

CUNY Academic Commons - Feature #12315

Design/UX # 3176 (Resolved): Consolidate Doc/File/Forum Attachment interface

Add New Item flow for revamped Library

2020-01-21 03:44 PM - Colin McDonald

Status:	Resolved	Start date:	2020-01-21
Priority name:	High	Due date:	
Assignee:	Boone Gorges	% Done:	0%
Category name:	Group Library	Estimated time:	0.00 hour
Target version:	1.17.0		

Description

Hello, starting this ticket per Sonja's request on the dev call to break it out from our main ticket [#3176](#) and focus only on the flow for adding a new item in the new Library design. We'll need to account for adding the different item Types -- File, Doc and Link i.e. external source -- and adding the metadata or content needed for each. I've attached the mockup Sonja did for this few revisions ago as a starting point. We'll need to add more copy I'm sure, but perhaps we clean up this mock first and go over any tech issues.

History

#1 - 2020-01-21 03:50 PM - Colin McDonald

- Assignee set to Sonja Leix

#2 - 2020-01-22 02:18 PM - Boone Gorges

Seems like a good start. I wasn't on the call yesterday, so please excuse me if some of this feedback is premature or duplicates things that've already been said:

- p1 Maybe we want more copy on step 1? 'Type of item' might need some clarification.
- p2 'Upload File' language - In the current interface, the file isn't actually uploaded until you click 'Add File'. Ideally, we'd keep it the same way (asynchronous uploading is neat but it makes the job quite a bit bigger), which suggests we might want to say 'Select file' or something similar.
- p3 'This is a minor edit' doesn't need to appear for new items
- d. Where are you dropped after submission? Into the top-level Library? Into the Library with the appropriate type filter selected? In the case of Docs, you could redirect into the Doc itself, but the same thing can't happen for Files and External.
- e. Is there a mechanism to create a new folder from here?
- f. Does this replace existing Create interfaces? So when you click 'Create New Doc', you're sent here with Doc selected? Likewise with Files.

#3 - 2020-01-24 08:04 PM - Sonja Leix

Thanks for your questions. I'll try answer what I have intended and let Colin and Matt chime in with additional feedback:

Boone Gorges wrote:

- p1 Maybe we want more copy on step 1? 'Type of item' might need some clarification.

Good call. Colin, could you work your copy magic to provide some context and help orient the user to proceed in the flow?

- p2 'Upload File' language - In the current interface, the file isn't actually uploaded until you click 'Add File'. Ideally, we'd keep it the same way (asynchronous uploading is neat but it makes the job quite a bit bigger), which suggests we might want to say 'Select file' or something similar.

Good point. I'll update that.

- p3 'This is a minor edit' doesn't need to appear for new items

Thanks for catching that. I'll update that.

- d. Where are you dropped after submission? Into the top-level Library? Into the Library with the appropriate type filter selected? In the case of Docs, you could redirect into the Doc itself, but the same thing can't happen for Files and External.

I would recommend to drop the user into the top-level Library page. Here all files are by default sorted by Newest, so the latest item the user added is accessible at the top of the list.

- e. Is there a mechanism to create a new folder from here?

Good point. Can we easily add an option within the folder dropdown, at the bottom of all existing folders, to create a new one? If not, I can add a field similar to the current UI.

f. Does this replace existing Create interfaces? So when you click 'Create New Doc', you're sent here with Doc selected? Likewise with Files.

Yes, that's correct. With the consolidated Library UI, we're also providing a consolidated creation flow for library items.

Batch upload

During our Tuesday meeting, Ray noted that we might want to include a way to batch upload files. There was a recent request (#12294). Looking at the ticket now, it seems this request will be tabled until a later release. If there is still a need to account for multiple file uploads, please let me know and I'll explore it.

Colin and Matt,
do you have any additional feedback for me to implement?

#4 - 2020-01-27 10:40 AM - Boone Gorges

I would recommend to drop the user into the top-level Library page. Here all files are by default sorted by Newest, so the latest item the user added is accessible at the top of the list.

This seems like a fine solution to me. We may want to show a success message as well.

Good point. Can we easily add an option within the folder dropdown, at the bottom of all existing folders, to create a new one? If not, I can add a field similar to the current UI.

Yes, I think this is pretty easy. I'm imagining something like: there'll be a new option at the end of the dropdown (formatted differently? Like maybe a leading plus sign: '+ Add new folder'). When selected, a text input will appear just below or beside the dropdown, with a helpful placeholder. User will enter the folder name here. We'll need validation to ensure that the user doesn't leave this field empty.

#5 - 2020-01-28 10:02 AM - Colin McDonald

This is all looking good to me. I imagine we'll want to clear this flow with the group on Friday, since this is a set of mockups nobody has looked at in a while, but I think a lot of it is pretty straightforward. We could try this line of copy on p1 to get the user started:

New Library Item

You can select three different types of items to add to your Library. Files are standalone uploads from your desktop like images or PDFs or Word Docs (similar to an email attachment). Docs are blocks of text that you'll be prompted to type in directly before adding. External Links point to an item hosted elsewhere on Google or Dropbox.

What type of item do you want to add?

***In writing this, I'm wondering whether we replace "From external source (Google, Dropbox" with "External Link (Google, Dropbox" for brevity and clarity.

#6 - 2020-01-29 12:12 PM - Colin McDonald

Modifying my copy in the prior comment based on our conversation yesterday that External Links could include ANY link, not just Dropbox or Google, but we want to highlight those two use cases. Also changing Docs to Editable Docs:

New Library Item

You can select three different types of items to add to your Library. Files are standalone uploads from your desktop like images or PDFs or Word Docs (similar to an email attachment). Editable Docs contain text that you type in directly before adding and that you can edit via your Library later. External Links point to an item hosted elsewhere on the web, like Google or Dropbox.

What type of item do you want to add?

#7 - 2020-01-30 05:55 PM - Sonja Leix

- File 12315-Add-New-Library-Item-v2.pdf added

Thanks Colin.

Attached is the updated flow to add new library items.

If a user interrupts a flow by clicking "cancel", "back to library", or selects a different type in the dropdown while they have already started inputting information into any of the fields, we should have a warning message (something like: "are you sure you want to" with an option to cancel and yes), before the user leaves the page.

#8 - 2020-01-31 10:26 PM - Colin McDonald

Notes from today's meeting, with some proposed fixes mostly for copy:

- In the drop-down for type of item, make it just "External Link" and not "External Link (Google Drive, Dropbox)"
- For the "Add to folder" option when uploading, make it possible add to a newly-created folder.
- For the "Please note:" copy when choosing External Link from the drop-down, change it to: "If you are linking to a document or other file that's hosted externally, it will have a time stamp from when it was added to the group library. These files are linked, which means any changes made in the original location won't trigger notifications to the group."
- Text under the link field, let's say: "E.g. <https://docs.google.com/document/>... Review your sharing options for the source file, so it is accessible to group members."

#9 - 2020-02-04 11:28 AM - Sonja Leix

- *File 12315-Add-New-Library-Item-v3.pdf added*

Thanks Colin, attached are the updated mockups. I've also added "Microsoft OneDrive" to the list of sources in the text above the dropdown.

#10 - 2020-02-04 05:53 PM - Sonja Leix

- *File 12315-Add-New-Library-Item-v4.pdf added*

I forgot to add the "Add new folder" within the flow. See attached with this functionality mocked up.

Boone, would love to hear your technical feedback. Happy to adjust.

#11 - 2020-02-04 06:10 PM - Boone Gorges

Thanks, Sonja. My only concern about this is on p7. When you select '+ Add new folder' from the dropdown and the new section appears, it seems to me that the 'Add to folder' dropdown should **not** read 'Select folder'. Can we continue to show '+ Add new folder'? Would this perhaps make the subheading 'Add new folder' in the grey box redundant?

#12 - 2020-02-04 08:01 PM - Sonja Leix

- *File Add-folder-selector.png added*

Boone Gorges wrote:

Thanks, Sonja. My only concern about this is on p7. When you select '+ Add new folder' from the dropdown and the new section appears, it seems to me that the 'Add to folder' dropdown should **not** read 'Select folder'. Can we continue to show '+ Add new folder'? Would this perhaps make the subheading 'Add new folder' in the grey box redundant?

Thanks, you're right. See attached what the section should look like and let me know if this makes more sense.

#13 - 2020-02-05 07:56 AM - Boone Gorges

Yup, that looks great - thanks, Sonja!

#14 - 2020-02-10 10:16 PM - Sonja Leix

Are there any more revisions for this flow are is this approved?

#15 - 2020-02-11 07:12 PM - Colin McDonald

Hi Sonja, I think we will show the group your latest mockup for this on Feb 21st for final approval. I don't think there are more changes to be made in the meantime, but if something comes up I'll let you know.

#16 - 2020-02-12 05:07 PM - Sonja Leix

Colin McDonald wrote:

Hi Sonja, I think we will show the group your latest mockup for this on Feb 21st for final approval. I don't think there are more changes to be made in the meantime, but if something comes up I'll let you know.

Sounds good. Thanks.

#17 - 2020-02-25 11:18 AM - Colin McDonald

- *File Screen Shot 2020-02-25 at 11.16.16 AM.png added*

Here are notes from the Friday group meeting to incorporate:

- Change the three options in the "Choose a type" drop-down to: Upload a file, Create an editable doc, Add an external link

- Keep the description field in the upload process, but limit the characters to 350. See attached screenshot from the Commons Team current file library for context. The 350 limit will make the long description there the maximum. It seemed to me about five lines or one paragraph was a good benchmark.

#18 - 2020-02-25 12:27 PM - Colin McDonald

I forgot that we also want to add an "Expand/Collapse Item Descriptions" link/option at the top of the library so you can clean up screen real estate if needed. It makes sense to me to leave the descriptions on by default.

#19 - 2020-02-25 05:32 PM - Matt Gold

Thanks, Colin. I would lean towards leaving them collapsed by default to create a less cluttered interface

#20 - 2020-02-26 12:07 PM - Sonja Leix

Colin McDonald wrote:

I forgot that we also want to add an "Expand/Collapse Item Descriptions" link/option at the top of the library so you can clean up screen real estate if needed. It makes sense to me to leave the descriptions on by default.

Thanks Colin, this belongs to issue [#3176](#)

#21 - 2020-02-26 12:10 PM - Sonja Leix

- *File 12315-Add-New-Library-Item-v5.pdf added*

Please review updated "Add Library Item" flow and share your final revisions.

It should all be pretty straight forward on mobile (single column).
Boone, let me know if you'd like me to mock any of this up for mobile.

Updates in mockup:

- Updated options in dropdown as per feedback during monthly meeting
- Added character limit to file description field
- Moved the file size and supported formats into a tooltip (which will be hidden by default of course)

#22 - 2020-02-27 05:28 PM - Colin McDonald

This all looks good to me, Sonja. I think we can use the upcoming Tuesday call to sign off on everything. In the meantime, I'm going to post to the group Forum with the latest mockups on the other two, more-involved tickets for Cloning and Library for final feedback, and note that this ticket had minimal changes after the monthly meeting.

#23 - 2020-03-03 08:13 PM - Sonja Leix

Colin McDonald wrote:

This all looks good to me, Sonja. I think we can use the upcoming Tuesday call to sign off on everything. In the meantime, I'm going to post to the group Forum with the latest mockups on the other two, more-involved tickets for Cloning and Library for final feedback, and note that this ticket had minimal changes after the monthly meeting.

Thanks Colin. Since we all agreed during today's call that this is good to go, I'll prep the design files and specs for development.

#24 - 2020-03-03 11:20 PM - Colin McDonald

Sounds good Sonja, thank you.

#25 - 2020-03-05 01:58 PM - Sonja Leix

- *File 12315-Add-New-Library-Item-v5-final.pdf added*
- *Status changed from New to In Progress*
- *Assignee changed from Sonja Leix to Boone Gorges*
- *Priority name changed from Normal to High*

Hi Boone,

Please find the approved and final designs here:

<https://xd.adobe.com/view/c4fcd76c-16ca-4180-6712-37ce3bdc48ed-b2cd/>

[PDF of final designs attached as well for reference]

It would be nice if we could implement a transition for the content appearance below the selector – so the content fades in.

Let me know if you have any questions.

#26 - 2020-05-04 10:30 PM - Boone Gorges

- *File group-library-create-external.gif added*
- *File group-library-create-doc.gif added*
- *File group-library-create-file.gif added*

Hi Sonja (and others) -

I've completed a first pass at the Add New flow for the new Library. The three attached gifs demonstrate how the process works for the three content types in question. I chose gifs instead of screenshots in order to show you the dynamic parts, especially those that may not have been 100% spelled out in the designs. Specifically - and here I'd welcome feedback or revisions from Sonja -

1. I added some form verification. If you leave a required field blank, you're shown a red error message. In the case of the URL field (the only other field that needs verification) I also check to see if you've entered a valid URL.
2. I added a spinner to the submit button during the submission process.
3. After creation, you're led back to the Library, which is sorted in **descending chronological order**, so that your newly created item appears at the top.
4. I added a 'Success' message at the top of the library, which fades away after 5 seconds.

The dev site is currently in use for some other testing, so I can't easily install this for you to play with at the moment, but hopefully the visuals will provide enough for any initial thoughts.

#27 - 2020-05-04 10:38 PM - Boone Gorges

- *File group-library-file-validation.gif added*

Adding one more gif, this one of form validation (and tooltip) for the file input when uploading a new file.

#28 - 2020-05-05 07:18 PM - Sonja Leix

Thanks Boone,
These gifs are super helpful to review implementation and share initial feedback.

Two things:

1. I like the temporary success message after created is successful. I'm not sure if "Creation successful" is the best message. Can we add a contextual message based on what the user just did? "Your external link was added successfully", "Your file was uploaded successfully", "Your doc was created successfully"?
2. In the "Create file" flow gif it looks like the character counter for the description isn't counting down as you're adding text.

Otherwise looking great! Excited to share with the group once we can test on dev.

#29 - 2020-05-07 10:57 PM - Boone Gorges

- *Status changed from In Progress to Testing Required*

Thanks, Sonja.

1. I like the temporary success message after created is successful. I'm not sure if "Creation successful" is the best message. Can we add a contextual message based on what the user just did? "Your external link was added successfully", "Your file was uploaded successfully", "Your doc was created successfully"?

I've made the change.

2. In the "Create file" flow gif it looks like the character counter for the description isn't counting down as you're adding text.

The phrasing "350 characters maximum" in the comp suggested that it wouldn't count down - "maximum" is a static number, while "remaining" is dynamic. In any case, I made a change so that once you start typing, the language changes to "349 characters remaining" etc.

I've merged everything into the 1.17.x branch and it's ready for testing on the dev site.

#30 - 2020-05-12 12:07 PM - Sonja Leix

Thanks Boone.

Tested it. Everything seems to be working find. I didn't try all file formats, but we should make sure that we do. I noticed that when adding an external link to Google Drive, it uses the general external link icon instead of the GDrive icon.

#31 - 2020-05-12 12:12 PM - Boone Gorges

I noticed that when adding an external link to Google Drive, it uses the general external link icon instead of the GDrive icon.

When reporting issues like this, could you please give specifics, including a link to the file on cdev? In this case, I detect the external service by looking at the URL format, so it's important to be able to examine the URL you used.

#32 - 2020-05-12 12:53 PM - Sonja Leix

Boone Gorges wrote:

I noticed that when adding an external link to Google Drive, it uses the general external link icon instead of the GDrive icon.

When reporting issues like this, could you please give specifics, including a link to the file on cdev? In this case, I detect the external service by looking at the URL format, so it's important to be able to examine the URL you used.

Absolutely. Go here: <https://commons.gc.cuny.edu/groups/cac-community-team-project-planning/library/#/>
Order by date (added 5/12/20 by me) and see external link called "abstract art". Here is the edit link to this item:
<https://commons.gc.cuny.edu/groups/cac-community-team-project-planning/library/#/edit/13113>

#33 - 2020-05-12 04:26 PM - Boone Gorges

Thanks, Sonja! It was indeed a URL issue, which has now been fixed.

#34 - 2020-05-14 12:46 PM - Sonja Leix

Boone Gorges wrote:

Thanks, Sonja! It was indeed a URL issue, which has now been fixed.

Thanks for fixing. Looks good. This is ready for presentation from my side.

#35 - 2020-05-15 11:25 PM - Boone Gorges

- *Category name set to Group Library*

#36 - 2020-07-14 01:06 PM - Boone Gorges

- *Status changed from Testing Required to Resolved*

Files

new-item.pdf	1.41 MB	2020-01-21	Colin McDonald
12315-Add-New-Llibrary-Item-v2.pdf	1.31 MB	2020-01-30	Sonja Leix
12315-Add-New-Llibrary-Item-v3.pdf	1.27 MB	2020-02-04	Sonja Leix
12315-Add-New-Llibrary-Item-v4.pdf	1.35 MB	2020-02-04	Sonja Leix
Add-folder-selector.png	31.7 KB	2020-02-05	Sonja Leix
Screen Shot 2020-02-25 at 11.16.16 AM.png	107 KB	2020-02-25	Colin McDonald
12315-Add-New-Llibrary-Item-v5.pdf	1.35 MB	2020-02-26	Sonja Leix
12315-Add-New-Llibrary-Item-v5-final.pdf	1.35 MB	2020-03-05	Sonja Leix
group-library-create-external.gif	736 KB	2020-05-05	Boone Gorges
group-library-create-doc.gif	1.09 MB	2020-05-05	Boone Gorges
group-library-create-file.gif	930 KB	2020-05-05	Boone Gorges
group-library-file-validation.gif	216 KB	2020-05-05	Boone Gorges