Procore Delete Experience Research & Findings

Research Lead

Sophia Nitti
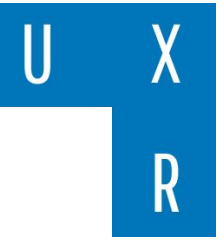UX Researcher

Project Lead

Amanda Bridge
Senior UX Content Strategist

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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

- ⅞ participants were stumped by the Drawings recovery workflow, and most needed guidance finding a drawing again after it was deleted.
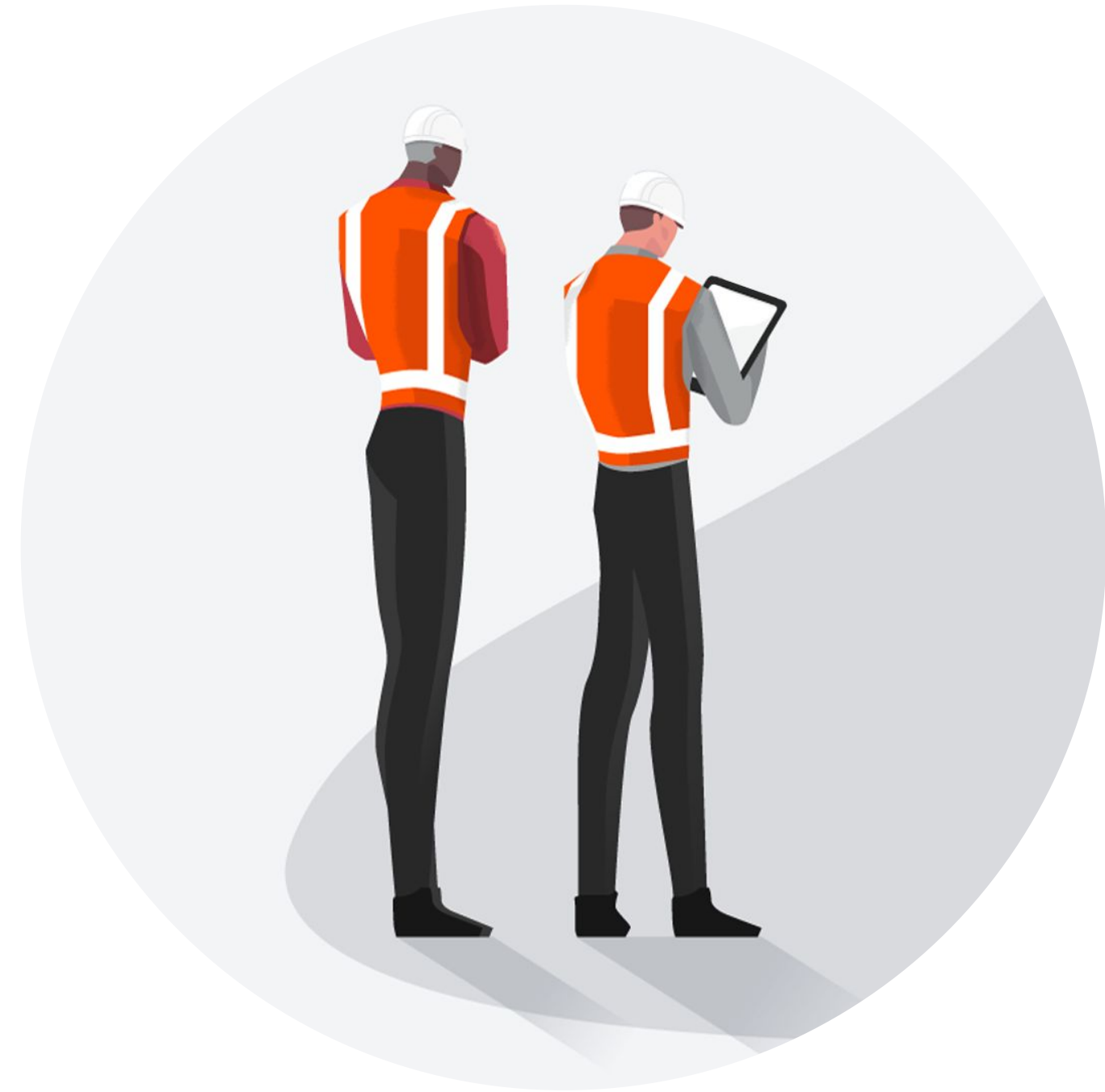
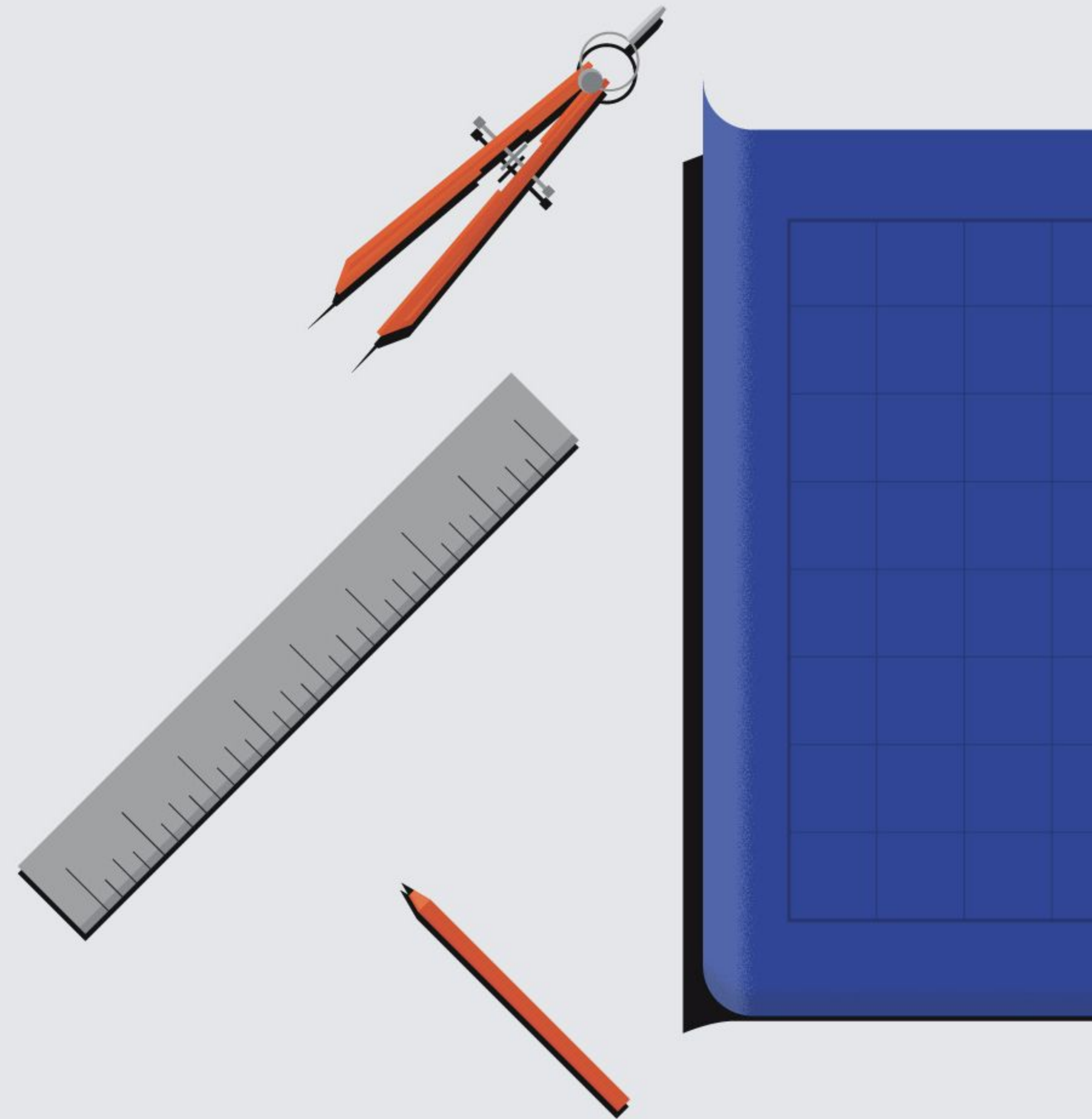**— TABLE OF CONTENTS**

01. Background

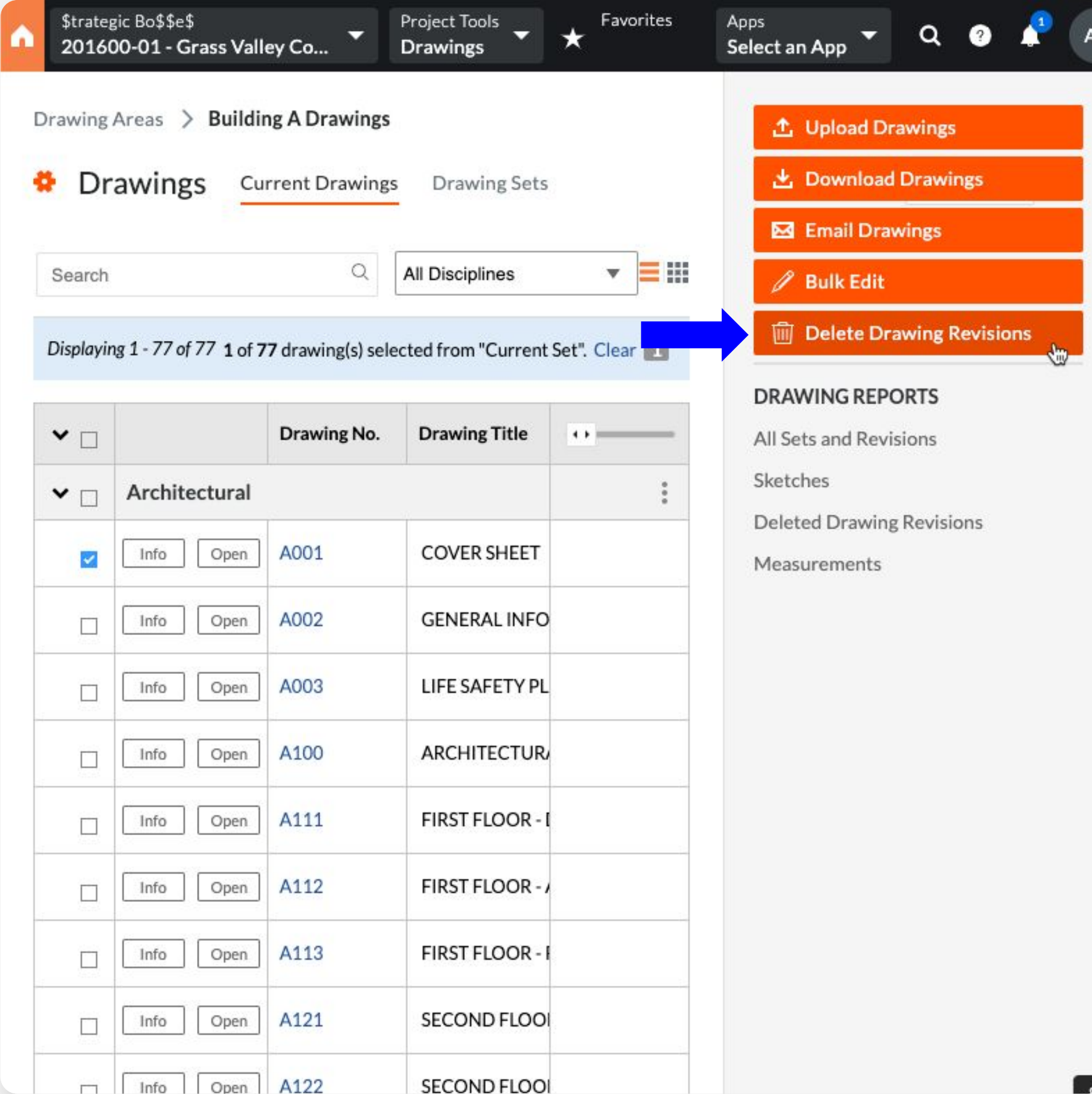02. Methodology

03. Considerations and Findings

04. Q&A

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Background

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

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1. Delete from Procore

Examples

+ Drawings

+ Daily Log

+ Specifications

2. Move to Recycle Bin

Examples

+ RFIs

+ Submittals

+ Change Events

+ Observations

+ Punch List

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3. Inactivate

Example

+ Directory

4. Archive

Example

+ Correspondence

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

Download Drawings

Email Drawings

Bulk Edit

Delete Drawing Revisions

from "Current Set". Clear 1

DRAWING REPORTS

All Sets and Revisions

Sketches

Drawing Sets

Disciplines

Drawing Title
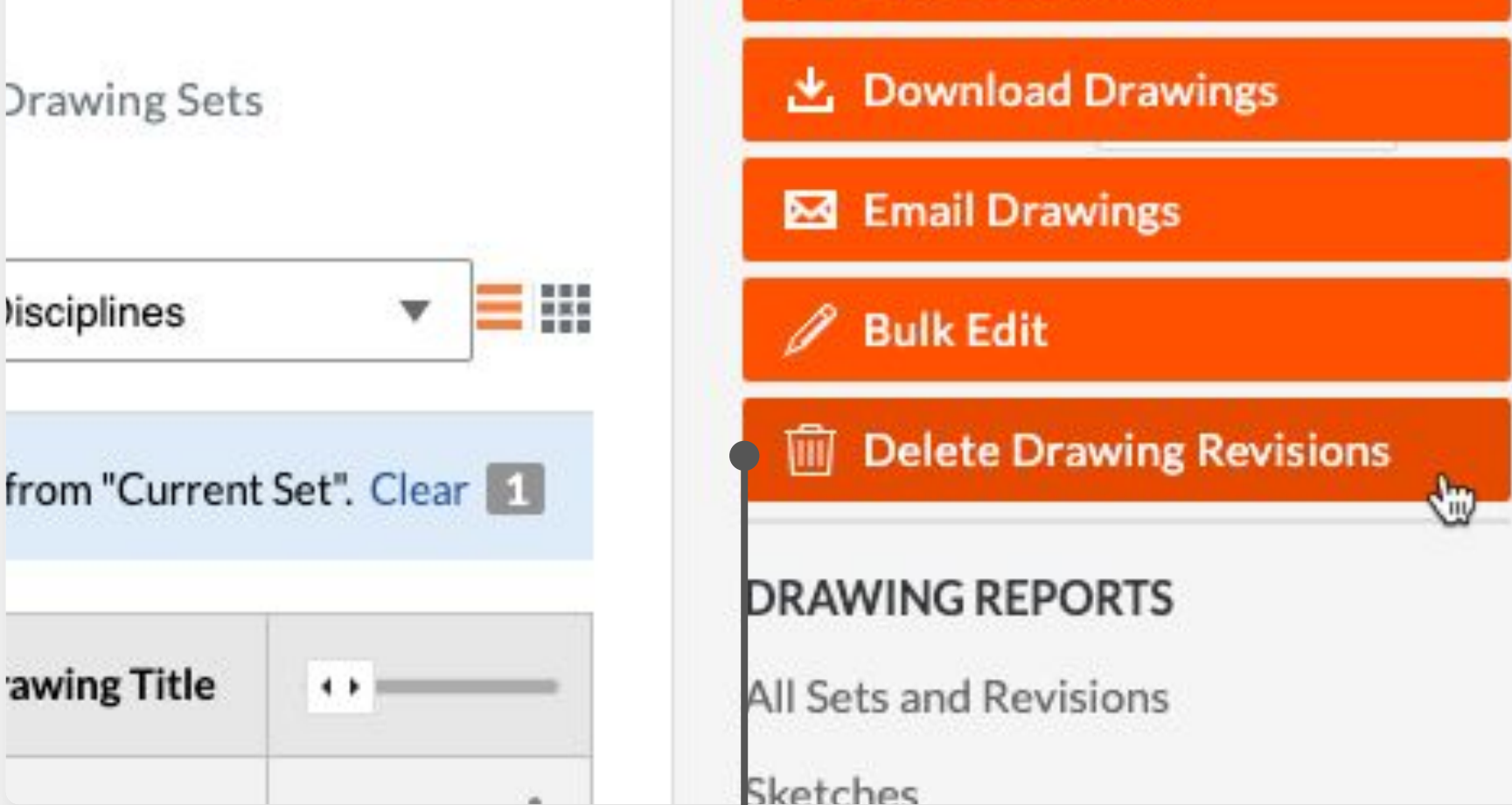
Deletes it from Procore without ability to automatically retrieve

Export

Email

Reopen RFI

Create Change Event

Create Instruction

Delete

Create RFI

ected RFI

(0) More

Edit

Due Date: 6/24/20
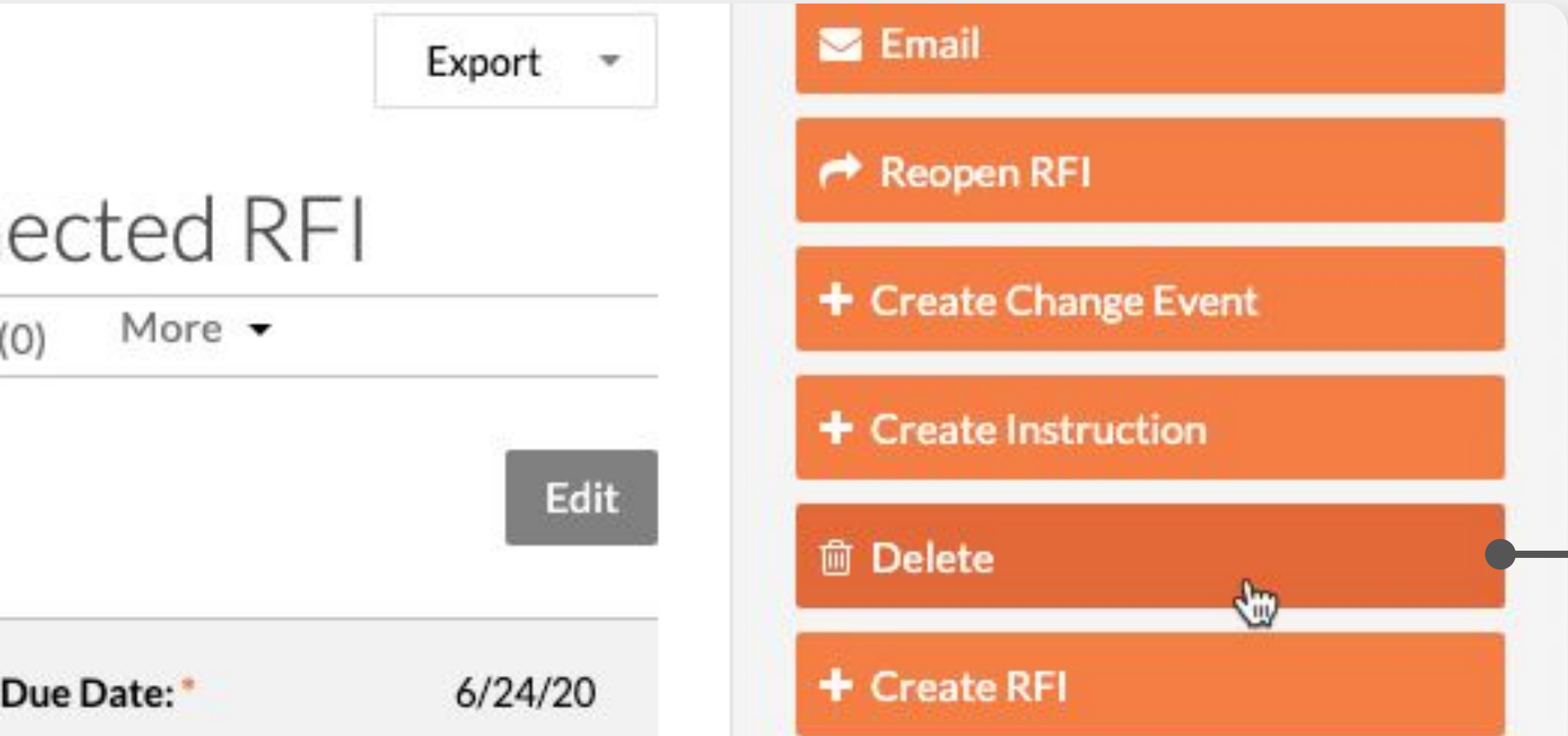
Sends to the recycle bin tab

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.

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Methodology

How did we conduct the research?

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		■		

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

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**
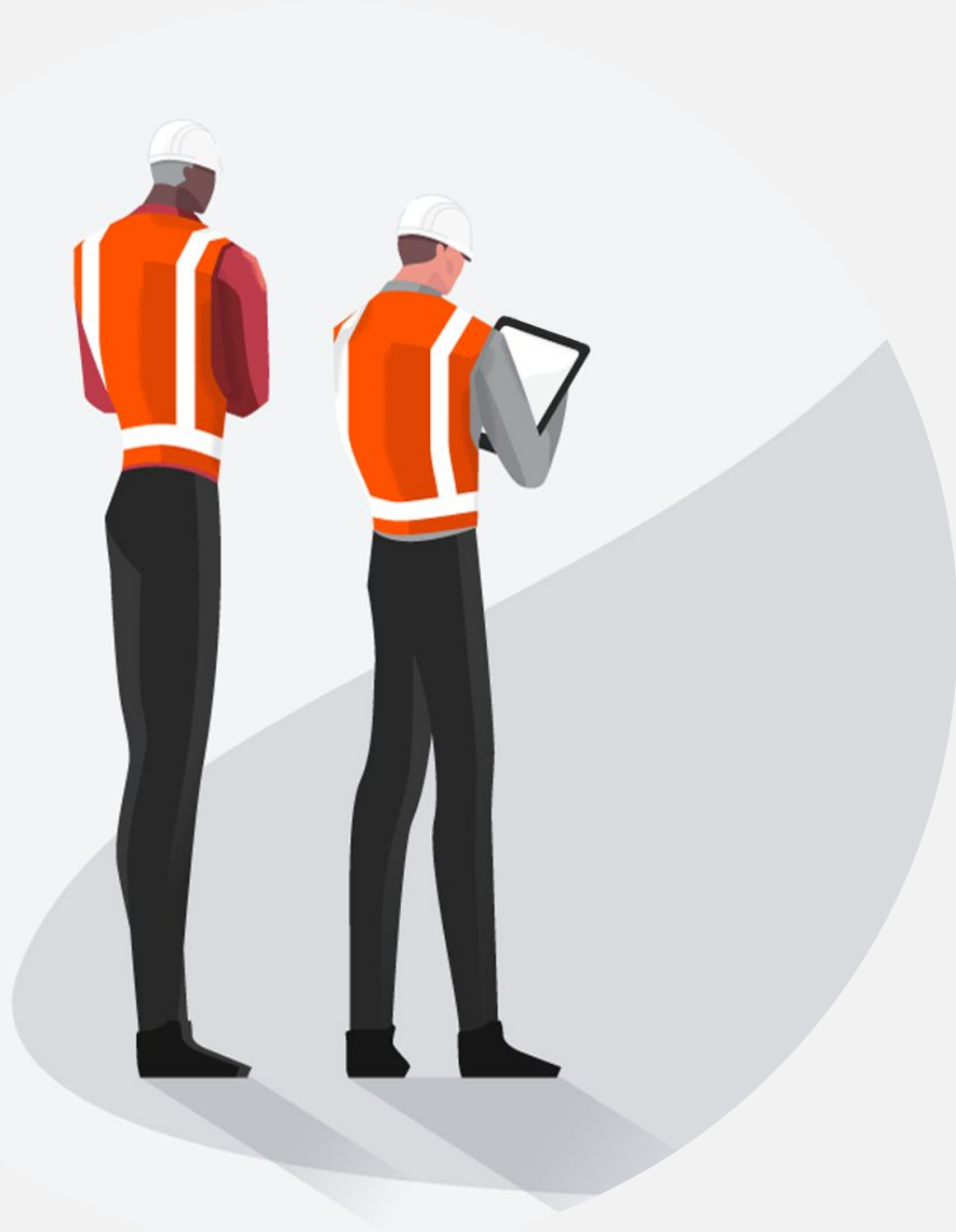
Recruitment

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

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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?
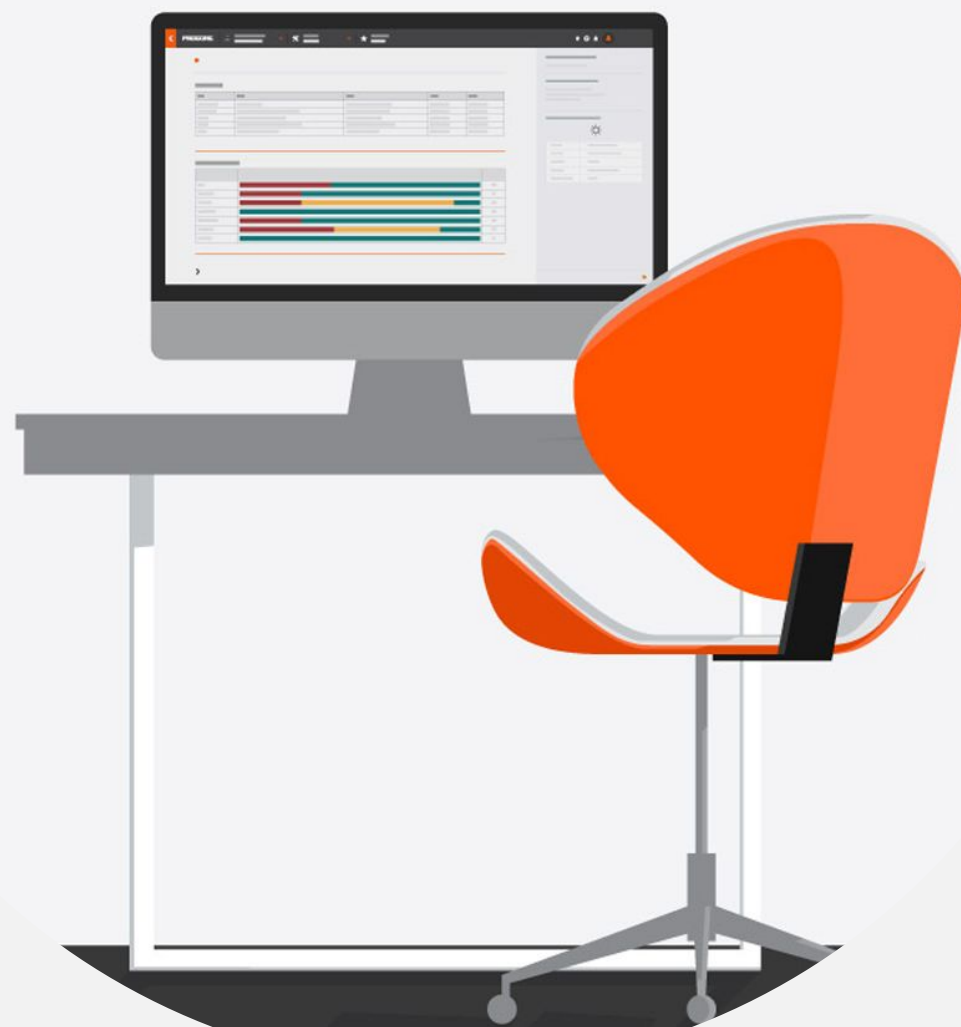
Usability Testing, cont.

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
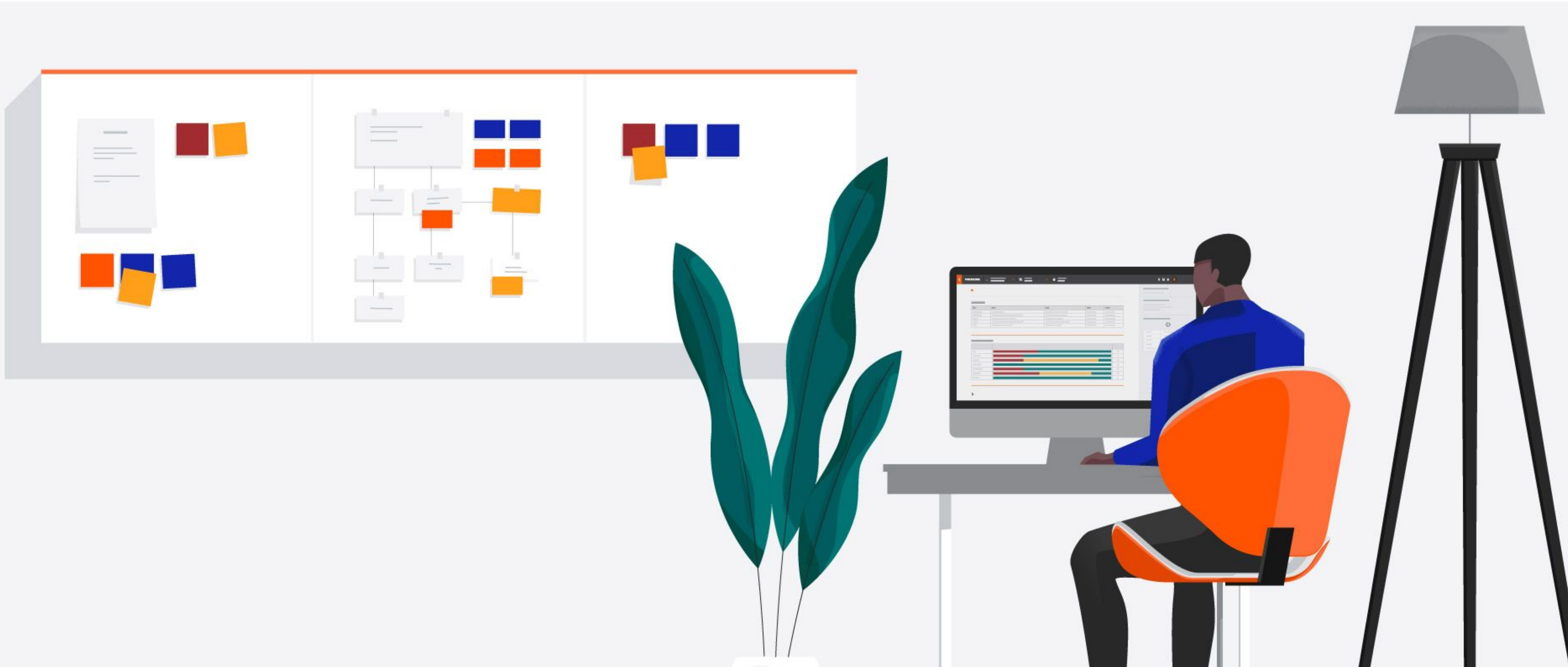
Goals

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
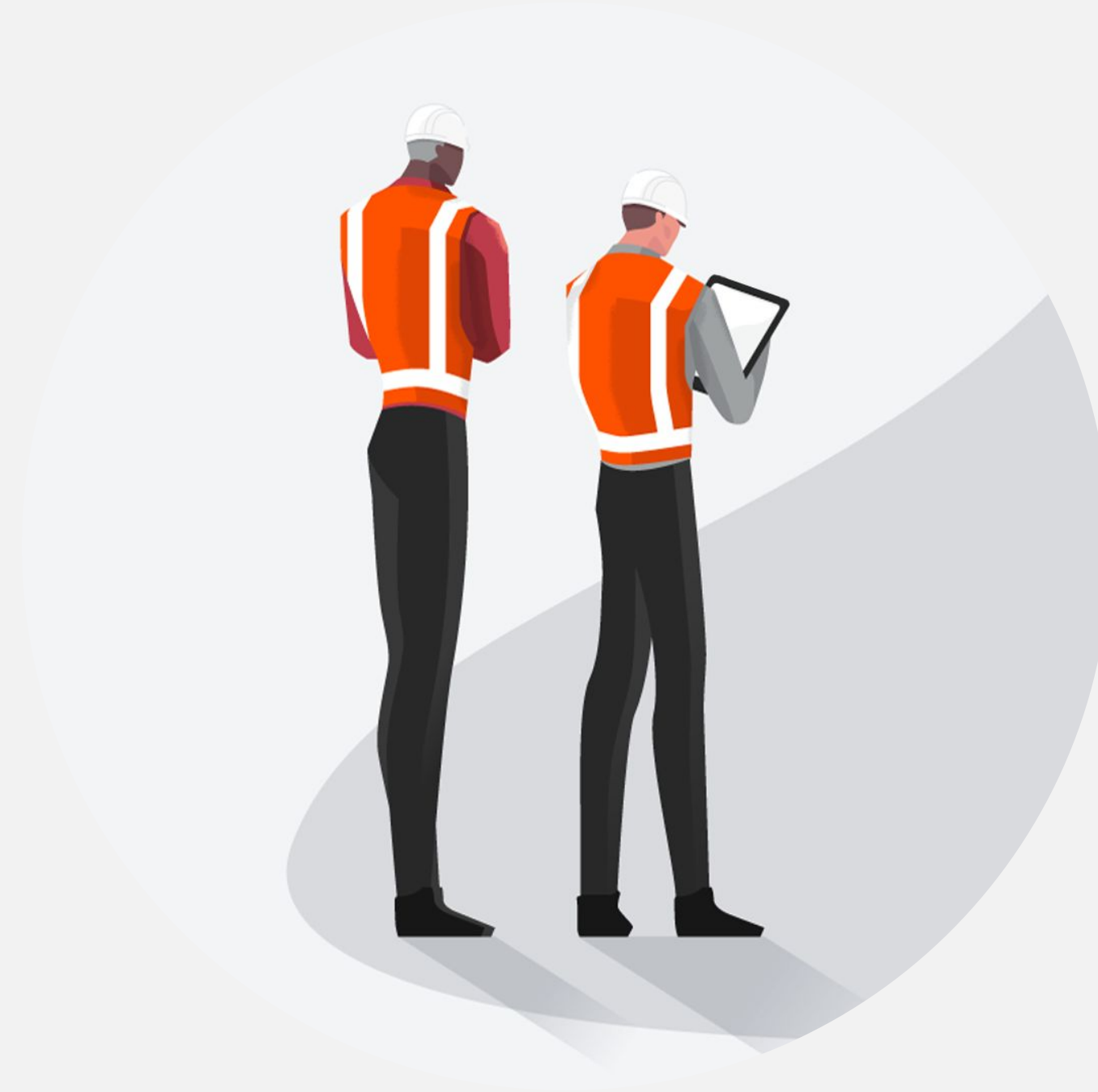
Findings

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"
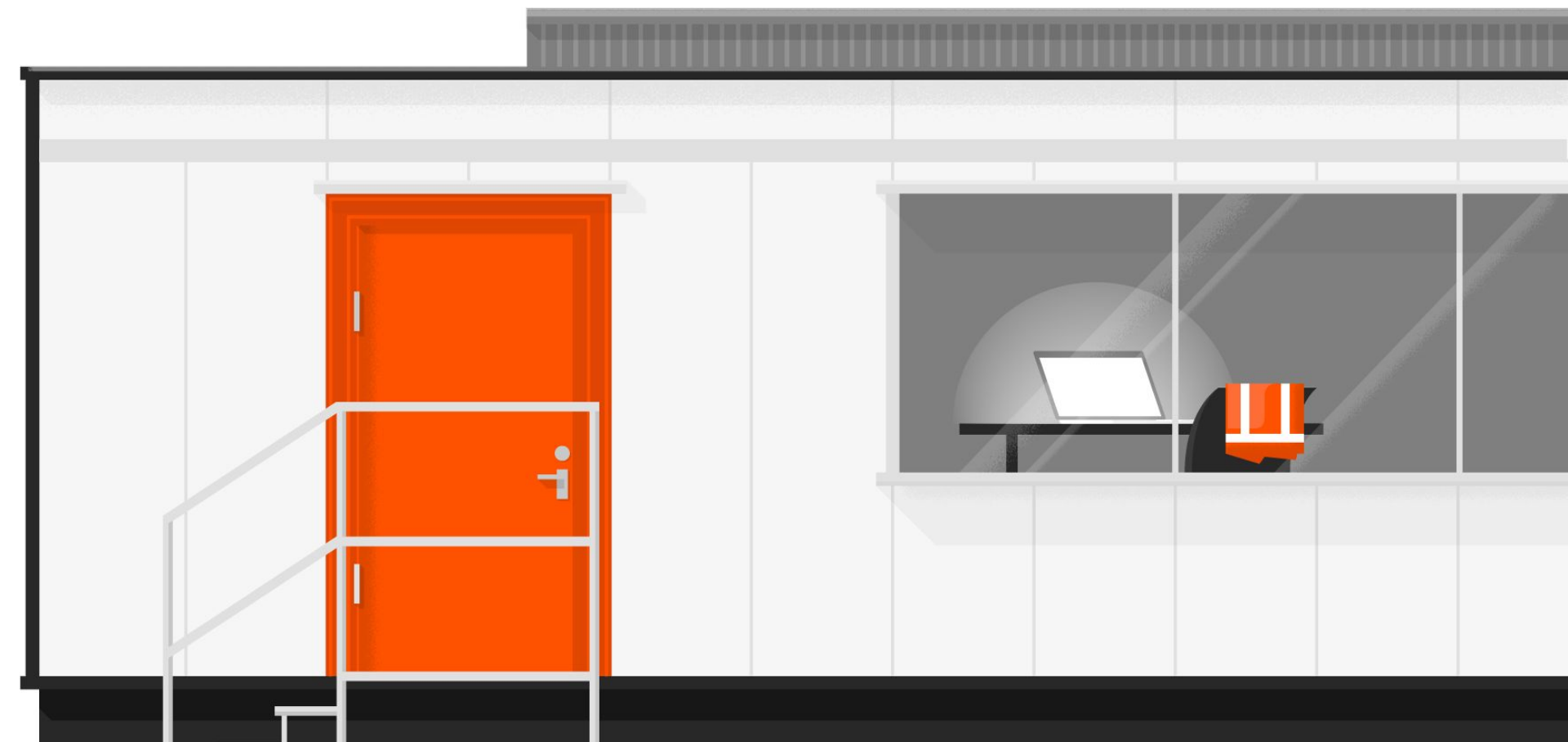
Considerations and Next Steps

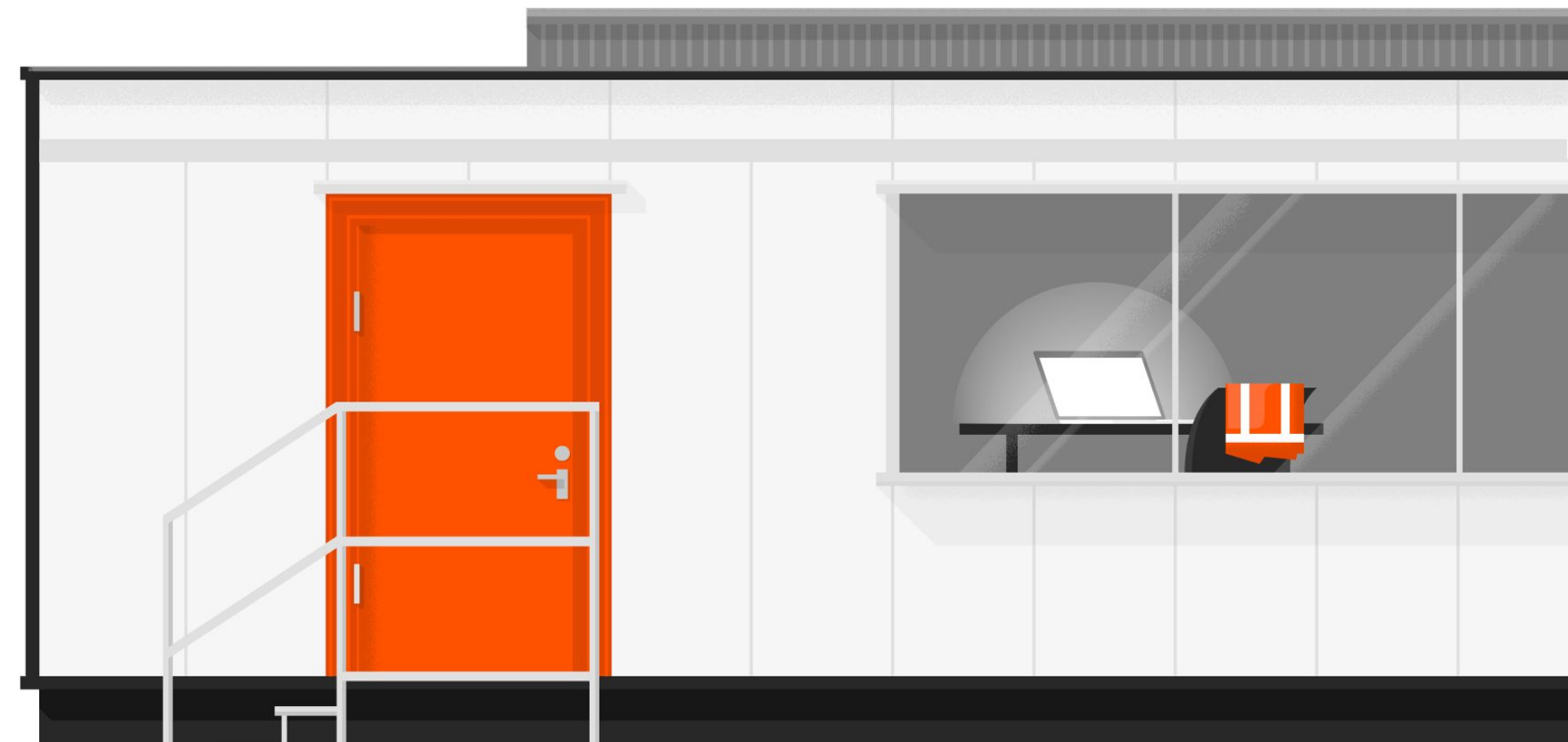What should we do with this information?

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!