

Sites, setts and experience (A24) User research report







Reference: LIT 17662

Version: 2.0

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Participants & method



Methodology

- 4 ecologists
- 1 to 1 remote usability testing sessions
- 3 male, 1 female
- 1/4 users declared on the inclusion form that they had an access need which was cognitive
- Duration 60 –75 mins

About the users

- Ecologist experience ranges from 5 35 years
- All consultants
- All senior/principal ecologists
- 2 class license holders



Background



Context

- <u>Pages</u> previously unseen by users
- 2nd half of journey shared by Kiran last time
- Replace a 21 page PDF application form PDF form here

Includes:

- Add information about the site where the ecologists work will take place
- How the setts will be affected by the work taking place
- The experience of the ecologist completing the work
- Upload any other documents needed to support the application (n ot already uploaded)
- Convictions declaration
- Agree to terms and send application

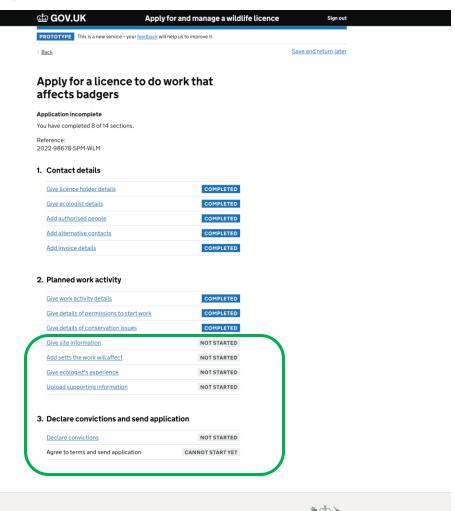


Objectives



The prototype journey

The new journey
we tested with users,
consists of 6 sections and
a total of 44 pages.
Prior to the page shown
on the right, users would
have gone through
another 26 pages. In
addition, the contact
details section is an
additional 48 pages



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Research questions

- Do any of the questions/steps in the user flow confuse people?
- How easy is it to fill out the online form and provide the information requested?
- Are there any problems with navigating through the flows?
- Are there any options or information missing?
- Does the terminology used in the application make sense?



Assessment recommendations & the bigger picture



Alpha assessment recommendations

 Be aware of any biases that might creep into their design based on the legacy pdf service they are converting into digital



 Establish exactly what personal data is needed for the service to function and remove any superfluous data currently being gathered.



The form demonstrated looked long but not cumbersome.
 The panel did reflect whether all data was required for relevant processing. The team need to ensure that all the data that is collected is used and is required for processing.



Beta workshop recommendations

 Document uploads: the intention is that the service reduces the burden on NE staff to process paper submissions and answer queries around maps but if the document upload functionality isn't simple and proven to meet user needs this may not be achieved.



 Design of the internal service is shaping design of the external user journey – this approach should be reversed so that Defra are not putting the burden on users.





Page by page insights from usability testing the A24 application





Give site information



Grid reference expectations

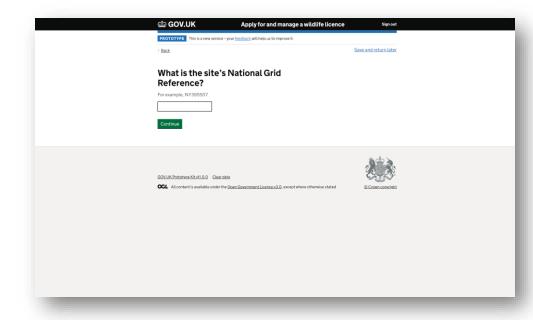
3 users expected to have to include more detail than 6 fig GR.

2 users would put a 10 fig GR

1 user would put 12 fig GR

"I would put in a 10 digit one anyway"

"Refining down to 12 figure for sett locations - because that gives you greater accuracy"



Unfamiliar terminology

Users questioned certain names/phrases

"I wouldn't think you'd have survey positions; maybe for bats"

"They're not specific terms people would have an immediate identified plan for"

"Affected habitats? Is that affected setts as well?"

"Development work area? Is that the proposals?"

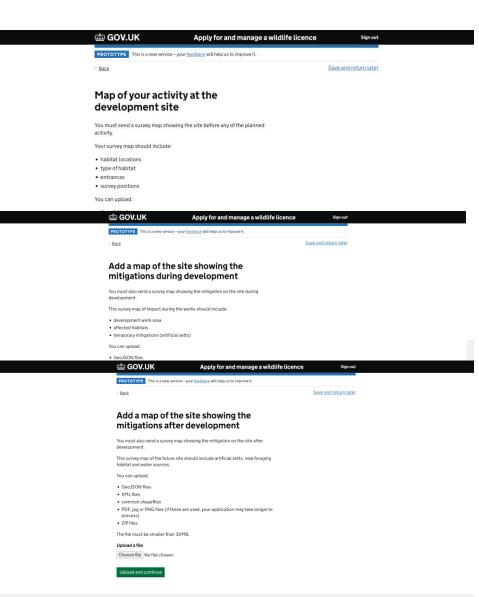
"I would say setts rather than entrances"

How might we use language that users recognise How might we improve language so that we're not creating cognitive overload for users

How might we use language so that our users can continue with the application

HMW improve clarity on what NE require

How might provide reassurance to users who are nervous about application delay or rejection with appropriate guidance about what information to include and what not to include?





Unsure of required details

Users would include more rather than less

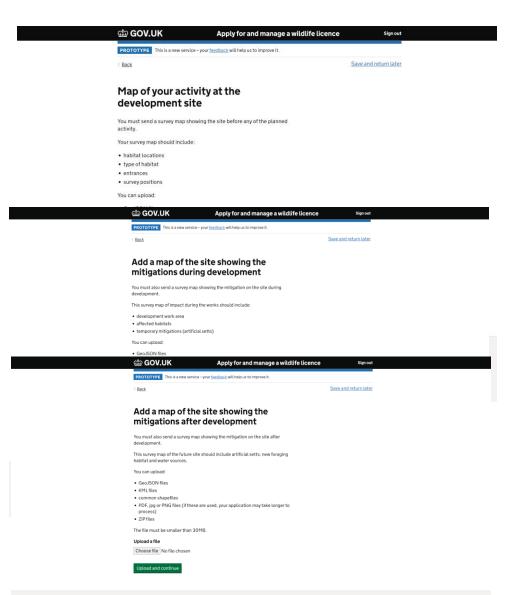
"If you're asking for something that is bespoke then you need to provide very clear guidance on exactly what that is"

"This is all very open ended, you have no context on the quantity of information you require"

"My response would be to throw everything into the pot and be precautionary"

"This is a lot of detail isn't it"

"If I've already submitted my badger mitigation report I'll be resubmitting it [here]"



General concerns re filetypes and missing filetypes

"I would have thought [this] would be a document rather than a map [you'd need]"

"If I sent KML files it could be hundreds and hundreds of polygons"

"...I'd upload PDF as standard but if shapefiles were useful for NE I'd submit them based on that"

"When we send shape files a lot of labelling can be lost"

"I would send multiple forms and file types as next to pdf it says it could take longer to process"

"I'd suggest adding badger compensation [as well as mitigation]"

"I'd expect to see some CAD filetypes"

HMW remove the anxiety for users that their application won't be delayed HMW encourage users to use GIS filetypes



Add setts the work will affect

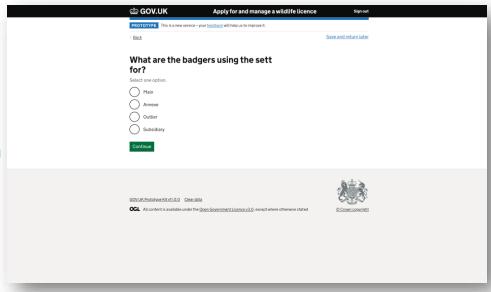


Question in wrong order

"Saying where mitigations are before saying what you will do to each sett"

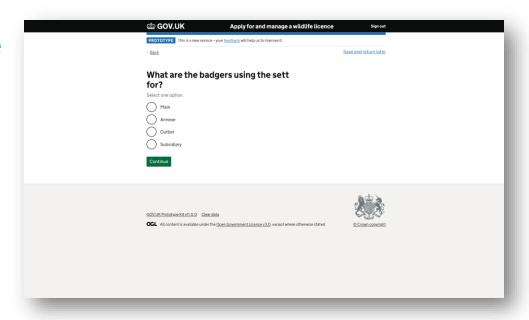
"I think documenting the location of the artificial sett previously is misleading. This section could come before [the previous section]. It would be useful to say: what setts are you closing (main setts and outlier) and then in next section have site location"

"Felt subsidiary should be above outlier"



More detail needed on the page?

1 user wanted the name of the sett he just added played back to him on this page



Playback previously entered sett name in H1

Combine 2 pages into 1

3 users thought the 'holes' questions should be on 1 page

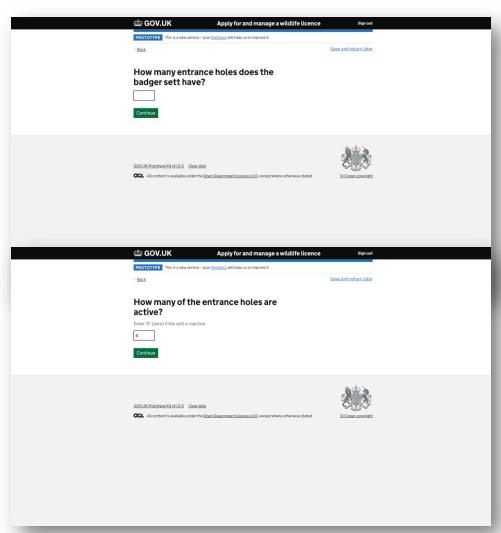
"active, partially active, inactive"
"I'd expect that to say active and in active"

"active entrance holes, main holes and inactive - would expect that to be grouped on the same page"

"Quite typical that some holes are active and some are not"

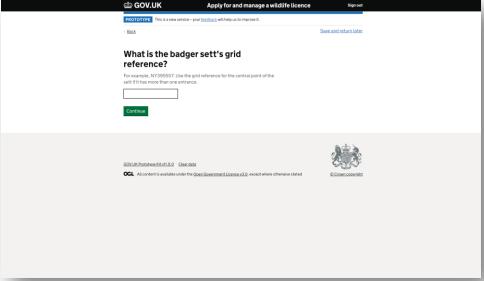
"So you've only asked for active holes and you've got 10 entrances... what about your inactive, disused ones? If we go out and there's 10 holes there, we'll gate 10 holes. They can quickly become used. So it would be beneficial to have those numbers add up"

Re active and inactive holes: "...it would be beneficial to have those numbers add up. Also it makes going back and reviewing your own form: it helps you process it inside your brain"



More detailed grid reference

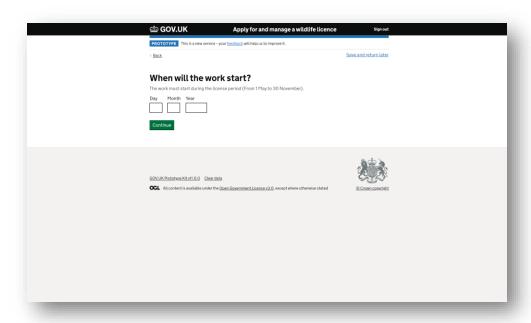
2 users wanted it to be a 10 digit grid ref again



Start date

"What happens if you put in the wrong date? Maybe a prompt to say this is outside the licensing period?"

"Target date to start work on site would be fine"



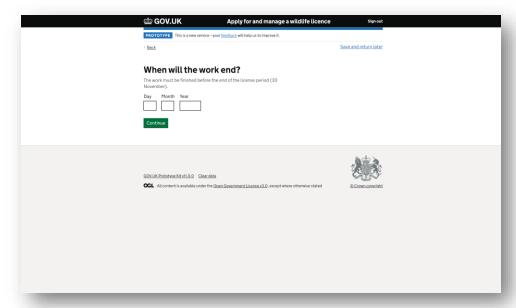
HMW remove the anxiety for users around start dates

back to business for rational

End date

2 users wanted the clarification of work being done

"you might want to specify when sett work will start as project work can be 2 years long"



Reorder choices

Users wanted least impact (top) to most impact (bottom)

1 user suggests another category 'creation of artificial sett and encouragement of displacement'

3 users this **everything** will 'disturb' the badgers

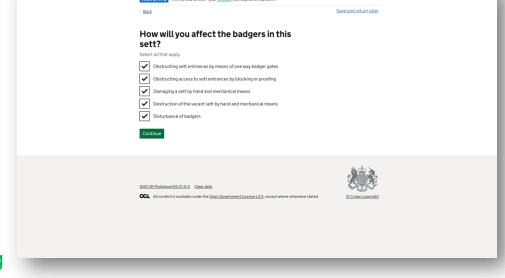
3 users ticked all boxes so they would be covered by the license in case

"I would want disturbance at the top"

"destruction of vacant setts last"

"I can't imagine you'd do #2 without doing #1?"

"I suppose if we're artificially creating a main sett, we'd be feeding them and moving them away from the main sett which is technically not disturbance but it would be another option"

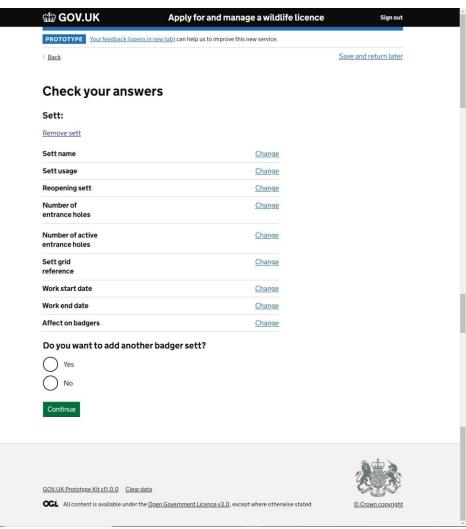


Apply for and manage a wildlife licence

^{*}Damage and destroy needed for legal purposes

Change of terminology

"It's not affect on badgers, its affect on setts"



Additional questions

"It would be good to say how many setts are you affecting and that let me fill this out three times"

Add compensation user + stakeholder feedback



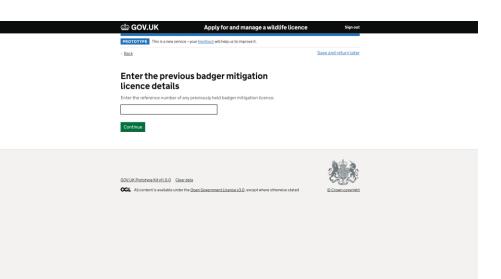
Give ecologists experience

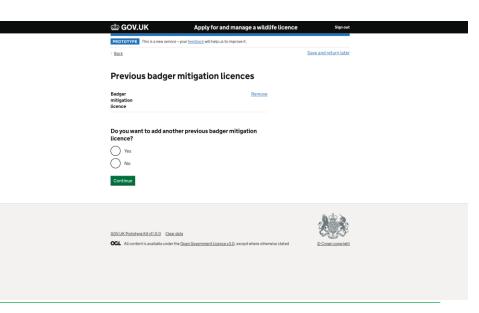


Previous experience

Users were unsure how many licenses to include here

- "I would probs do most recent"
- "Would be it easier if you just had an 'add' button?"
- "I suspect it could be clearer. You know, it could be like our previous badger mitigation licenses that you know relevant to this aspect of work"
- "Would choose the most significant recent license"
- "I would very much be expecting the system to hold this information and for me to not have to do it twice"





Seeing what's coming up next

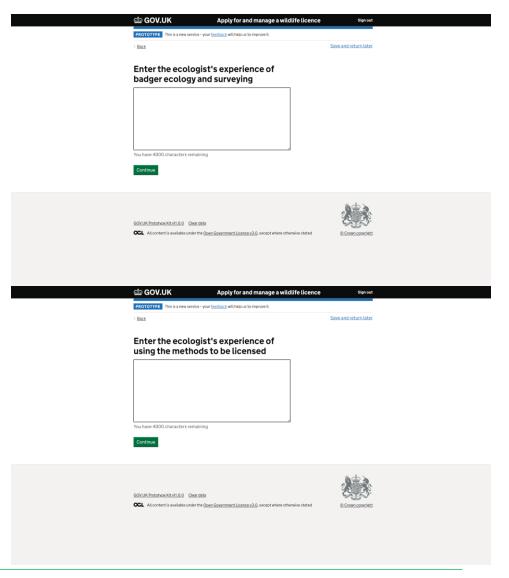
Users want to see what question is coming up next to stop repeating themselves or including irrelevant information

"I'd think 'I've just done all that' and then go back and remove what I'd written on the previous page"

"I'd have to go back and bring it across to this one"

"[what to add] based on guesswork"

(will this info be held in their profile or have to be completed each time by the ecologist?)



Add experience Awaiting info from HB as to whether this is needed in here

All 4 users thinks the previous experience questions are irrelevant if someone has a class license

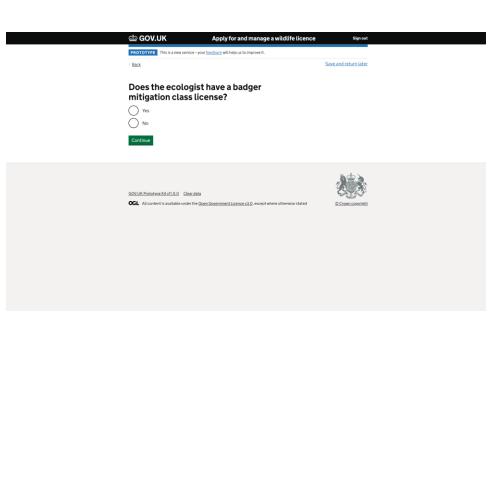
"If they've got one of these they don't need to do an application?"

"Should this come at the very beginning?"

"Would expect this question to be at the beginning and 'trumping everything else'"

"It should be kept as two separate workflows... I could have just put my class license in here... maybe early in the form there should be an option of: are you going down a traditional route or a class licence, and then take away those past two pages because they're not relevant to me [as a class licence holder].

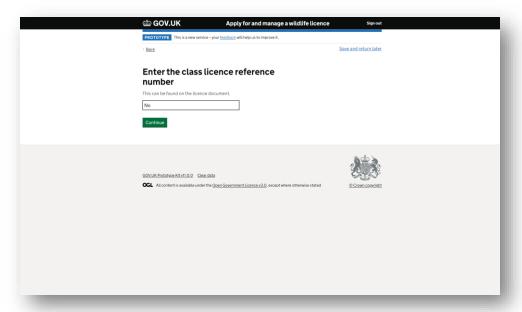
"wouldn't give previous experience boxes because you have a class licence?"



How many licenses need adding? Awaiting info

from HB as to whether this is needed in here

"Wanted some guidance on how many licences NE wanted to see here"





Upload supporting information



Items that can be uploaded vs should be

Users thought this page didn't portray the necessity of what was needed

"I would be reading this as you can upload, it's optional, not a requirement"

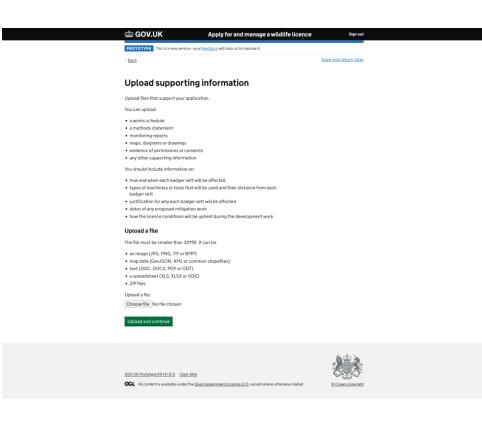
"I see this as more of an optional if it's right at the end"

"The 'should' items are things that NE need prior to this within the application...nice to haves would be included on this page"

"[this page] is not 'can' more 'should'

"You're adding uncertainty as to what you need [to provide]"

"I would have thought by now the 'should' section would have already been captured"



HMW instruct users on what information they must upload

Uploading multiple files

Users wanted to upload more than 1 file at a time

"I have to do it individually?"

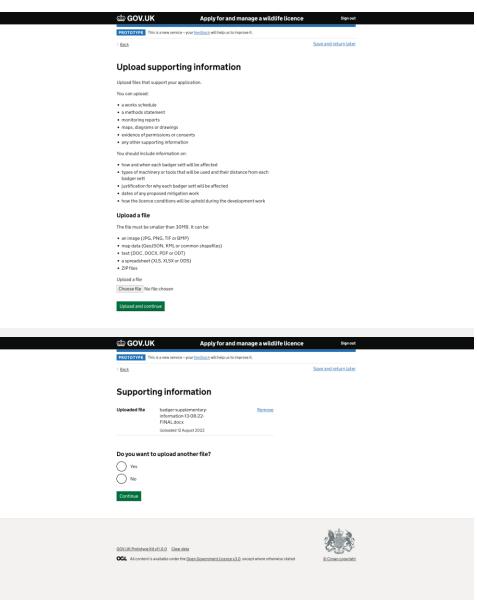
"If we were doing it individually I want to be able to title them"

"There may be 10 or 15 files to upload and I'd be want to do it all at once"

HMW quickly inform users on the best way to upload information

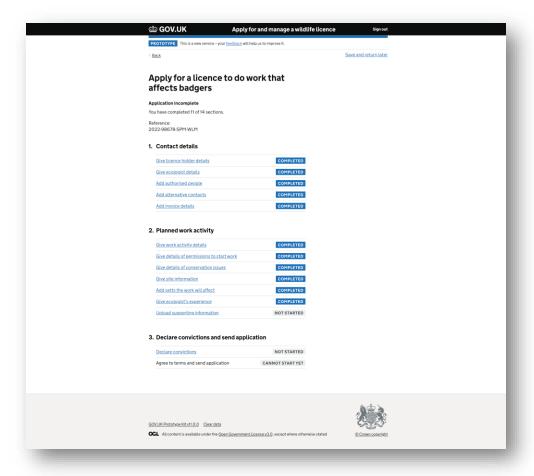
HMW learn from the business the best way to do file upload

HMW ensure our internal users can handle uploaded information



Story should be told at the beginning not the end

"You're asking for the sort of things that 'tell the story' at the end rather than the beginning"



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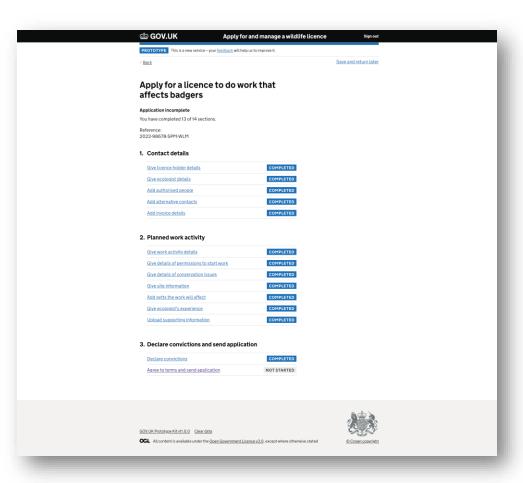


Declaration



Convictions

"oh right declare convictions means criminal convictions"



Tweak content 39

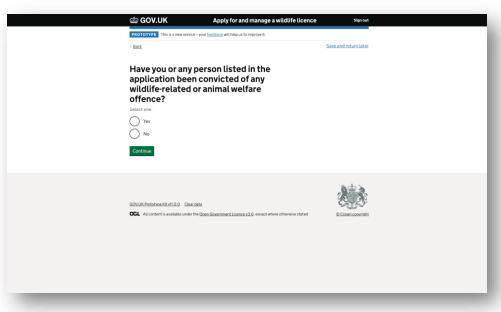
Convictions legality

Users confused about whether this should legally be put on them

"will there be an option for person named on licence, like developer, could they say if they have wildlife convictions? you don't know for sure 'to best of your knowledge'"

"you'd probably just ask [client]. So as long as I was comfortable my side didn't have any convictions, and if they lied and it came back, I'd say well I asked them"

"I suppose you are asking for something more than reasonable... it is something that perhaps you can have a feedback form to check with the named individuals because it is perhaps putting undue pressure on the consultant"





Terms



Client to sign

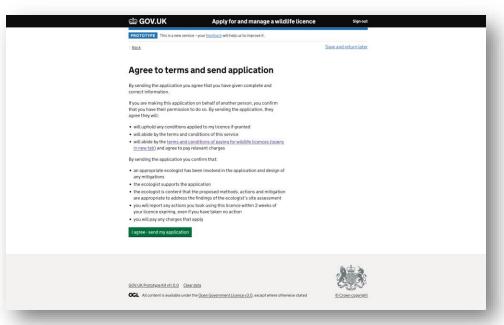
All users wanted the client to be able to sign/check at this point

"What would be helpful here is a way of sending this form to them [client] for them to sign off as well"

"Yeah, there you go. Highlights 'on behalf of the other person, you confirm that you have their permission to do so."

"Would expect some form of written communication or input/agreement from the client"

"so i'd be thinking I'll email the client, would copy paste and ask them to confirm the below, then i'd get written confirmation from them, save to my folder then i'd click yes on this application, i would have them agreeing on record and file somewhere in the system"



Client to sign

2 users want to see costs upfront

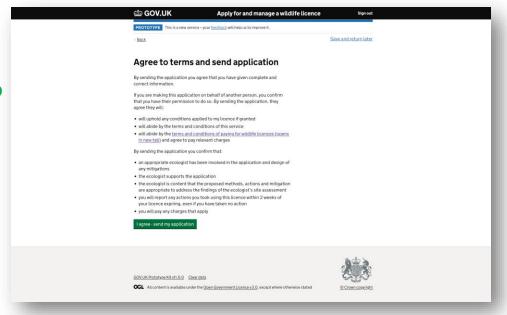
"highlights last bullet point - what are the charges, billing address, PO etc"

"can I click on the link? I would want to to see how much I will be paying, usually we charge our clients before we do this"

1 user spots 'send my application'
"oh but it's send my application"

All users want a presubmission download

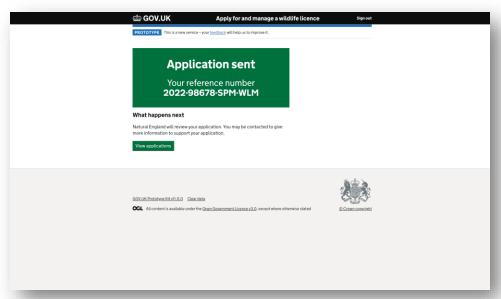
"what's easier for me is pdf version with reference number, site name etc"



Client to sign

2 users expect an automatic email of confirmation and form

"i would probably want an email saying 'we've received your application' as we pass that to clients"

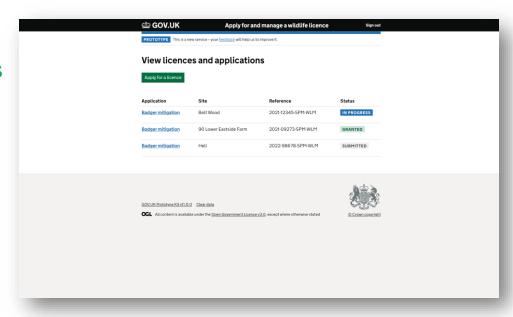


View licences

2 users want to see response times

"Wanted to see if the application was being considered or when a decision date would occur"

"I want to see when I will get a response by"



Licence overview

- 4 users thought this page came too late
- "I would double check the page or see and think oh i've not sent the client that"

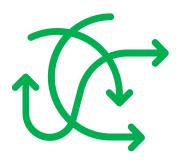




High level insights from usability testing the A24 application



High level insights



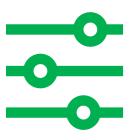
Lost in the flow

Even though there is a summary page which the user is brought back to time and again, as a user it is hard to understand, given the lengthy form, where exactly they are in the form.



Uploading files

The upload pages are not straight forward to users. There's a lack of understanding of what exactly is needed along with what are mandatory vs optional uploads.



In the wrong order

The information needing to be provided didn't seem to make sense at certain points. The thinking was that certain questions should have been raised earlier in the flow.

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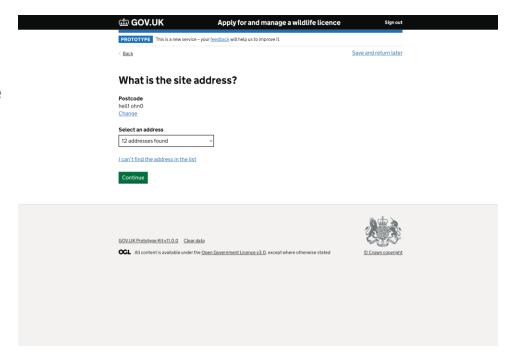
Lost in the flow



Lost in sections

Users wanted to see a heading to show which section of the form they were completing e.g 'Give site information'

"Is there a thing to summarise which section I'm in?"

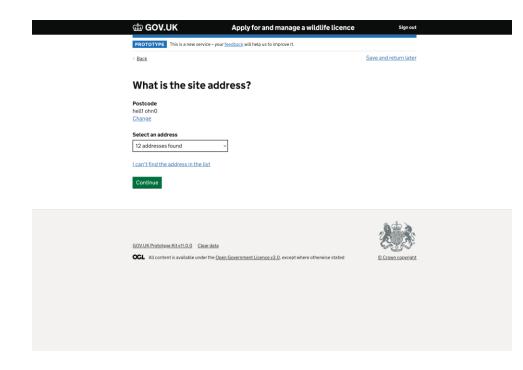


Where in the journey?

Users wanted to see how far through the journey they were

"Percentage complete would be nice"

"Page numbering would be good"





Pairing up the journey



Lack of guidance

- Users thought that if there was more guidance throughout the application, less personal inference would be relied upon and a more standardised approach would be seen
- Users concerns links directly to previous research with internal users who would like more guidance (White box with green text and outline)

"Other thing is the lack of guidance for ecologists to submit a comprehensive application. Since gov.uk took down our guidance it's been hard"

"But one becomes disenchanted about filling these in because there isn't [any guidance about what to include]"

"This starts to suggest that you've got guidance about what you can use where (about the machinery tools) but you're not telling me that."

"There's lots of important stuff you're not providing guidance about what you need"

"Licence criteria is currently based on judgement, it's quite open to interpretation"

Key points to consider

More work for all involved

- Ecologists are overly cautious and will provide more information than necessary to ensure there are no delays with getting the licence
- Lots of documents for assessors to review
- Increased work load for all
- Could result in application delays
- Could result in delays for ecologists work therefore delaying developers work



Assessment recommendations — how did we do?



Alpha assessment recommendations

 Be aware of any biases that might creep into their design based on the legacy pdf service they are converting into digital



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Next steps



Conduct a 'how might we' session to:

Ideation on HMW