User Experience Direct
(UX Direct)

FAQ: How to build User Profiles

Disclaimer

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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

A user profile describes the characteristics of a person working in a particular job role. For example, the characteristics of a compensation specialist would include a detailed description of that person's attributes (job title, level of education and training, goals, key tasks, age range, etc.). These attributes typically represent a range of values, for example, an age range described as being between 25 and 40. There is only one user profile for each role.

1. Why create user profiles?

A user profile is one of the foundations on which a usable software application is built. The user profile drives the organization of and terminology used in an application. For instance, the menus, features, and controls are grouped according to that user's functional needs. The way that the software organizes tasks and task sequences and the language it uses depend on knowing who its users are and how they do their work.

User profiles also are important in designing a company's customization of an application. Often, customizations are needed because a company's work practices are unique. The designer of the customization not only needs to know those practices but how the software implements the practices and, especially, how it constrains them. With a user profile, the designer can fit the design to the user's attributes. For example, if a task sequence will be new to relatively novice computer users, the design may use a wizard or constrained sequence of steps to guide them.

The user profile also keeps a team of designers on the same page about users, so that different designers are making the same assumptions about the user attributes.

2. Is a user profile the same as a persona?

No, though they are often confused. A persona is a fictional individual created to describe a typical user based on a user profile. A persona describes an individual person who represents a group of users. The person has a name and a photo. The persona describes that person's personal and job goals, skills, expectations, key tasks, relationships with other workers, etc. There may be more than one persona for each user profile. User profiles describe the range of characteristics for a user role, not the characteristics of a single fictional user.

3. How are use cases and user profiles related?

A use case or user scenario describes how a user or a fictional persona completes a task or behaves in a certain situation, based on a user profile. It allows a designer to start thinking about the steps in a task that might later become screen pages or sections of a page.

4. What attributes make up a user profile?

While each profile is different, these are some of the key characteristics in an enterprise profile:

- Demographic characteristics – age, gender, location

- Occupational experience – job title, years at job, brief job description, division of company

- Level of authority – making decisions across business processes or within a business process at the enterprise, division, or territory level

- Company information – industry, size, distribution of facilities, structural organization

- Education and training – degree/major, certificates, specialized training such as observing a co-worker or being shadowed by a supervisor

- Computer experience – average usage, Internet usage, hardware usage

- Tools used in addition to a software application – Excel, Microsoft Word, database query language

- Collaboration – who works with whom, who reviews or approves work, who sends work for approval

- Frustration and pain points – perceived barriers to getting work done

- Software product experience – frequency of use of applications and versions of those applications

- Domain knowledge – understanding of technical domain, business areas, company policies, company templates

- Key goals – what the user strives for, any quantitative measures of success

- Key tasks – most frequently performed/important tasks

- Attitudes and values – product preferences, acceptance of change

Appendix A contains an example user profile for a compensation specialist. It has sections for:

- Background demographics

- Performance goals

- Key tasks

- Observations and opportunities

- Wants and needs

The observations and opportunities section describes issues that compensation specialists have with their current application, and the wants and needs section lists some of their desires for features in a new application or customization.

5. How do I create a user profile?

Profile creation for an application that is being implemented at a customer site is an iterative process. It begins with identifying the user roles of the people who will be using the configurations and customizations of the application. Key stakeholders should be able to identify who will be affected by the implementation, and there may be more than one user role involved. Generally, the less specialized the application, the more user roles you will find. For example, a Web site that describes a company's benefits is likely to be used by all employees, while an application that deals with workers compensation is likely to be used only by a compensation specialist. It may be of value also to gather any documentation about company policies and procedures that influence customizations.

Once the users are identified, the best way to develop a profile is to interview them. The number of interviews needed depends on the size of the population of users for each user role. The more interviews, the more reliable the data, but research has shown that no more than 5 to 6 interviews are

needed. If users work at sites that are geographically distributed, the interviews can be done over the phone.

Appendix B contains an example interview/survey form. The form is from an interview with people who are in a compensation specialist role, but the questions are typical for developing a user profile.

The data from the interviews are tabulated to establish the range of answers for the role. Then the team creates a profile like the one in Appendix A. The profile is distributed to all of the people working on the customization so that everyone has the same characteristics in mind as they design the screens and screen flows.

6. How is the profile used?

The primary value of a user profile is that it drives the design. Instead of asking, "How would I use this application," designers ask, "How would a typical compensation specialist use the application?" The user profile provides an initial reference point instead of the designers' point of view, so that they design from the typical user's point of view.

For example, having a user profile for a compensation specialist helped the designers of a customization of an application. The user profile in Appendix A shows that the specialist is challenged by the complexity of workers compensation issues. The specialist is familiar with workers compensation terminology and general principles, but the details of each case are complex. Consequently, based on this profile, the designers created a step-by-step process that allowed the specialist to work through the logic of each case one step at a time. Creating the process required talking with compensation experts in the company to get the company's business process correct, but the result provided support for the specialist in an important aspect of his job.

The user profile can also be used during evaluations of the customization. Looking at each screen and the flow of screens, an evaluator can ask, "Would a typical compensation specialist understand the terminology being used?" or "Does the flow of screens map to the company's compensation business processes?"

Appendix A. Sample User Profile

User Profile: Compensation Specialist

A compensation specialist designs, implements, and administers a company's fixed and variable pay programs. He or she evaluates the organization's competitive compensation position by comparing salary with market salary surveys. A compensation specialist ensures that compensation programs meet with the organization's objectives and applicable government regulations. Compensation specialists partner with the finance department to ensure that plan designs are modeled from a cost perspective and are appropriately budgeted. He or she audits jobs for content, prepares job descriptions, and reviews requests for new or revised job classifications.

Compensation Specialist Background

A compensation specialist has an advanced level of domain knowledge in compensation and human resources.

Education

A bachelor's degree is generally required for the compensation specialist role, preferably in Business Administration or a related field. In addition, domain-related certification is preferred for this position.

Training

A compensation specialist typically has four or more years of professional human resources experience; he or she has generally been responsible for a variety of other HR functional areas such as employment, employee relations, compensation, or benefits before becoming a compensation specialist.

A compensation specialist has likely received on-the-job training in addition to training through a professional organization and college-level coursework. Job training and training materials may be verbal or documented in procedural manuals, market surveys, or employment legislation.

Tools Used

People in this role use Oracle Human Resources Management System (HRMS), Microsoft Excel, and Microsoft Outlook.

Compensation Specialist Performance Goals

The primary goals for compensation specialists are to create and maintain an effective compensation program, provide data to the finance department for the salary adjustment budget, audit and maintain job descriptions, and ensure that compensation programs meet the organization's objectives while complying with applicable laws and regulations.

Compensation Specialist Key Tasks

- Changing and creating jobs and grades

- Market salary analysis and market pricing

- Running reports against the human capital management (HCM) data warehouse (internal equity reports)

- Looking up a particular employee's salary

Compensation Specialist Observations and Opportunities

Table 1. Compensation Specialist Observations and Opportunities

Observation	Opportunity/Recommendation
The flow of the screens in the application is very cumbersome. There is a need for the user to be guided step by step to prevent forgetting to do something.	Consider providing trains for compensation tasks. Provide field and page validation.
Cannot track job history.	Provide the ability to track job history.
Creating jobs is too difficult. Currently the Compensation Specialist must access various sources to collect data and then must manually enter the information into the system.	Contextual menus would be helpful when creating jobs.
The system forces the user to search first before creating a new job.	Allow the user to create a job without searching first.
The users observed commented that there was too much clicking and saving in the application.	Automatically save at each step in a process. At the end of the process provide discard changes.
Data entry methods for job codes are not consistent in the Oracle application. Users need to use F11 to enter data in some fields, but in other fields they do not.	Ensure that data entry methods are consistent throughout the application.
Compensation Specialists have difficulty with the Worker's Compensation flow. One of the Compensation Specialists mentioned that when he used SAP at a previous job it was much easier because it was step-by-step process, which walked him through the business process (e.g., workers compensation code, standard schedule). This participant wanted validation on each screen, and wants error message to be more specific.	Provide a train for the Worker's Compensation flow.
Grades and jobs are not linked in the application, which does not match the company's business process.	Provide the ability to associate job codes and grades.
It was annoying to the Compensation Specialists observed to have to type in the Security and Exchanges Commissions (SEC) description when creating a job. These users mentioned that it should auto populate. Entering the SEC code number won't populate the description once it is entered. Users have to manually type in the description.	Consider auto-populating the SEC description once the SEC code has been entered.
The Compensation Specialists observed at SAS mentioned that they did not use the '"Further Job Information" and "Job Evaluation" screens. It was difficult for them to get out of these screens (due to error messages about missing data—"No entries found for List of Values") once they accessed the screens.	
The OK button on the Further Job Information screen does not dismiss the dialog but navigates the user to another screen (the "Additional Job Details" screen) instead. This is not what the Compensation Specialists expect.	Ensure that the save model is consistent throughout the application.
There were screens that the Compensation Specialist entered that he could not exit out of. The Compensation Specialist commented "when you are dealing with live employee data you want to be able to get out without saving, without having to do anything else, very quickly and very simply and you cannot always do that".	Always provide the ability to exit out of a process, discarding changes.

Compensation Specialist Wants and Needs

- Ability to house salary survey information in the application.

- A data dictionary to tell what each field means.

- Ability to have real-time market information in the application.

- Ability to load all of the job descriptions created in another application without having to re-type them.

- Contextual menus for creating jobs. Currently, the compensation specialist must access various sources to collect data and manually enters the information into the application.

- Have a drop-down menu for the Job Title field, such that when the user types "specialist," they have a drop-down menu of all the jobs containing the word "specialist."

- Ability to auto-populate job codes when the job code has been added once.

- Allow mass update/upload for job grades.

- Transactions that step you through routine tasks, for example, "create a job."

Appendix B: Sample User Profile Interview Form Compensation Specialist

Date:

Interviewer:

Participant's name:

Job/role:

Introduction

We are in the process of designing a new version of the Human Resources application suite. We are talking to multiple people to learn about their daily tasks and work environment. The information that you share with us will be combined with feedback that we collect from other participants, and it will be synthesized to provide us with context to make design recommendations.

Permission

We'd like to make sure that we capture your comments for the rest of the team. Would it be OK to record this session?

If the participant would like more details, follow up with: We'll be recording the audio so that we can focus on what you're saying instead of trying to take notes. After we transcribe the notes, we will erase the tape. May we record this session?

Role

What is the name of your division or organizational unit within the company?

What department do you work in?

How long have you worked at this company? _____ years

How long have you been working in your field? _____ years

How long have you worked in your current role/position (at any company)? _____ years

What is your job title?

Can you give me a short description of what your job role is (job function and primary responsibilities)?

Did you work in another position before your current position?
        If so, what position did you hold and for how long did you work in that position?
        Position: _____ Length in this position: _____ years

How many years of experience in your field did you have before you achieved your current role?

What are your primary areas of domain expertise or specialization?

How would you describe your level of domain expertise in human resources? (Give the interviewee the following options.)

___ Novice—New to the role or domain
___ Intermediate—Have a good general understanding of the domain but may not know all of the

nuances or details for specific areas
___ Advanced—Have a strong understanding of the entire domain space
___ Expert—Other people view me as an authority on all aspects of this domain

Are you a manager?
___Yes
___No

If you are a manager, how many direct and indirect reports do you have?
_____ Direct reports
_____ Indirect reports

If you are a manager, how long have you been a manager? _____ years

What are your primary goals in your role?

How is a person's success in your role evaluated?

Tasks

What is a typical day like for you? Describe the types of tasks you complete during the day.

What are the most important tasks you perform?

What tasks do you perform most frequently?

Which tasks are the most complex or provide the biggest challenge?

HR Applications

How often do you use the current human resources applications?
___ Rarely—Once a month or less
___ Occasionally—A few times a month
___ Regularly—Once or twice a week
___ Frequently—Once a day to all day

If you selected "Frequently," how many hours a day is spent working with human resources applications? _____

How much of your time do you spend working in the human resources system, on average,
each time you use it (time per session)? _____

What are the top five tasks you perform using your human resources applications?

What are the top five things you do in your role that do *not* involve using human resources software applications?

Do you do a great deal of data entry?

Did you receive training on your human resources applications?

If so, how many hours of training did you receive? _____ hours

What type(s) of training did you receive on your human resources applications?
___ Printed documentation
___ Online tutorials
___ Observing a co-worker
___ Job shadowing with supervisor
___ In-house instructor-led training
___ Vendor-led training
___ None
___ Other

If other, please specify: _____

Computer Experience

How many hours per day do you spend on the computer for your job? _____

Which statement best describes your computer usage?
___ I don't use computers.
___ Casual user. I write an occasional letter, play games such as Solitaire,
     and browse the Internet.
___ Frequent user. I'm very comfortable on the computer and use it to create
     spreadsheets, presentations, etc.
___ Power user. I live on computers. I keep up with the latest innovations
     and can write code.

What software applications do you use the most?

Which statement best describes your use of the Internet?
___ I don't use the Internet.
___ Casual user. I browse Web sites and send e-mails.
___ Frequent user. I'm very comfortable on the Web and manage my life using
      the Internet through e-mail, online shopping, and banking.
___ Power user. I work and play on the Internet. I keep up with the latest Web
     innovations and can code Web pages.

How many hours per week do you spend using the Internet for work? _____

Demographic Information

Let's finish by getting a little information about you.

Approximately how old are you?

What is the highest level of education you have attained?
___High school
___Trade school (associate's degree)
___ Some college
___College degree (bachelor's degree)

___Post-graduate (master's degree, doctorate)
___Other
If other, please specify: _____

What was your degree major or area of study?

Thank You and Wrap Up

Thank you so much for taking the time to speak with us today. Your comments will be very useful in helping us design our product to better meet the needs of someone in your role.