

Paycor Usability Testing Results

Enterprise 2.0 – June BETA

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Paycor Enterprise 2.0



Agenda

1. Paycor Usability Test Summary
2. Executive Overview
3. Feedback from Usability Testing
4. Appendix

Paycor Usability Test Summary

Testing Summary

- Users successfully completed simpler payroll and employee management tasks.
- Complex payroll workflows within the Pay Data Grid created significant usability challenges.
- Hidden columns, horizontal scrolling, and poor visibility reduced task success and efficiency.
- Users frequently relied on trial-and-error when workflow behavior did not match expectations.
- Navigation, terminology, and system feedback issues contributed to confusion across multiple tasks.
- Users reported positive overall impressions despite workflow-specific usability problems.

Recommendations

- **Improve visibility** of controls, actions, and system status throughout the application.
- **Reduce reliance on horizontal scrolling** and hidden information within the Pay Data Grid.
- **Improve workflow guidance** for payroll processing and manual check tasks.
- **Strengthen error messaging, validation, and save-state feedback.**
- **Simplify terminology and align labels** with payroll user expectations.
- **Increase consistency** across screens, workflows, and interaction patterns.

Executive Overview

- Users successfully completed most payroll and employee management workflows, although efficiency was reduced by navigation and discoverability issues.
- Payroll processing tasks within the Pay Data Grid generated the greatest number of failures, partial completions, and user frustrations.
- Hidden controls, scrolling requirements, and inconsistent workflow behavior frequently disrupted task completion.
- Terminology, feedback, and visibility issues caused users to rely on trial-and-error behavior.
- Despite these challenges, users generally viewed the application positively and were able to complete many core tasks successfully.

Key Insights

- 8 participants
- Strong performance on simpler workflows
- Pay Data Grid created the greatest usability challenges
- Hidden columns and scrolling significantly impacted task completion
- Users relied on trial-and-error when workflows were unclear
- Overall user satisfaction remained positive despite workflow issues

Executive Overview

Overall Ratings

- 75% task success – Employee Deduction
- 75% task success – Employee Salary
- 100% task success – Net Cash for Payrun
- 100% task success – Review Payrun and Pre-post Payroll Journal
- 25% task success – Manual Check workflow

Key Issues Identified

- Hidden columns and excessive horizontal scrolling
- Poor discoverability of key actions and controls
- Weak error visibility and system feedback
- Confusing terminology and labels
- Inconsistent workflow behavior
- Limited visibility of critical information
- Trial-and-error behavior when users became stuck

Executive Overview

High-Level Opportunity

- Improve visibility of payroll information and controls
- Reduce navigation and scrolling burdens
- Strengthen workflow guidance and feedback
- Simplify terminology and labels
- Increase consistency across screens and workflows
- Improve the efficiency of payroll processing tasks

Feedback from Usability Testing

Task 1 – Enter a new employee's information.

N = 8

* Indicates required information

Department *
201 - Union Center Store

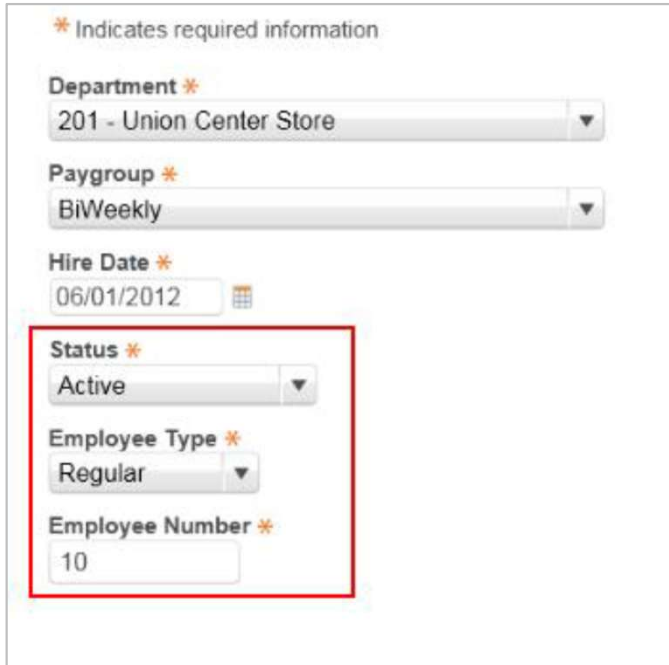
Paygroup *
BiWeekly

Hire Date *
06/01/2012

Status *
Active

Employee Type *
Regular

Employee Number *
10



Task Time: 7:20 | Success: 62.5% (5 Complete, 2 Partial, 2 Failed)

Observed User Behavior:

- Users struggled with scrolling throughout the wizard and frequently had to scroll back to the top of the page to continue.
- Users frequently clicked Next without progressing because required fields were missing or the system required fields to be re-entered, but no clear error message was displayed.
- Tabbing through fields did not consistently move the screen, forcing users to both tab and manually scroll.
- Users were confused by required fields that were already populated with default values.
- Multiple users were uncertain what "Effective Date" meant and whether it referred to the hire date, payroll date, or current date.

Task 1 – Continued

N = 8

Representative Quotes:

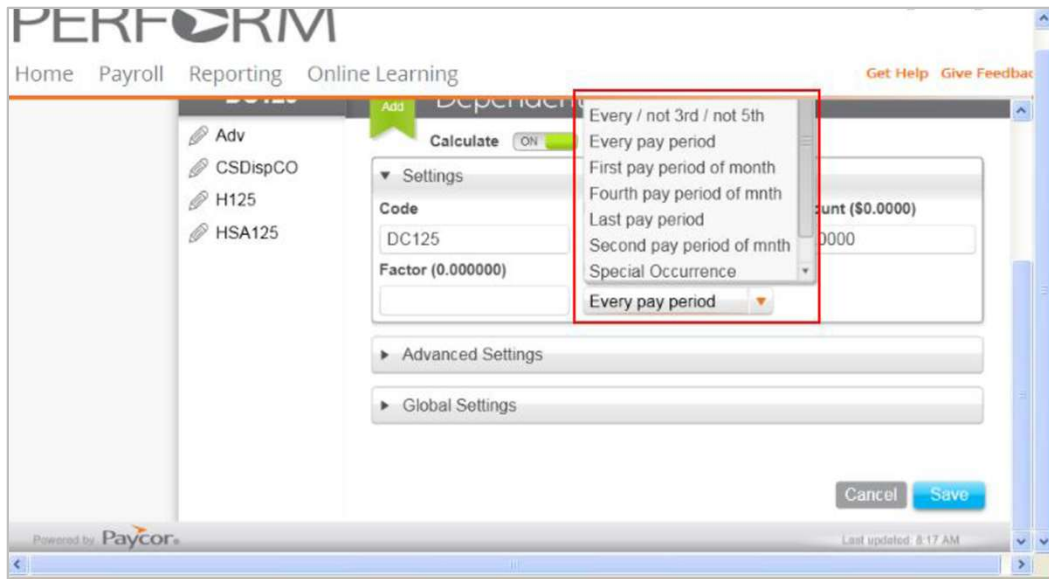
- "That is going to be a pain in the butt to scroll down all the time. That is one of my pet peeves."
- "I don't think you should have to scroll up. I don't like that. I think it would be better if you did not have to scroll at all."
- "That should pop-up in a different color when you go to Next. It should tell you what you missed."

Key Findings:

The New Hire Wizard was hindered by significant usability and workflow issues. **Scrolling behavior, unclear terminology, pre-populated required fields, and missing error messages created confusion and prevented users from completing the task.** These issues contributed to a relatively **low task success rate** and added nearly three minutes of avoidable effort to task completion.

Task 2 – Please set up an employee deduction.

N = 8



Task Time: 3:29 | Success: 44% (3 Complete, 1 Partial, 4 Failed)

Observed User Behavior:

- Users struggled to determine which fields were required because required fields were not consistently marked.

- Several users failed to notice the Save button because it was located below the visible portion of the page.
- Users were confused by the meaning of Frequency values and had difficulty identifying which option represented a monthly deduction.
- Users did not understand the purpose of flags and often explored them while searching for the deduction setup workflow.
- Users were uncertain whether deductions had been successfully added due to limited system feedback.
- The page layout caused users to focus on existing deductions rather than the controls needed to add a new deduction.

Task 2 – Continued

N = 8

User Comments:

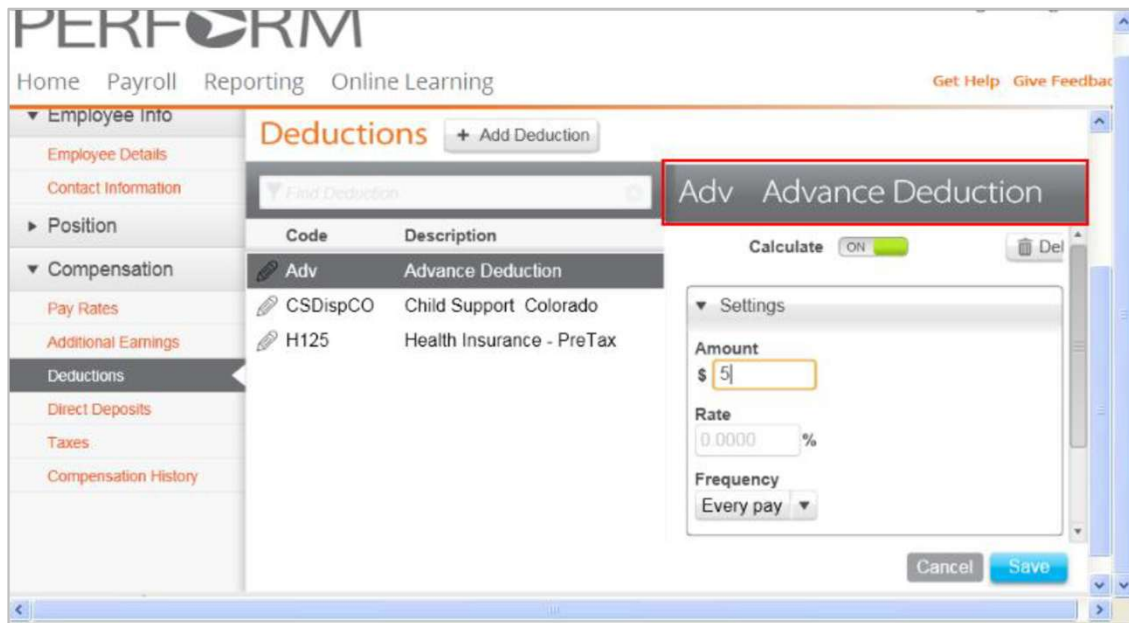
- "I did not like that I had to scroll down to see the Save button."
- "Why should I when it says Add Deduction right here? It says Add Deduction, so you would think the next screen would come up."
- "And I guess I am thinking that everything I want to do should be on one page so I can see it. I think that in my mind some of this stuff is big (in size) and it does not need to be that big and they could fit everything on one page."

Key Findings:

Users struggled to complete the Company Deductions task due to unclear terminology, confusing screen layout, missing required-field indicators, and poor visibility of key actions. **The combination of scrolling issues, unclear Frequency values, and weak feedback contributed to a low task success rate, with half of the participants unable to complete the task successfully.**

Task 3 – Set up a \$50 per day deduction

N = 8



Task Time: 3:33 | Success: 75% (6 Complete, 2 Failed)

Observed User Behavior:

- Users had difficulty identifying which deduction they were configuring because screen headings were not prominent.

- Several users focused on the deduction list rather than the selected deduction heading and initially entered information into the wrong deduction.
- Users were slower than expected locating the Employee Deduction screen.
- Scrolling continued to create usability issues throughout the workflow.
- Save and Cancel buttons on the main Employee Deduction screen caused confusion after users had already saved the deduction, leading some to believe their work had not been saved.

Task 3 – Continued

N = 8

User Comments:

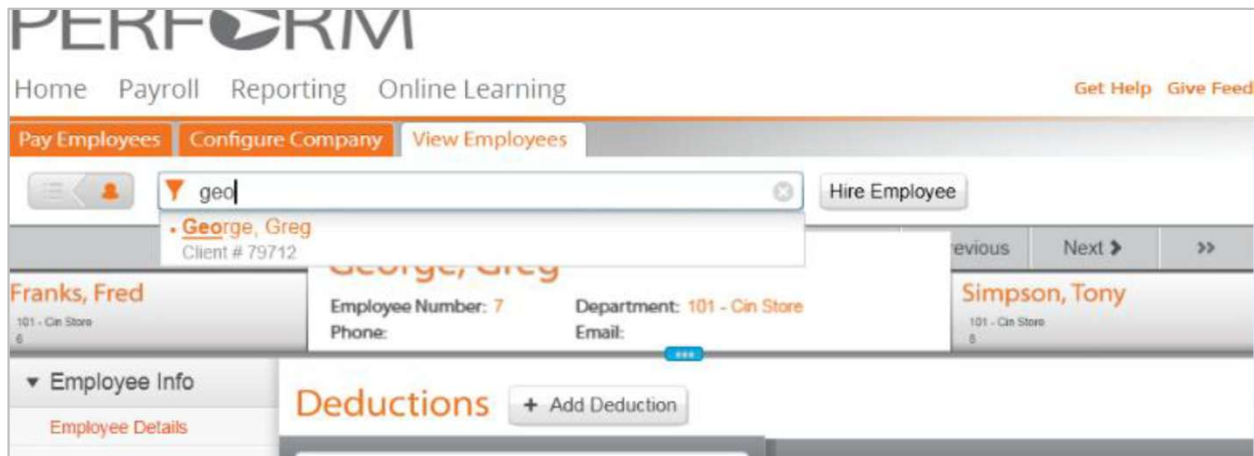
- "I did not notice that right away."
- (You did not notice the heading?) "No. I didn't. It's gray – it does not really stick out."
- "This is not saving time."
- "The less clicks, the better."

Key Finding:

While Employee Deductions performed better than Company Deductions, **users still struggled with low-visibility headings, scrolling, and unclear save behavior**. Participants generally preferred the Employee Deduction workflow because it was easier to understand, required fewer clicks, and more clearly communicated available options. However, **poor heading visibility and confusing save states continued to create unnecessary errors and delays**.

Task 4 – What is Greg George's annual salary?

N = 8



Time: 1:00 | **Success:** 75% (6 Complete, 2 Failed)

Observed User Behavior:

- Most users completed the task quickly once they located the correct employee record.
- Users relied heavily on the Find field to locate employees.
- Some users became confused when selecting an employee from search results because the employee's name did not populate the Find field.

- Users who missed page headings or employee context navigated to the wrong screen.
- Scrolling continued to create navigation problems, causing some users to lose track of which employee they were viewing.
- One user was confused by the funnel/filter icon and did not recognize its purpose.

Task 4 – Continued

N = 8

User Comments:

- "I expected his whole name to display in the Find field."
- "I want to see everything on one screen."
- "It just doesn't seem obvious."
- "This little thing here is very confusing to me. I don't know what it is."

Key Findings:

Users were generally able to locate employee salary information efficiently, making this one of the **stronger-performing tasks**.

However, the **Find field behavior, lack of visible employee context,** and **continued scrolling issues** created confusion that led some users to navigate incorrectly or lose track of the employee record they were viewing.

Task 5 - PART 2 - Add a column for H125 deduction amount.

N = 8

Add / Remove Paydata Column			
Earnings		Deductions	
Code	Description	Hours	Amount
Hol	Holiday	<input type="checkbox"/>	<input type="checkbox"/>
OT	Overtime Hours	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Reg	Regular	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Sick	Sick	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Vac	Vacation	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Cancel Ok

Time: 1:49 | Success: 43.8%
(3 Complete, 1 Partial, 4 Failed)

Observed User Behavior:

- Users were generally able to locate the Add Column function, but many struggled to verify that the column had been successfully added.
- Participants had difficulty finding the newly added column because it was displayed outside the visible area of the grid and required horizontal scrolling.
- Multiple users did not notice the horizontal scroll bar and became frustrated trying to locate the added column.
- One user could not identify the Deductions tab within the modal window because the tab styling did not appear selected.
- Some users were confused by the overall layout of the Pay Data Grid and were unsure where newly added columns would appear.

Task 5 - PART 2 – Continued

N = 8

User Comments:

- "There are too many scroll bars."
- (Do you think there is anywhere else on the page where you would look?) "Why should I when it says Add Deduction right here? It says Add Deduction so you would think the next screen would come up."
- "Oh, that is ridiculous. I don't like that at all."
- "At this point, I do not know. I give up."

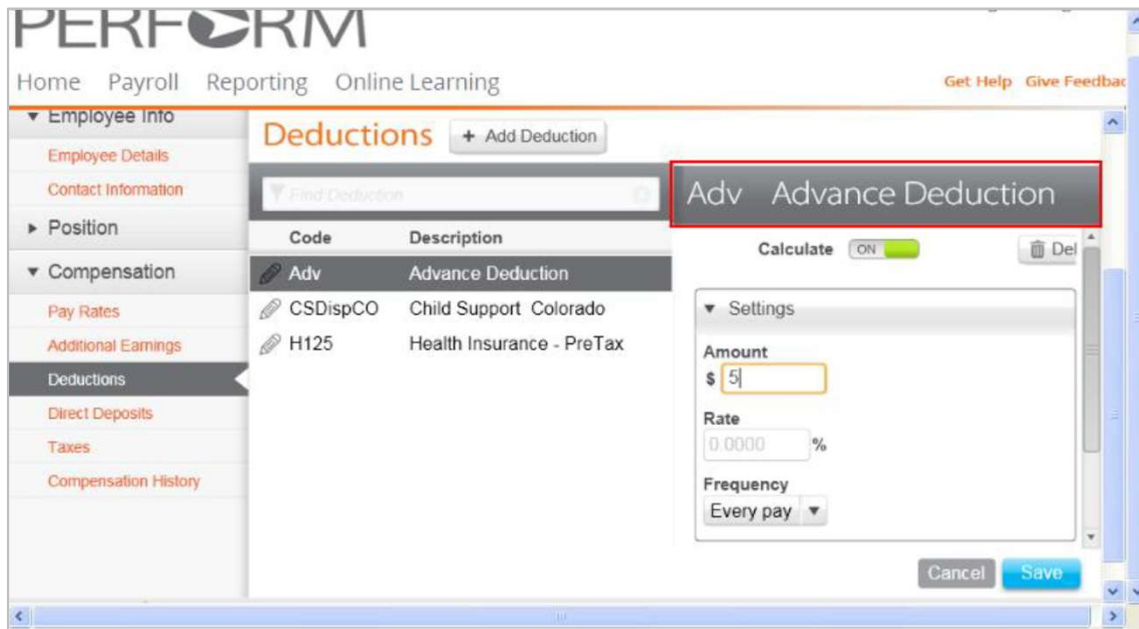
Key Findings:

Users could generally complete the action of adding a column, but many could not determine whether the column had been added successfully.

Horizontal scrolling, poor visibility of the added column, unclear tab states, and a confusing grid layout resulted in a **low success rate** and significant user frustration.

Task 5 - PART 3 Add a column for Vacation earning hours.

N = 8



Time: 1:23 | Success: 38%
(3 Complete, 1 Partial, 4 Failed)

Observed User Behavior:

- Users struggled to locate the Vacation earning hours value within the Add Column modal window.
- Participants continued to have difficulty finding newly added columns after they were added to the grid.
- Horizontal scrolling remained a significant barrier, preventing users from locating or verifying the added column.
- Some users did not understand the overall Pay Data Grid layout and were unsure where newly added columns would appear.

Task 5 – PART 3 – Continued

N = 8

Observed Behavior Continued:

Users experienced problems tabbing between fields, with focus jumping unexpectedly, and making data entry difficult.

User Comments:

- "Wow. Boy, that is not very intuitive."
- "How would someone know that unless they had been told that?"
- "Intuitively, you want this to be as intuitive as possible."

Key Findings:

Users struggled to add and locate the vacation earning hours column due to a combination of **confusing screen layout, difficulty locating values within the modal window, and horizontal scrolling requirements.** Participants frequently **relied on training or assistance** to complete the task, indicating that the workflow was not sufficiently intuitive for first-time users.

Task 5 – PART 4 – Pay Dan Davis, 40 hours and \$50 - H125

N = 8

Time: 1:40 | Success: 37.5% (1 Complete, 4 Partial, 3 Failed)

Observed User Behavior:

- Users struggled to enter values because they could not locate the columns that had been added in the previous tasks.
- Horizontal scrolling remained the primary usability issue, with several participants unable to find hidden columns needed to complete the task.
- Users frequently expected all payroll columns to be visible without additional scrolling.
- Some users attempted to use browser scroll bars rather than the application scroll bar, causing additional confusion.
- One minor issue occurred when existing field values were not automatically cleared when users clicked into a field.

Task 5 – PART 4 – Continued

N = 8

User Comments:

- "Why won't it let me go to that column?"
- "It was confusing because these (columns) were hidden. As you scroll across, you would think that they would all show up. And so there were hidden fields."
- "I don't see the column. I give up."

Key Findings:

Users had significant difficulty completing payroll entry because **required columns were hidden from view**. **Horizontal scrolling** created a **major barrier to task completion**, preventing users from locating fields they knew should exist. Even when users understood what information needed to be entered, they often could not find the appropriate column, resulting in a **low success rate** and substantial frustration.

Task 5 – PART 5 – Pay Ernie Evers for 40 hours and 5 hours OT

N = 8

Time: :50 | Success: 13% (1 Complete, 7 Partial)

Observed User Behavior:

- Most users were able to enter payroll amounts, but many struggled to locate the correct columns.
- Tabbing between fields caused the screen to jump unexpectedly, making it difficult for users to track their location within the grid.
- Users frequently lost sight of required columns as focus moved across employees and columns.
- Horizontal scrolling continued to create visibility issues, preventing users from easily finding payroll fields.
- Participants expressed a strong preference for seeing all payroll information on a single screen.

Task 5 – PART 5 – Continued

N = 8

User Comments:

- "I want to see all those columns on the same screen. I don't like – I just don't like how it is coming together. It just seems to me to be hard to find."
- "I don't like this."
- "It just seems to me to be hard to find."

Key Findings:

Although users generally understood the payroll entry task, the **Pay Data Grid** made data entry difficult by requiring **excessive navigation**. **Tabbing behavior**, **hidden columns**, and **horizontal scrolling** reduced visibility of key information, and made it challenging for users to **maintain context** while entering payroll data.

Task 5 – PART 6 – Pay Tony Simpson, 32 hours, with 8 vacation days.

N = 8

Time: :59 | Success: 13% (1 Complete, 6 Partial, 1 Failed)

Observed User Behavior:

- Most users understood the payroll entry task and were able to enter hours once they located the appropriate fields.
- Users continued to struggle with navigating back to previously added columns within the Pay Data Grid.
- Horizontal scrolling remained a significant usability issue, making it difficult to locate and re-enter column fields.
- Several users expected all payroll columns to be visible simultaneously and became frustrated when required information was hidden off-screen.
- One participant was unable to complete the task because she could not find the appropriate column.

Task 5 – PART 6 – Continued

N = 8

User Comments:

- “That’s real bad. It would be nice to see them all in one page.”
- "That is confusing to you because you don't know how to go back in [to the column fields]."

Key Findings:

Users generally understood what information needed to be entered, but the **Pay Data Grid** continued to create **navigation challenges**. **Hidden columns** and **horizontal scrolling** prevented users from efficiently locating payroll fields, resulting in **repeated partial completions** and **ongoing frustration** with the workflow.

Task 5 – PART 7 – What is the net amount of Ernie Evers' check?

N = 8



Deductions		Taxes		Benefits	
Hours	Current	Code	Current	Code	Current
2.40	\$58.20	401k	\$48.50	SOC	\$38.64
5.20	\$126.10	H125Family	\$50.00	MED	\$13.34
0.40	\$9.70	KMtcTr	\$24.25	FITWH	\$69.71
9.60	\$232.80			OHCIN	\$5.80
20.80	\$504.40			KYBND	\$0.07
40.00	\$970.00	Total	\$98.50	Total	\$128.51

Time: 2:18 | Success: 50% (4 Complete 4 Failed)

Observed User Behavior:

- Most users looked for the employee's net check amount in the Totals section rather than in the Employee (EE) Drawer.

- Users struggled to locate the Net Amount field because it was not displayed where they expected to find payroll summary information.
- Several participants had difficulty viewing the entire EE Drawer and became frustrated by the need to scroll horizontally and vertically.
- Some users attempted to navigate to other areas of the application, including Review & Approve, believing the information would be located there.
- Users who successfully completed the task often required extensive searching before locating the correct value.

Task 5 – PART 7 – Continued

N = 8

User Comments:

- "I don't like that you can't see everything in one screenshot."
- "I can't see the whole thing. I don't like that."
- "It is not clear at all. I am guessing."
- "I would say it is not in this page. Right now you are just entering hours and time data."

Key Findings:

Users consistently expected the employee's **net check amount** to be located near the **Totals section** and often failed to notice it within the **EE Drawer. Limited visibility, scrolling requirements**, and unclear navigation made the information difficult to find, resulting in a **low task success rate** and **significant user frustration**.

Task 5 – PART 8 – What is the Net Cash for this payrun?

N = 8

Home Payroll Reporting Online Learning Get Help Give Feedback

Pay Employees Configure Company View Employees

Check Date: JUN 15 2012 Market Place Client #: 79712

Enter Paydata Review & Approv Submit

Estimated Cash Requirements

Prepost Payroll Journal ▶ This estimate is for 05/27/2012 - 06/09/2012, Union Center, BiWeekly. Please be sure to fund your bank account to cover your **Total Payroll Liability** plus any changes you request from us and our service fees.

	Amount	Description
	6,219.42	Net Cash
+	2,025.58	Employee Tax Withholding
+	919.88	Employer Tax Liability
	9,164.88	Total Payroll Liability

Net Cash	
Net Pays	6,219.42
Partial Direct Deprt	0.00
Manual Checks	0.00
Payables	0.00
Total Net Cas	6,219.42

2 Payru...
Two days required for direct deposit
Banks need 48 hours to complete

Time: :57 | Success: 100% (8 Complete)

Observed User Behavior:

- Users were generally able to locate the Net Cash amount and complete the task successfully.
- Once users reached the Review & Approve screen, they were able to find the requested information with minimal difficulty.

- Several users commented that the Totals button was not prominent and could be difficult to locate.
- Participants consistently noted layout issues on the Review & Approve screen, describing the information as crowded and difficult to read.
- Users felt available screen space was not being used effectively, resulting in a cramped presentation of important payroll information.

Task 5 – PART 8 – Continued

N = 8

User Comments:

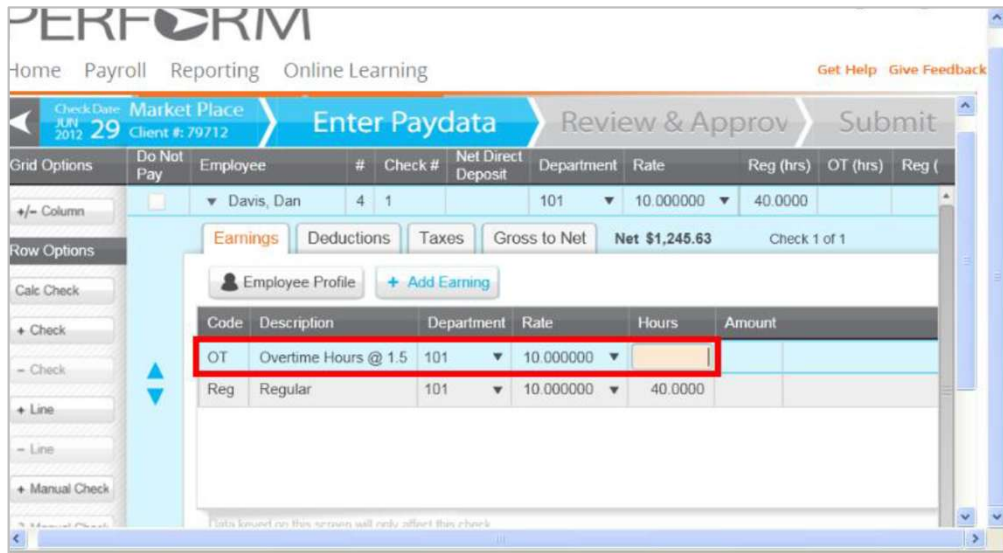
- "There is no dollar sign. If you would see the whole screen and not go up and down and up and down, it would be a lot better."
- "No. It looks like they just crammed it into the screen. I mean it works."
- "Most of it except for this column over here. They definitely need to add some space over here."
- "I don't like this over here. That bothers me. There is all this space over here with nothing."

Key Findings:

Users successfully located the Net Cash amount, resulting in a **high task success rate**. However, participants consistently identified usability issues with the **Review & Approve screen**, particularly the **crowded layout** and **poor use of available screen space**. While these issues did not prevent task completion, they **negatively impacted readability** and **overall user satisfaction**.

Task 5 – PART 9 – Add a manual check for Dan Davis for 3 Regular hours.

N = 8



Time: 5:37 | Success: 25% (2 Complete, 6 Failed)

Observed User Behavior:

- Most users were able to locate the Add Manual Check function but struggled to understand how to complete the workflow.
- Users did not recognize that Gross to Net was required to calculate the manual check and frequently expected the system to calculate automatically after entering data.
- Several participants searched for a Save function and assumed saving would trigger the calculation process.
- Users became trapped in the Employee (EE) Drawer because they could not exit without completing the calculation step.
- Participants were frequently confused by screen layout, scrolling requirements, inconsistent terminology, and the inability to view all relevant information on a single screen.
- Many users questioned field order and expected Regular hours to appear before Overtime hours.

Task 5 – PART 9 – Continued

N = 8

User Comments

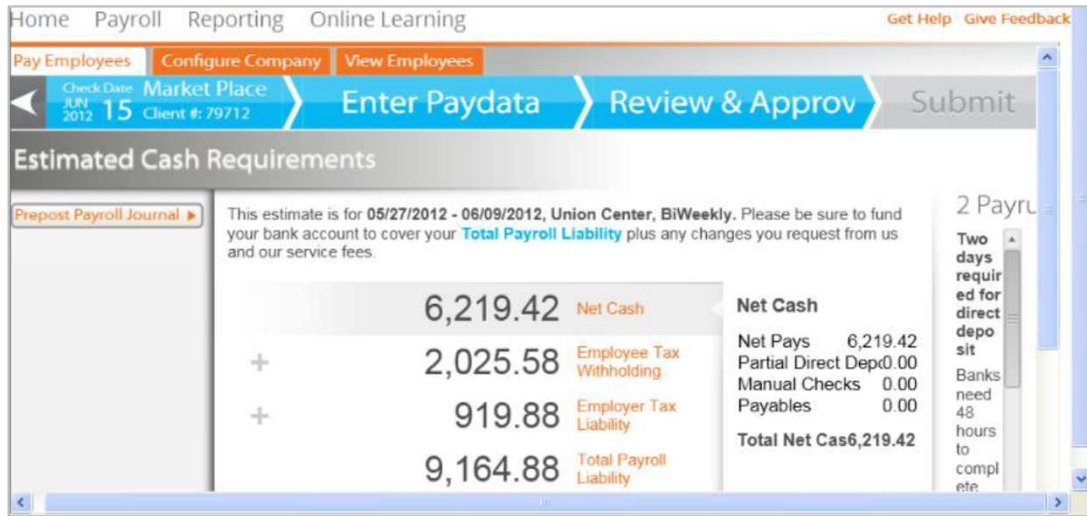
- "It should have a Save and automatically calculate it when you save it."
- "I might get stuck on that one. I do remember them [training video] at some point using the Gross to Net."
- ("Do you know how to do the calculations?) "No I don't."
- "Why wouldn't it calculate automatically?"

Key Finding

Users struggled to complete the Manual Check workflow because it was not obvious that **Gross to Net** was required to calculate the check. Many participants expected the system to calculate automatically after entering data or assumed a **Save** action would perform the calculation. Users who did not complete the calculation became trapped in the **EE Drawer** and were unable to return to the Pay Data Grid, resulting in a **25% task success rate** and significant user frustration.

Task 5 – PART 10 – Review your payrun and open Pre-post Payroll Journal.

N = 8



- Although users successfully completed the task, several commented on the layout and readability of information displayed on the screen.
- Participants felt information on the right side of the screen appeared crowded and difficult to read.
- Users noted that available screen space was not being used effectively, resulting in a compressed presentation of important payroll information.

Time: 1:24 | Success: 100% (8 Complete)

Observed User Behavior:

- Users were generally able to review the payrun and locate the Pre-post Payroll Journal without difficulty.
- Task completion was quick for most participants, indicating that the workflow was relatively straightforward once users reached the Review & Approve screen.

Task 5 – PART 10 – Continued

N = 8

User Comments:

- "It kind of runs over. You have a ton of room over here and then this is scrunched in."
- "You cannot read it."
- "If this is really important, have this across the bottom."
- "No, that is not easy to read."
- "Does everything need to be so big? I can read this without my glasses."

Key Finding

Users successfully completed the task and were able to access the **Pre-post Payroll Journal**. However, participants consistently identified **readability and layout issues** on the **Review & Approve screen**.

Information appeared **crowded and poorly organized, reducing scan ability** and negatively affecting the overall user experience despite the **high task success rate**.

Methodology
Research Questions
Testing Tasks

APPENDIX

Methodology

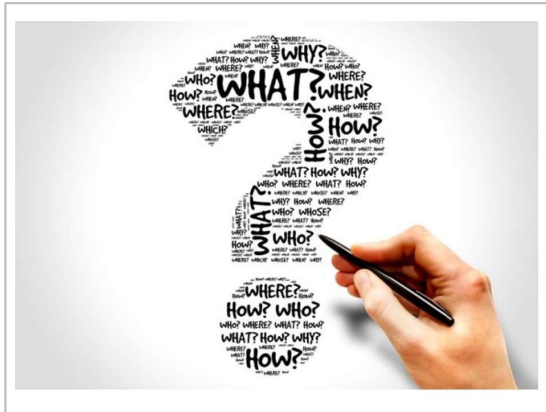
Qualitative Usability Testing

Usability testing in UX is a research method where representative users are observed completing specific tasks on a digital interface. Its primary goal is to identify pain points, measure task success, and uncover design flaws so teams can build intuitive, user-friendly products. Moderated sessions are led in real-time by a researcher who guides the participant and asks follow-up questions. Qualitative tests focus on the why (capturing user feedback, confusion, and opinions).

Survey

Surveys are asked after usability testing to bridge the gap between what users do (their observed actions) and what they think or feel (their subjective experience). Post-usability testing surveys capture both quantitative benchmarks and qualitative insights.

Research Questions



- Can users successfully complete key payroll tasks?
- Are workflows intuitive and easy to navigate?
- Are important controls and actions discoverable?
- Do users understand system terminology and feedback?
- What usability issues create errors, confusion, or inefficiencies?
- Can users successfully manage pay data, deductions, manual checks, and payrun review tasks?
- Are grid-based interactions and column management discoverable?
- Can users accurately complete complex payroll workflows without assistance?

Testing Tasks

- Task 1 – Enter a new employee's information.
- Task 2 – Please set up an employee deduction.
- Task 3 – Set up a \$50 per day deduction
- Task 4 – What is Greg George's annual salary?
- Task 5 – PART 2 - Add a column for H125 deduction amount.
- Task 5 – PART 3 Add a column for Vacation earning hours.
- Task 5 – PART 4 – Pay Dan Davis, 40 hour and \$50 - H125
- Task 5 – PART 5 – Pay Ernie Evers for 40 hours and 5 hours OT
- Task 5 – PART 6 – Pay Tony Simpson, 32 hours, with 8 vacation days.
- Task 5 – PART 7 – What is the net amount of Ernie Evers' check?
- Task 5 – PART 8 – What is the Net Cash for this payrun?
- Task 5 – PART 9 – Add a manual check for Dan Davis for 3 Regular hours.
- Task 5 – PART 10 – Review your payrun and open Pre-post Payroll Journal.