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University of Exeter prioritises usability of a new HR system

Usability testing from Civica ensures the new system is easy to use and meets accessibility standards

Appraisal process with an electronic performance development review (ePDR) system, it was critical that the new system would be easily usable and accessible by all members of staff to carry out performance assessments and record goals for personal development. To ensure it would meet user needs, the the university chose Civica's Customer Experience (CX) team to put the ePDR system through usability testing.

Transforming performance assessments

The University of Exeter needed to work with an external supplier to build a specific solution to meet their needs. Selecting an off-the-shelf ePDR system, the University of Exeter worked with an external supplier to customise the system to meet its needs: university employees need to be able to use the system to carry out performance assessments, record goals for personal development, and plan any training required.

With around 4,000 academic and professional services staff relying on the new system, the university wanted to be confident that its

many employees could easily use the system and that it would save time when completing the performance process.

Partway through the development project, the university decided to bring in Civica to carry out independent usability testing of the proposed system.

Benefits

- A usable, intuitive system supporting the university's transition from paper-based to electronic performance development reviews

- 4,000 academic and professional services staff using the system

- Compliance with WCAG 2.0 guidelines, AA level, to improve accessibility of the system

- Knowledge gained from the Civica engagement applied elsewhere in the university, including to its testing process and diversity policy.

Key outcomes:

1 | 4,000 staff use the system

2 | 64 issues identified and proposals for resolving them

3 | Knowledge gained applied elsewhere in the university

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Lizzy Sones, Senior HR Advisor, University of Exeter

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The testing focused on the usability and intuitiveness of the system and Civica suggested improvements as appropriate. Although initially concerned the analysis might delay the launch of the system, Lizzy Sones, Senior HR Advisor at the university, and her colleagues in the HR team were soon won over.

" We learned so much from the Civica engagement, we're now confident about raising questions and asking for changes. That's down to how well Civica explained the usability issues and the effectiveness of the solutions they recommended."

Lizzy Sones, Senior HR Advisor, University of Exeter

"A key reason for adopting ePDR is to enable ongoing conversations between staff and managers, so the system has to be easy to use day to day," says Sones. "As soon as I understood the benefits a human factors analysis could deliver in terms of usability, I couldn't wait to get started."

Hands-on testing for usability

Via the Digital Marketplace, the university selected Civica to carry out the analysis. "The Civica team really knew their stuff," says Sones. "They explained clearly what the engagement involved and what it would deliver, and were approachable and easy to work with." Civica led face-to-face sessions with a group of testers from different university departments, asking them to explore the ePDR system and perform specific tasks. Civica used the 'think aloud' usability testing technique where the testers were directly observed completing their performance development review process and were asked to think out loud describing expectations and feelings about their experience, including commenting on the design and layout.

Identifying issues, proposing solutions

Civica combined feedback from the testing sessions with human factors expertise into a report on the ePDR system's usability. The report clearly communicated at a glance whether each finding was a serious problem, moderate problem or no issue.

For Sones, the most critical outcome of the human factors analysis was learning that the ePDR system didn't meet WCAG 2.0 web content accessibility guidelines, which are considered best practice for web applications and are a legal requirement under the Equality Act 2010. "Accessibility is, of course, important to our reputation," says Sones. "More than that, some of our staff would have struggled to use a non-compliant system."

In addition to identifying all of the issues, Civica made recommendations for resolving them. For instance, the university had previously designed an interactive form to act as the interface to the system and take users through the appraisal workflow. Civica made valuable recommendations on how to improve this, says Sones: "The report included an amazing clickable flowchart that showed us how to optimise the end-to-end ePDR process."

Armed with the report, Sones revised the appraisal form and asked the external software provider to make changes to the ePDR system. To ensure the best outcome for the university, the provider applied Civica's report recommendations to an updated version of the system that was poised for launch.

Spreading best practice

"We're so pleased with the resulting improvements, I only wish we'd engaged with Civica sooner. The new system is full of great functionality that will let us take performance development reviews to the next level," says Sones. "Now that the usability issues have been nailed down and it meets WCAG 2.0 guidelines, we're confident everyone will find it easy to use."

Beyond that, the university is applying knowledge gained during the engagement more widely. It has, for example, revised its testing processes; while the diversity manager has updated internal standards to make WCAG 2.0 AA level compliance mandatory.

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