

# Awards Management User Research Phase 1

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- **Research Methods**
- **Findings**
- **Opportunities**
- **Future Research**

# Research Methods

## Diary Study

> A diary study is used to collect self reported data about behaviors, experiences, and activities over a period of time.

## Open Card Sort

> An open card sort is used to understand a participant's mental model for organizing the information architecture.

# Research Goals

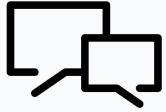
## Diary Study Goals:

- See users day-to-day cross-product experiences
- Understand motivations and sentiment while working with SAGE, MR, and DSS
- Observe habits and activities over a period of time (1 week)
- Usage, tasks, and engagement

## Open Card Sort Goals:

- Understand how our users interact with awards
- Observe users mental model for pre- and post-awards management
- Determine the global navigation and information architecture

# Participant Profile



Open Card Sort: 11 total

Diary Study: 6 total



Departments: ABC Group, APL, Arts & Sciences, CHEM, EDU, ENG, ENV, NURS, Public Health, SOM



Roles: Administrator, Compliance Analyst, Grants and Contracts Manager, Pre-award Analyst

# Study Details

## Diary Study

- Online and remote study via Google Forms
- Asked participants to log 5 days of their awards management activities
- Tool agnostic
- Took place in July 2020

## Open Card Sort

- Online and remote study via website Proven by Users
- Asked participants to sort common awards management activities and terms into groups and name each group
- Took place in August 2020

# Findings

# Diary Study Themes





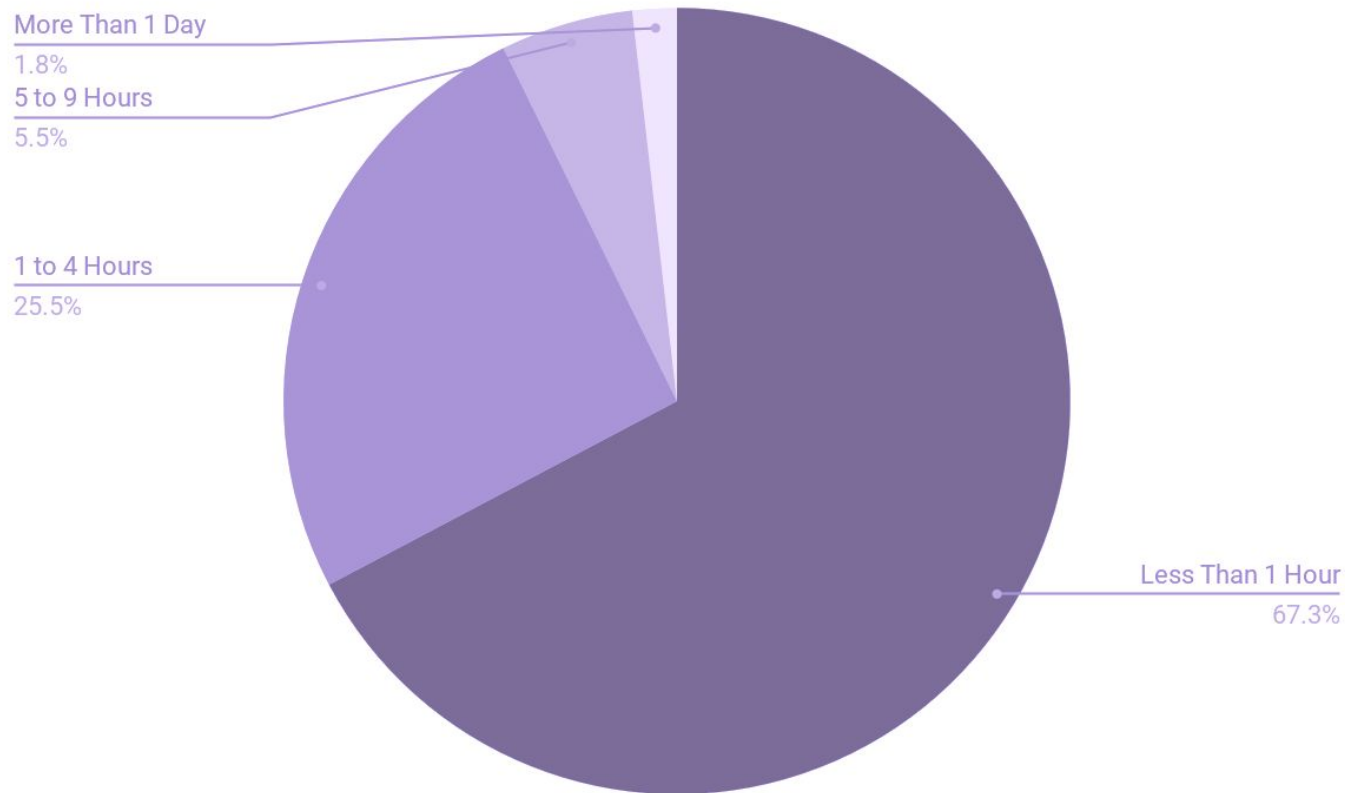
# Activities by the Numbers

- 74 total activities logged
- 74% of the 74 activities were completed
- 26% of the 74 activities were not completed in the study period
- 36% of the activities required a pen/paper/printer and/or a scanner
- 12% of the activities required a phone call

# Software and Tools Used

Excel	74%	PC or Laptop	99%
Email	85%	Pen and Paper	24%
Access	30%	Phone or Cell	8%
Word or Docs	29%	Printer	7%
Adobe Reader	27%	Scanner	5%
Internet Search	27%	Calculator	3%
Zoom	3%		

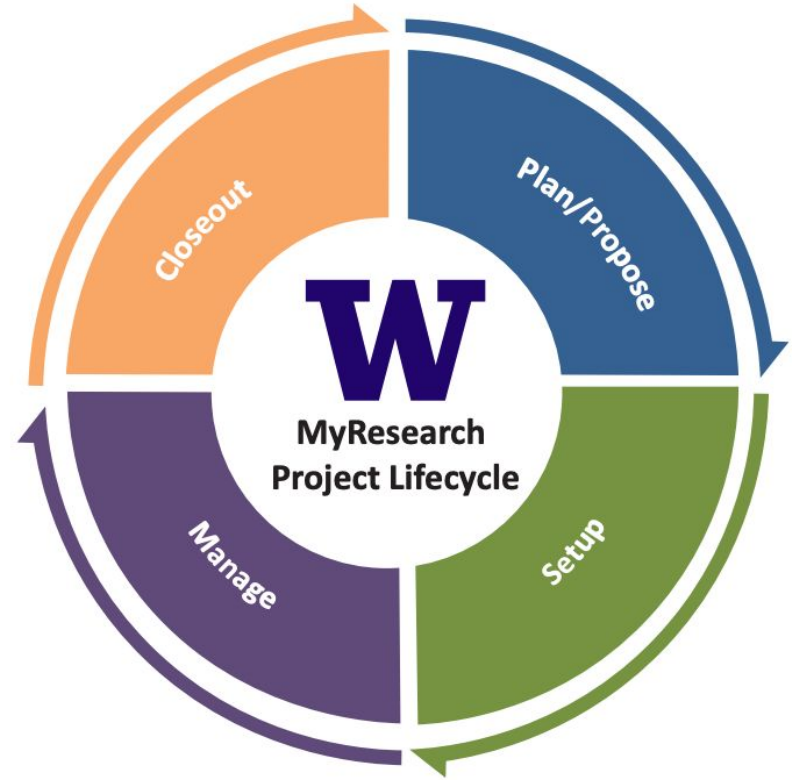
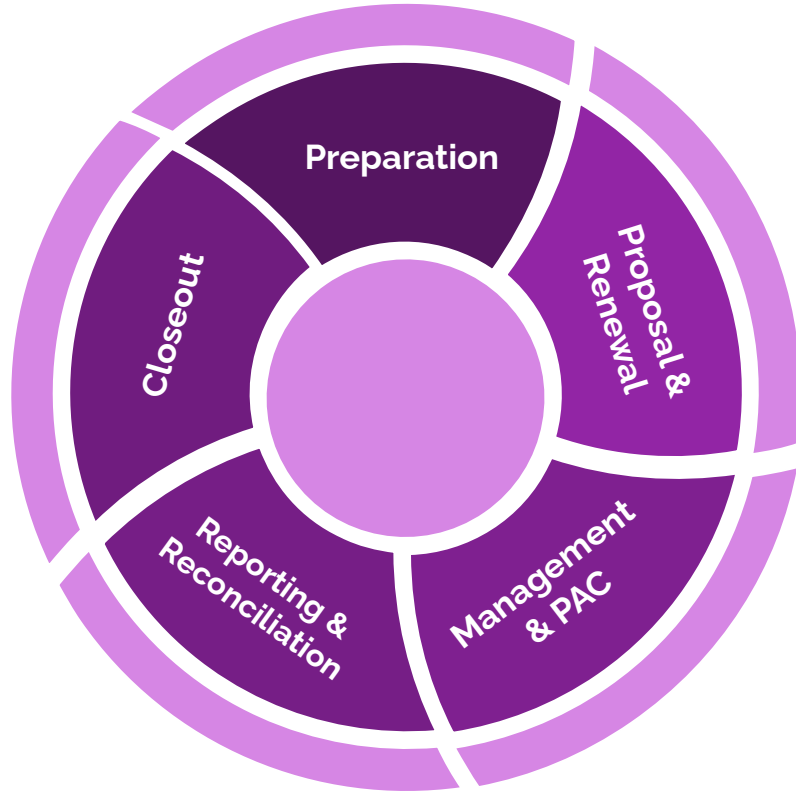
# Time to Complete Activity



# Activities Worked On

- Reporting - Budget Projection, Burndown, Check-In
- Advance and Extension requests
- Sponsor requests and sponsor driven changes
- Award modifications
- Hiring and student eligibility
- Grant and subaward proposal, submission, and resubmission
- Award and PI transfers
- Faculty recertification

# Lifecycle



# 53%

Of activities happen in the MANAGE phase

## What hindered? Participants Said...

"I have an internal Excel budget template that was readily available. All I had to do was log into Workday to look up current salary information."

"...So I keep a spreadsheet..."

"I don't have access to the database to check student eligibility."

"I often have to view so many different systems to get a full picture of an award."

"Having to manually fill out PDF forms, getting them signed, and then emailing them back to gift processing seems like it could be streamlined."

"We track faculty effort with an internal database, so there's always issues with human error and whether things have been updated in a timely manner."

## What helped? Participants Said...

"It's helpful that the invoices that GCA prepares are readily available in Grant Tracker."

"Grant Tracker"

"SAGE is helpful for IPAs."

"I got a fast response from OSP."

"SAGE is helpful for routing and accessing non-award agreements."

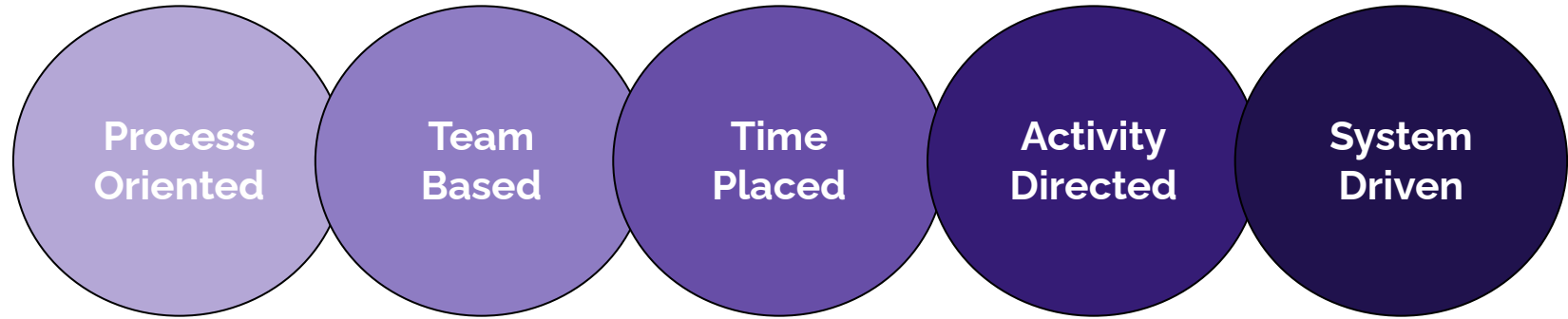
"The PM I work with is very quick to answer email."



# Pain Points

- Using shadow spreadsheets for data not included in My FD
- PDF's that cannot be filled out, signed, and sent electronically
- Actions that cause audit flags
- Going back and forth between systems that do not talk to each other
- Missing data in MY FD queries that should be there
- Forms with timeouts and no way to save work in progress

# Card Sort Themes



# Participant Grouping Sample

## Process/Cycle Oriented

- Early and refresher PI training
- Non-award agreements
- Proposal submission
- Pending proposal tracking
- Compliance Issues
- Grant lifecycle management
- Checkpoint issues
- Closeout

## Team/Role Based

- Post-award budget team duties
- HR team duties
- Post-award change requests
- Pre-award team duties
- Reports and documents for PI
- Alerts and notifications
- eGC1 and other statuses

# Data Uses and Future Research

## Data Uses

- Feature sets
- Information Architecture
- Content and labels

## Future Study

- Closed card sort
- IA usability testing
- Survey for frequently used content and labels

# Opportunities

# Features Wishlist

- > Track the status of activities and tasks
- > View the most recent activity and history
- > Communication, notes, and to-dos in one place
- > Easily launch actions and activities in one place

# System Aligns with Workflow

- > Users can work in phases to prepare, manage, update, report, and perform closeout
- > Each phase should be transparent and trackable for all users
- > Easy access to historical data and awards communication
- > Alert to critical actions: compliance, due dates, requirements
- > End-to-end process can be completed online

# Language Consistency

- > Information Architecture informed by users' mental models
- > Labels that matches user definitions
- > User friendly terminology that spans the organization



# Future Research

## Phase 2

- Information Architecture and Labeling
  - IA and content modeling with user testing
- ORIS Feedback Group
  - Establish user feedback group
- Iterative design testing
  - Ongoing usability testing cadence
- UX Personas
  - Determine current segmentation gaps

**Questions?**

# Thank you!

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