highlight specific areas of the interface.

Summary

Behavior Change

- Change hover to on-click action

Rename

- Rename Discovery to Analytics (or Dashboards)
- Rename Modeling to Model
- Rename Integration to Data

Relocate

- Administration—make a top link
- Support—make links available via Help
- Formulas—ensure contextual availability
- * • Assumptions—combine with Sheets
- * • Announcements—subsumed by Home

Enhancements

- * • Subnav for Reports
- * • Configurable homepage (Admin-set defaults)

Deeper Evaluation Required*

Callout Boxes:

- Show/hide menu**: Points to the top navigation bar.
- Add subnav for reports**: Points to the REPORTS menu item.
- Workflow is under Processes**: Points to the PROCESSES menu item.
- Admin & Support links**: Points to the top right navigation area.

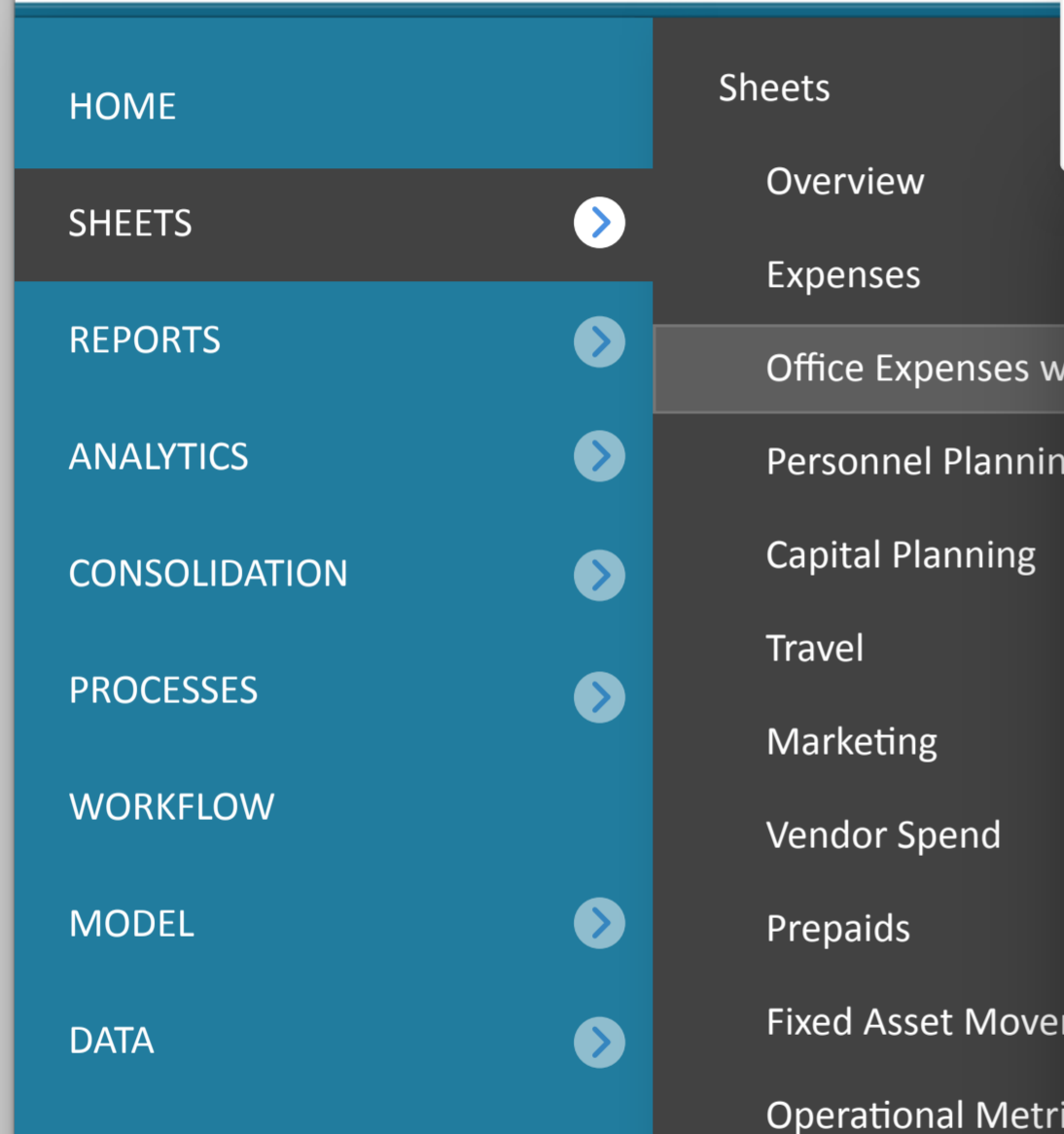
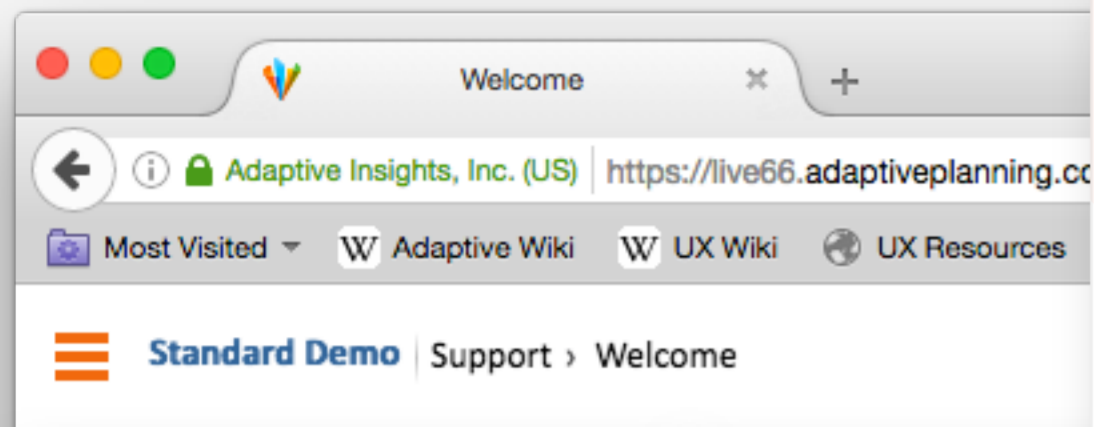
Other Considerations

Content Management & Other Functions

Primary Navigation / Sheets Overview / Report Folders

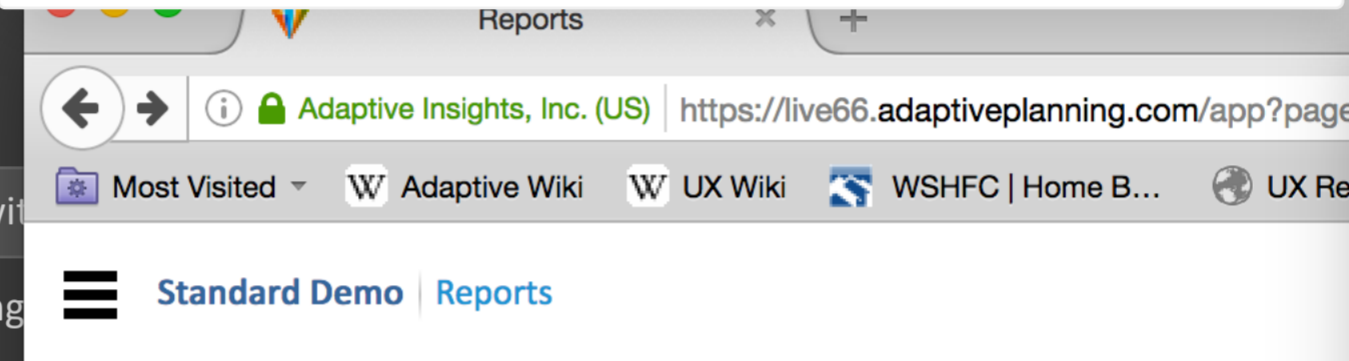
Primary Issues

- Inconsistent UI and interaction models
- Poor user experience
- Visually outdated and unappealing



Primary Issues

- Inconsistent UI and interaction models
- Poor user experience
- Visually outdated and unappealing



Search:

Folders

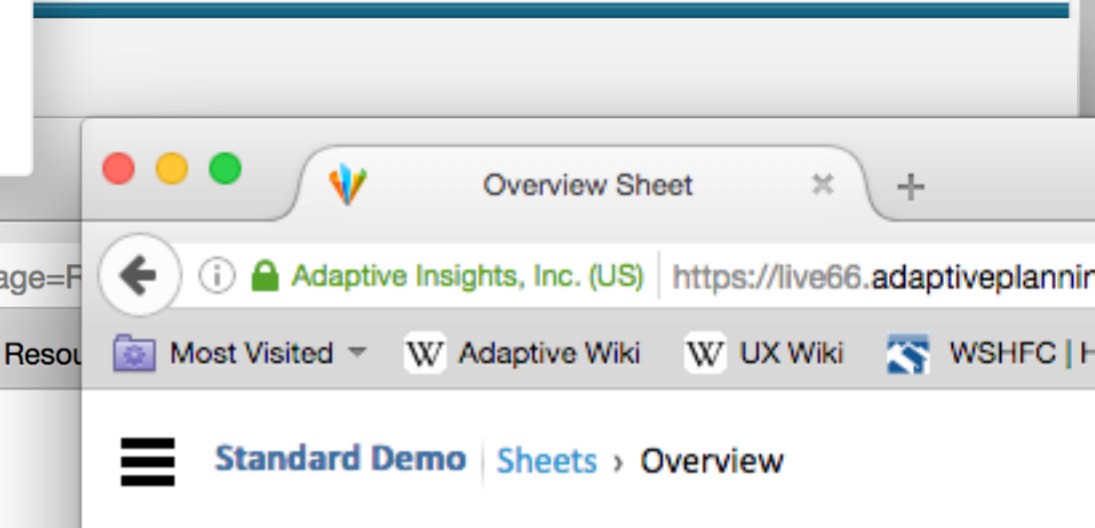
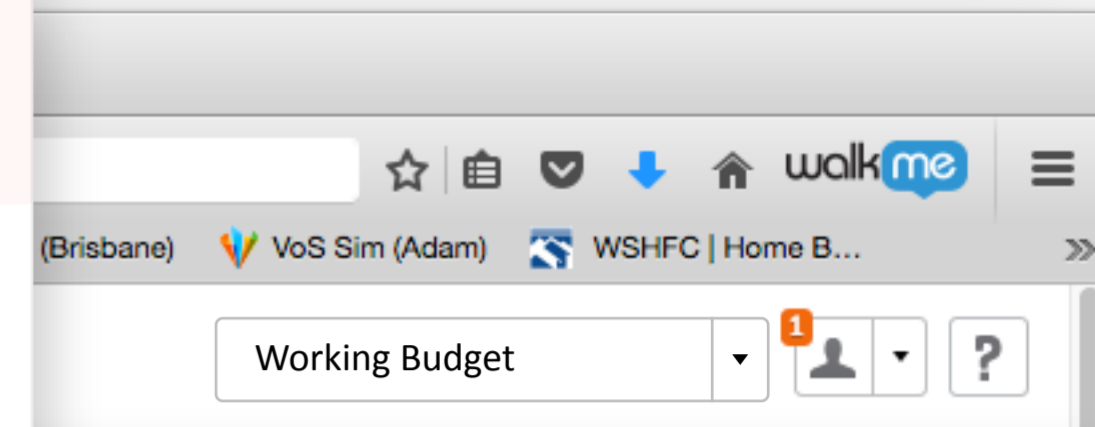
- Favorites
- Personal Reports
- Shared Reports
 - Allocation Reports
 - Announcements
 - Attachments
 - Attribute Reports
 - Consolidation Reports
 - Financial Statements
 - Graphs and Charts
 - Historical Reports
 - Integration Reports
 - Metric Reports
 - OfficeConnect
 - Packages
 - Personnel Reports
 - Revenue Reports
 - Sample Reports
 - Transaction Reports
 - Variance Analysis
 - Workflow Notification

Reports in Folder "Shared Reports > Financial Statements"

Name
Balance Sheet
Cash Flow Statement
Financial Summary
Functional P&L
Income Statement - CAD One
Income Statement - UK Op
Income Statement - US Op
Product P&L
Rolling 12 Month Report

- Add To Favorites
- Copy to Personal Folder
- Move to Personal Folder
- Email Report
- Rename
- Modify
- Attach Template
- Run as HTML
- Run as Excel
- Run as PDF
- Run as Template
- Create Snapshot
- Delete

Page: 1 Total Pages: 1



My Sheets

- [Expenses](#)
- [Office Expenses with Trend](#)
- [Personnel Planning](#)
- [Capital Planning](#)
- [Travel](#)
- [Marketing](#)
- [Vendor Spend](#)
- [Prepaids](#)
- [Fixed Asset Movement](#)
- [Operational Metrics](#)

Level Workflow Status

Name: Marketing
Updated by: Anne
Updated on: Jul 13, 2016

Note:

Status: ✔ Approved

Reports Overview

The screenshot shows the Adaptive Insights Reports Overview interface. The browser address bar displays the URL: <https://live66.adaptiveplanning.com/app?page=ReportMenu&service=page&zx=MTA0II>. The page header includes the Adaptive Insights logo, the company name "YourCompany, Inc.", and a "Working Budget" dropdown menu. The main content area is titled "Reports in Folder 'Shared Reports > Financial Statements'". It features a table with columns for "Name", "Created By", and "Last V". The table lists several reports, including "Balance Sheet", "Cash Flow Statement", "Financial Summary", "Income Statement - US Op", "Product P&L", and "Rolling 12 Month Report". A context menu is open over the "Income Statement - US Op" report, showing options such as "Add To Favorites", "Copy to Personal Folder", "Move to Personal Folder", "Email Report", "Rename", "Modify", "Attach Template", "Run as HTML", "Run as Excel", "Run as PDF", "Run as Template", "Create Snapshot", "Delete", "Properties", and "Permissions". A search bar is located at the top left, and a "New Report" button is at the top right. A sidebar on the left shows a "Folders" tree with categories like "Favorites", "Personal Reports", "Shared Reports", "Allocation Reports", "Announcements", "Attachments", "Attribute Reports", "Consolidation Reports", "Financial Statements", "Graphs and Charts", "Historical Reports", "Integration Reports", "Metric Reports", "OfficeConnect", "Packages", "Personnel Reports", "Revenue Reports", "Sample Reports", "Transaction Reports", "Variance Analysis", and "Workflow Notification".

Find

Create

Navigate

Browse & Organize

Search metadata

Access Management

Name	Created By	Last V
Balance Sheet	Business Analyst	8/7/20
Cash Flow Statement	Business Analyst	8/7/20
Financial Summary	Business Analyst	8/7/20
Income Statement - US Op	Business Analyst	8/7/20
Product P&L	Business Analyst	8/7/20
Rolling 12 Month Report	Business Analyst	8/13/2015 6:51:48

Page: 1 Total Pa

Features

- Add, edit and delete
- Browse and navigate (view)
- View metadata
- Search/filter
- Organize
- Manage permissions
- View in other formats
- Manage settings and parameters
- Version
- Export
- Save and manage snapshots
- Shared vs personal
- Share (collaborate)

Sheets Overview

The screenshot shows the 'Overview Sheet' interface for 'Marketing' level. The page includes a navigation menu on the left, a 'Level: Marketing' dropdown, and a 'Level Workflow Status' section. Callouts highlight key features: 'Navigate' points to the left-hand menu; 'Select level' points to the 'Level: Marketing' dropdown; 'Search metadata' points to the search links on the right; and 'Submit, approve' points to the 'Status: Approved' section with 'Reject' and 'Save Note Only' buttons.

My Sheets

- › Expenses
- › Office Expenses with Trend
- › Personnel Planning
- › Capital Planning
- › Travel
- › Marketing
- › Vendor Spend
- › Prepaids
- › Fixed Asset Movement
- › Operational Metrics

Level: Marketing

[Search Cell Notes](#)

[Search Audit Trail](#)

Level Workflow Status

Name: Marketing

Updated by: Anne

Updated on: Jul 13, 2016

Note: 5% increase in Q1

Status: Approved

Copyright © 2004-2016 Adaptive Insights, Inc. All rights reserved. | [Privacy Pol](#)

Features

- Add, edit and delete
- Browse and navigate (view)
- View metadata
- Search, filter, organize (?)
- Search cell notes and audit trail
- Manage permissions
- Manage settings and parameters
- Version and level
- Export (?)
- Save and manage snapshots (?)
- Shared vs personal (?)
- Share (collaborate)
- Submit, approve (workflow)

Content Management & Navigation Considerations

- 1 Cross-product consistency (Sheets, Reports, Dashboards, etc.)
- 2 Primary vs. secondary functions
 - Primary—navigating, filtering, organizing, etc.
 - Secondary—viewing in other formats, exporting, printing, sharing, snapshots, searching notes and audit trail, managing permissions, etc.
- 3 Screen layout and design
 - Header and footer functions (breadcrumbs, top-links, search, personal preferences, etc.)
 - Netsuite and Salesforce context
 - Responsive and mobile design
 - Keyboard controls

Viewing & Finding

- Navigation (browse), incl. setting level
- Favorites
- Persistence
- Search—contextual (filter?)
- Search—global (search results, notes, audit trail, etc.)
- Contextual options (right-click)
- Sorting
- Keyboard control

Managing (administrative & personal)

- Add, edit, delete
- Organization (folders)
- Permission management (folders and content)
- Set default views (by role)
- Audit trail
- Snapshots (creating, scheduling, etc.)

Screen Layout & Design

- Header and footers (incl. metadata, filters)
- Branding, icons, buttons, etc.
- Netsuite and Salesforce views (context)
- Keyboard control
- Responsive
- Mobile

Contextual Options

- Edit, delete
- Permission management (folders and content)
- View in alternate formats
- Export and print
- Search notes and audit trail
- Save and manage snapshots
- Share
- Notes (indicate, view, add, search)
- Submit and approve

Alternate Models

1. Model 2 (vertical, 8 tabs)
2. Model 3 (vertical, 5 tabs)
3. Model 4 (horizontal, 5 tabs)

Model 2:

Left-hand Panel, 8 Tabs

Model 2 - Feature-rich Navigation Panel

The screenshot shows a web browser window with the URL `https://live66.adaptiveplanning.com/app?postToken=-2115460917`. The page header includes the Adaptive Insights logo, the company name "YourCompany, Inc.", and a "Working Budget" dropdown. The left navigation panel is a multi-tiered menu with categories: Home, Sheets, Total Company (with a search icon), Reports, Analytics, Consolidation, Processes, Model, and Data. The "Total Company" section is expanded, showing a list of items like "All sheets", "Expenses", "Office Expenses with Trend", "Personnel Planning" (selected), "Capital Planning", "Travel", "Marketing", "Vendor Spend", "Prepays", "Fixed Asset Movement", and "Operational Metrics". A context menu is open for "Personnel Planning", listing options: "Add to favorites", "Edit", "Save snapshot", "Print", "Export", "Share", and "Delete".

1. Browsing & Context Awareness

Multi-tiered menu (visible while browsing and viewing content) allows for easier browsing and context visibility—no need for breadcrumbs.

2. Options at Your Fingertips

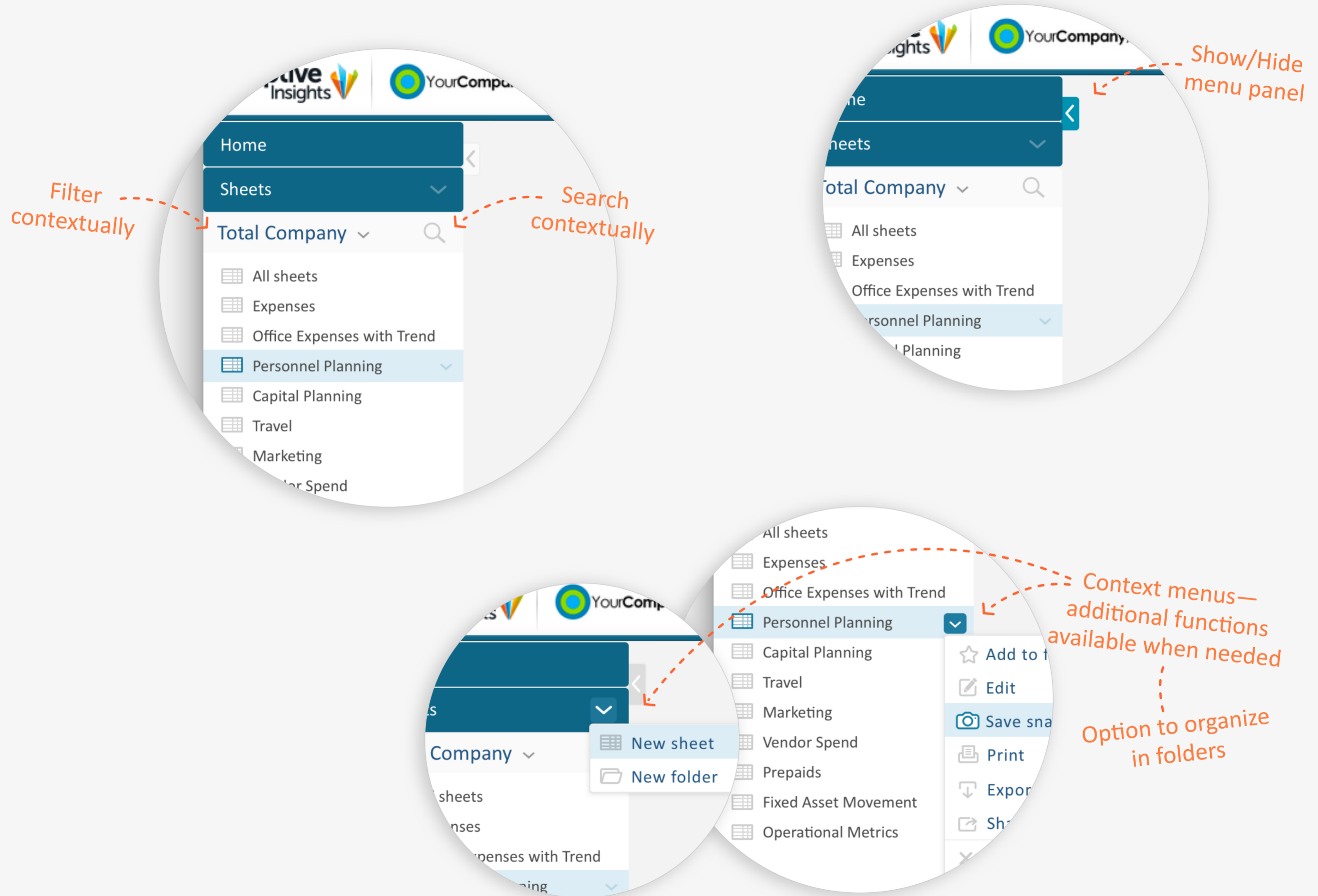
Icons provide a way of indicating options without distracting from primary functions because of their low profile. They also aid discoverability since they're visible when seeking additional functions.

3. Adding Functionality to Navigation

Contextual options (level selection, search, context menus) provide rich interaction while eliminating need to navigate away and back.

Additional functions, such as folder management and permissions, provide further options.

Model 2—Enhanced UX



Model 2 - Menus

- Home
- Sheets
- Total Company
- All sheets
- Expenses
- Office Expenses with Trend
- Personnel Planning
- Capital Planning
- Travel
- Marketing
- Vendor Spend
- Prepays
- Fixed Asset Movement
- Operational Metrics

- Reports
- Analytics
- Consolidation
- Processes
- Model
- Data

- Home
- Sheets
- Reports
- Folder 1
 - Report 1
 - Report 2
 - Report 3
- Folder 2
 - Report 4
 - Report 5
- Folder 3
 - Report 6

- Analytics
- Consolidation
- Processes
- Model
- Data

- Home
- Sheets
- Reports
- Analytics
- Total Company
- Perspective 1
 - Dashboard 1
 - Dashboard 2
 - Dashboard 3
- Perspective 2
 - Dashboard 4
 - Dashboard 5
- Perspective 3
 - Dashboard 6

- Consolidation
- Processes
- Model
- Data

- Home
- Sheets
- Reports
- Analytics
- Consolidation
- Intercompany Eliminations
- Journal Entries
- Report 1
- Report 2

- Processes
- Model
- Data

Model - Menus cont'd

- Home
- Sheets
- Reports
- Analytics
- Consolidation
- Processes

Workflow

My Assignments

- Process 1
- Process 2

Manage Processes

- Process 1
- Process 2
- Process 3
- Process 4
- Process 5

- Model
- Data

- Home
- Sheets
- Reports
- Analytics
- Consolidation
- Processes
- Model

Model

Manage Details

- Versions
- Levels & Dimensions
- Accounts
- Rules
- Sheets

- Data

- Home
- Sheets
- Reports
- Analytics
- Consolidation
- Processes
- Model
- Data

Data Sources

- Data source 1
- Data source 2
- Data source 3

Loaders

- Loader 1
- Loader 2

Tasks

- Task 1
- Task 2
- Task 3

Data Agent

- Data Agent 1

Model 3:

Left-hand Panel, 5 Tabs

Model 3 - Content Aggregation

The screenshot displays the Adaptive Insights web application interface. At the top, there is a browser window with the URL `https://live66.adaptiveplanning.com/app?postToken=-2115460917`. Below the browser, the Adaptive Insights logo and "YourCompany, Inc." are visible. The main navigation bar includes "Working Budget" and several utility icons. A left-hand sidebar menu is open, showing a hierarchical structure of content. The "Total Company" section is expanded, listing items like "Sheet 3", "Sheet 5", "Report 2", "Folder 1", "Sheet 1", "Sheet 2", "Dashboard 1", "Folder 2", "Report 1", "Report 2", "Folder 3", "Report 3", "Report 4", "Folder 4", "Dashboard 2", "Dashboard 3", and "Report 5". A circular callout highlights a sub-menu for "Sheet 1", which lists "Sheet 5", "Report 2", "Folder 1", "Sheet 1", "Sheet 2", "Dashboard 1", "Folder 2", "Report 1", "Report 2", and "Folder 3". An orange callout box with the text "+ Aggregated Content" is positioned over the right side of the interface, with a white text box below it explaining that artificial separation of products is removed and content is organized based on customer preference.

+ Aggregated Content

Artificial separation of products is removed—
Sheets, Reports and Dashboards can be organized
based on customer preference. Favorites are
aggregated as well.

Model 3 - Content Aggregation

The screenshot shows the Adaptive Insights web application interface. The browser address bar displays the URL: <https://live66.adaptiveplanning.com/app?postToken=-2115460917>. The page header includes the Adaptive Insights logo, the company name "YourCompany, Inc.", and a "Working Budget" dropdown menu. The main navigation is a sidebar on the left with a search bar and a list of items under the "Planning & Analysis" section. The items include "Total Company", "Sheet 3", "Sheet 5", "Report 2", "Folder 1", "Sheet 1", "Sheet 2", "Dashboard 1", "Folder 2", "Report 1", "Report 2", "Folder 3", "Report 3", "Report 4", "Folder 4", "Dashboard 2", "Dashboard 3", and "Report 5". At the bottom of the sidebar are sections for "Consolidation", "Processes", "Model", and "Data".

Annotations in orange text with dashed arrows point to specific features:

- "Aggregated content, including favorites" points to the search bar in the sidebar.
- "Search across content types" points to the search bar in the sidebar.
- "Create new objects from main navigation" points to the "New sheet", "New report", "New dashboard", and "New folder" options in the dropdown menu.
- "Folders allow content aggregation & natural permission & management" points to the "Folder 1" through "Folder 4" items in the sidebar.
- "Click on a folder to view, search and sort content, etc." points to the "Folder 1" item in the sidebar.
- "Each tab persists the last viewed item" points to the "Sheet 1" item in the sidebar.

Model 3 - Menus

- Performance
- Total Company
 - Sheet 3
 - Sheet 5
 - Report 2
 - Folder 1
 - Sheet 1
 - Sheet 2
 - Dashboard 1
 - Folder 2
 - Report 1
 - Report 2
 - Folder 3
 - Report 3
 - Report 4
 - Folder 4
 - Dashboard 2
 - Dashboard 3
 - Report 5
- Consolidation
- Processes
- Model
- Data

- Performance
- Consolidation
 - Intercompany Eliminations
 - Journal Entries
 - Report 1
 - Report 2
- Processes
- Model
- Data

- Performance
- Consolidation
- Processes
 - Workflow
 - My Assignments
 - Process 1
 - Process 2
 - Manage Processes
 - Process 1
 - Process 2
 - Process 3
 - Process 4
 - Process 5
- Model
- Data

- ?
- Consolidation
- Processes
- Model
 - Model
 - Manage Details
 - Versions
 - Levels & Dimensions
 - Accounts
 - Rules
 - Sheets
- Data

- ?
- Consolidation
- Processes
- Model
- Data
 - Data Sources
 - Data source 1
 - Data source 2
 - Data source 3
 - Loaders
 - Loader 1
 - Loader 2
 - Tasks
 - Task 1
 - Task 2
 - Task 3
 - Data Agent
 - Data Agent 1

Model 4:

Horizontal Navigation, 5 Tabs

Model 4

The image shows a software interface with a navigation menu on the left and a top bar with tabs. The navigation menu is titled "Total Company" and lists various items like "Sheet 3", "Sheet 5", "Report 2", "Folder 1", "Sheet 1", "Sheet 2", "Dashboard 1", "Folder 2", "Report 1", "Report 2", "Folder 3", "Report 3", "Report 4", "Folder 4", "Dashboard 2", "Dashboard 3", and "Report 5". The top bar has tabs for "Portal", "Consolidation", "Processes", "Model", and "Data", along with "Working Budget", a search icon, a user icon, a settings icon, and a help icon. A subnavigation menu is open under the "Processes" tab, showing "Assignments", "2017 Budget", "Manage", "Q3 Reforecast", "August Close", "Q4 Quarterly Forecast ...", "Q3 Quarterly Budget Revi...", and "2017 Budget". Another subnavigation menu is shown under the "Consolidation" tab, with "company Eliminations" and "Journal Entries".

+ Horizontal Tabs & Custom Subnav

- Tabs are always visible w/efficient use of space
- Full height used for content management
- Left-hand navigation can be unique to section

Click tab for last view or click arrow for a specific screen

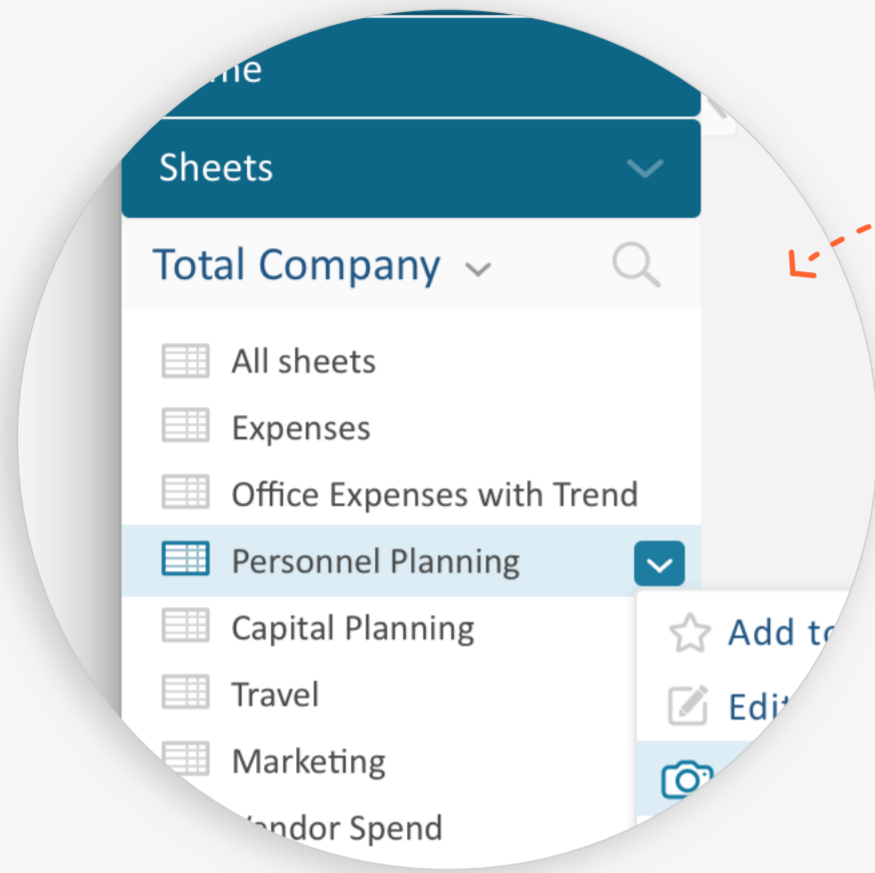
Subnav can be different for each primary tab

Micro-interactions:

Feedback & Fluidity

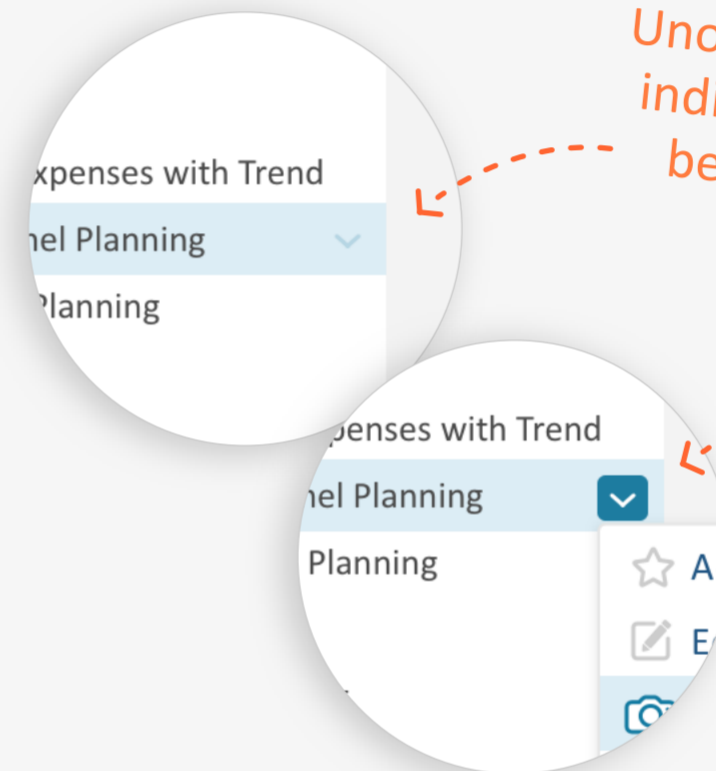
Micro-interactions

Browsing & Context



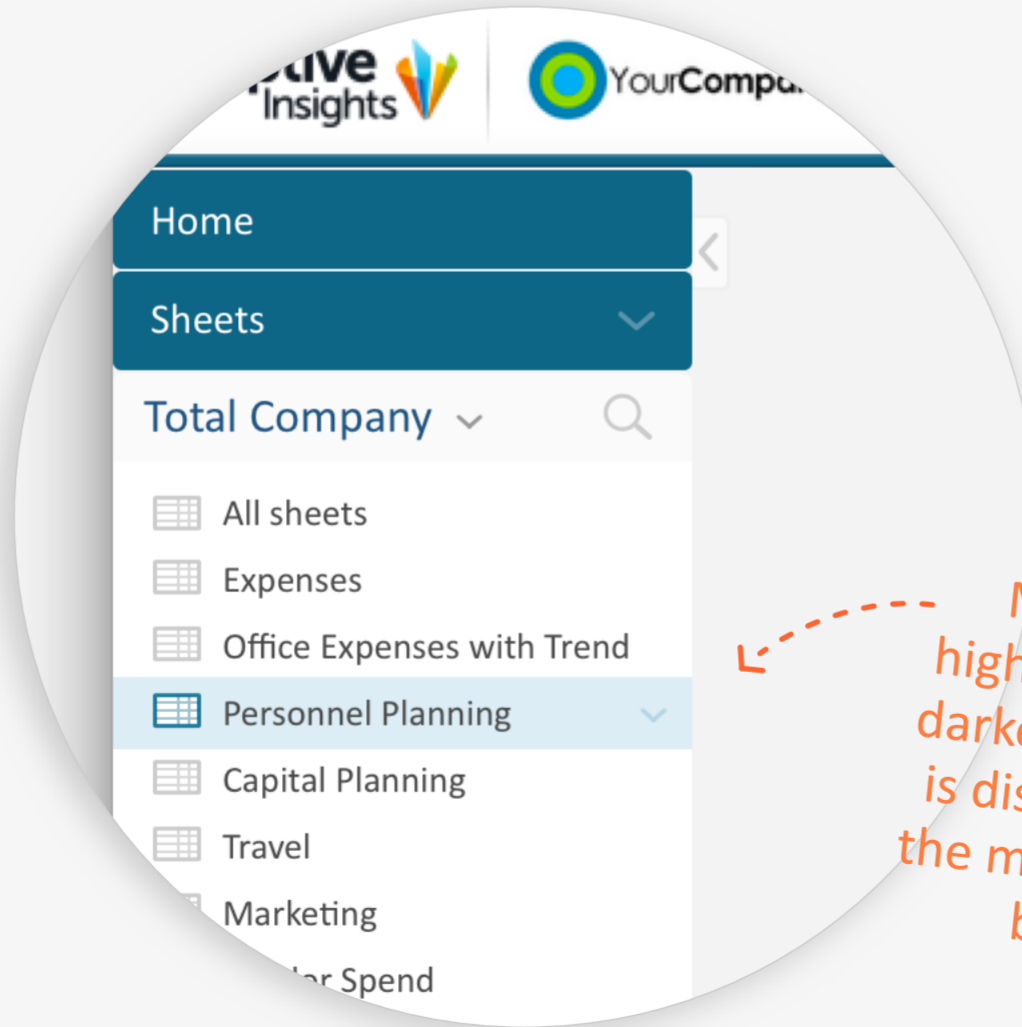
Expand tab and see content in-context—no need for breadcrumbs

Auxilliary Functions



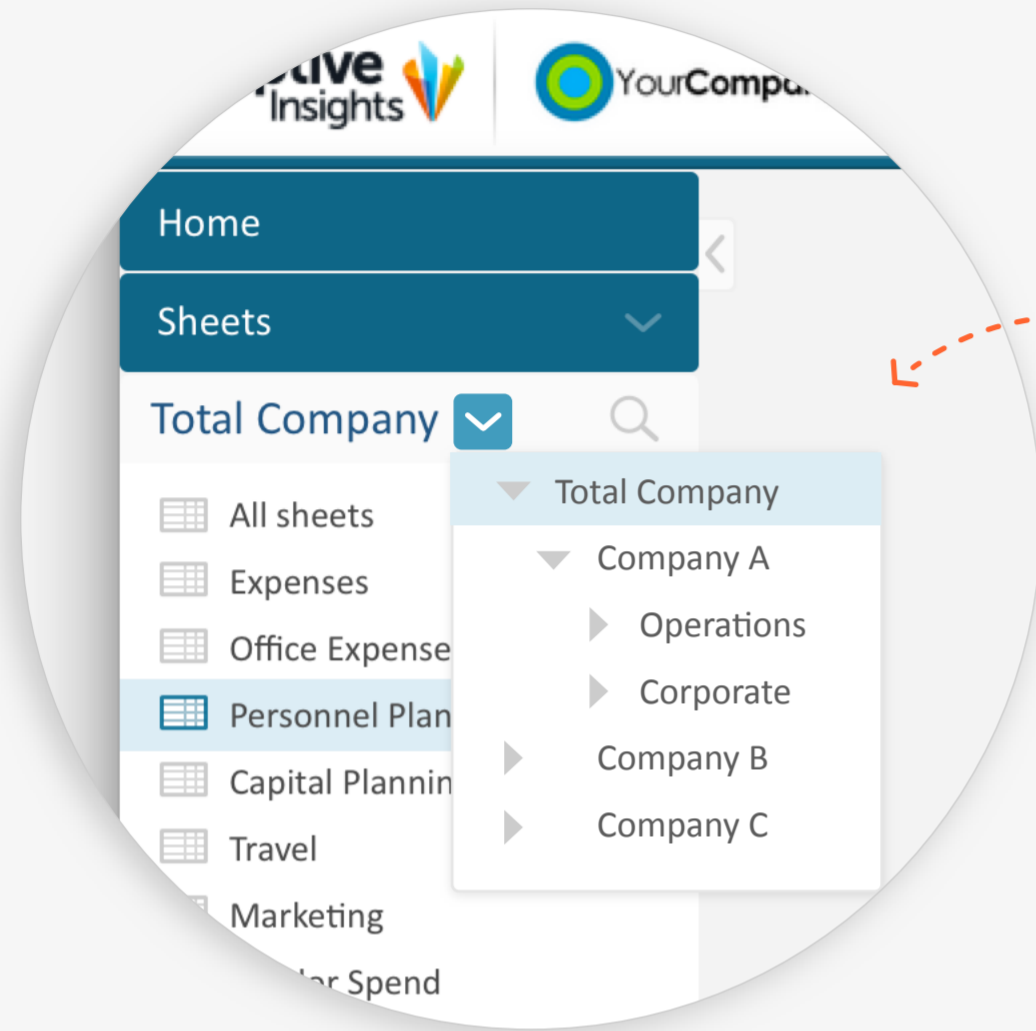
Unobtrusive context menus indicate more options and becomes prominent on hover and click

Maintain Context



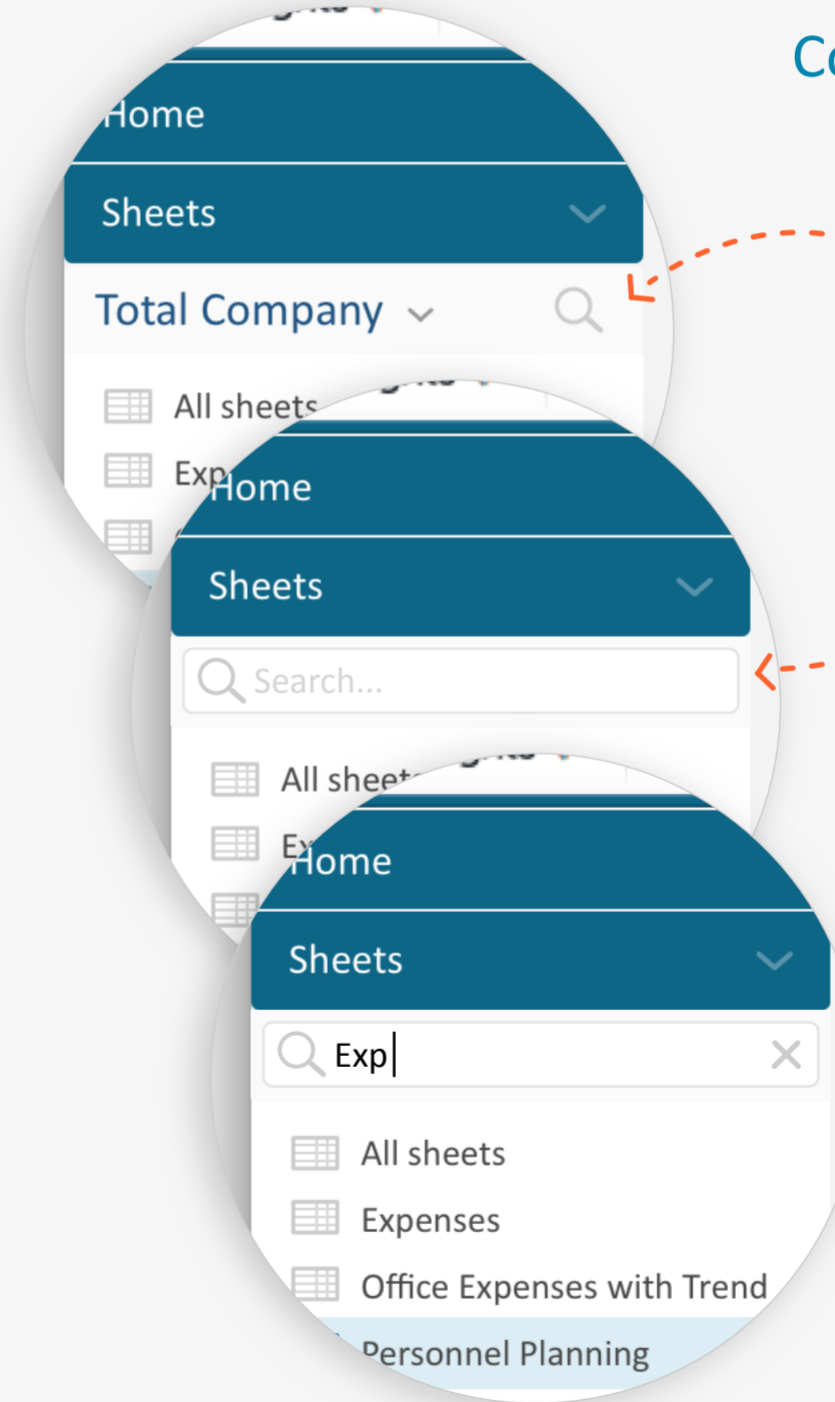
Menu item selection—highlights on hover and icon darkens on selection. Content is displayed in the context of the menu, providing for easier browsing capability.

Micro-interactions (cont'd)



Contextual Filtering

Set filters in context to reduce confusion about what is being viewed



Contextual Search

Click on search icon and search field slides into view

Related UX Proposals

Evaluation, Design & Rework

Related UX Proposals

Navigation Update (v1)

Goal: Ease-of-use (scanability, quick navigation)

1. Eliminate marketing terms
2. Eliminate unnecessary items
3. Change hover actions to on-click

Navigation Redesign (v2)

Goal: Provide richer functionality in the navigation and eliminate unnecessary tracking, navigation and screens. also improve perception and appeal.

- Contextualize functions (level selections, search, favorites, organization, add, edit and delete options, export, share, permission and workflow management and numerous other options)
- Eliminate Sheets and Reports Overview screens and breadcrumbs
- Add universal search results screen with flexible filtering (incl. notes and audit trail)
- Responsive and mobile-friendly design
- Keyboard controls

Homepage (v1)

Goal: Consolidate and improve current solution

1. Make homepage dynamic
2. Include Announcements and Dashboard functionality

Homepage (v2)

Goal: Dynamic portal solution—functional, flexible and scalable

1. Content aggregation and custom widgets
2. Flexible Admin and individual settings
3. Persistence

Workflow

Provide submission and approval options in context (sheet view and navigation right-click)

Search Consistency

Eliminate inconsistencies across search functions and optimise search experience

Responsive/Mobile

Ensure a quality experience for touch and small format devices

Related UX Proposals (cont'd)

Administration Screens

Improve administration experience and eliminate outdated designs throughout Administration and Model Management screens

Snapshots

Improve functions for saving, scheduling, organizing and retrieving snapshots

Collaboration

Improve notes, sharing and staging functions