

Redesign Reporting tool for Impactful Insights.

Case Study - 1

Seema Pattnaik

Objective →

Redesign Reporting tool for Impactful Insights.

Objective

- Project Overview** how this initiative started
- My Role** position, responsibilities and time constraints
- Discovery** insights, findings for the existing product
- Design Strategy** our vision
- Solution** design principles and documentation
- Retrospective** Impact and future plans

Seema Pattnaik

McKESSON | DSCSA

DSCSA Traceability Report

Sold To Location (Required) Ship To Location (Required) Item Details Shipment Date

Select Select Select From Se

Customer GLN
is Enter value(s)

McKesson Account Number
is 9876543210 x
5678901234 x
5678901234 x
5678901234 x
5678901234 x

McKesson Account Name
is Enter value(s)

National Group Number
is Enter value(s)

National Group Name
is Enter value(s)

National Sub Group Number
is Enter value(s)

National Sub Group Name
is Enter value(s)

Chain Number
is Enter value(s)

Chain Name
is Enter value(s)

Territory
is Enter value(s)

**Welcome to the McKesson
DSCSA Traceability Portal**

bsite will allow you to query and download DSCSA Traceability data. If yo
looking for data prior to November 27, 2023 [Click Here](#).

information about McKesson's DSCSA capabilities and for assistance usi
site [Click Here](#).

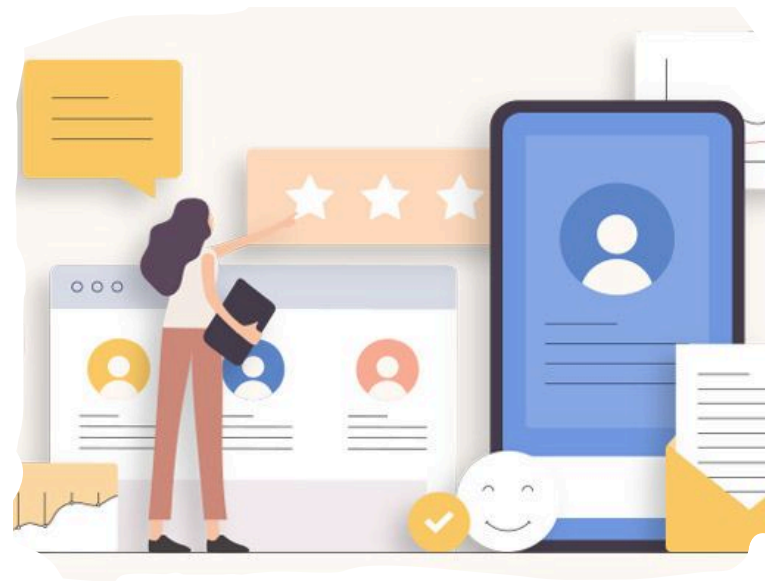
Role →

Redesign Reporting tool for Impactful Insights.

My Role

As **Lead UX designer**, I worked with 3 UX designers,
3 Product Managers, 1 Researcher and 1 Data scientist.

Time frame- 6 Months



Seema Pattnaik

Overview [➔](#)

Redesign Reporting tool for Impactful Insights.

Overview

What

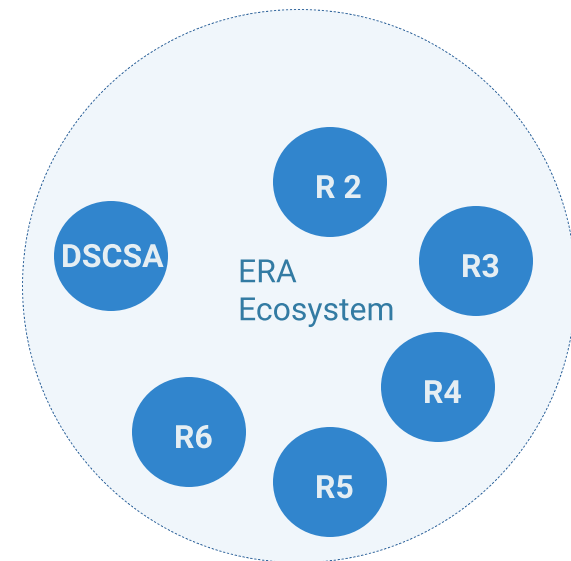
Redesign of our current MVP enterprise application reporting tool aiming to **boost user adoption** and **facilitate the smooth transition** away from the legacy system.

Why

Developing an advanced data analytics reporting tool with **visualization capabilities** empowers **businesses** to **gain insights**, **save time**, and **understand their purchases, prices, and contracts** more effectively.

How

- **Advanced analytics** for **data-driven decisions**.
- **Actionable reports** for **informed decision-making**.
- **Intuitive visualizations** for **easy data exploration**.
- **Streamlined processes** for **time savings**.



Redesign Reporting tool for Impactful Insights.

Overview

No change in active state of the current selection

Users missed valuable information

Filters values were misleading

Download CTA was not obvious

McKesson | Enterprise Reporting & Analytics

All ACCOUNTS

SEARCH

DSCSA Traceability Report

Download

1m ago

At a Glance

Solutions (Custom Reports)

Explore (Custom Reports)

DSCSA Traceability

Custom Groups

My Reports

Team Reports

My Scheduled Reports

Administration

The DSCSA Traceability Report provides access to transactional data for applicable products sold by McKesson under Section 562(d)(1)(B) of the Drug Supply Chain Security Act ("DSCSA"). Please note that this data shows two transactions for each product by invoice, therefore the results will have twice as many lines of data than invoice detail from purchase history. There is a limit of 5,000 lines of data that will be rendered on your screen, but you can download up to 50,000 lines using the DOWNLOAD button on the top right corner of the page.

Table with values

McKesson DSCSA Traceability Report

Account Number	Transaction Type	Invoice/Credit Number	Invoice Date	NDC Number	Description	Quantity	Shipped	Lot Number	Transaction Date	Seller Name	Seller Address	Buyer Name
1 000007	TI	7400229435	2023-04-05	80610013060	ZORIVIE CRM 02% 400M	0	DIRECT PURCHASE	T0CA-3-A	2023-04-05	McKesson Corporation	One Post Street, San Francisco, CA 94104	688 VAMC WASH OP
2 000007	TI	7400229435	2023-04-05	80610013060	ZORIVIE CRM 02% 400M	0	DIRECT PURCHASE	T0CA-3-A	2023-04-05	SPS/ARCUTIS BIOTHERAPEUTICS	301 MASON ROAD LAVERGNE, TN 37086	McKesson Corp
3 000007	TI	7400229435	2023-04-05	78206012701	DULERA MD 100MG 120 DOSE	0	DIRECT PURCHASE	X00021	2023-04-05	McKesson Corporation	One Post Street, San Francisco, CA 94104	688 VAMC WASH OP
4 000007	TI	7400229435	2023-04-05	78206012701	DULERA MD 100MG 120 DOSE	0	DIRECT PURCHASE	X00021	2023-04-05	ORGANON LLC	30 HUDSON STREET 3RD FLOOR, JERSEY CITY, NJ 07302	McKesson Corp
5 000007	TI	7400229435	2023-04-05	78206012701	DULERA MD 100MG 120 DOSE	0	DIRECT PURCHASE	X00021	2023-04-05	McKesson Corporation	One Post Street, San Francisco, CA 94104	688 VAMC WASH OP
6 000007	TI	7400229435	2023-04-05	78206012701	DULERA MD 100MG 120 DOSE	0	DIRECT PURCHASE	X00021	2023-04-05	ORGANON LLC	30 HUDSON STREET 3RD FLOOR, JERSEY CITY, NJ 07302	McKesson Corp
7 000007	TI	7400229435	2023-04-05	77771018170	HYDROIZ HCL TB 250MG RAD 1000	1	DIRECT PURCHASE	H183003	2023-04-05	McKesson Corporation	One Post Street, San Francisco, CA 94104	688 VAMC WASH OP
8 000007	TI	7400229435	2023-04-05	77771018170	HYDROIZ HCL TB 250MG RAD 1000	8	DIRECT PURCHASE	H183003	2023-04-05	McKesson Corporation	One Post Street, San Francisco, CA 94104	688 VAMC WASH OP
9 000007	TI	7400229435	2023-04-05	77771018170	HYDROIZ HCL TB 250MG RAD 1000	2	DIRECT PURCHASE	H183003	2023-04-05	McKesson Corporation	One Post Street, San Francisco, CA 94104	688 VAMC WASH OP
10 000007	TI	7400229435	2023-04-05	72482071250	BUPROPION TAB 400MG EXEL 500	0	DIRECT PURCHASE	35400950	2023-04-05	EXELIAN PHARMACEUTICALS	242 S CULVER ST STE 208 LAWRENCEVILLE, GA 30046	McKesson Corp
11 000007	TI	7400229435	2023-04-05	72482071250	BUPROPION TAB 400MG EXEL 500	0	DIRECT PURCHASE	35400950	2023-04-05	McKesson Corporation	One Post Street, San Francisco, CA 94104	688 VAMC WASH OP
12 000007	TI	7400229435	2023-04-05	72482071250	BUPROPION TAB 400MG EXEL 500	0	DIRECT PURCHASE	35400950	2023-04-05	McKesson Corporation	One Post Street, San Francisco, CA 94104	688 VAMC WASH OP
13 000007	TI	7400229435	2023-04-05	72482071250	BUPROPION TAB 400MG EXEL 500	0	DIRECT PURCHASE	35400950	2023-04-05	McKesson Corporation	One Post Street, San Francisco, CA 94104	688 VAMC WASH OP
14 000007	TI	7400229435	2023-04-05	72482071250	BUPROPION TAB 400MG EXEL 500	0	DIRECT PURCHASE	35400950	2023-04-05	McKesson Corporation	One Post Street, San Francisco, CA 94104	688 VAMC WASH OP
15 000007	TI	7400229435	2023-04-05	72482071250	BUPROPION TAB 400MG EXEL 500	0	DIRECT PURCHASE	35400950	2023-04-05	McKesson Corporation	One Post Street, San Francisco, CA 94104	688 VAMC WASH OP
16 000007	TI	7400229435	2023-04-05	72482071250	BUPROPION TAB 400MG EXEL 500	0	DIRECT PURCHASE	35400950	2023-04-05	McKesson Corporation	One Post Street, San Francisco, CA 94104	688 VAMC WASH OP
17 000007	TI	7400229435	2023-04-05	72482071250	BUPROPION TAB 400MG EXEL 500	0	DIRECT PURCHASE	35400950	2023-04-05	McKesson Corporation	One Post Street, San Francisco, CA 94104	688 VAMC WASH OP
18 000007	TI	7400229435	2023-04-05	72482071250	BUPROPION TAB 400MG EXEL 500	0	DIRECT PURCHASE	35400950	2023-04-05	McKesson Corporation	One Post Street, San Francisco, CA 94104	688 VAMC WASH OP
19 000007	TI	7400229435	2023-04-05	71858002554	TROGENT CP 100MG 30	0	DIRECT PURCHASE	221009	2023-04-05	McKesson Corporation	One Post Street, San Francisco, CA 94104	688 VAMC WASH OP
20 000007	TI	7400229435	2023-04-05	71858002554	TROGENT CP 100MG 30	0	DIRECT PURCHASE	221009	2023-04-05	McKesson Corporation	One Post Street, San Francisco, CA 94104	688 VAMC WASH OP
21 000007	TI	7400229435	2023-04-05	71858002554	TROGENT CP 100MG 30	4	DIRECT PURCHASE	221014	2023-04-05	McKesson Corporation	One Post Street, San Francisco, CA 94104	688 VAMC WASH OP

Double scroll on the page

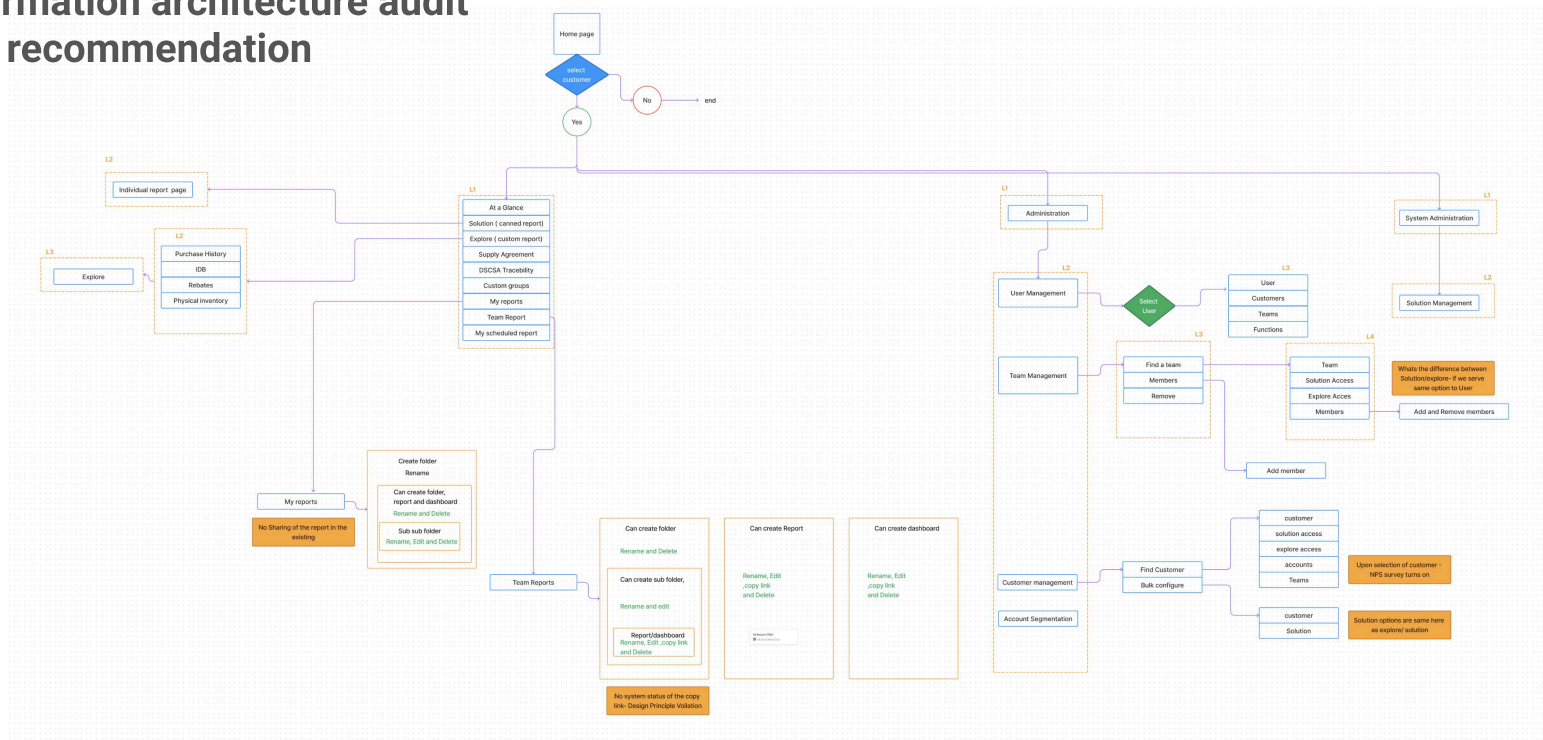
Seema Pattnaik

Research →

Redesign Reporting tool for Impactful Insights.

Overview

Information architecture audit and recommendation



Seema Pattnaik

Research →

Redesign Reporting tool for Impactful Insights.

Strategy

AI to be a Thought Partner in Ideation and Design Thinking



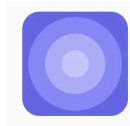
Cast a wide
net of Options

- 1. Brainstorm Ideas
- 6. Iterate and Guide



Weigh Pros and Cons

- 2. Provide Examples
- 5. Provide Direction



Identify
Blind Spot.

- 3. Apply Judgment
- 6. Find the Spark

Seema Pattnaik

Solution



Redesign Reporting tool for Impactful Insights.

Research

Research Duration- 14 Days

Research Questions

Why Users are not using the Platform to create and share Reports with customers?

- Users are having trouble understanding how to use the filters effectively.
- The report takes too long to process, causing delays.
- Users are not receiving clear feedback when errors occur.
- The categories for filters are confusing to users.

Whats are users saying about the current tools?

" When I make a report, I'm unsure if the data about specific customers is accurate, and there's a lot of unnecessary information included ".

Retails Sales Manager, CRA

" I'm making cheat sheets for my customers to help them create reports easily because there are so many options to choose from".

Account Executive, ERA



Seema Pattnaik

Research →

Redesign Reporting tool for Impactful Insights.

Research

Current Platform Property Evaluation Measuring across dimensions

6 dimensions, or categories, of **Usability Design** were leveraged to **conduct a thorough investigation into the Platform's Usability and Experience Design**. 30 participants, without consensus or communication, individually scored the platform.

6 Dimensions

- Language, Content and Typography
- Visual Design (Form)
- Semiotics (Metaphors)
- Architecture (Flow, Intuitiveness)
- Feedback (Errors, etc.)
- Interaction Design

A	B	C	D
	Buttons containing calls-to-action are limited to one per page or screen. (example: "submit my form")	Very Poor	2
	Contingent interactions are obvious and easy to use. (example: a text field that becomes active only if the user checks a box to add an alternate mailing address)	Very Poor	2
A	B	C	D
	It is visually clear what I should	Very Poor to Great	
	If there are multiple choices, the	1 to 10	
	Heuristic Evaluation Work Sheet		
	Language, Content and Typography		
	Important actions, tasks and intents are clearly signaled or called out, and no instructions are needed.	Poor	4
	If needed, instructions are present, discoverable and easy to follow.	Poor	3
	Appropriate formatting standards have been used consistently throughout. (appropriate to the topic, audience, industry, culture, etc.)	Average	5
	All language is used clearly, consistently, and concisely.	Very Poor	2
	Important warnings or notifications are easy to understand and resolve or dismiss	Average	5
	The content is structured well for easy scanning.	Poor	3
	The tone fits the audience and the experience.	Poor	3
	All text is easily readable in terms of sizing, font, accessibility, etc.	Good	6
	Button actions and other calls-to-action are easy to understand.	Very Poor	2
	The experience provides me with all the information I need, where and when I need it.	Poor	3
	The experience provides me with the right amount of information, and I am not overwhelmed.	Poor	4
TOTAL SCORE FOR THIS SECTION.		Very Poor	36.36%

Seema Pattnaik

Research →

Research

Affinity mapping after contextual research

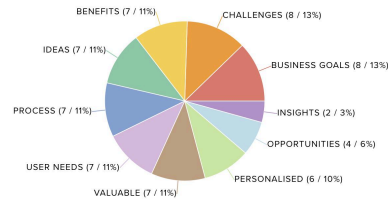
Issues / Painpoints



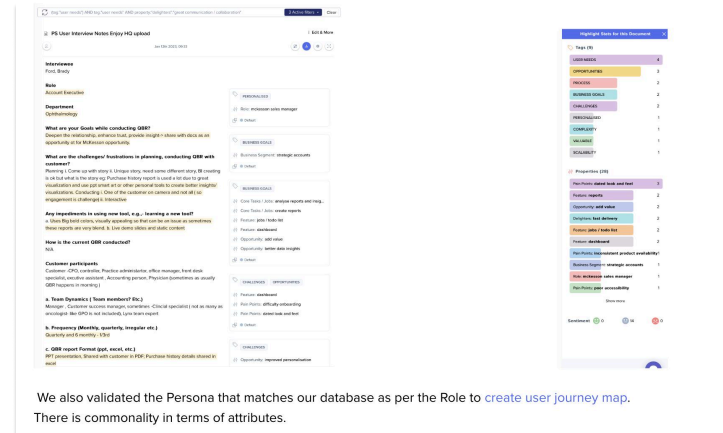
Analysis of the report

QBR User Interviews

Tool used



Seema Pattnaik



Eric – Retail Sales Manager (McKesson)



Age: 36
Location: On the road
Uses: Laptop
Traits: On the go, responsive, energetic
Background: Ex-pharmacy tech, had a knack for sales
Career Goals: Grow into a larger role in the sales organization

- Running reports a few hours a week
- Receives requests via email from customers
- Logs in as customer users to run reports for them
- Sends response via email as either an Excel attachment or to tell them to look in Connect for their report
- Always adds explanation and interpretation of data

Quotes

"My customers are looking for actionable information but most of what we can provide them is general data"



- **Goals:**
- Customer happiness
- Quick turnaround on issues (few escalations)
- Getting new customers and keeping the ones he has
- **Frustrations:**
- Data issues (affects trust)
- Too much driving, not always at computer

Research 

Redesign Reporting tool for Impactful Insights.

Research- Findings

Businesses with high level of complexity (HC)	Medium / Low complexity businesses (LC)	Only here for the data
Full Use of Platform capabilities	Just the necessities – mostly downloading tweaked canned reports into Excel	Downloading and transferring data to other platforms for further analysis.
This is what Platform is optimized for. Users invest time/ effort into learning the platform and experimenting.	ERA is intimidating, too much complexity, daunting. Connect R&A is safer and more efficient	N/A

Redesign Reporting tool for Impactful Insights.

Measuring Success

RESULTING TOTAL

38% Poor

TOTAL BASELINE QUALITY EXPERIENCE SCORE

65% Good

AVERAGE STANDARD SYSTEM USABILITY SCORE

+ 27% Goal

REQUIRED LIFT IN QUALITY EXPERIENCE SCORE

Redesign Reporting tool for Impactful Insights.

Measuring Success

“The purpose of visualization is insight, not pictures. “— Ben Shneiderman



Redesign Reporting tool for Impactful Insights.

Problem

User Story

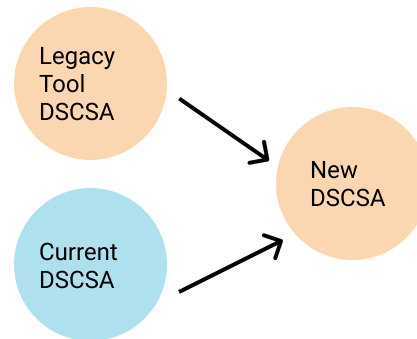
After getting access to the DSCSA report, I want to learn about the customer data, download and share the reports with internal and external account sales executive.

User Goals

- Learn about customer data
- Simple and intuitive design
- Access relevant information

User task

- Filter selection
- Download application



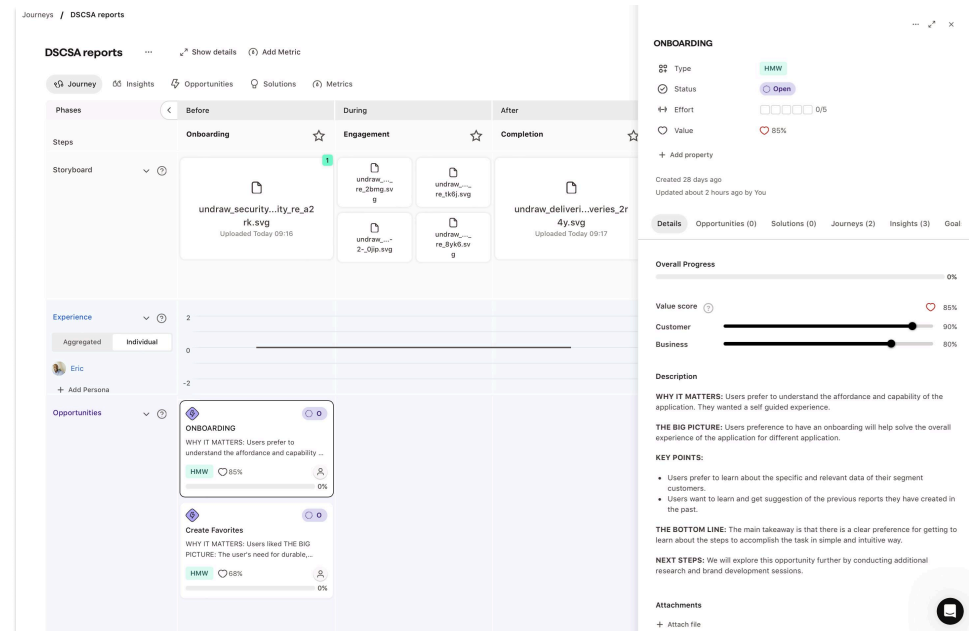
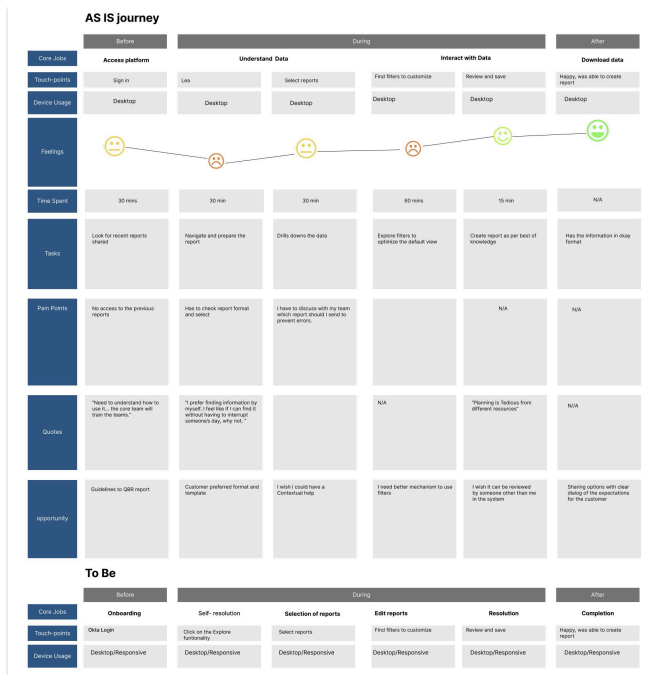
Seema Pattnaik

Strategy



Redesign Reporting tool for Impactful Insights.

Solution



Seema Pattnaik

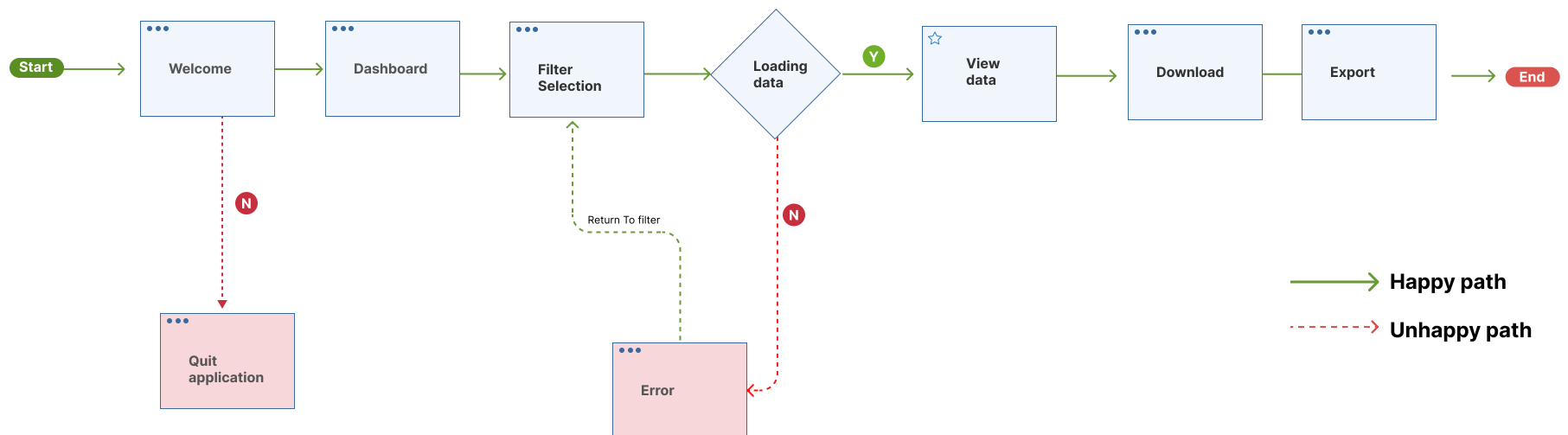
Solution



Redesign Reporting tool for Impactful Insights.

Solution

User Flows for happy and unhappy path View data and download the report without any manipulation

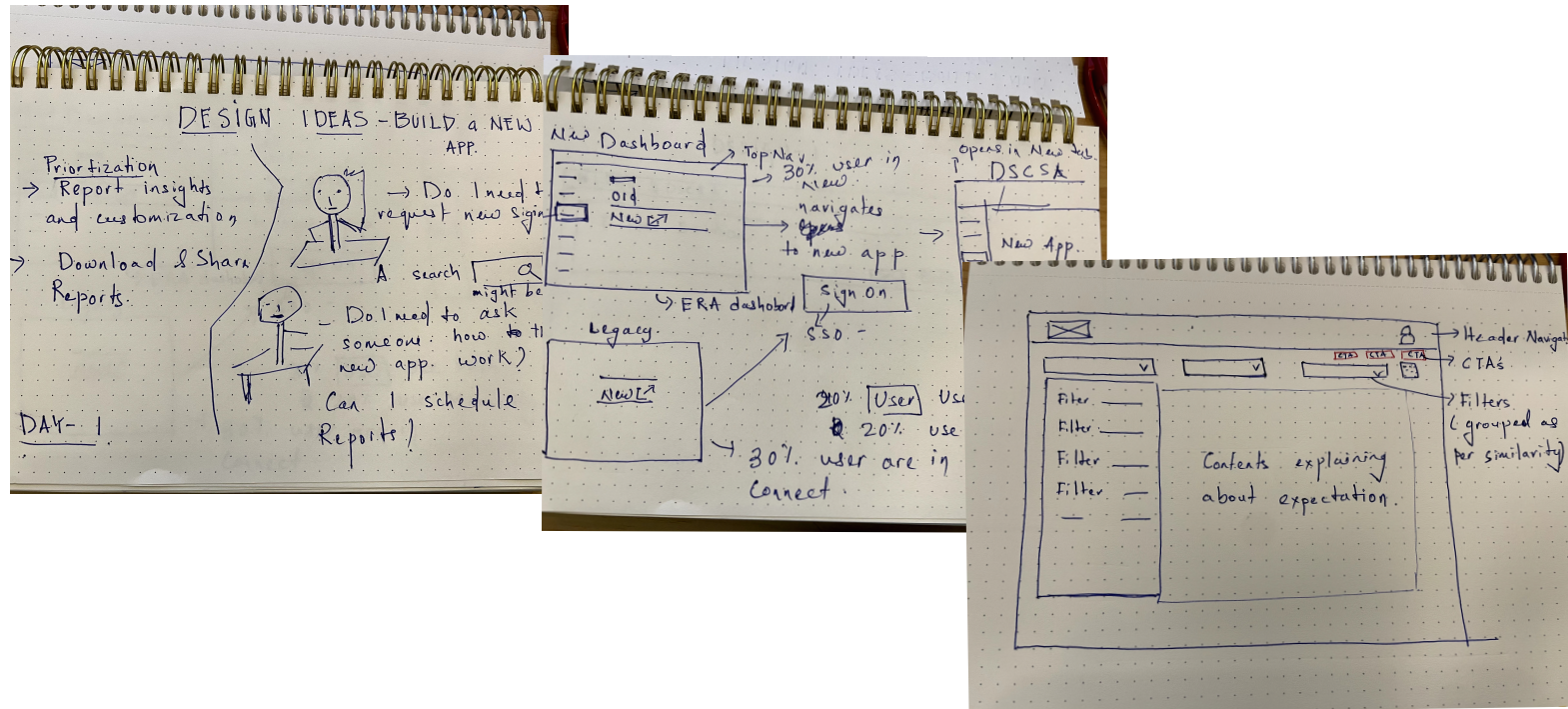


Seema Pattnaik

Solution ➔

Redesign Reporting tool for Impactful Insights.

Solution



Redesign Reporting tool for Impactful Insights.

Solution

Conducted A/B testing on the home screen to evaluate different filter options placement

Design-1

[illegible]

Design-2

[illegible]

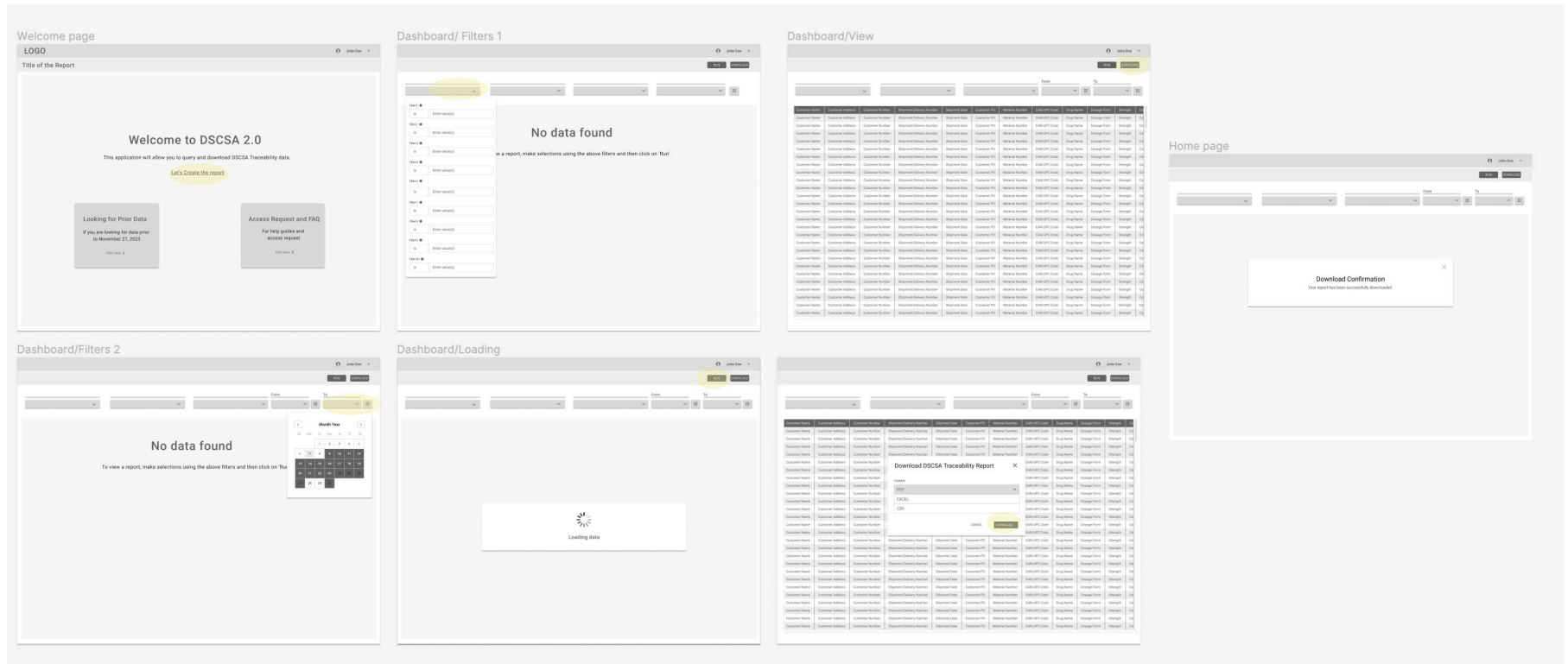
Seema Pattnaik

Solution



Redesign Reporting tool for Impactful Insights.

Solution



Seema Pattnaik

Solution



Redesign Reporting tool for Impactful Insights.

Design System

I was responsible to define the color tokens by partnering with the brand and product team



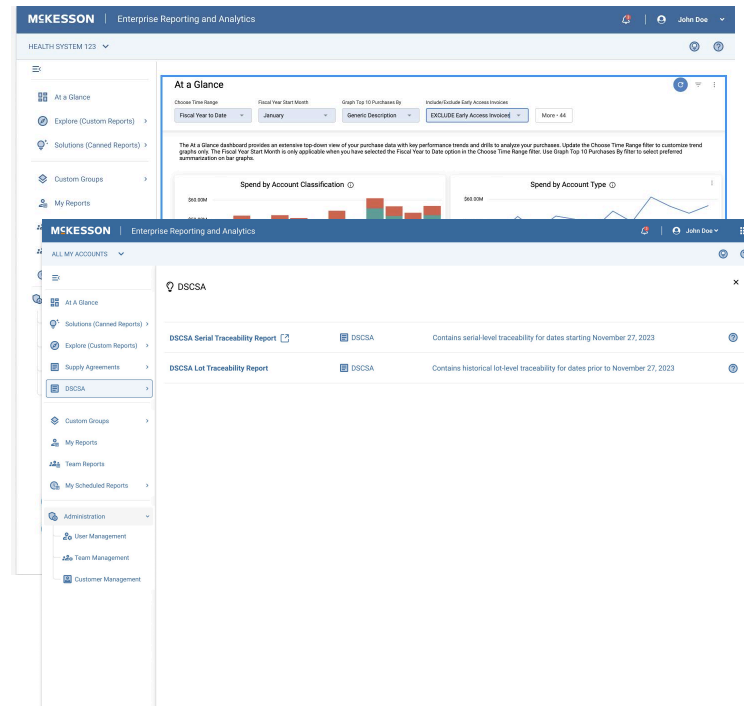
CTA



Grey Scale



Alerts and Messaging



Seema Pattnaik

Solution

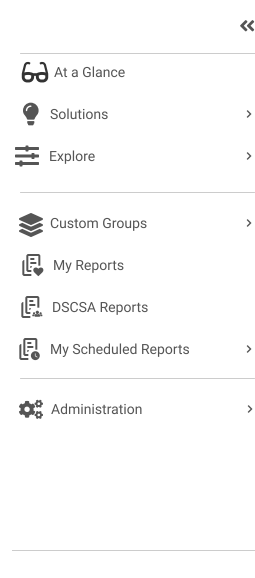


Redesign Reporting tool for Impactful Insights.

Solution

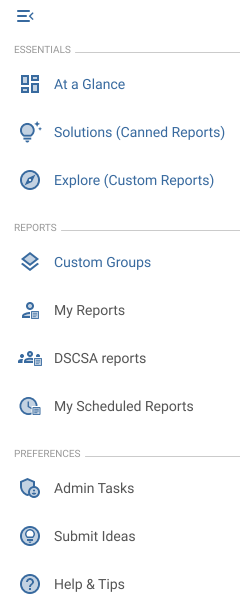
Existing Menu

Lead the effort for
iconography during
design workshop



New Menu

Expanded



collapsed



Seema Pattnaik

Solution



Redesign Reporting tool for Impactful Insights.

Solution

Prototype ➤

Old Design

The screenshot shows a legacy reporting tool interface. It features a top navigation bar with the 'McKESSON' logo and 'Enterprise Reporting & Analytics'. A left sidebar contains a menu with options like 'At A Glance', 'Solutions (Canned Reports)', 'Explore (Custom Reports)', 'Supply Agreements', 'DSCSA', 'Custom Groups', 'My Reports', 'Team Reports', 'My Scheduled Reports', and 'Administration'. The main content area displays a 'DSCSA Traceability Report' with a table of data. The table has columns for 'Report ID', 'Report Name', 'Report Type', 'Report Date', 'Report Status', 'Report Owner', 'Report Created By', 'Report Created Date', 'Report Last Modified By', 'Report Last Modified Date', 'Report Version', 'Report Description', 'Report Notes', and 'Report Actions'. The table contains multiple rows of data, including report IDs like '1', '2', '3', '4', '5', '6', '7', '8', '9', '10', '11', '12', '13', '14', '15', '16', '17', '18', '19', '20', '21', '22', '23', '24', '25', '26', '27', '28', '29', '30', '31', '32', '33', '34', '35', '36', '37', '38', '39', '40', '41', '42', '43', '44', '45', '46', '47', '48', '49', '50', '51', '52', '53', '54', '55', '56', '57', '58', '59', '60', '61', '62', '63', '64', '65', '66', '67', '68', '69', '70', '71', '72', '73', '74', '75', '76', '77', '78', '79', '80', '81', '82', '83', '84', '85', '86', '87', '88', '89', '90', '91', '92', '93', '94', '95', '96', '97', '98', '99', '100'. The interface is cluttered with many small text elements and a complex layout.

Seema Pattnaik

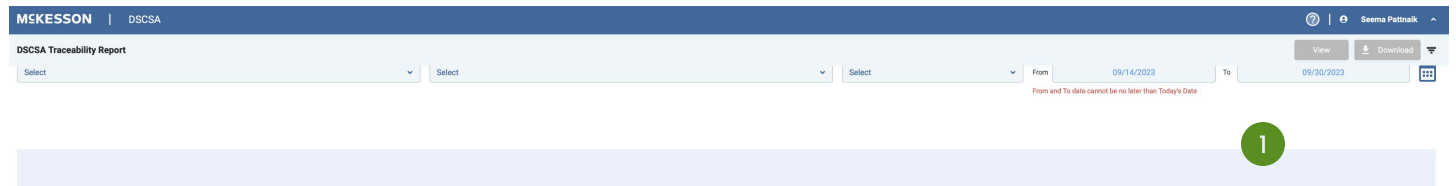
New Design

The screenshot shows a modern reporting tool interface. It features a top navigation bar with the 'McKESSON' logo and 'Enterprise Reporting and Analytics'. A left sidebar contains a menu with options like 'At A Glance', 'Solutions (Canned Reports)', 'Explore (Custom Reports)', 'Supply Agreements', 'DSCSA', 'Custom Groups', 'My Reports', 'Team Reports', 'My Scheduled Reports', and 'Administration'. The main content area displays a 'DSCSA' report with a search bar and a table of data. The table has columns for 'Report ID', 'Report Name', 'Report Type', 'Report Date', 'Report Status', 'Report Owner', 'Report Created By', 'Report Created Date', 'Report Last Modified By', 'Report Last Modified Date', 'Report Version', 'Report Description', 'Report Notes', and 'Report Actions'. The table contains multiple rows of data, including report IDs like '1', '2', '3', '4', '5', '6', '7', '8', '9', '10', '11', '12', '13', '14', '15', '16', '17', '18', '19', '20', '21', '22', '23', '24', '25', '26', '27', '28', '29', '30', '31', '32', '33', '34', '35', '36', '37', '38', '39', '40', '41', '42', '43', '44', '45', '46', '47', '48', '49', '50', '51', '52', '53', '54', '55', '56', '57', '58', '59', '60', '61', '62', '63', '64', '65', '66', '67', '68', '69', '70', '71', '72', '73', '74', '75', '76', '77', '78', '79', '80', '81', '82', '83', '84', '85', '86', '87', '88', '89', '90', '91', '92', '93', '94', '95', '96', '97', '98', '99', '100'. The interface is clean and modern, with a clear focus on the data.

Collaboration ➔

Redesign Reporting tool for Impactful Insights.

Collaboration



- 1 There is no sticky navigation for interactive experience in the nav bar, since we have an accordion

Design QA- crucial for User centric design.
I partnered with technology team to maintain parity
with design and dev built up.

pography

```
color: #252525;  
text-align: center;  
font-family: Roboto;  
font-size: 40px;  
font-style: normal;  
font-weight: 500;  
line-height: 149.4%; /* 59.76px */  
letter-spacing: 1.2px;
```

Seema Pattnaik

Retrospective →

Redesign Reporting tool for Impactful Insights.

Impact

After

~12min

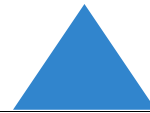
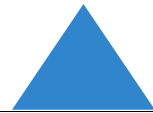
Time to onboard

45% less

Customer calls

78%

NPS Score



Before

~1 hr

Time to onboard

90% around

Customer calls

37%

NPS Score

Redesign Reporting tool for Impactful Insights.

Retrospective

“Design is iterative- we’ve developed a clear vision for refining the product. In my role as a lead, I had the opportunity to contribute to the UX blueprint and understand the productive friction between stakeholders, **which ultimately helped me advocate for the rationale behind our design decisions.**”



Thank you for your time