

UW Connect Finance User Survey Report

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Executive Summary

The UW Connect Finance Portal (UWCF), launched in July 2023, was designed to centralize training materials from the UW Finance Transformation Program (UWFT). The UWCF User Survey, distributed in July 2024, aimed to gather user feedback to enhance the portal's design and usability. With a 25% response rate from 53 respondents, the survey provides insights into user experiences and areas for improvement.

Key Findings:

- **Overall Satisfaction:** Users generally visit the site weekly but report mixed satisfaction. Search functionality is a significant pain point, while site organization is better received.
- **Site Features and Functionality:** Features such as site links and help options are often underutilized. Users primarily rely on the search bar due to difficulties with other site areas and outdated materials.
- **Content Quality:** Many respondents rated the content as poor or fair, citing outdated, unclear, and insufficiently detailed information. The search function is deemed inadequate.
- **Training Preferences:** Users prefer job aids and recorded demos for immediate needs, with a call for more diverse and well-organized training methods.
- **Missing and Self-Created Content:** There is a demand for clear instructions on Workday functions. Many users create their own content but face challenges with its accuracy and consistency.

Recommendations:

1. **Enhance Training and Resources:**
 - Develop unit-specific guidance and quick demos.
 - Create tailored role-based training journeys.
 - Add a glossary and detailed resources for common Workday errors.
2. **Improve Content and Layout:**
 - Upgrade the user interface and ensure content is current and relevant.
 - Enhance search functionality and visual clarity.
3. **Strengthen Support and Communication:**
 - Implement a helpline and improve response times for support tickets.
 - Clarify form instructions and streamline approval processes.
 - Establish feedback channels.

Implementing these recommendations will improve UWCF's functionality, align it more closely with user needs, and enhance overall satisfaction with the portal.

Background and Objectives

The UW Connect Finance Portal (UWCF) was initially established as a repository for training materials created during the UW Finance Transformation Program (UWFT). Since its launch in July 2023, only anecdotal data has been gathered to enhance its design and usability. The UWCF User Survey aims to:

- Identify pain points in the content, site navigation, search effectiveness, and overall satisfaction with UWCF
- Collect feedback for improving the portal.
- Provide a basis for data-driven recommendations.
- Establish quantifiable metrics for tracking improvements.

Methodology

The UWCF User Survey was distributed on July 15, 2024, targeting 208 UW employees involved at various levels within the Shared Environments. The survey, created using Microsoft Forms, was distributed via email. As of July 31, 2024, 53 respondents had completed the survey, resulting in a 25% response rate.

Participants were asked to provide information about their roles, the types of content they consumed, the groups they supported, other sites they visited for training-related information, and their overall experience with UWCF. For the complete survey, refer to Appendix A.

Results

Complete survey data can be found in Appendix B.

Respondent demographics:

Respondents were in various roles: administrator, director, shared environment specialist, finance analyst, etc.

- Of the 53 respondents, 47% were individual contributors
- 43% of respondents were managers and above.
- Multiple respondents had some responsibility for a Shared Environment or Cost Center.

UWCF visits and Overall Satisfaction:

Most respondents visited the site weekly or more often and were primarily neutral when asked about their overall satisfaction regarding UWCF.

- 54% of respondents visited UWCF at least weekly or more often.
- 16% of respondents visited UWCF more than once a month.
- 26% of respondents visited UWCF as needed or when necessary.

- 4% of respondents have never visited UWCF.

Most respondents were neutral in their overall satisfaction with UWCF. Searching for content gathered the most very dissatisfied responses, while the site organization gathered the most satisfied responses.

- 35% of respondents were neutral in their overall satisfaction with UWCF.
- 33% of respondents were unsatisfied with searching for site content.
- 42% of respondents were neutral with the site navigation.
- 33% of respondents were satisfied with the site organization.

Additionally, respondents said there is a need for more detailed and tailored training materials, particularly in areas like reconciliation and reporting, where users feel current content is lacking. Site navigation and search functionality are seen as cumbersome, with unintuitive naming conventions making it challenging to find relevant information. Respondents suggest the implementation of quick demos and a more intuitive search system to enhance usability. The site's clunky interface and delays in content updates have led to a lack of trust, making it hard for users to rely on the platform.

UWCF Site Features and Functionality:

Respondents said the features on the UWCF site were “somewhat useful” but pointed out that many features, such as the “UW Site Links, Featured article, Most Viewed article, Top rated article, and Need help,” they did not use or rated as “Extremely not useful.”

- 32% of respondents said the UW Site links were somewhat useful.
- 60% of respondents said the search bar was either somewhat or extremely useful.
- 56% of respondents felt the Functional Areas and Browse by Subject content sections were somewhat useful.
- The Featured, Most Viewed, Top Rated, and Need Help averaged 25% of respondents who didn't use these features.

Many respondents primarily use the search bar due to difficulties navigating other site areas, finding them cumbersome and overwhelming. They report outdated training materials and links, making locating current and relevant information challenging. The lack of content hierarchy and filters exacerbates this issue, with some users feeling overwhelmed by too much information. There is also a call for more organized resources, streamlined content, and updated site features. Several users suggested role-based filters and better categorization to improve usability.

UWCF Content:

Most respondents rated the existing content on the UWCF site as fair or poor. Respondents expressed frustration with outdated and unclear content, making finding relevant and accurate information difficult. They noted that training materials often lack depth and detail, leaving them uncertain about the implications of their actions. The search function is seen as inadequate, especially for those unfamiliar with specific terminology. Many users rely on colleagues for help rather than the provided resources, and there is a call for more frequent updates and better

communication when changes are made. Overall, the current resources are not user-friendly and need significant organizational, clarity, and comprehensiveness improvements.

- 63% of respondents rated their overall satisfaction with the content as poor or fair.
- 70% of respondents rated the reliability and accuracy of the content as poor or fair.
- 68% of respondents rated the ease of finding content as poor or fair.
- 63% of respondents rated the comprehensiveness of topics as poor or fair.
- 48% of respondents rated the usefulness of the content as poor or fair.
- 63% of respondents rated the clarity and understandability of the content as poor or fair.
- 54% of respondents rated the organization of the content as poor or fair.

Users mainly seek job aids and guides for specific Workday processes like journals, transfers, purchasing, and reporting. There's a strong need for training on forms, UW Connect navigation, and spend categories. Many prefer updated, precise, comprehensive resources, especially for less common tasks. Overall, job aids are heavily relied upon for specific actions.

Training Sites Used and Training Modalities:

Users often rely on department-specific websites like Procurement, Travel, and GCA when they can't find information on UW Connect Finance (UWCF). Some create or use internal resources like DataGroup Wiki or their department's self-created content. Others turn to external sources like Google, other institutions' resources, or the BI Portal. There's also mention of using Teams chats for additional guidance.

Users were asked which training methods they preferred. They responded:

- 54% of respondents preferred job aids, manuals, and quick reference guides.
- 47% of respondents preferred recorded demos as their primary training method.

Users prefer quick access to information through job aids for immediate needs but also value a mix of learning methods like webinars, e-learning, and recorded demos. Job aids should be well-designed and easily printable, while recorded demos are helpful but limited by data privacy concerns. E-learning allows for self-paced learning, though users find current downloadable aids frustrating due to formatting issues. Live training benefits new concepts and real-time interaction but can be too fast-paced. Users appreciate easily searchable, well-organized content and a combination of methods tailored to their needs.

Missing and Self-Created Content

Users were asked if there was content missing from UWCF or if they had created their own content.

Self Created Content

There is a mix of approaches to creating and using training content. Some individuals develop their own materials as supplementary resources to UWCF but face challenges ensuring they are up-to-date and accurate. Many have created department-specific guides and videos, such as ProCard reconciliation tutorials and Workday report guides, but some lack the time or resources to produce

formal, uniform content. The preference is for official, comprehensive guides and a streamlined process for updating and sharing training materials.

Missing Content

The critical needs for reconciliation training and resources include step-by-step guides for report running, particularly in the sponsored project area, and clear instructions on business processes and reconciliation procedures. There is a call for improved reporting guidance, including what reports to run and why, and more detailed instructions on handling various financial transactions and Workday functions. Users would benefit from enhanced job aids, flow charts, and accurate and up-to-date visual guides. There is also a need for better search functionality and organized content that includes troubleshooting and FAQ sections. Training should be relevant, easy to navigate, and provide comprehensive, detailed instructions.

Final comments:

Multiple respondents expressed dissatisfaction with UWCF as a platform and the existing content as not useful. Other comments fell into the following three areas:

Training and Resources:

- Unit-Specific Guidance: Provide detailed instructions for specific units.
- Quick Demos: Offer brief, practical demos for immediate needs.
- Training Journeys: Develop tailored training paths for roles.
- Glossary and Error Handling: Add a glossary and resources for common Workday errors.

Content and Layout:

- User-Friendly Design: Improve layout and update notifications.
- Search and Visuals: Enhance search functionality and clarity of visuals.
- Current and Relevant: Ensure content is up-to-date and remove outdated information.

Support and Communication:

- Help Line: Implement a helpline for immediate support.
- Forms and Approvals: Clarify form instructions to speed up approvals.
- Faster Ticket Follow-Up: Improve response times for support tickets.
- Feedback: Establish feedback channels for improvements.

Conclusions and Recommendations

The UW Connect Finance Portal (UWCF) was established to centralize training resources related to the UW Finance Transformation Program. Despite its launch in July 2023, user feedback indicates several areas needing improvement. Respondents have highlighted issues with content relevance, site navigation, search functionality, and overall usability. The survey reveals that many users struggle with outdated materials, insufficient detail,

and inefficient site features, affecting their satisfaction and ability to use the portal effectively.

Recommendations

1. **Enhance Training and Resources:**

- Develop **unit-specific guidance** and **quick demos** for immediate application.
- Explore **training journeys** tailored to various roles.
- Introduce a **glossary** and detailed resources for common Workday errors.

2. **Improve Content and Layout:**

- Upgrade the site to a **user-friendly design**, ensuring **current and relevant** content.
- Refine **search functionality** and improve the **clarity of visuals** to enhance user experience.

3. **Strengthen Support and Communication:**

- Implement a **helpline** for real-time support and **faster ticket follow-up**.
- Clarify **form instructions** and approvals to streamline processes.
- Establish **feedback channels** to ensure continuous improvement.

These steps will address user concerns and improve the overall functionality and effectiveness of UWCF, aligning it more closely with user needs and expectations.

Appendices

Appendix A

UWCF User Survey

1 What is your role within UW? Text.

Enter your answer

2 Are you an: (Select all that apply) Multiple choice.

Individual Contributor

Responsible for a Shared Environment/Cost Center

Manager

Director

Other

3 Which unit(s) do you support? Text.

Enter your answer

4 How often do you refer to UWCF for training-related information? Single choice.

Daily

More than once per week

Weekly

Once every other week

Monthly

Never

Other

5 Please rate your satisfaction of the following items when using UWCF? Likert Scale.

6 If you answered "Neutral", "Not Satisfied", or "Very dissatisfied" to any of the statements in question 5, what improvements to those areas would you like to see? Please be specific. Text.

Enter your answer

7 Please rate the following UWCF landing page components? Likert Scale.

8 If you answered "Neutral", "Somewhat not useful", or "Extremely not useful" to any of the statements in question 7, what improvements to those areas would you like to see? Please be specific. Text.

Enter your answer

9 How do you rate the content within UWCF in the following areas? Likert Scale.

10 If you answered "Good", "Fair", or "Poor" to any of the statements in question 9, what improvements to those areas would you like to see? Please be specific. Text.

Enter your answer

11 What types of training content or information do you most frequently seek on UWCF? Text.

Enter your answer

12 What other websites do you use to access training-related information? Text.

Enter your answer

13 Is there any content you feel is missing from UWCF that you would like to see added? Please provide specific details. Text.

Enter your answer

14 Which of the following training methods do you prefer? (Select all that apply) Multiple choice.

Job aid (e.g., manuals, quick reference guides)

eLearning (e.g., online courses, interactive modules)

Live webcast (e.g., live online seminars, webinars)

Recorded demos (e.g., pre-recorded instructional videos)

Other

15 Explain why you prefer the methods selected in question 14. Text.

Enter your answer

16 Have you created training content for your unit(s) that you would like to see added to UWCF? If yes, please describe the content you have created. Text.

Enter your answer

17 What additional comments or suggestions do you have for improving UWCF? Please share any specific feedback or ideas you think would enhance our services. Text.

Enter your answer

18 May we contact you for further follow-up? If yes, please provide your email address. Text.

Enter your answer

Appendix B

Survey Data

Survey data can be found here: [UW Connect Finance User Survey.xlsx](#)