

Paycor Usability Testing Results

Enterprise 2.0 – March BETA

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Paycor Enterprise 2.0



Agenda

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

Paycor Usability Test Summary

Testing Summary

- **100% task success** across deduction and PTO workflows
- **60% task success for bonus payrun workflow** due to hidden interactions and workflow confusion
- **Users responded positively to the application's ease of use and learnability**
- **Major breakdown areas included discoverability, terminology confusion, hidden controls, and weak error visibility**
- Questionnaire results showed **strong satisfaction and usability ratings across most workflows**
- Findings identified **opportunities to improve workflow clarity, navigation consistency, and interaction visibility**

Recommendations

- **Improve discoverability** of controls, buttons, and hidden interactions across workflows
- **Strengthen error visibility and validation feedback** to reduce user confusion and trial-and-error behavior
- **Simplify terminology and align labels** more closely with payroll user mental models
- **Improve consistency between screens and interaction patterns** to increase user confidence
- **Reduce visual overload on key workflow screens** while maintaining access to critical payroll information
- **Enhance navigation and workflow clarity** for complex payroll and employee management tasks

Executive Overview

- Payroll and employee management workflows can become inefficient and error-prone when users struggle with navigation, terminology, hidden interactions, and inconsistent workflow behavior.
- A usability evaluation was conducted to identify workflow breakdowns, improve discoverability, and reduce user confusion across payroll, deduction, and PTO management tasks.

Key Insights

- 8 participants
- Users relied on trial-and-error when workflows did not match expectations
- Strong satisfaction and usability ratings

Overall Ratings

- 100% task success – deduction/PTO workflows
- 100% task success – direct deposit
- 100% task success – PTO adjustment/accrual
- 60% task success – bonus payrun workflow
- Positive feedback on ease of use and learnability

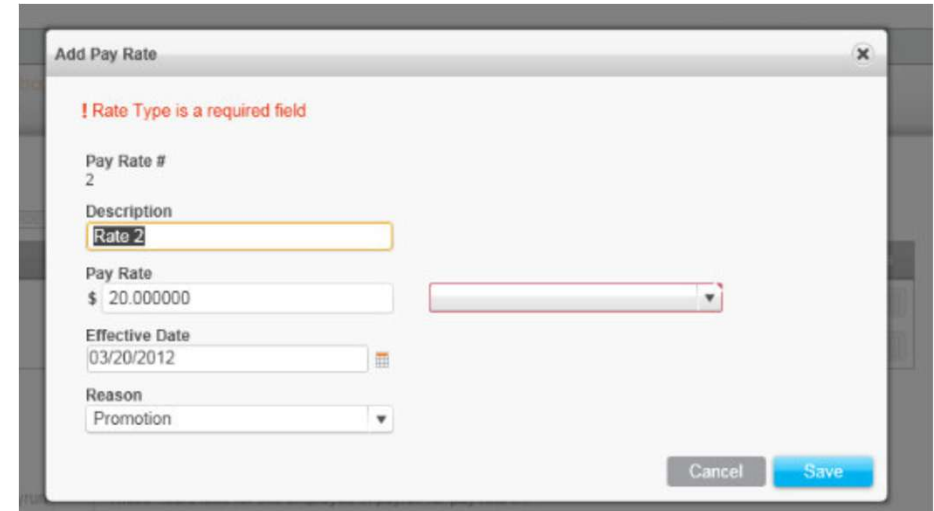
Executive Overview

Key Issues Identified

- Hidden interactions and non-obvious controls
- Weak or inconsistent error feedback
- Poor discoverability of key actions
- Confusing terminology and labels
- Inconsistent interaction behavior between screens
- Workflow entry points not always intuitive
- Trial-and-error behavior when users became stuck

High-Level Opportunity

- Improve control and action visibility
- Strengthen error messaging and validation
- Simplify terminology
- Increase consistency across screens
- Reduce visual complexity
- Improve workflow navigation and guidance



The screenshot shows a web form titled "Add Pay Rate" with a close button (X) in the top right corner. At the top, a red error message reads "! Rate Type is a required field". Below this, the form contains several fields: "Pay Rate #" with the value "2"; "Description" with a text input field containing "Rate 2"; "Pay Rate" with a text input field containing "\$ 20.000000" and a dropdown menu to its right; "Effective Date" with a text input field containing "03/20/2012" and a calendar icon; and "Reason" with a dropdown menu containing "Promotion". At the bottom right, there are "Cancel" and "Save" buttons. The error message is positioned above the "Description" field, but the "Pay Rate" dropdown menu also has a red outline, illustrating the issue of ambiguous error feedback.

Some users couldn't tell which field was in error due to similar colors of field outlines. (Most participants were color blind in this study.)

Executive Overview

Overall Survey Ratings

- **88%** (7 of 8) rated overall ease of use positively.
- **88%** (7 of 8) rated the application simple to use.
- **100%** (8 of 8) felt comfortable using the application.
- **88%** (7 of 8) rated learning the application positively.
- **88% (7 of 8) rated overall satisfaction positively.**
- **100%** (8 of 8) believed the application would improve effectiveness or make their jobs easier.

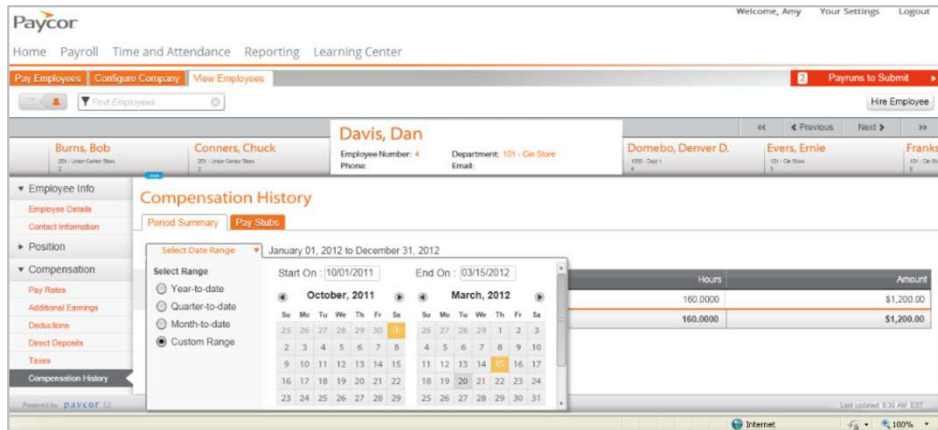
Key Issues Identified

- **88%** (7 of 8) rated navigation/location awareness positively.
- **75%** (6 of 8) rated information organization positively.
- **88%** (7 of 8) rated information clarity positively.
- **Users identified issues with button visibility, terminology, and the Select Payrun workflow despite generally positive satisfaction ratings.**

Feedback from Usability Testing

Task 1 – How much did [employee] make between October 1 to March 15?

N = 6



Task Time: 3:32 | Success: 100%

Observed User Behavior:

- Users struggled with the calendar control because it closed unexpectedly while they were entering dates.
- Several users could not see the Apply Dates button because it displayed below the page fold.
- Users became confused when the selected date range did not update after the calendar closed unexpectedly.

Representative Quotes:

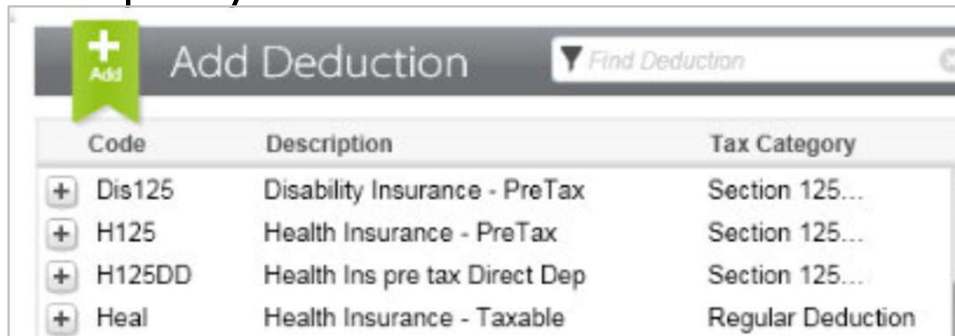
- “I don’t like that you have to scroll down to get to the button. That should be on the same screen.”
- “Did it go away? Let’s try that again.”
- “Okay. I am not real sure where at this point.”

Key Finding:

Users had difficulty completing the compensation history task because the calendar interaction behavior and below-the-fold Apply Dates button created workflow confusion and interrupted task completion.

Task 2 – Set up a \$22 monthly deduction for all employees.

N = 8



The screenshot shows a web interface titled "Add Deduction" with a search bar labeled "Find Deduction". Below the title is a table with three columns: "Code", "Description", and "Tax Category". Each row in the table has a plus icon in the first column, indicating it can be added. The table lists four deduction options:

Code	Description	Tax Category
+ Dis125	Disability Insurance - PreTax	Section 125...
+ H125	Health Insurance - PreTax	Section 125...
+ H125DD	Health Ins pre tax Direct Dep	Section 125...
+ Heal	Health Insurance - Taxable	Regular Deduction

Task Time: 3:32 | Success: 75%

Observed User Behavior:

- Users were confused about what the flags meant and which deductions had already been added.
- Users struggled to understand how to add deductions using the plus icon.
- Users were unsure whether deductions had actually been added successfully.
- Two users failed because they did not understand which deduction codes were already assigned to the company.

Representative Quotes:

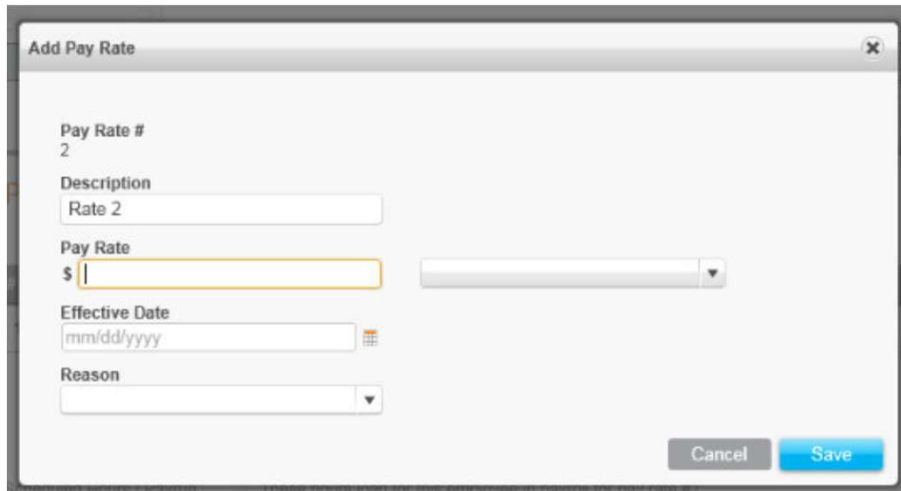
- “I have to be honest, I would call for help with this one.”
- “I guess if I were someone using this, I would question why are there two different ways of doing this.”
- “I am thinking that I am not sure if I have added it.”

Key Finding:

Users struggled to understand deduction setup behavior, deduction status, and add-deduction workflow interactions within the Configure Company deduction screen.

Task 3 – How would you set up two pay rates for an employee?

N = 8



Representative Quotes:

- “I don’t know what this pencil means.”
- “I am not sure why it would be under Add a Pay Rate. It is history.”
- “Actually, the error I got would have been nice to say you need to pick whether it is hourly or salary.”

Task Times: Part 1 – 2:31 | Part 2 – 1:20 | Part 3 – 1:28 | Success: 63% (5 of 8)

Observed User Behavior:

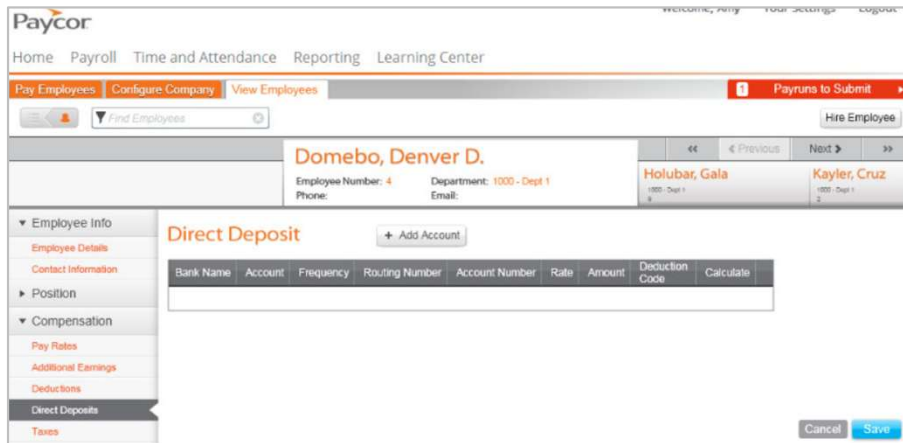
- Users struggled with required fields and confusing Windows-style error messages.
- Several users did not understand where historical pay rate information should be entered.
- Users were confused by inline editing behavior and Edit icon interactions.
- Three users failed Part 3 due to confusion about pay rate history and Compensation History workflows.

Key Finding:

Users experienced significant confusion with pay rate history workflows, error handling, required fields, and editing interactions during pay rate management tasks.

Task 4 – In client 79009, how would you add a direct deposit account?

N = 8



Representative Quotes:

- “I don’t know how to do this.”
- “I think you would have to sign out of this.”
- “These [buttons] need to be bigger.”
- “The first time I am using a program ... it is a process of elimination.”

Task Time: 3:34 | Success: 100%

Observed User Behavior:

- Several users were initially unsure how to switch between client IDs.
- Some users expected they would need to log out to change clients.
- Users struggled to see the Add Account button when adding a direct deposit account.
- Most users eventually completed both workflows successfully after exploration.

Key Finding:

Users successfully completed client-switching and direct deposit tasks, but discoverability issues and unclear button visibility reduced confidence and increased exploratory behavior.

Task 5 – How would you create an additional payrun for a bonus check?

N = 8



Task Times: 5:49 | Success: 60%

Observed User Behavior:

- Users struggled to identify where to begin the additional payrun workflow.
- Several users did not notice the Additional Payrun indicator at the top of the screen.
- Users clicked employee names expecting the employee drawer to open, but nothing happened.
- Some users confused the calendar graphics with actual payroll dates.
- Several users relied heavily on trial-and-error behavior throughout the workflow.

Representative Quotes:

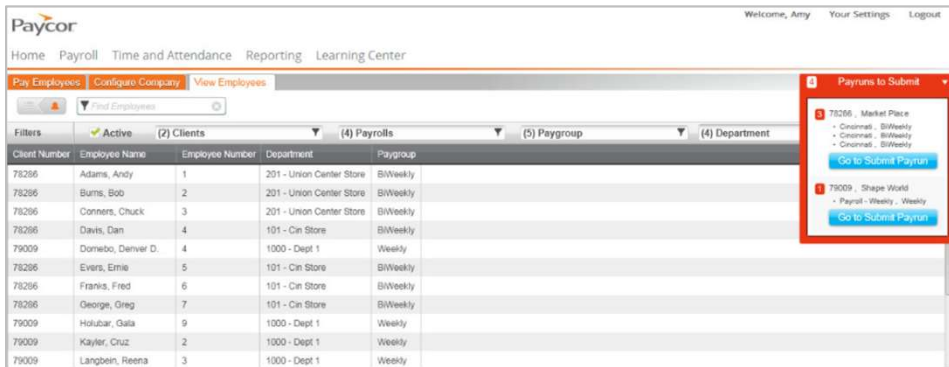
- “Obviously it is not obvious.”
- “I am lost at this point.”
- “I would be doing a lot of trial and error stuff.”
- “It was not obvious – the arrow?”
- “I would have had a hard time with that one.”

Key Finding:

Users experienced significant workflow confusion during the bonus payrun process due to weak interaction visibility, unclear workflow entry points, hidden employee drawer behavior, and poor discoverability of key controls and indicators.

Task 6 – Hire a new employee using the New Hire wizard.

N = 8



Client Number	Employee Name	Employee Number	Department	Paygroup
78296	Adams, Andy	1	201 - Union Center Store	BiWeekly
78296	Burns, Bob	2	201 - Union Center Store	BiWeekly
78296	Connors, Chuck	3	201 - Union Center Store	BiWeekly
78296	Davis, Dan	4	101 - Cin Store	BiWeekly
79009	Dornebo, Denver D.	4	1000 - Dept 1	Weekly
78296	Evers, Ernie	5	101 - Cin Store	BiWeekly
78296	Franks, Fred	6	101 - Cin Store	BiWeekly
78296	George, Greg	7	101 - Cin Store	BiWeekly
79009	Holubar, Gaila	9	1000 - Dept 1	Weekly
79009	Kayler, Cruz	2	1000 - Dept 1	Weekly
79009	Langben, Reena	3	1000 - Dept 1	Weekly

Task Times: 6:32 | Success: 25% (2 of 8)

Observed User Behavior:

- Users struggled with missing error messages and unclear required-field validation throughout the wizard.
- Several users could not determine why the Next button was not advancing the workflow.
- Users were confused because the Contact Information screen opened in the middle of the page instead of at the top.
- The Hire Employee button was partially hidden by a hover overlay for some users.
- Users experienced confusion when the Cancel & Close button did not behave as expected.

Representative Quotes:

- “Did I forget something?”
- “It is not obvious.”
- “I was going to say – where is his address?”
- “I thought it said Hide Employee.”

Key Finding:

Users experienced significant workflow friction in the New Hire wizard due to weak validation feedback, unclear error handling, inconsistent interaction behavior, and page positioning issues that interrupted task flow and increased confusion.

Task PP 1 – Set up a \$25 automatic donation for an employee.

N = 8

Task Times: Not Timed | Success: 100%

Observed User Behavior:

- Users progressed through the workflow quickly with minimal confusion.
- Most users understood the deduction setup flow immediately.
- Several users commented positively on the simplicity and clarity of the workflow.
- A few users requested clearer terminology and additional frequency information on the summary screen.

User Comments:

- “That was very easy.”
- “It doesn’t get any easier than that.”
- “That’s easy.”
- “That was easy and again, I don’t like some of the terminology like Compensation.”
- “The only thing that does not jump out at me is that it is happening every pay.”

Key Finding:

Users successfully completed the paper prototype deduction workflow with little difficulty, indicating that the simplified workflow, clearer structure, and guided progression significantly improved usability and learnability compared to earlier deduction-management tasks.

Task PP 2 – Set up a computer loan deduction for an employee.

N = 8

Task Time: Not Timed | Success: 100%

Observed User Behavior:

- Users progressed through the workflow quickly with little confusion.
- Users responded very positively to the automatic deduction calculation feature.
- Several users commented that removing manual calculations simplified the process significantly.
- A few users requested clearer frequency information and more obvious Add Deduction controls.

User Comments:

- “That would be nice.”
- “Pretty easy – especially since I did not have to calculate it myself.”
- “You don’t have to think.”
- “It figures it out for you – that is awesome.”
- “I really like that.”

Key Finding:

Users successfully completed the loan deduction workflow and responded very positively to the automatic calculation functionality, indicating that simplifying financial calculations significantly improved usability, confidence, and workflow efficiency.

Task PP 3 – Set up a child support deduction for an employee.

N = 8

Task Time: Not Timed | Success: 100%

Observed User Behavior:

- Users progressed through the workflow quickly with minimal confusion.
- Most users understood the deduction flow and summary screens without difficulty.
- Several users requested additional summary information, including employee details, arrears explanations, and mandated deduction information.
- Users responded positively to the simplified workflow and navigation structure.

User Comments:

- “That was easy.”
- “It seems pretty easy to navigate.”
- “It looks simple enough.”
- “I like it. It is pretty self-explanatory.”

Key Finding:

Users successfully completed the child support deduction workflow and responded positively to the simplified interaction flow, though several users requested additional contextual and summary information to better explain arrears, mandated deductions, and deduction frequency.

Task PP 4 – Give an employee 10 additional hours of PTO.

N = 8

Task Time: Not Timed | Success: 100%

Observed User Behavior:

- Most users progressed through the workflow quickly and understood the navigation structure.
- Several users had difficulty locating the Adjust Balance button because it did not stand out visually.
- Some users initially explored Accrual Activity or Accrual Details before identifying the correct adjustment workflow.
- Users generally responded positively to the terminology, workflow clarity, and informational structure.

User Comments:

- “It seems pretty easy to navigate.”
- “That is very user friendly.”
- “Very, very informative.”
- “It is cool. I like that.”

Key Finding:

Users successfully completed the PTO accrual workflow and responded positively to the navigation and terminology, though several users struggled to locate the Adjust Balance action because the control lacked sufficient visual prominence and clarity.

Task PP 5 – Set up PTO accruals for a new employee.

N = 8

Task Time: Not Timed | Success: 100%

Observed User Behavior:

- Users generally progressed through the workflow successfully and understood the overall setup process.
- Several users were confused by the term “Accrual Method” and were unsure what values should be entered.
- Some users suggested using a pull-down menu with predefined accrual options.
- Users also expressed confusion about the meaning of “Accrual Date Used.”
- Several users initially explored Accrual Activity before realizing the employee was new and had no accrual history.

User Comments:

- “I have no clue.”
- “It was pretty easy.”
- “That’s not so bad.”
- “Very good tracking system.”

Key Finding:

- Users successfully completed the PTO accrual setup workflow, but unclear terminology — particularly “Accrual Method” and “Accrual Date Used” — created confusion and reduced confidence during setup tasks.

Methodology
Research Questions
Testing Tasks
Survey Questions

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 complete payroll processing workflows efficiently?
- Can users locate required payroll functions?
- Do users understand system feedback and status indicators?

Testing Tasks

- Task 1 – How much did [employee] make between October 1 to March 15?
- Task 2 – Set up a \$22 monthly deduction for all employees.
- Task 3 – How would you set up two pay rates for an employee?
- Task 4 – In client 79009, how would you add a direct deposit account?
- Task 5 – How would you create an additional payrun for a bonus check?
- Task 6 – Hire a new employee using the New Hire wizard.
- Task PP 1 – Set up a \$25 automatic donation for an employee.
- Task PP 2 – Set up a computer loan deduction for an employee.
- Task PP 3 – Set up a child support deduction for an employee.
- Task PP 4 – Give an employee 10 additional hours of PTO.
- Task PP 5 – Set up PTO accruals for a new employee.

Survey Questions

Participants completed a post-test usability questionnaire using a 7-point Likert-scale ratings assessing ease of use, learnability, information quality, interface quality, and overall satisfaction.

Questions	Results
Overall, I am satisfied with how easy it is to use this application.	5/10 users rated 5 (Somewhat agree) 3/10 users rated 6 (Agree) 2/10 users rated 7 (Strongly Agree)
It was simple to use this application.	1/10 user rated 4 (Neither agree nor disagree) 3/10 users rated 5 (Somewhat agree) 3/10 users rated 6 (Agree) 3/10 users rated 7 (Strongly Agree)
It was simple to use this application.	1/10 user rated 4 (Neither agree nor disagree) 3/10 users rated 5 (Somewhat agree) 3/10 users rated 6 (Agree) 3/10 user rated 7 (Strongly Agree)
I feel comfortable using this application	1/10 user rated 3 (Somewhat disagree) 1/10 user rated 4 (Neither agree nor disagree) 1/10 user rated 5 (Somewhat agree) 2/10 users rated 6 (Agree) 5/10 users rated 7 (Strongly Agree)
Learning to operate the application would be easy for me.	3/10 users rated 4 (Neither agree nor disagree) 3/10 users rated 6 (Agree) 4/10 users rated 7 (Strongly Agree)

Survey Questions

Questions	Results
Using the application would enhance my effectiveness on the job.	1/10 user rated 3 (Somewhat disagree) 1/10 user rated 4 (Neither agree nor disagree) 2/10 users rated 5 (Somewhat agree) 3/10 users rated 6 (Agree) 3/10 users rated 7 (Strongly Agree)
Using the application would make it easier to do my job.	1/10 user rated 4 (Neither agree nor disagree) 4/10 users rated 5 (Somewhat agree) 2/10 users rated 6 (Agree) 3/10 users rated 7 (Strongly Agree)
The information provided for the application is easy to understand.	1/10 user rated 2 (Disagree) 2/10 users rated 4 (Neither agree nor disagree) 2/10 users rated 5 (Somewhat agree) 1/10 user rated 6 (Agree) 4/10 users rated 7 (Strongly Agree)
It was easy for me to determine my location in the application.	2/10 users rated 3 (Somewhat disagree) 1/10 user rated 4 (Neither agree nor disagree) 3/10 users rated 5 (Somewhat agree) 1/10 user rated 6 (Agree) 3/10 users rated 7 (Strongly Agree)
The organization of information on the application screens is clear.	2/10 users rated 4 (Neither agree nor disagree) 4/10 users rated 5 (Somewhat agree) 1/10 user rated 6 (Agree) 3/10 users rated 7 (Strongly Agree)

Survey Questions

Questions	Results
The interface of this application is pleasant.	1/10 user rated 4 (Neither agree nor disagree) 3/10 users rated 5 (Somewhat agree) 2/10 users rated 6 (Agree) 4/10 users rated 7 (Strongly Agree)
I like using the interface of this application.	1/10 user rated 4 (Neither agree nor disagree) 4/10 users rated 5 (Somewhat agree) 2/10 users rated 6 (Agree) 3/10 users rated 7 (Strongly Agree)
This application has all the functions and capabilities I expect it to have.	1/10 user rated 4 (Neither agree nor disagree) 1/10 user rated 5 (Somewhat agree) 4/10 users rated 6 (Agree) 4/10 users rated 7 (Strongly Agree)
Overall, I am satisfied with this application.	2/10 users rated 5 (Somewhat agree) 4/10 users rated 6 (Agree) 4/10 users rated 7 (Strongly Agree)
I like using the interface of this application.	1/10 user rated 4 (Neither agree nor disagree) 3/10 users rated 5 (Somewhat agree) 2/10 users rated 6 (Agree) 4/10 users rated 7 (Strongly Agree)