

Unify Dashboard & Transaction Redesign to GEL

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Unify

Search for a transaction

Recent transactions

Toll Relief Rebate - New Application

RSA/RCG Competency Card

Boat Driving Licence Application

Services



Current Rebates & Vouchers >



Previous Rebates & Vouchers



Disaster Assistance



Liquor & Gaming



Maritime



NDIS



Driving



Licenses



GRACE

Transactions



Back T

Before

First L



RAUS

RAUS



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1

Research summary

Research summary

Introduction

This research is aimed at improving the Unify Dashboard to make it easier to navigate for our various frontline staff user groups. We also used this opportunity to have our users review and give feedback on our new redesigns following the SNSW Design system (GEL).

Problem statement / Business need

The Unify dashboard has not changed or gone through user feedback research since it started 5 years ago and is in need of a redesign to fit our users better.

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Research methodology

Research methodology(s)

Methodology used (approach and type of research)

- 45 minute 1:1 research interviews
- Two designs tested:
 - [<Dashboard Figma link>](#)
 - [<Transaction Figma link>](#)
 - Password for figma: Unify1234

Device(s) used

- Desktop
- Laptop (CCS/SSS)

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Recruitment criteria

Recruitment criteria

Number of participants

- N = 13

Participation (mix of Frontline staff)

- Service Centre
- Contact Centre
- Middle Office (Goulburn)
- CCS (Customer Care Specialists)
- SSS (Savings Finder specialists)

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Learning goals

Learning goals

- Do they use the existing favourites function?
- What do they think of the recent transactions feature?
- What do they think of the re-ordering services on the left?
- What do you think of the transaction groupings of each category section? What do they think of the current and previous transactions?
- Are the transaction links clear?
- What do they think of the new dashboard design?
- Would you use a search function for transactions if there was one?
- What do they think of the new transaction design with the GEL style?
- What do you think of the red button colour?
- What do you think of the help section with the collapse/expand feature?

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Research findings

Research findings

Learning goal 1

Recent transactions		
Toll Relief Rebate - New Application	Back to School Voucher - Status Check	SER - New Application
RSA/RCG Competency Card	NDIS Worker Check Application	International Driving Permit Application
Boat Driving Licence Application	Flood Recovery Rental Support Payment - Status Ch...	New Vessel Registration

"Usually has a few tabs open at the same time"

Recent transactions to replace favourites function

54% of the users said they use the existing favourites function

Everyone liked the recent transactions feature and think it is a good replacement for the favourites function.

"Thinks it looks awesome. Would not miss favourites. Thinks everyone would benefit."

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Opportunities / Recommendations


Opportunities / Recommendations


- Add search function
- Show a dashboard with transactions that's relevant to the user group role
- Create a universal status check to reduce number of transactions and simplify things
- Add a feedback form


Research findings


Learning goal 2


Services


 Current Rebates & Vouchers >


 Previous Rebates & Vouchers


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Re-ordering of the services make sense?

Everyone thought this was good and ordering makes sense.

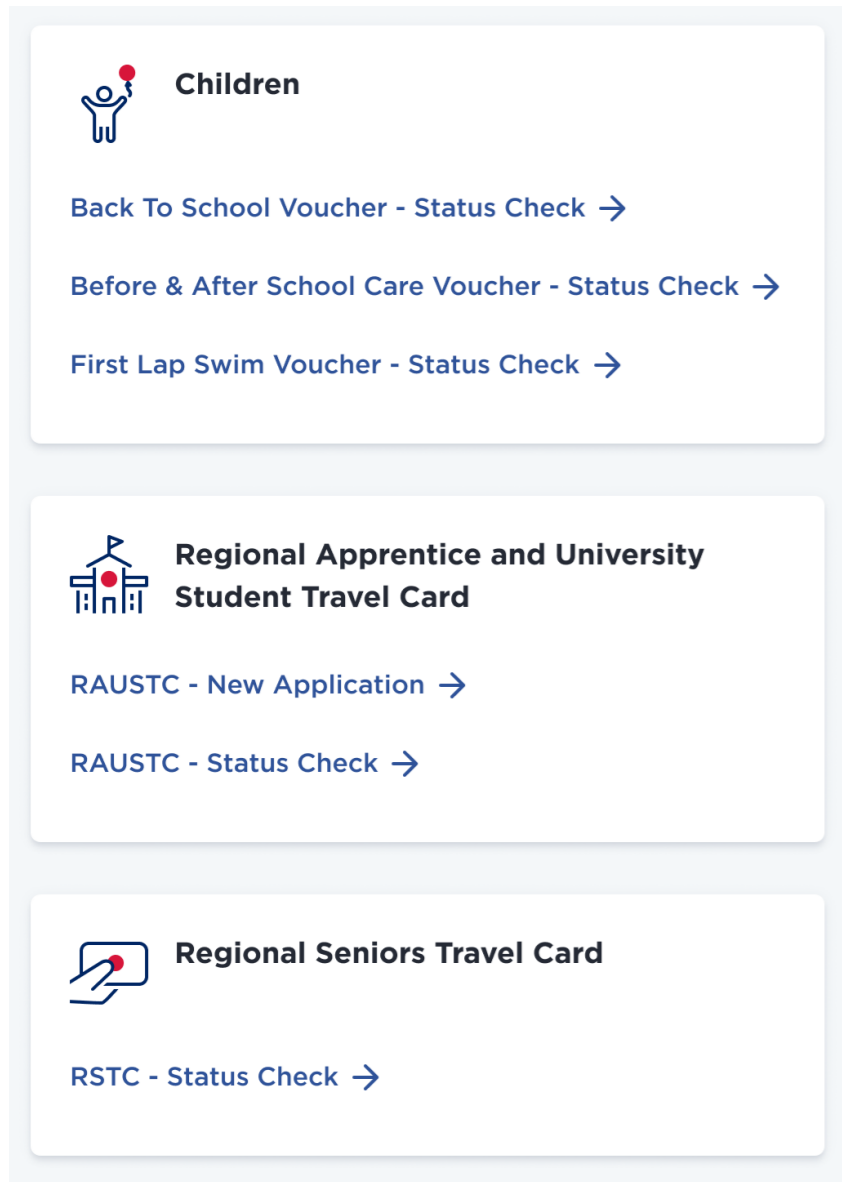
A few people suggested whether they could personalise this more.

"Sorting makes sense and the icons help"

"Is there a way to reorder this according to the CSR as volume of transaction is seasonal?"

Research findings

Learning goal 3



Category groupings in each section make sense?

Previous category makes sense, looks good sorted by year. Makes sense separating closed applications.

Toll doesn't belong to the current transactions section and it belongs to transport and not really a rebate.

Only CCS and SSS use Savings finder appt.

Grace doesn't belong to Transport only.

"Toll belongs to transport, not really a rebate"

"Is there a way to reorder this according to the CSR as volume of transaction is seasonal?"

Research findings

Learning goal 5

What did they think of the new dashboard design?

Like the layout, more user friendly, less cluttered, like the colours and groupings, easier to navigate.

Likes the layout of the tiles because its similar to the website

Likes all the icons for each transaction

Looks more user friendly, love it

"Tiles, layout and icons will make transactions a lot faster"

"Cut down on the clutter that was on the old dashboard"

Research findings

Learning goal 6

If there was a search function for transactions, would you use it?

9 out of 13 users would use search function. (69%)

Do you use the exit button?

0 users use exit button, everyone closes the tab at the end of the transaction

"Maybe good for someone not familiar with Unify" (search)

"Would definitely use that - work across so many transactions etc - would be useful"

Research findings

Learning goal 7

[Transaction name]

firstname.lastname

Service Desk

Location

Select your location from the list

Haymarket

Checklist

Please check you have the following before continuing:

☒ Confirm the applicant has not previously applied.
If they have previously applied, you will not be able to continue.

☒ The applicant has relevant POI documents.
Ensure the applicant has relevant POI documents in their possession. The names on each of the POI documents must match. Please see the help content for further guidance.

☒ Lorem ipsum dolor sit amet, consectetur adipiscing elit.
Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.

Privacy collection

Read out the following and ask for the applicant's consent:

- You agree for Service NSW to use the details from your documents to verify your identity.
- Providing us with the requested information is not required by law, however if you choose not to provide us with it, we may not be able to process your application and you may not be able to participate in the program.

☒ Yes, the applicant consents to the above.

Terms & conditions

Read out the following and ask for the applicant's consent:

- You agree to indemnify Service NSW, other NSW Government agencies, and their officers, employees and agents against any liability or loss in connection with your participation in the Scheme.
- You may be audited or investigated by Service NSW and/or other NSW Government agencies.

☒ Yes, the applicant consents to the above.

Applicant details

Back to search

First name

Middle name (optional)

Last name

Date of birth

Error: date in format of DD/MM/YYYY

Contact details

At least one phone number is required. Mobile numbers need to be verified, otherwise an alternate number can be provided.

Mobile number

Error: a mobile number using 10 digits with no spaces or symbols

Send verification code

☐ Provide alternate number

Residential address

Select typing and select from the list

Create assisted account

What do you think of the new transaction design following the GEL/Service NSW style? What do you think of the red button?

Like the colours, everything is easy to read, more simplified, change in font helps see it clearer.

"Super easy to go through"

"The red buttons are good because it aligns with the Service website"

Research findings

Learning goal 4

Are the transaction links clear?

Yes links are clear

Similar names - A way to differentiate between would be good - not clear whether it's a application or status check

Some people prefer without the arrow, but this only came about later after the first few interviews, so would need further testing to see what the majority prefers.

"Prefers arrows as it prompts user to click on it"

"Thinks it looks better without arrow"

Research findings

Learning goal 8

Help[Expand all](#)[Collapse all](#)

Eligibility

▼

Applicants with a single name

▼

Verify identity (POI)

▼

What do you think of the new help accordion feature with the collapse/expand functions?

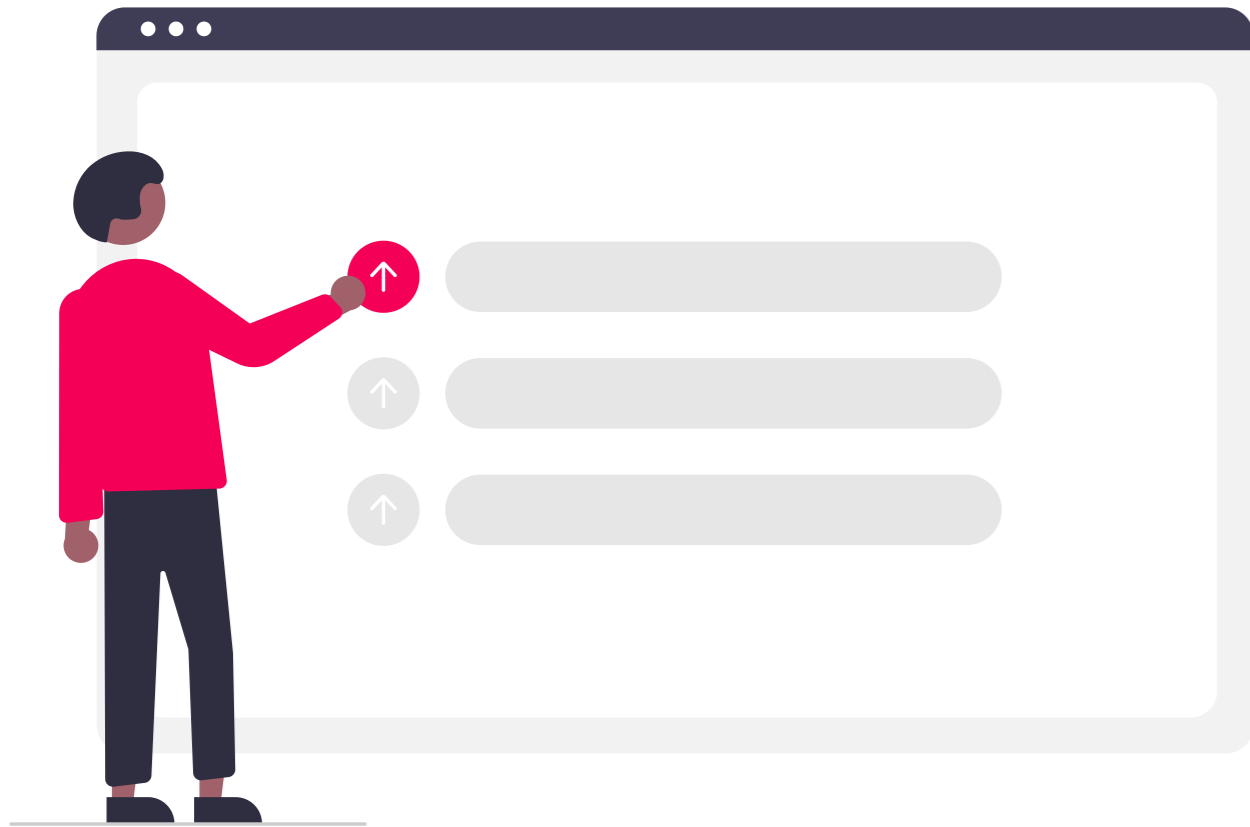
Everyone liked the help with expand/collapse feature.
CC and SC prefer it expanded
Hypercare team and MO prefer it collapsed

"if you need it, it's there, otherwise don't clutter the page"

"Information could be more concise to reduce scrolling"



Next steps



- Implement designs into dev
- Design universal status check
- [View revised designs in figma here](#)
- [Miro research notes and synthesis](#) (reference)
- Password for figma and miro: Unify1234