

Performance Measures: Target End-User Success

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Federal Agencies Centralized Trial-Balance System (FACTS I)

FACTS I

- Supports preparation of the *Financial Report of the U.S. Government*
- Used by 200+ federal agency accountants to report data to Treasury:
 - Define the fund groups for reporting (Master Appropriation File, MAF)
 - Transmit USSGL adjusted trial (ATB)
 - Transmit NOTES financial and non-financial data



Federal Agencies Centralized Trial-Balance System (FACTS I)

Federal Agencies Centralized Trial-Balance System (FACTS I) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites Media Links

Federal Agencies Centralized Trial-Balance System (FACTS I) Help **LOG OFF**

Preparer: NICOLE BURTON Logged-On: 6/3/2002 10:35:08 AM ET

Home MAF ATB NOTES Ref Tables Downloads Contact Info

[Edit MAF List](#) | [MAF Reports](#) | [Submit All to EMS](#) | [Check MAF Status](#) | [Add Bus Line](#)

[Getting Started](#)
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Edit MAF List

Total MAF

ATB Code	Fund Group Title	BSF	Fund Type	Bus Line	Status	Action
Status: H=In-process, S=Submitted, A=Approved, D=Disapproved						
						Add MAF
00 01 0100	test1	015	1	11	Chg A	Edit Submit
00 01 0995	Training Salaries & Expenses	151	7	10	Chg I	Edit Submit
00 01 0996	Change Training Two	351	1	01	Chg D	Edit Submit
00 01 0997	Change Training Three	351	3	02	Chg A	Edit Submit
00 01 0998	FACTS1 Training ATB Code	451	2	01	Add A	Edit Submit
00 02 0995	Change Training One	151	12	02	Chg A	Edit Submit
00 02 0996	Change Training Two	351	1	03	Chg A	Edit Submit
00 02 0997	Change Training Three	351	3	01	D	Edit Submit
00 02 0998	FACTS I Training ATB Code	451	2	01	Add A	Edit Submit
00 03 0995	Training Salaries & Expenses	151	13	01	Chg A	Edit Submit
00 03 0996	Change Training Two	351	1	01	Chg A	Edit Submit
00 03 0997	Change Training Three	351	3	03	Chg A	Edit Submit
00 03 5998	FACTS1 Training Salaries	451	2	01	Add A	Edit Submit
00 04 0995	training salaries and expenses	151	8	01	Chg I	Edit Submit
00 04 0996	Change Training Two	351	1	01	Chg A	Edit Submit
00 04 0997	Change Training Three	351	3	02	Chg A	Edit Submit
00 04 5998	facts i training salary	451	2	01	Add A	Edit Submit
00 05 0994	Presidential Incentive	920	2	05	Add A	Edit Submit
00 05 0995	Changing Fund Group	151	11	01	Chg A	Edit Submit
00 05 0996	Change Training Two	351	1	01	Chg A	Edit Submit
00 05 0997	Change Training Three	351	3	04	Chg A	Edit Submit
00 05 0998	FACTS 1 Training Salaries.	451	2	01	Add A	Edit Submit
00 06 0994	presidential incentive	920	2	01	Add A	Edit Submit
00 06 0995	changing fund group	151	11	01	Chg A	Edit Submit
00 06 0996	Change Training Two	351	2	01	Chg I	Edit Submit

Done Internet

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What are Performance Measures / Usability Goals?

Performance Measures *quantify* Business Goals

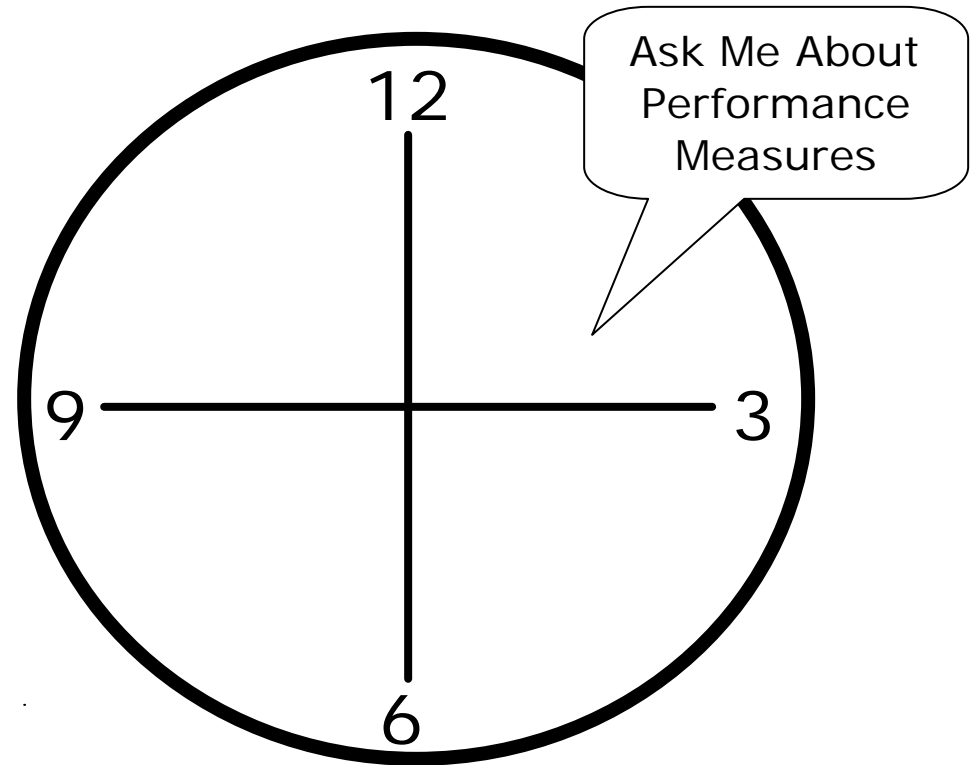
FACTS I Business Goal

“The primary reason for the FACTS I development effort is the contractual requirement to **depart GOALS** [legacy platform] **by August 2001**. The new development is not viewed as a conversion but rather **a re-engineered system** accompanied by Business and Functional Requirements. While much of the core functionality will remain unchanged (**MAF, ATB, NOTES**), the implementation will reflect **new technology**.”



When Do You Create Performance Measures?

- Early—Establish Performance Measures in 12-3 quadrant
- If not, derailment begins



Thanks to The Usability Group for the clock & quadrant metaphor, www.usability.com

How Do You Create Performance Measures?

- Gather customer & task data
- Target core customers & core tasks
- Work with operations staff, “guesstimate” metrics for Usefulness, Ease of Use, Ease of Learning, and Satisfaction

Example:

FACTS I Preparer (agency accountant)
– Ease of Use Measures

- Add or Edit MAF data: no more than **1 minute per MAF record**
- Submit ATB bulk file: no more than **10 minutes** and **2 attempts**

How Do You Know When the Design is Right?

- Conduct timed usability tests against performance measures

Step	Task/Comments	Metrics Goal/Actual		Severity	Proposed Solutions	Action
1	Login: Users continually expect the cursor to be focused on the Login field when they are presented with the screen (DG)	1 min	45 secs	3	Not a severe problem but a continuing annoyance	Next year
4	Nav Home Page: Clicked on MAF window dates before MAF Tab (DG)	-	-	2	Make the main menu buttons look more button-like, add separators	ER (cosmetic)
6	Add MAF: Didn't see Add MAF link; clicked on Add BL link (DG)(JH)	1 min	5 min+	1	Replace Add BL with Add MAF ; make Add BL a link on individual Edit screens.	ER
6	Check MAF Status: "What does Chg/Rev mean in the Status column? (JH) (I didn't know either)	-	-	3	Suggest removing Chg/Rev; may be old clutter.	ER (cosmetic)

- Correct major problems

- Conduct post-implementation studies

Example: "30% increase in productivity between FY2000 (legacy) and FY2001 (new system) as measured by Federal agency submissions by completion date"

Performance Measures Summary

- **Target core customers & core tasks**
- **Create narrow, measurable metrics**
- **Map performance measures to business goals**

