

SE-1853

Search in the Partner Portal

DESIGN REVIEW: 13/06/2023

Context

Objective

Focus of this feature

To implement **search functionality** in the Partner Portal so agents can find applications quickly.

Problem & opportunities

Problem statement

On the Partner Portal, the Applications are sorted based on their Last Modified status and the top 10 thousand applications are visible on the portal. For clarification, the Last modified time stamp reflects the last time an application was modified and not the time an application was created. Thus, a year old application can also be ranked high in the list if it was recently modified due to an automated job for example.

When an Agent wishes to update a recent application then it is possible that the application is not visible on the portal and not among the top 10 thousand applications. Hence he might not be able to find it. Additionally, it is time consuming to scroll through the applications list to find the intended application.

Context

Up to this point...

UX best practice

We conducted desk research to look into how other search functionality works, as well as looking into best practice for a search experience.

Technical constraints

We met with Simon Symou (solution architect) to discuss what's possible technically and what effort/cost is involved in developing different technical solutions.

Draft designs

We worked on developing the draft designs we'll show today to demonstrate what we think would be a good search experience. This includes considerations on copy.

Elements of an effective search experience

ELEMENTS THAT MAKE UP AN EFFECTIVE SEARCH EXPERIENCE

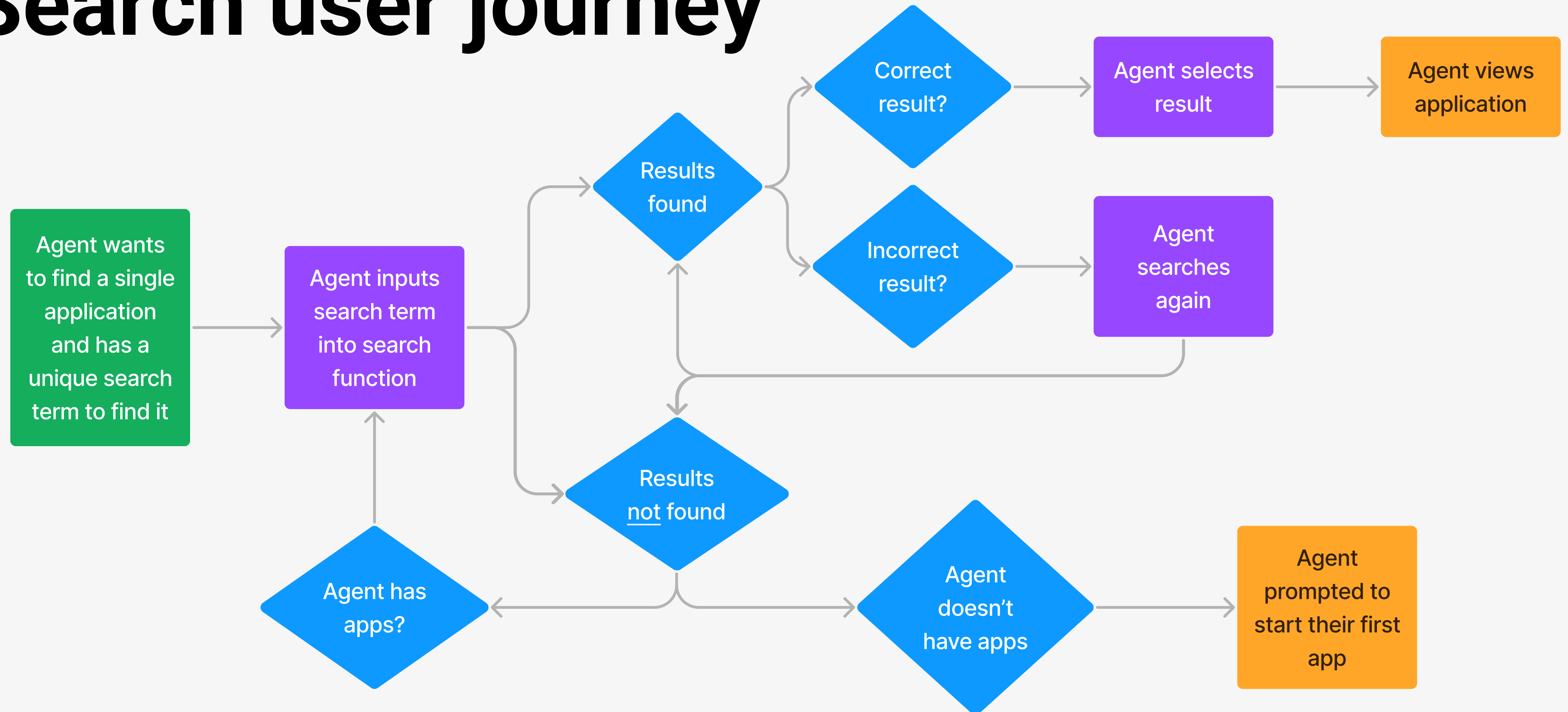
Search bar for
entering search into

Search suggestions /
realtime results

Search results page

Recent searches
(search history)

Search user journey



Opportunity to show 'character'

As this is new functionality and the 'search results' page doesn't currently exist, we're using this opportunity to utilise recent work done to clarify 'voice & tone' for the Partner Portal.

There are various examples of use of copy and illustrations that represent those new guidelines.

191 results from your 211 applications

Show me all my applications

Start your first application



I've got no results for you

You've got 211 applications but they don't include the term "[search term]"

Requirements

Functionality

		Search (search bar)
Results Page (results found)	Results Page (no results)	Ability to search applications by criteria (to be defined through user research)
Surface results	Show illustration & message	
Surface details for each app	Show relevant CTA buttons	Show live results in search bar (typeahead)
Filter results	Results Page (no apps)	Ability to click on app in live results and go straight to app selected
Provide results total	Show illustration & message	
Provide number of results viewed out of total (ie. 10/100)	Show relevant CTA buttons	See additional prompt/guidance for how to search (in dropdown)

Search vs View

Search applications

Search is a good experience when you have a unique search term to use. But if the user doesn't have any search term to begin with, then the ability to view applications and filter down to a selection is more useful.

View applications

To service this user need, we are proposing updates to the 'side panel' in the application view so that filtering is better, as well as including a route to 'view all applications' from the search results page.

Future updates

This is a quick win solution, but we think a future update might be to give the user the ability to 'save views/lists' so they can quickly view a subsection of applications. This would need validating through user research as to whether this functionality is wanted/needed.