



# PEPS Usability Study Results

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## Executive Summary

Creative Services Division  
November 7, 2014

Overall, the pages did well. It was mentioned many times that PEPS staff, particularly Bruce and Paula, are very helpful. While the discussion below only mentions problems, we also received positive comments about the ease of completing several tasks.

Phase 1 (Nov. 14, 2014)

### Consultants Page

<http://previewstage.txdot.gov/business/consultants---new.html>

#### *Problems:*

- Term “Qualification-Based Selection” is not understood
- Lack of description/information of what is included in the Qualification-Based Selection link.
- Confusion of what will be found under Resources vs. Qualification-Based Selection

#### *Recommendations:*

- Rename link and add text “Architectural, Engineering, and Surveying Consultants can:”
- Add additional text to explain what items will be found and actions/processes can be performed on following pages:
  - Precertification
  - Administrative Qualification
  - Find new contracts
  - Manage existing contracts
  - Perform administrative tasks
- Remove Resources section and add to Qualification-Based Selection page as a new section.

### Qualification-Based Selection

<http://previewstage.txdot.gov/business/consultants---new/qualification-based-selection.html>

#### *Problems:*

- Under Getting Started, the link “View processes and procedures” was not understood. Too many mentions of words “process and procedures” throughout the pages.
- Links “Precertification and Administrative Qualification” were not completely understood – what about these, what will I find here?

- Many participants had a hard time finding PS-CAMS under “manage contracts.”
- “Routine Tasks” is not a good name for these tasks, as they are not done routinely or frequently.

### *Recommendations:*

- Rename link to the “Getting Started” page.
- Rename “Precertification” and “Administrative Qualification” to “Become Precertified” and “Become Administratively Qualified.”
- Change “Contracting” to “Opportunities” and only include “Projected Contract Solicitations,” “Current Contract Solicitations” and “Selected Consultants.”
- Add new section called “Manage Active Contracts.” Add descriptive text about what project managers do within PS-CAMS. Must also include “PS-CAMS” in description or link.
- Rename “Routine Tasks.”
- Add Resources area from Consultants page.

### Precertification

<http://previewstage.txdot.gov/business/consultants---new/qualificatio-based-selection/getting-started/precertification.html>

### *Problems:*

- Participants didn’t find the Note to update or renew precertification.

### *Recommendations:*

- Add new sections for “Updating,” “Renewal” and “Insurance Requirements.” Small explanation text, then linking to the pages.

### Administrative Qualification

<http://previewstage.txdot.gov/business/consultants---new/qualificatio-based-selection/getting-started/administrative-qualification.html>

### *Problems:*

- Some participants were unable to understand the difference between “selection process” and “qualification process.” Again, the word “process” was mentioned too many times and overwhelmed the participants in figuring out which was what.

- Multiple participants thought that the process to become qualified was to contact TxDOT for instructions.

### *Recommendations:*

- Follow the layout of Precertification using more sections, numbered steps and bullets points.
  - Add “Become Qualified” header above 2<sup>nd</sup> paragraph
  - Move CPA Audit and Self-Certification links below 2<sup>nd</sup> paragraph
  - Add “Submit Qualification Documentation” header. Add text and link to submittal process.
  - Add “Contract Selection Processes” above 3<sup>rd</sup> paragraph. Keep “Comprehensive,” “Streamlined,” “Accelerated” and “Federal” processes links under 3<sup>rd</sup> paragraph.
  - Add “Re-analysis” header and small text to explain it.
  - Add “Insurance Requirement” header and small text and link to information.

### Update Precertification Information

<http://previewstage.txdot.gov/business/consultants---new/qualificatio-based-selection/administrative-tasks/update-precertification.html>

### *Problems:*

- Confusion between when to use CCIS and when to email. Most participants did not read the difference and would just log in and try. The two with the most problems was “Add an employee to your firm” vs. “Transfer employees from one firm to another.”

### *Recommendations:*

- Suggest removing “transfer employees from one firm to another,” since both “add and delete employees to/from your firm” can be done in CCIS (though when transferring, it would need to be done by two separate firms).

### Directories

<http://previewstage.txdot.gov/business/consultants---new/resources/directories.html>

### *Problems:*

- Some participants didn’t understand the term “Directories”

### *Recommendations:*

- Change name to “List of Firms”

- Add both DBE and HUB firm lists.

## Phase 2

### Current Contracts Solicitations

<http://previewstage.txdot.gov/business/consultants---new/qualificatio-based-selection/contracting/current-contracts.html>

#### *Problems:*

- Participants didn't like having separate pages for the solicitation and corresponding documentation.
- Some participants thought "Current Contract Solicitations" was "TxDOT speak."

#### *Recommendations:*

- Follow RFP/RFQ layout where a solicitation is listed then all corresponding documents are in a table under it.
- Rename to "Advertised Contracts"

### Programmed Page for Active Precertified Firms

<http://www.dot.state.tx.us/des/precert/precrt1.htm>

#### *Programs:*

- Links on page brought them to old information

#### *Recommendations:*

- Remove links from page.

### Programmed Pages for Current Contracts Solicitations, Addenda

<http://www.txdot.gov/insdtdot/orgchart/cmd/cserve/profserv/notice/index.htm>

<http://www.txdot.gov/insdtdot/orgchart/cmd/cserve/profserv/addenda/index.htm>

#### *Problems:*

- Many participants were not 100% sure that there were no solicitations or addenda at the time.
- Many participants did not like having to sort through the long lists (particularly during waves) of solicitations. Wanted a way to sort.
- Many participants noted that they don't refer to the solicitations by Project ID and don't have this information on hand when looking up addenda, documents and meetings. In order to find these documents for their contracts, participants would have to open multiple PDFs and search through to see if they match.

## *Recommendations*

- When there are no solicitations or addenda, add statement: “There are none at this time.”
- Add feature that would enable the user to sort the solicitations by any of the table headers.
- The participants do refer to the contract by work type, location of service and contract breakdown (7 contracts for \$14 mil). Adding this information to the table and allowing sorting (even better multiple levels of sorting or filtering) would make it easier for the users to find only their contracts.

## Programmed Pages for Selected Consultants

<http://www.txdot.gov/insdot/orgchart/cmd/cserve/profserv/awards/index.htm>

## *Problems:*

- Many participants did not like having to sort through the long lists (particularly during waves) of solicitations. Wanted a way to sort.

## *Recommendations*

- Add feature that would enable the user to sort the solicitations by any of the table headers.

## Programmed Page for Active Precertified Firms by Work Category

[https://www.dot.state.tx.us/des/ccis/Anonymous\\_Sign\\_On.htm](https://www.dot.state.tx.us/des/ccis/Anonymous_Sign_On.htm)

## *Programs:*

- Participants didn't know when the report was finished generating.
- Had to search through legalese to find how to generate report.

## *Recommendations:*

- Add visual clue like spinning circle or clock to let the user know it is still working.
- Move legalese to bottom of page.



# PEPS Usability Study Results

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## Executive Summary

Creative Services Division

January 5, 2015

Overall, the pages did well. It was mentioned many times that PEPS staff, particularly Bruce and Paula, are very helpful. While the discussion below only mentions problems, we also received positive comments about the ease of completing several tasks.

## Consultants Page

<http://previewstage.txdot.gov/business/consultants---new.html>

### *Problems:*

- Even though the participants knew that they were considered an “Architectural, Engineering and Surveying Consultant” some didn’t notice the link to click to get into the area content. Instead they understood all of the top navigation to be related to “AES” content only and not for all of Business area.
- Participants wanted to get to content quicker and wanted to have the bullets points under “AES” clickable.
- Participants wanted to know exactly what was considered Administrative Tasks and Obtain Resources. They made guesses as to what would be under it (which matched exactly what we have under them), but they didn’t want to guess. They want to know exactly on this page.
- Those experienced working with TxDOT were looking for keywords: PS-CAMS, CCIS, and insurance.

### *Recommendations:*

- A graphical button might help to identify this as a link to be clicked.
- Add links to each of the bullet points to the second page right to where the content is. (Anchor links)
- Define what is or can be found under administrative tasks and obtain resources.
  - Perform administrative tasks with CCIS (including annual renewal, update information, submit insurance requirements)
  - Obtain Resources (including service center locations, list of firms, tools and standard sheets)
- Add PS-CAMS, CCIS and insurance keywords to the bullet items that they correspond with.
  - Manage active contracts with PS-CAMS
  - Perform administrative tasks with CCIS? Not all tasks under Admin Tasks are completed with CCIS
- Remove Find Local Contacts bullet



## Architectural, Engineering & Surveying Consultants

<http://previewstage.txdot.gov/business/consultants---new/architectural-engineering-surveying-consultants.html>

### *Problems:*

- Selected consultants is not related to finding new contracts
- Looking for keyword PS-CAMS for managing contracts.
- Looking for keyword CCIS, for many tasks
- Annual renewal is for firm only?
- “Update Precertification Information” was not clear enough, felt too board in explanation
- Didn’t understand what type of firms would be listed behind “List of Firms”
- ~~Participants considered the CCIS database a resource~~

### *Recommendations:*

- Add to the description of Find Opportunities “and know who was selected.”
- Change “Manage Active Contracts” to Manage Active Contracts with PS-CAMS”
- Add “with CCIS” to “Annual Precertification Renewal” and “Update Precertification Information”
- Change “Annual Precertification Renewal” to “Annual Firm Precertification Renewal with CCIS”
- Change to “Updated firm and employee precertification information”
- Add “able to do business with TxDOT” to “List of Firms”
- Add to the description of Perform Administrative Tasks “Make firm and employee updates to your precertification.” This way there is consistency from first page.
- ~~Add databases category to resources with link to CCIS— are there other databases they will need?~~

## Precertification

<http://previewstage.txdot.gov/business/consultants---new/qualificatio-based-selection/getting-started/precertification.html>

### *Problems:*

- Order of content, doesn’t seem to match their process thinking. Likes the order of content of AQ better.
- Had a hard time finding user ID within “Obtain Access”

- Some participants missed that you needed to fill in multiple forms to get access.
- Inconsistency of naming the forms to get access between CCIS and PS-CAMS
- Liked the PS-CAMS presentation

### *Recommendations:*

- Change order of content to:
  - Eligibility
  - Prepare Application
  - Obtain User ID
  - Submit Application
  - Update
  - Renew
  - Insurance Requirements
  - Recommended Next Step
  - Resources – right-hand button?
- Change “Obtain Access” to “Obtain User ID”
- Change “1. Obtain a User ID for using PS-CAMS by completing these forms:” to “1. Obtain a User ID for using PS-CAMS by completing three forms:”
- Make form names consistent on both PS-CAMS and CCIS pages. I prefer the full text names that is on the PS-CAMS page:
  - Request for External Access to TxDOT Information Systems (Form 1980)
  - Information Security Compliance Agreement (Form 1828b)
- Make presentation for CCIS just like PS-CAMS

### Administrative Qualification

<http://previewstage.txdot.gov/business/consultants---new/qualificatio-based-selection/getting-started/administrative-qualification.html>

### *Problems:*

- Secondary pages of the AQ process do not have contact information.
- Make the link to AQ status by firm stand out more.

### *Recommendations:*

- Add contact information to all subpages of the AQ area.
- Either make a header for AQ status by firm or make it a bullet point.

## Insurance Requirements

<http://previewstage.txdot.gov/business/consultants---new/architectural-engineering-surveying-consultants/insurance-requirements.html>

### *Problems:*

- Confused what the process is to submit insurance requirements.

### *Recommendations:*

- Explain process (similar to Precertification or AQ with steps) on how to submit insurance requirements.
- Take information from the form itself and add to webpage. Learn process on page before looking at form.

## Manage Contracts with PS-CAMS

<http://previewstage.txdot.gov/business/consultants---new/architectural-engineering-surveying-consultants/managed-contracts.html>

### *Problems:*

- Had a hard time finding user ID within “Obtain Access”
- Webinar on PS-CAMS is now out of date and needs to be updated.
- Some participants missed that you needed to fill in multiple forms to get access.
- Participants thought the process to obtain a user ID was long and excessive – three different forms are too much (same for CCIS access). They didn’t want to go back to webpage to fill in the next form, but instead wanted the form to lead you to the next form that needs to be filled out (similar to how 1828b works).

### *Recommendations:*

- Change “Obtain Access” to “Obtain User ID”
- Update presentation of PS-CAMS with new screen shots.
- Change “1. Obtain a User ID for using PS-CAMS by completing these forms:” to “1. Obtain a User ID for using PS-CAMS by completing three forms:”

## General Notes

Participants thought of the precertification for an employee and firm as very different processes, though both use the CCIS system.

