

Find Similar in Compare room

Anthony Remizov, Michelle Ng | Revised: July 25 2019

Background

- In Veyron, users had the ability to find similar subject members to the ones currently in view. This allowed users to quickly add comparisons by filtering using relevant members of attribute as a starting point.

Epic requirements

- Improve the overall “find similar” experience, keeping the UI pattern cohesive across the Compare room in Vantage.
- Needs to work for different subjects.
- Default attributes should appear as configured by the Admin and users should be able to edit this default view.

End-to-end workflow

1. The admin configures which attributes appear by default for all subjects

In Admin, the administrator can configure which attributes appear by default per subject. If no attributes are defined by the admin, the list will appear empty. That tenant level setting is subject to restrictions by security configurations for each individual user. Each user will only see the dimensions in the Find Similar list that they are allowed to see.

2. Users begin with default attributes specified by the admin

Users have the option to find similar subject members using default attributes or to find similar subject members using their own specified list of attributes (which should be autosaved). Once the results are returned by the server, users then have the option to add the similar subject members to the Compare chart as a group or individually.

When users reset their list of attributes, all changes made are discarded and the list switches back to the default as defined by the admin.

3. All compared subject members can be recalled under Recent (by session)

Users have the option to add previous compared subject members under “Recent.” The “Recent” results are separated into two categories, Subject and Group, and only persist per session. If users decide to compare a different subject, “Recent” will start off empty.

4. Capture compare view to analysis (Future)

Once the author has completed the compare room analysis, the view can be captured and create as a card in Analysis. On the consumption perspective, when users are viewing the compare chart, the attribute list created by the author is persisted. The number of dimensions on the list will also be displayed depending on each user permission.

Feature tracking

Goal

- To increase the engagement and value in the Compare room
- To measure the impact of Find similar feature

1. Engagement activities

- Add comparison by Find similar from different entry points
- Edit attribute list
- Switch between subject members when finding similar
- Add as group vs individually
- Capturing (future)

2. Track success rate and number of users

- Overall number of users using Compare room
 - i. Number of groups and individual being added through Find similar
- Duration when using the Compare room

3. Weigh each engagement activity

Which activity has the most impact that may affect the success rate?

4. Rank users (persona) based on engagement score

What type of users are using Find similar the most often?