FAQ: How to add UX in your Implementation Cycle

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User Experience Direct (UX Direct) is an Oracle Applications User Experience (UX) program that provides user experience expertise to Oracle customers and partners for their implementations, customizations, and usage of Oracle enterprise applications. The goal of this program is to enhance end user experiences during and after customer implementations and improve user adoption of Oracle’s enterprise applications.

Overview

This checklist is provided by the Oracle Applications User Experience team to guide Oracle customers, consultants and partners and to ensure that the user experience for Oracle Applications is incorporated during the implementation phase.

This checklist should be used at the beginning of a project rollout for enterprise applications. You can apply this checklist to any enterprise application rollout.

1. Is usability identified as a key requirement for your implementation?

Generally, the implementation business requirements are focused on features and functionality, usability is not spelled out as a requirement.

Usability is a key attribute of user interfaces that defines the ease of use and learnability. It is defined by the ISO 9241-11 as three essential components:

- **Effectiveness:** Can users complete their tasks without making mistakes?
- **Efficiency:** How easily can the users accomplish their goals?
- **Satisfaction:** Do the users like the product from ease of use standpoint?

If usability is not identified as a key requirement when a customized solution is rolled out, end users may resist its adoption.

To ensure usability is built into the implementation process, a user-centered design (UCD) approach needs to be followed.

2. Does your implementation team include user experience experts?

Typically, the consulting and implementation teams do not have the same competencies as the user experience professionals. The consultant’s core competencies are business process engineering, change management, technical database and user-interface design. Usability engineering and user experience designers are generally missing during implementations. If UX professionals are not included, it is critical to fill this gap either by hiring a UX person or getting a UX consultant. Their role would be to ensure that the customizations and implementations not only meet the functional needs but also the usability needs of end users.

3. Have representative users been engaged in the implementation process?

End-user involvement is critical for a successful implementation. To have representative end users as part of the design process helps ensure the product’s adoption.

The implementation stakeholders generally consist of implementation managers, developers, technical consultants, Enterprise Resource Planning (ERP) process owners, vendor sales consultants, and project managers. You need end users to complete the team.

It is essential to have users who represent the real end users for whom the application is intended to be involved in the customization process from the beginning. It's too late to bring them in to buy into the rollout before their requirements are met.

4. Have target user profiles/roles been created for implementations?

User profiles describe the characteristics of the people working in a particular role. User profiles are essential for designing a role-based interface so the user sees all of the key tasks that they are supposed to do.

User profiles also help ensure that the application is designed with the goals of the users in mind. The critical tasks the users will perform are addressed in the design. User profiles also help drive customizations. For example, the user profile for a purchasing manager would drive how a purchasing application helps the user to bid for contracts or negotiate contracts.

See the UX Direct: User Profile collateral for an extended explanation of how to create and use user profiles.
5. Have the target user’s key tasks for business processes been identified?
For successful enterprise implementations, it is critical that the key business processes and user tasks be identified. Oracle’s Business Process Modeling tool and pre-defined processes can be used for this purpose. When a customized application modifies an organization’s business processes, it is essential to study the impact on key tasks. Those new tasks and task flows need to be designed with users in mind, and the benefits of the new processes need to be made clear to users. It is best to address the change process with users up front rather than being presented as a fait accompli during rollout.

6. Have performance goals been established to measure the efficiency or productivity of users?
It is a good practice to identify the operational efficiencies the business wants to introduce with the new ERP system. For example, an organization might want to improve its completion rates for employee appraisals and objectives from 75% to 90%. Working from a baseline where documents are used, the company might measure the rate of completion both before and after the installation of software that provides electronic documents. These measurements provide criteria for UX professionals that help assess the success of an implementation.

7. Do you follow any industry design standards or your own best practices for your customizations?
When an application user interface is customized to meet the needs of a business, it is critical to follow the best practices of design to keep the designs consistent. Ideally, design patterns are built into the user interface components, but some products allow flexibility, and designs can be used in any way that meets a particular preference. A customization that does not follow the user interface paradigm of the application is harder for users to learn. New designs should look and feel the same as the rest of the application.

Oracle’s UX Direct program is introducing design standards and patterns that customers can use during their customizations. For example, Oracle Business Intelligence Enterprise Edition, or OBIEE 10g, design patterns will be available soon to help customers make Oracle Business Intelligence Applications (OBIA) dashboards consistent with best practices.

8. Have the customizations been usability tested and validated with users?
One of the best practices that the Oracle Applications User Experience team promotes is validation of the designs of Oracle applications or customized applications with users. Usability testing is different than user acceptance testing. Most user acceptance testing is done to ensure the product meets the functionality needs of the business. Usability testing, however, validates how easily and efficiently the feature functionality that has been designed meets the users’ expectations.

Usability testing is a standard technique used by UX professionals to uncover any major barriers for users to accomplish their tasks. A usability test can be conducted by asking users to perform a set of common tasks while being observed by a moderator. A simple test can be conducted in a conference room.

The outcome from usability testing can be used to refine the designs and make the product more acceptable for user adoption. See the UX Direct: Usability Testing collateral for an extended explanation of how to plan and conduct a simple test.

9. Has the impact of changes been evaluated and communicated to users?
The rollout of a new enterprise product can have a substantial impact on employee work satisfaction. The application changes the way users perform standard business functions, and they have to adjust to new tools and procedures. The implementation team needs to understand why and how these changes will impact users. To manage the user expectations, it is critical to communicate the anticipated Return on Investment (ROI) to users. For example, if the users know that a new automated payroll system will make calculations and deductions done in a fraction of the time they spent before and make their lives easier, the system’s acceptance becomes easier. User perception is key to adopting new technologies.

10. Does the change management and training process inform the users about the benefits of the applications?
Often, the training materials focus on the mechanical steps to complete tasks but do not address the reason why performing the tasks is important. It is important for users to understand how the features and functions of the new enterprise solutions will improve their productivity and efficiency in their jobs.