Unify Dashboard & Transaction Redesign to GEL

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Recent transactions

Toll Relief Rebate - New Application RSA/RCG Competency Card Boat Driving Licence Application

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- 6. (Optional) Opportunities / Recommendations





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.







Research methodology





Research methodology(s)

Methodology used (approach and type of research)

- 45 minute 1:1 research interviews
- Two designs tested:
 - <a href="mailto:
 Dashboard Figmalink">Cashboard Figmalink
 - Transaction Figma link>
 - Password for figma: Unify1234

Device(s) used

- Desktop
- Laptop (CCS/SSS)







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)







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?

- style?
- feature?



• 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

• What do you think of the red button colour?

• What do you think of the help section with the collapse/expand









Learning goal 1

Recent transactions

Toll Relief Rebate - New Application RSA/RCG Competency Card Boat Driving Licence Application

Back to School Voucher - Status Check NDIS Worker Check Application Flood Recovery Rental Support Payment - Status Ch... SER - New Application International Driving Permit Application New Vessel Registration

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.



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

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



Opportunities / Recommendations







Opportunities / Recommendations

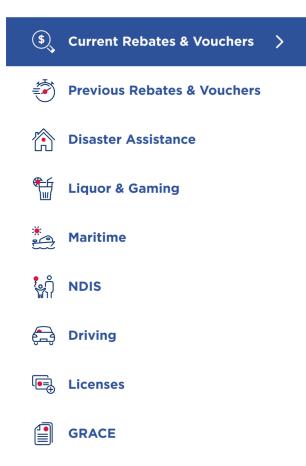
- Add search function
- Show a dashboard with transactions that's relevant to the user group role
- Create a universal status check to reduce number of transactions and simplify things
- Add a feedback form





Learning goal 2

Services



Re-ordering of the services make sense?

Everyone thought this was good and ordering makes sense.

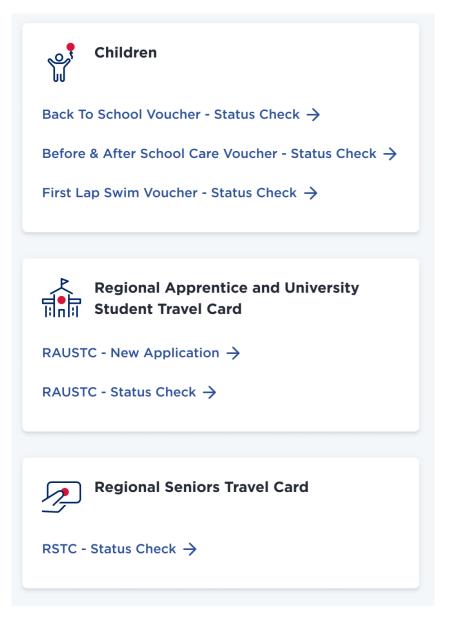
A few people suggested whether they could personalise this more.



"Sorting makes sense and the icons help"

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

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?"

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"

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"

Learning goal 7

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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"

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"

Learning goal 8

Help	Expand all	Collapse all
Eligibility		~
Applicants with a s	ingle name	~
Verify identity (POI)	\sim

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

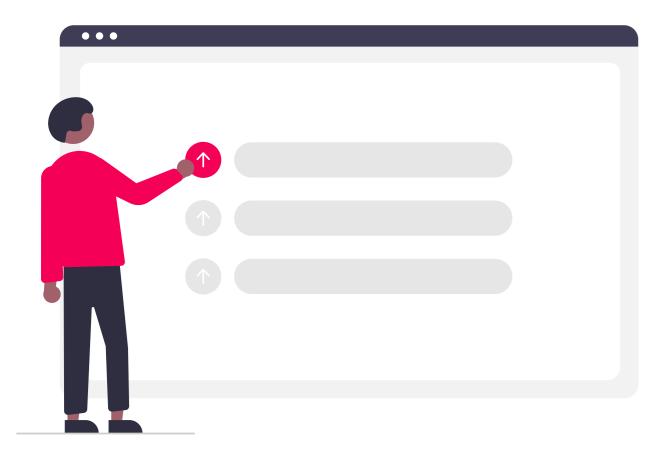
Everyone liked the help with expand/collapse feature. CC and SC prefer it expanded Hypercare team and MO prefer it collapsed



"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
- <u>View revised designs in figma here</u>
- Miro research notes and synthesis (reference)
- Password for figma and miro: Unify1234



