

Procore Delete Experience Research & Findings

Research Lead

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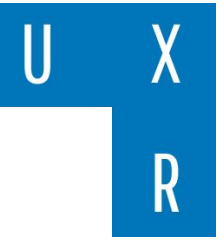
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Executive Summary



“Recycle Bin” Is the Correct Page Name

- The majority of participants knew that nothing is ever permanently deleted in Procore and that they can retrieve items from the Recycle Bin.
- All participants were familiar with the idea of a “Recycle Bin” from working with other software, such as their email.

Participants Wanted a More Clear Delete Button Label

- Many participants expressed that “Delete” seemed like a permanent action, and shouldn’t be associated with the Recycle Bin. Two participants offered “Move to Recycle Bin” as a potential label, while reserving the “Delete” label for hard delete actions.
- When asked about the word “Archive,” participants agreed that they would only store items they would want to reference later in an archive, not items they were disposing of. Additionally, “Recycle” was assumed to mean reuse.

Executive Summary, cont.

A Consistent Delete Experience is Needed Throughout Procore

- When going through each delete workflow, participants commented on the need for consistent language, delete / retrieve confirmation modals, and success banners that appear after an action. They also asked for more guidance on what was happening to their items after an action was taken.

The Recycle Bin and List Pages Look Too Similar

- Participants expressed a need for a different subtab design to make the difference between the list page and the Recycle Bin subtab more clear. Many participants stated that the Recycle Bin could be easily missed, and that their team often didn't know it existed without training.

The Drawings Tool Delete Experience Is Confusing to Users

- 7/8 participants were stumped by the Drawings recovery workflow, and most needed guidance finding a drawing again after it was deleted.

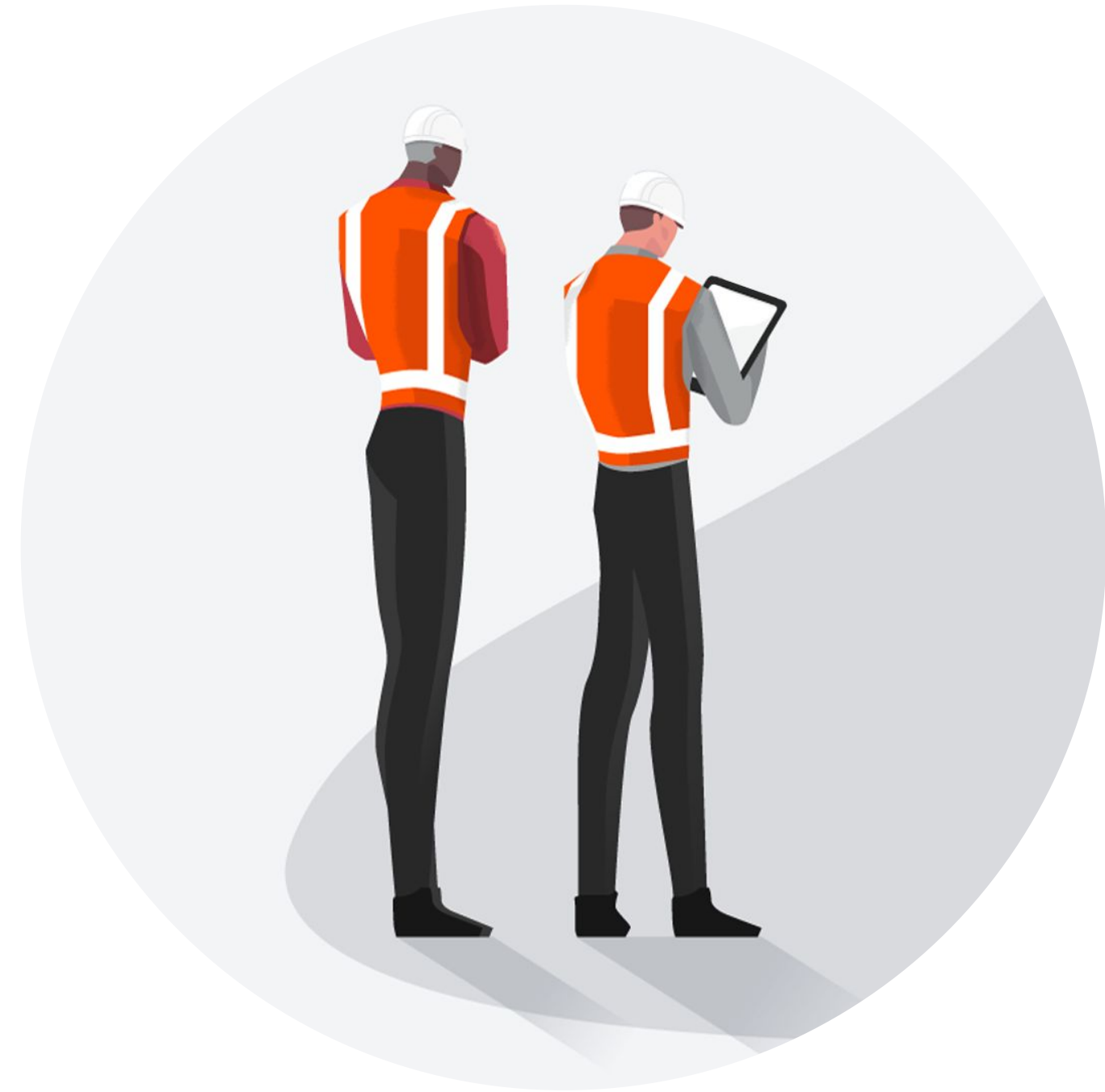
— TABLE OF CONTENTS

01. Background

02. Methodology

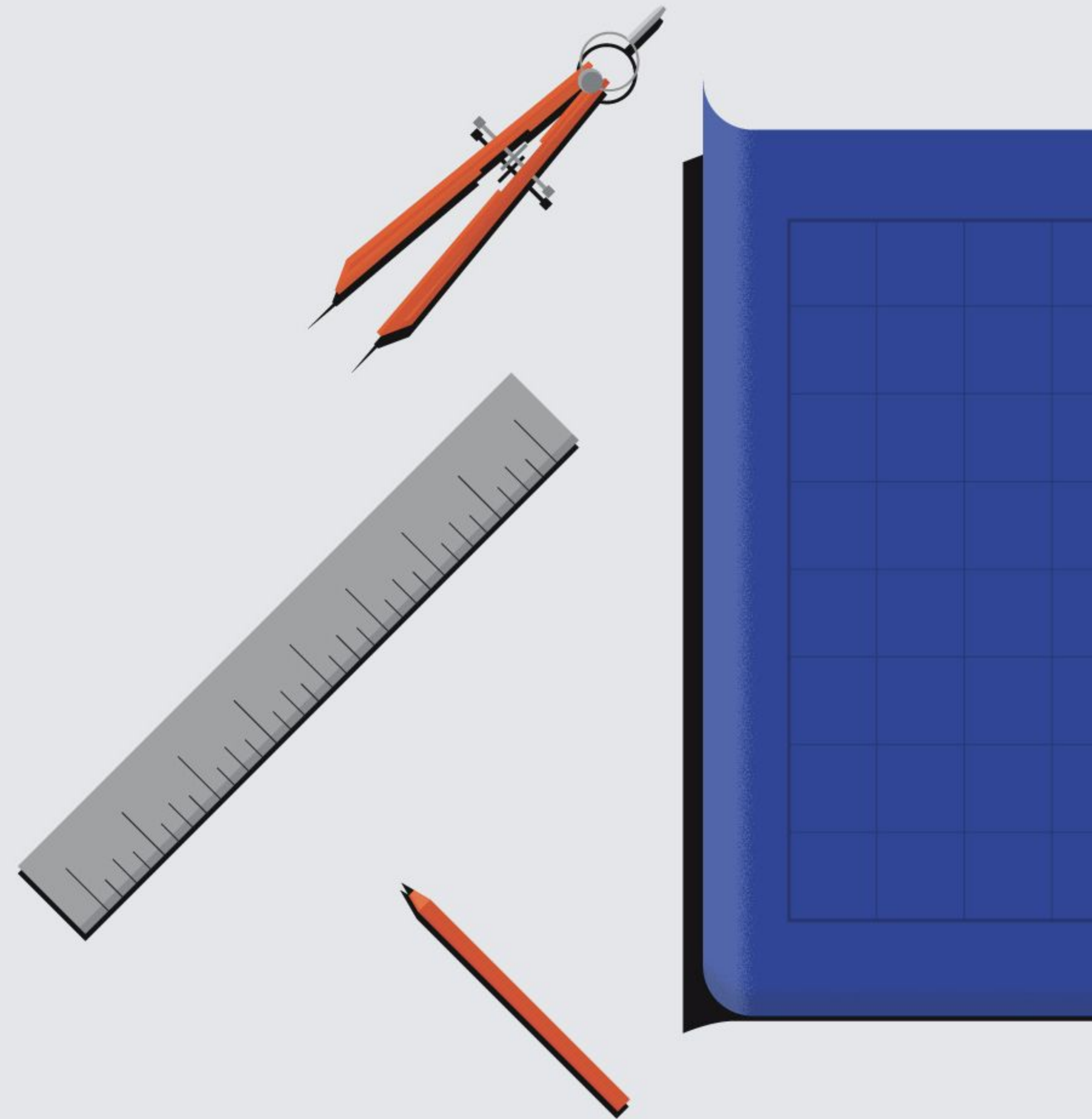
03. Considerations and Findings

04. Q&A



Background

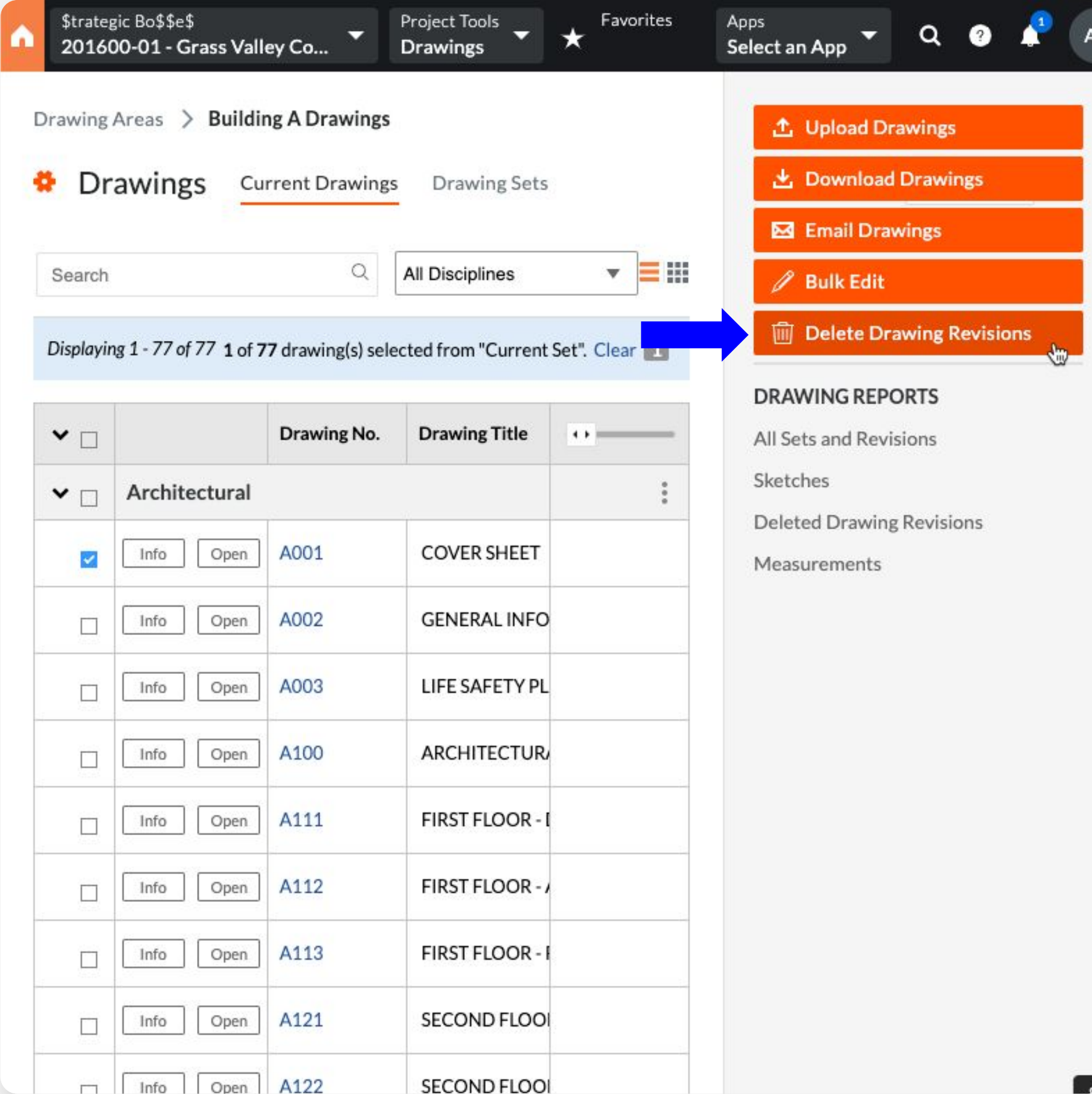
When choosing to remove an item in Procore, a user has several options depending on the tool.



1. Delete from Procore

Examples

- + Drawings
- + Daily Log
- + Specifications



2. Move to Recycle Bin

Examples

- + RFIs
- + Submittals
- + Change Events
- + Observations
- + Punch List

The screenshot shows a software interface for managing RFIs. At the top, there is a navigation bar with a home icon, a dropdown menu for '\$trategic Bo\$\$\$ 201600-01 - Grass Valley Co...', 'Project Tools RFIs', 'Favorites', and 'Apps Select an App'. Below the navigation bar, the breadcrumb 'RFIs > RFI #TEST-27: connected RFI' is visible, along with an 'Export' button. The main heading is 'RFI #TEST-27: connected RFI', with tabs for 'General', 'Related Items (0)', 'Emails (0)', and 'More'. The 'GENERAL INFORMATION' section contains a table of fields: 'Number: * TEST-27', 'Due Date: * 6/24/20', 'Connected RFIs: 005 - Doors Plus Inc (GVCH - ED Remodel)', 'Subject: * connecte', 'Status: Closed or', 'Assignees: * AJ Bluhr', 'Ball In Court:', 'RFI Manager: * Bob Builc', 'Distribution List:', 'Created By: Door:', 'Date Initiated: 6/19/20', 'Received From:', 'Responsible Contractor:', 'Drawing Number:', 'Spec Section:', 'Location:', and 'Sub Job:'. An 'Edit' button is located to the right of the 'GENERAL INFORMATION' section. A blue arrow points from the 'Edit' button to the 'Delete' button in the right-hand sidebar. The sidebar contains several orange buttons: 'Email', 'Reopen RFI', '+ Create Change Event', '+ Create Instruction', 'Delete', and '+ Create RFI'. A mouse cursor is hovering over the 'Delete' button.

3. Inactivate

Example

+ Directory

The screenshot shows the Procore Company Tools Directory interface. At the top, there are navigation menus for 'Strategic Bo\$\$\$' (with a 'Select a Project' dropdown) and 'Company Tools Directory'. A notification banner at the top states: 'A new Permissions Tool has launched! Click the Company Tools navigation bar and find it under Core Tools or go directly by clicking the View New Permissions button.' Below this is a navigation bar with tabs for 'COMPANY DIRECTORY', 'Users', 'Con...', 'Comp...', 'Distributio...', 'Inactive ...', 'Inactive C...', and 'Inactive Co...'. There is also an 'Export' button. A search bar and a 'Group by: None' dropdown are present. The main content area shows a table of users with columns for 'Name', 'Email / Phone / Fax', and actions. A 'Bulk Actions' dropdown menu is open, with a blue arrow pointing to the 'Inactivate' option. The table contains the following data:

Bulk Actions		Uncheck all		Name ↑	Email / Phone / Fax	
		T1		test123 123test	123@123.com	Invite
<input checked="" type="checkbox"/>	Edit	IA		Integrations Account	integrations@constructionbi	Invite Prequalify
<input checked="" type="checkbox"/>	Edit	AA		Amy Accounting Project Accountant	(530) 999-1234 (business) (530) 999-9876 (business fa: robinprocoresubcontractor+	Re-Invite Prequalify
<input type="checkbox"/>	Edit	JA		Joshua Adler	joshua.adler@procore.com	Re-Invite Re-Qualify
					(530) 999-9997 (mobile)	

4. Archive

Example

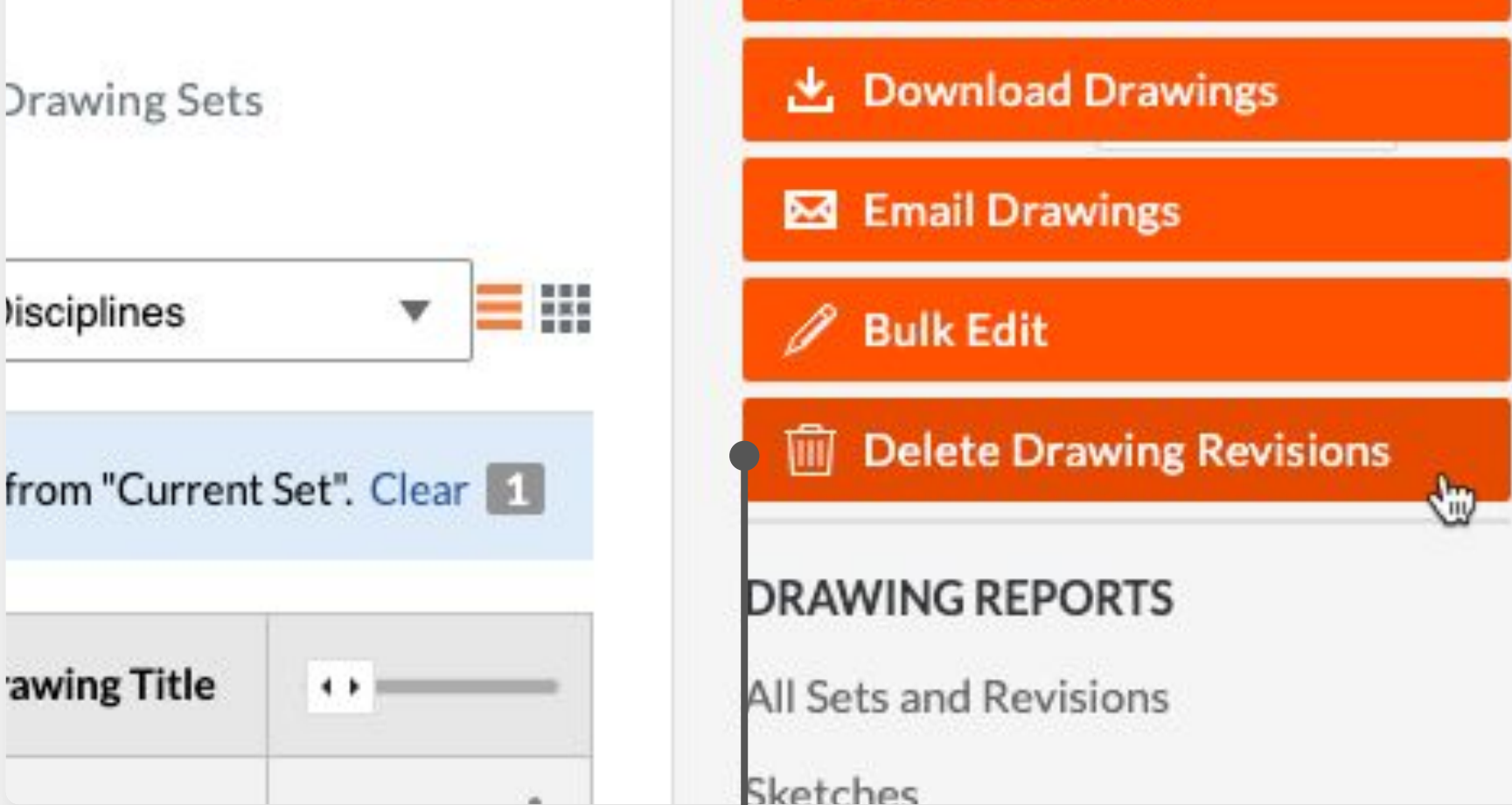
+ Correspondence

The screenshot shows a software interface for managing correspondence. At the top, there is a navigation bar with a home icon, a dropdown menu for '\$strategic Bo\$\$\$ 201600-01 - Grass Valley Co...', another dropdown for 'Project Tools Correspondence', a star icon for 'Favorites', and a button for 'Apps Select an App'. Below this, the breadcrumb 'Correspondence > Addendum #ADD-1: Work Stoppage' is visible. The main title is 'Addendum #ADD-1: Work Stoppage', followed by tabs for 'General', 'Related Items (0)', 'Emails (0)', and 'Change History (3)'. To the right of the title are buttons for 'Export' and 'Create'. A dropdown menu is open, showing options for 'Email (82)', 'Close', and 'Archive'. A blue arrow points to the 'Archive' option. Below the menu is a 'GENERAL INFORMATION' section with a table of details.

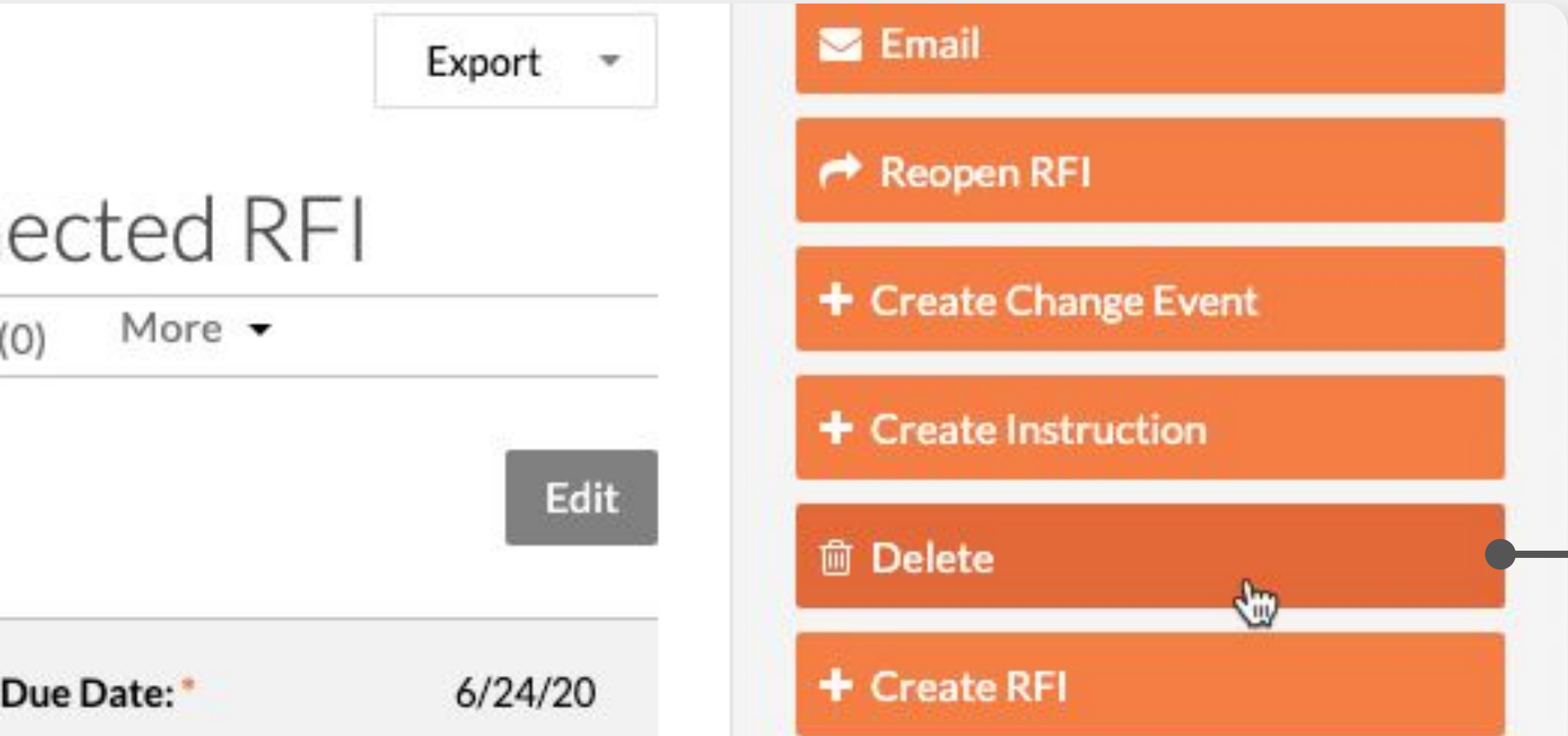
Number:	ADD-1	Status:	Open
Subject:	Work Stoppage		
Private:	Yes	Created At:	04/28/20
Created By:	Idris Oladipo (Procore Technologies)	Issued On:	04/28/20
Received From:	Idris Oladipo (Procore Technologies)	Distribution:	Oladipo, Idris (Technologies)
Schedule Impact:	90.0 days	Cost Impact:	\$1,000,000.00
Location:			
Trade:	Site Demo	Specification Section:	07 21 00 - Ther
Description:	Sent from Procore		
Attachments:			

BACKGROUND

Deletion across tools is inconsistent and indifferentiable between actions. So we wondered if our users were getting confused.



Deletes it from Procore without ability to automatically retrieve



Sends to the recycle bin tab

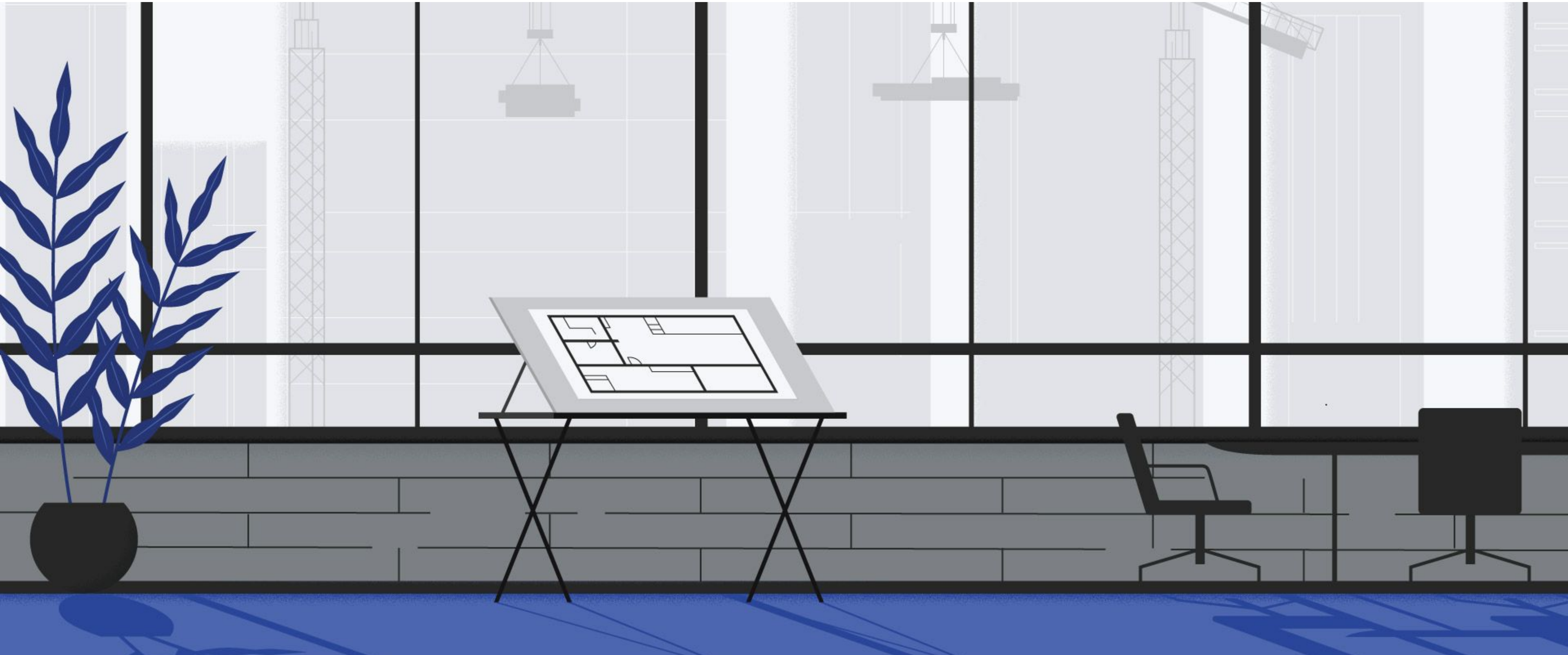
BACKGROUND

Because the recycle bin and delete are global features that appear in almost every tool, UX Content partnered with UX Research to dig deeper and learn more about how our users delete in Procore across different tools.



Methodology

How did we conduct the research?



Audit & Persona Research

Key Findings:

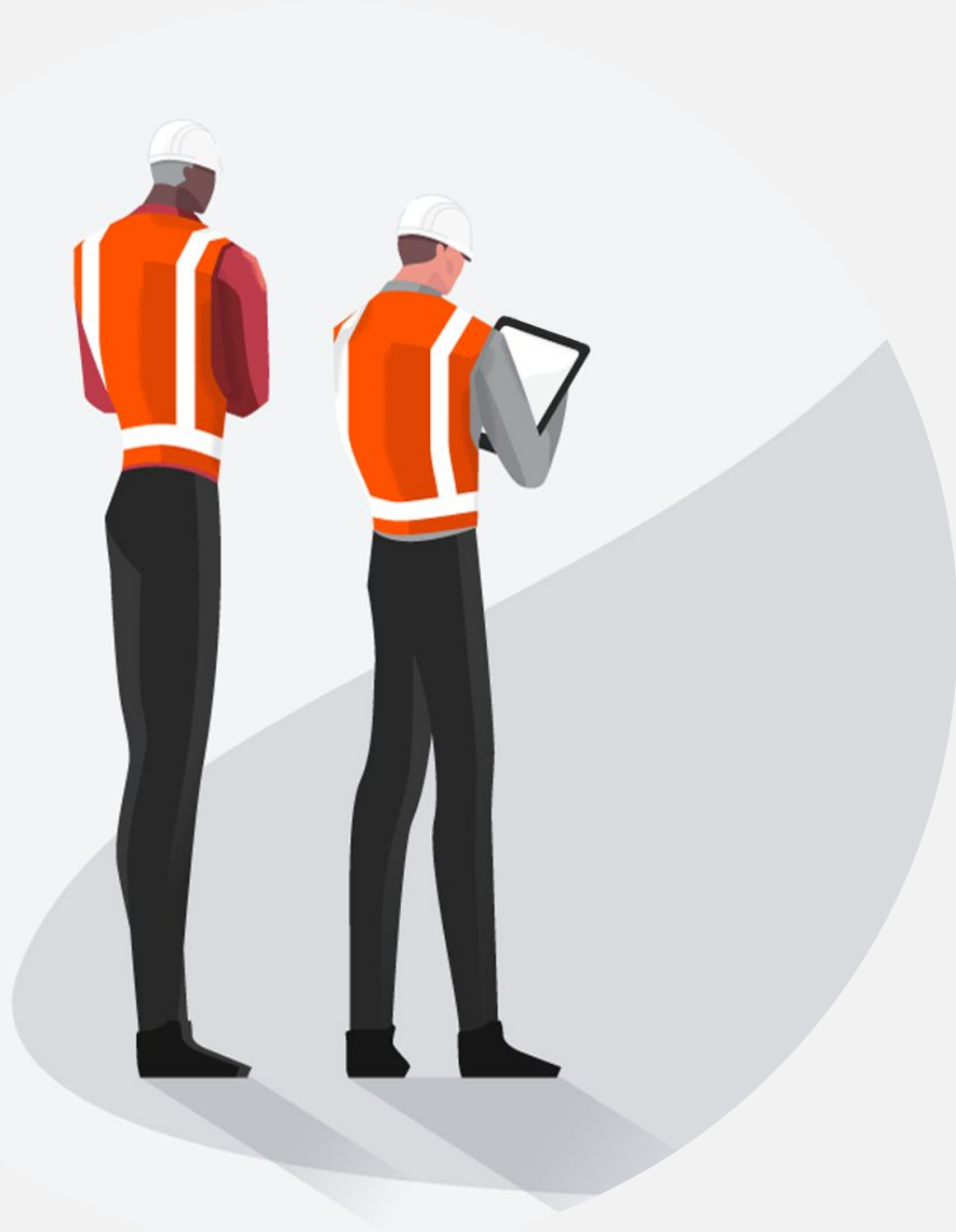
- + There are 4 delete experiences in Procore
- + Permanently delete and the Recycle Bin are the most common
- + Project Managers, IT, Project Engineers, and Procore power users mostly manage deletion of items
- + Within permanently delete and standard Recycle Bin experiences, people often deleted in Submittals, Drawings, and Punch List

Tool	Permanently Delete	Recycle Bin	Archive	Inactivate
Company Level				
Directory				
Documents (ish)				
Admin				
Permissions				
Timecard				
Inspections				
Reports				
Schedule (N/A)				
Timesheets (N/A)				
Planroom (N/A)				
Project Level				
Home (N/A)				
Documents				
Directory				
Reports				
Tasks				
Admin				
Submittals				
Instructions				
RFIs				
Drawings				
Assemble (not sure)				
Specifications				
Schedule				
Emails				
Transmittals				
Meetings				
Photos				

Determine Research Goals

What do we want to find out about the delete and recycle bin experiences in Procore?

1. Learn users' mental models
2. Identify how users comprehend the different workflows
3. Uncover the user experience
4. Gain insight into our users' natural language



Recruitment

We worked with Recruitment Specialist Briana Perry to build a screener in **Qualtrics** and surface it in **Builders Club**. Briana then reached out to users who identified themselves as **ideal research candidates**:

Persona

PEs, PMs, Superintendents, Project Admins

Job Tasks

Manages the deletion of items in their projects

Time Using Procore

Mixed of new and veteran users

Familiar with Tools We're Researching

Drawings, Punch List, Submittals



Usability Testing

1-hour sessions were held with 8 participants whose ACV ranged from Mid Market to Enterprise.

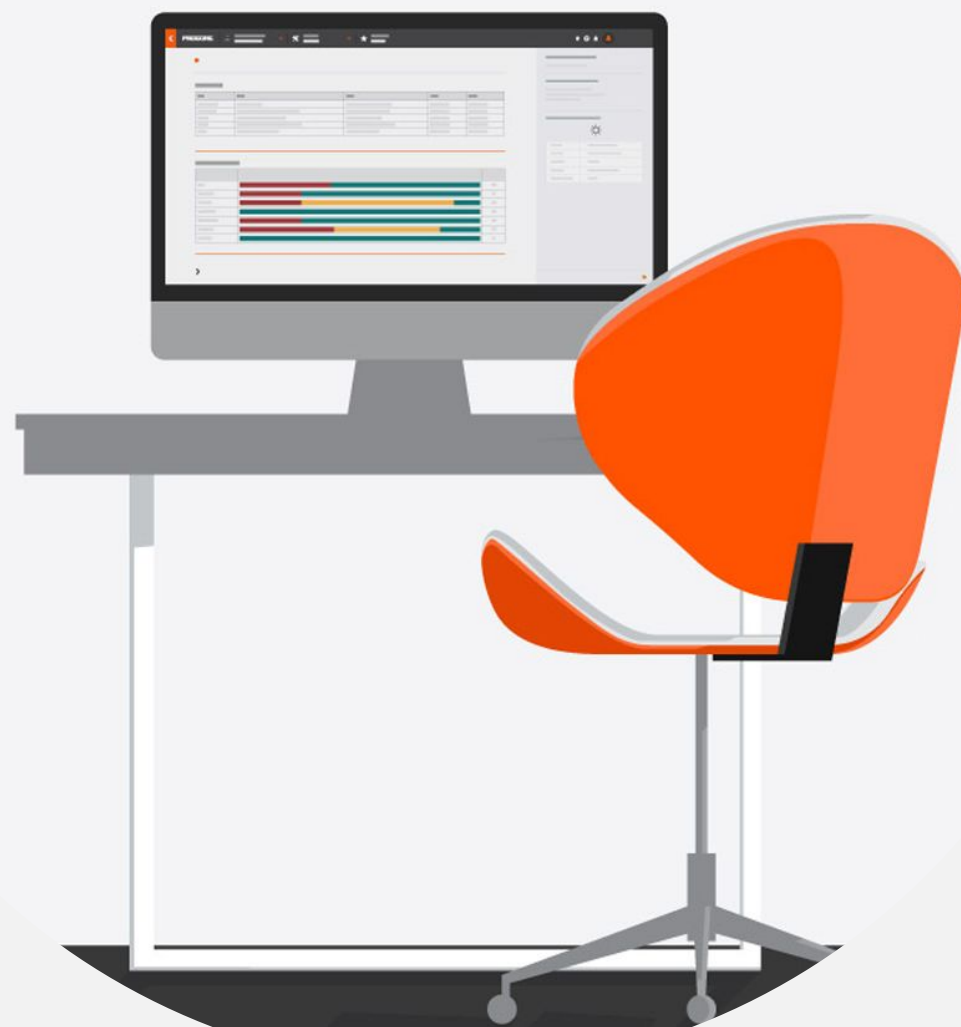
[Usability Script](#)



Usability Testing, cont.

The first half of the session focused on exploring participants' knowledge and usage of the Recycle Bin and delete experiences.

- + What does delete mean to you?
- + What does Recycle Bin mean to you?
- + How frequently do you access the Recycle Bin?
- + What kinds of items do you put in the Recycle Bin?



Usability Testing, cont.

During the second half, we asked participants to complete a series of tasks.

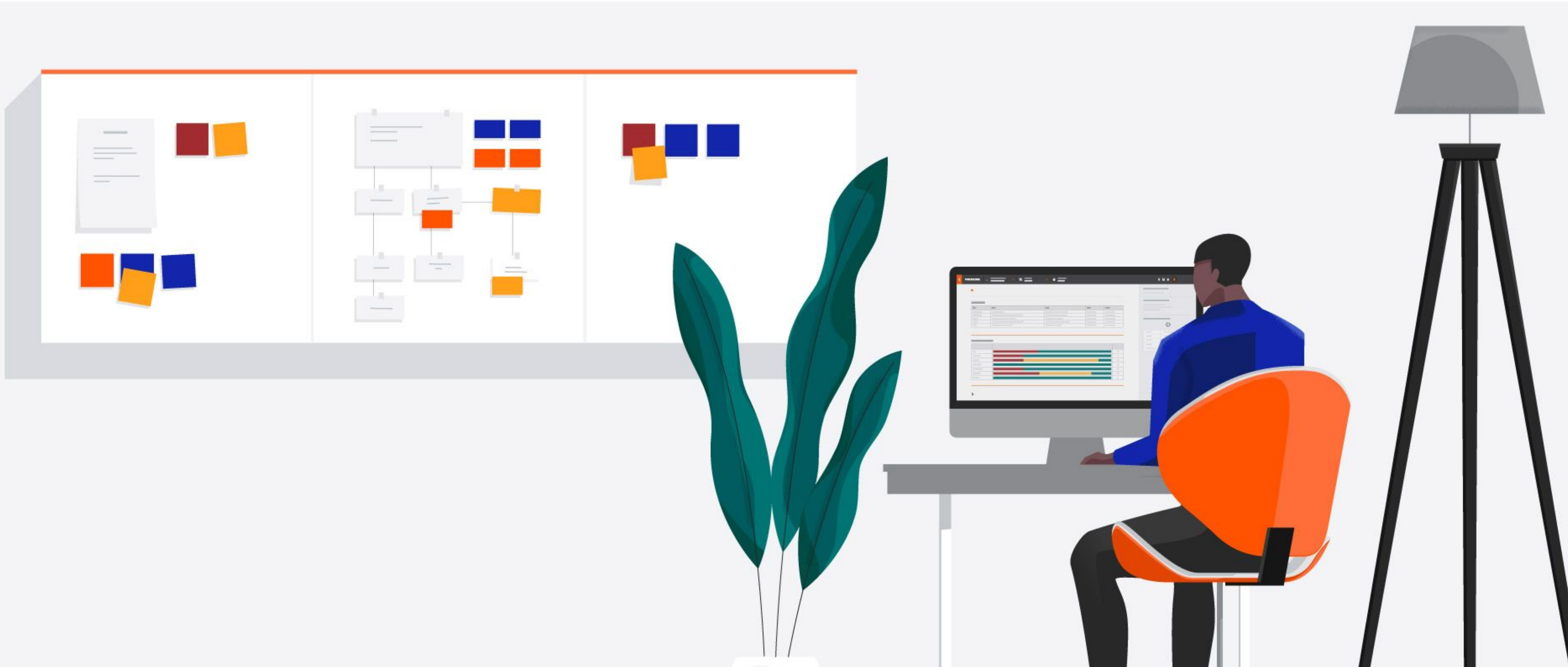
- + Can you show me how you would delete that item?
- + Can you show me how you would put that item back onto your list page?
- + Can you tell me what you know about the screen you're looking at?

Drawings

[Click here to start](#)

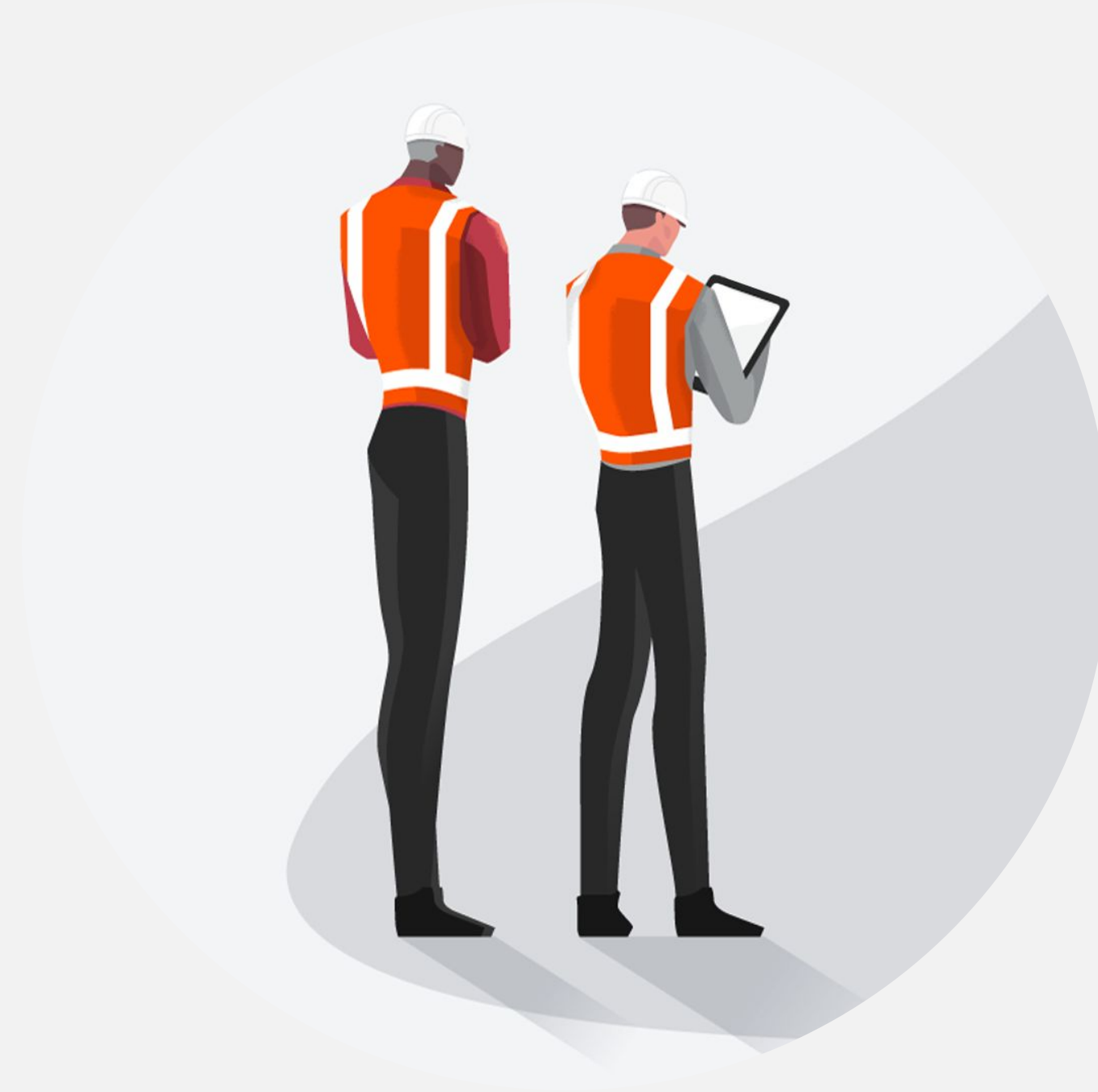
Findings

Let's dig into what we learned



Goals

- 1.** Learn users' **mental models** around deleting items in Procore
- 2.** Identify how users comprehend the different delete **workflows**
- 3.** Uncover the delete and Recycle Bin **user experience**
- 4.** Gain insight into our users' **natural language** when they talk about deleting an item



Findings

1. Learn users' mental models around deleting items in Procore

2. Identify how users comprehend the different delete workflows

3. Uncover the delete and Recycle Bin user experience

4. Gain insight into our users' natural language when they talk about deleting an item

Users understood the Recycle Bin

- The majority of participants knew that nothing is ever permanently deleted in Procore and that they can retrieve items from the Recycle Bin

One person is typically in charge of managing deleted items

- Several participants identified themselves as the “point person” who manages the deletion of items and answers questions around deleting in Procore. However, many people on their team had Admin access and could delete

Without training, the Recycle Bin could be overlooked

- Several participants expressed that, “Users who don't know Procore might not know a Recycle Bin exists [without training]”

Findings

1. Learn users' mental models around deleting items in Procore
- 2. Identify how users comprehend the different delete workflows**
3. Uncover the delete and Recycle Bin user experience
4. Gain insight into our users' natural language when they talk about deleting an item

Standard Recycle Bin workflow is most familiar to users

- Punch List and Submittals was well received
- Tasks given were completed quickly in Submittals and Punch List

“Permanently” Delete workflows are least familiar

- The Drawings workflow was described as: cumbersome and confusing
- Majority of participants needed assistance completing the tasks given in Drawings

Findings

1. Learn users' mental models around deleting items in Procore
2. Identify how users comprehend the different delete workflows
- 3. Uncover the delete and Recycle Bin user experience**
4. Gain insight into our users' natural language when they talk about deleting an item

Wins

Punch List

- Fast and intuitive experience - 8/8 completed workflow process without needing to stop and think

Submittals

- The success banner that was displayed after both deleting and retrieving was found helpful by all participants.
- The majority of participants named Submittals as their favorite delete experience due to the success banners and confirmation modals that presented information on what would / did happen to the item when the action was taken

Findings

1. Learn users' mental models around deleting items in Procore
2. Identify how users comprehend the different delete workflows
- 3. Uncover the delete and Recycle Bin user experience, cont.**
4. Gain insight into our users' natural language when they talk about deleting an item

Pain Points

Punch List & Submittals

- Recycle Bin sub tab could be easily missed. Many users wanted a more prominent header or better-defined text to show where they are in the app

Drawings

- Majority of participants had trouble completing the delete and recover experience in this tool. The multiple steps of having to download then re-upload felt time consuming and participants found it confusing
- $\frac{7}{8}$ participants found this workflow to be unfamiliar

Findings

1. Learn users' mental models around deleting items in Procore
2. Identify how users comprehend the different delete workflows
3. Uncover the delete and Recycle Bin user experience
- 4. Gain insight into our users' natural language when they talk about deleting an item**

The Delete action is considered permanent

- When asked if “delete” made sense in the Recycle Bin workflow, many participants thought delete was incorrect because it sounded too permanent and intimidating

Button labels could be changed to help workflow comprehension

- Two participants offered “Move to Recycle Bin” as a potential label, while reserving the “Delete” label for hard delete actions
- When asked about the word “Archive,” participants agreed that they would only store items they would want to reference later in an archive, not items they were disposing of.

Findings

1. Learn users' mental models around deleting items in Procore
2. Identify how users comprehend the different delete workflows
3. Uncover the delete and Recycle Bin user experience
- 4. Gain insight into our users' natural language when they talk about deleting an item, cont.**

Recycle Bin is familiar and consistent with other apps

- Recycle Bin terminology made sense to participants and was viewed as the correct language to use for the actions completed, all participants understood what recycle bin could and could not do

“I can delete things and bring them back from the Recycle Bin if needed”

Considerations and Next Steps

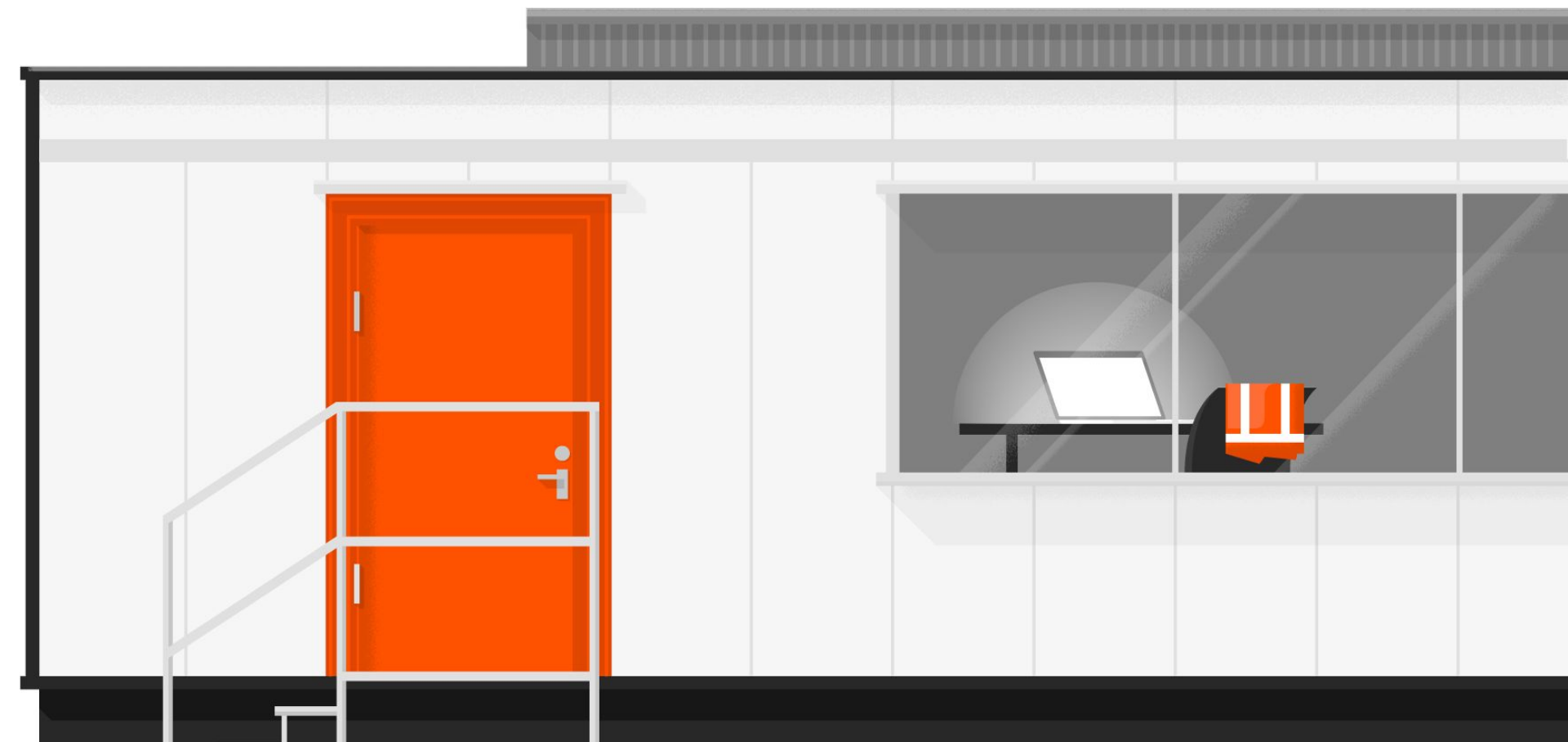
What should we do with this information?



Considerations

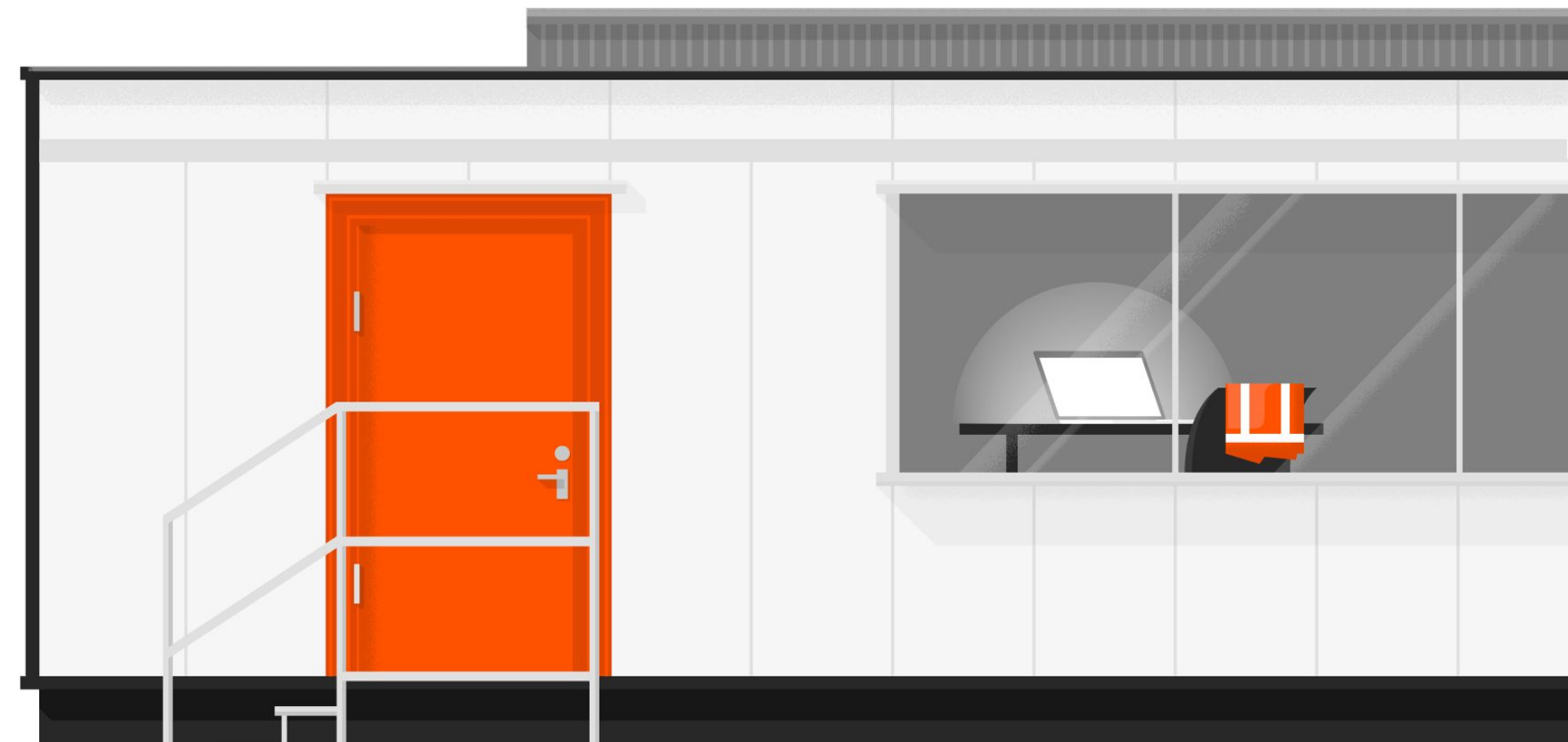
This research only touched on 3 tools with 2 different delete/recycle experiences.

It would be interesting to test the remaining delete functionality and establish a ranking of all recycle/delete experiences and see which workflow comes out on top.



Next Steps

- Explore the creation of a **standard delete workflow** that includes consistent confirmation modals and success banners. Apply this experience to all relevant tools.
- Consider relabeling the **Delete buttons** that move the item to the Recycle Bin.
- Consider revisiting the **subtab design** to make the page you're on more obvious.
- Conduct further research into the **Drawings delete experience**.





Thank you!