



Microsoft Dynamics NAV

Benchmark Study on the User Experience of Microsoft Dynamics NAV 5.0 and Microsoft Dynamics NAV 2009

White Paper

Abstract

This report documents usability benchmark results demonstrating that users are more successful completing job-related tasks and more satisfied with Microsoft Dynamics NAV 2009 compared to Microsoft Dynamics NAV 5.0. Comparative studies carried out in March and June 2008 indicate that, when using Microsoft Dynamics NAV 2009, novice users will experience a decrease in learning time and therefore associated costs, while also enjoying more success with greater satisfaction.

Date: November, 2008

www.microsoft.com/dynamics/nav/

Contents

| | |
|---|-----------|
| Introduction | 3 |
| The Test..... | 3 |
| Results | 5 |
| What the users particularly liked..... | 5 |
| Success Rates..... | 9 |
| Satisfaction | 9 |
| Test Results for Susan Profile..... | 10 |
| Test Results for Phyllis Profile | 11 |
| Conclusion | 11 |

Introduction

Microsoft is committed to delivering business applications that people actually enjoy using. We want the people who use our applications to find them useful, usable, and desirable—meaning that they can get their work done; they can easily discover how to accomplish tasks in the application; and they find using the application enjoyable. So we must deliver a positive user experience that enables Microsoft Dynamics users to be more efficient and productive, and with less effort and training time.

In March and June 2008, Microsoft ran two usability benchmark tests to compare the user experience of Microsoft Dynamics NAV 5.0 Classic user experience with that of the new RoleTailored User Experience in Microsoft Dynamics NAV 2009.

The purpose of the tests was to demonstrate the innovation in Microsoft Dynamics NAV and to document the improvements. The tests provide a comparative evaluation of the two versions from a user experience perspective, establish the understandability and learnability of Microsoft Dynamics NAV 2009, and highlight its particular strengths.

To measure whether improvements are being made in the user experience of Microsoft Dynamics NAV 2009, the effort to finish a business task in Microsoft Dynamics NAV 5.0 was compared to the effort to complete the task in Dynamics NAV 2009. This was achieved by evaluating how far users were able to complete a task successfully; the time **taken to complete the task, the ease of use, and the user's perceived success**. The two tests were comparative studies that primarily focused on task success—a factor crucial to a person's productivity.

The two tests were based on two roles that represent key functions in a typical company: sales and finance. One focused on the role of Susan, an order processor, and the tasks required in her position and the other on the role of Phyllis, an accounting manager and her related tasks.

This paper documents the test results, which clearly show that the RoleTailored user experience outperforms the Classic experience. Furthermore, users who are familiar with the business processes associated with finance and sales but who have little or no experience with Microsoft Dynamics NAV can quickly start using the program often with minimal or even no training, meaning that companies can save considerably on training costs. This white paper outlines the areas that people particularly liked and significant differences between the two user experiences are detailed.

The Test

To compare both user experiences, a series of tasks were performed by test participants on both clients. To counter any learning effects from one task to another, for each person, the order of the tasks was randomized as was the user experience they started on.

Two separate benchmark studies were carried out:

- Twenty people, matching the Susan persona¹ were asked to perform a total of 14 core order processing tasks on both clients.
- Twenty-two people, matching the Phyllis persona were asked to perform a total of 13 core accounting tasks on both clients.

None of the participants in the tests had any prior experience with Microsoft Dynamics NAV, but before they started, they received a short introduction to the core concepts of both the Classic and the RoleTailored user experience through a pre-recorded video tutorial.

For each task, it was determined what percentage of people were able to complete the task within reasonable time, how satisfied they were about performing the task, and how much time it took them to complete the task successfully.

The following data was recorded:

- Task success
- Time taken to complete the task

The following subjective measures were also gathered via a questionnaire, which was administered on completion of each task:

- Ease of use
- Satisfaction
- Perceived time taken to complete the task

These three subjective measures were combined into one net satisfaction score, which is the satisfaction score documented in this paper.

¹ The personas referred to here are part of the Microsoft Dynamics Customer Model, which is a tool that Microsoft has developed to document how people work within departments—and how this drives performance across organizations. The model helps ensure that Microsoft Dynamics is designed based upon a thoroughly-researched, consistent set of people and processes that apply to most businesses. The model includes 61 "personas" or "user profiles" which represent a typical view of the people within an organization defined primarily by the collection of roles they have. A role is a specific grouping of tasks that a persona is responsible for or participates in.

Results

What the users particularly liked

There were many **positive user experiences** brought to light during the tests, and many test subjects commented on features of the program that they liked or felt were an improvement compared to Microsoft Dynamics NAV 5.0 (classic).

The following are excerpts illustrating the reactions from the users.

Better UI and Easier Navigation

"I like that it has an auto-complete feature...Navigation is much easier in the newer version. ... It was a lot quicker—fewer steps to do the same thing. There's a better chance I can sit down at it and figure it out without being told how to do it."

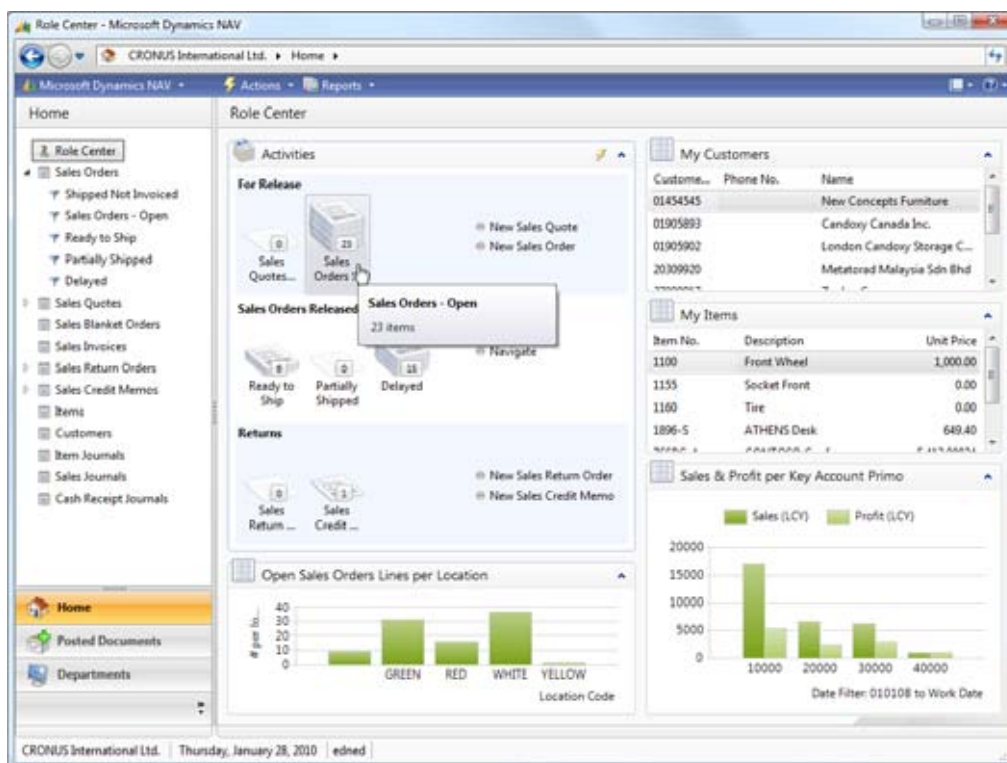


Figure 1 Easy navigation and UI of the Role Center

Filter as You Type

"Oh - that's cool," when typing "the sell-to customer number" the system automatically suggests the entire entry.

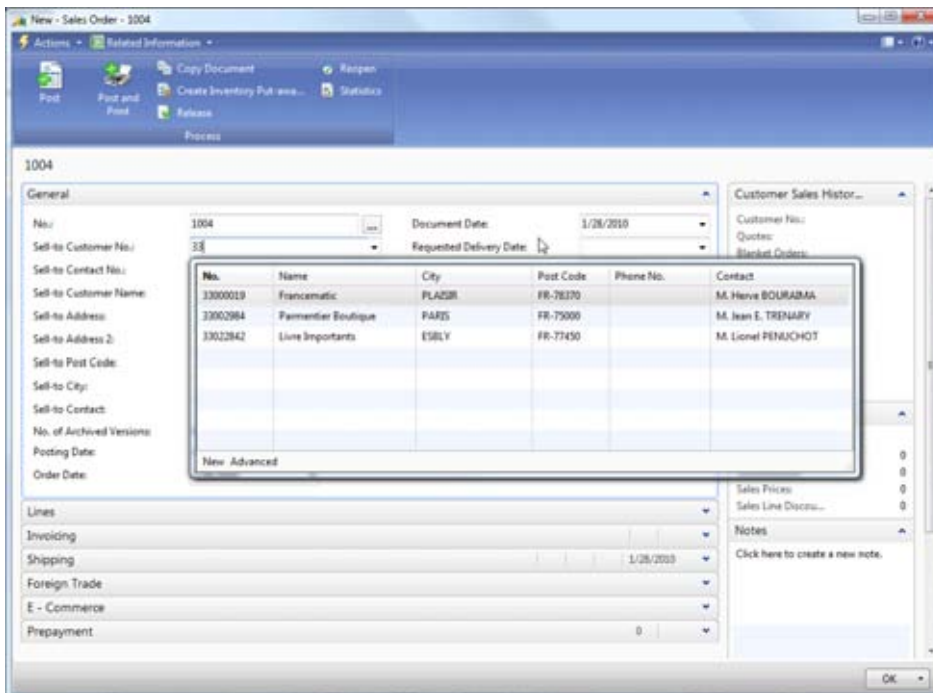


Figure 2 Filter as you type

FastTab Information Visibility

"Shipping location...It said GREEN FEDEX—I didn't even have to open that." She opens Shipping FastTab and realizes as she is opening it that the information she needed is already visible on the tab.

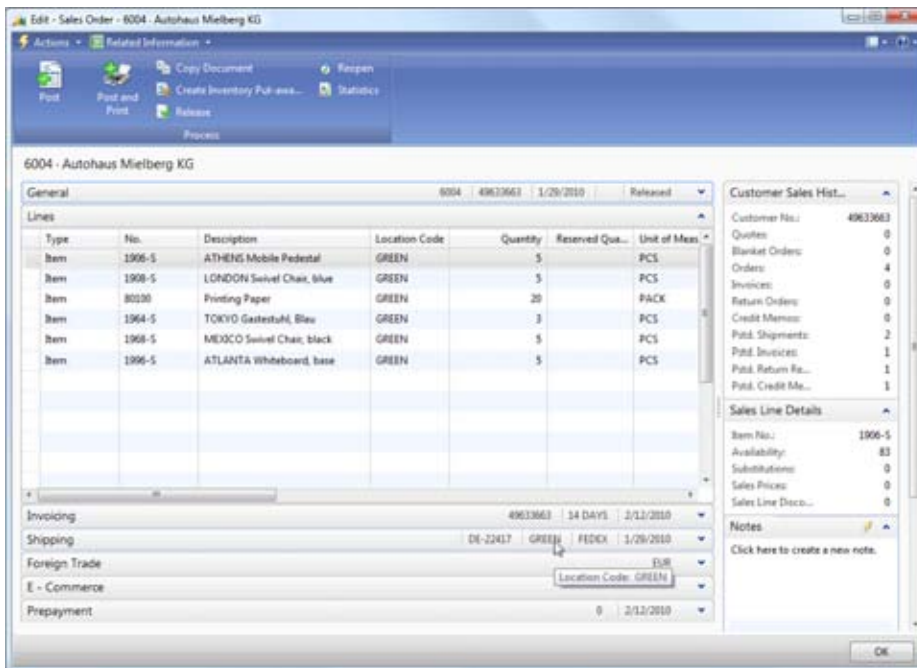


Figure 3 FastTabs give easy access to information

Office 2007 Similarity

"I do like that it uses a familiar interface...If you're using any other Office 2007 products you're going to recognize the navigation panes."

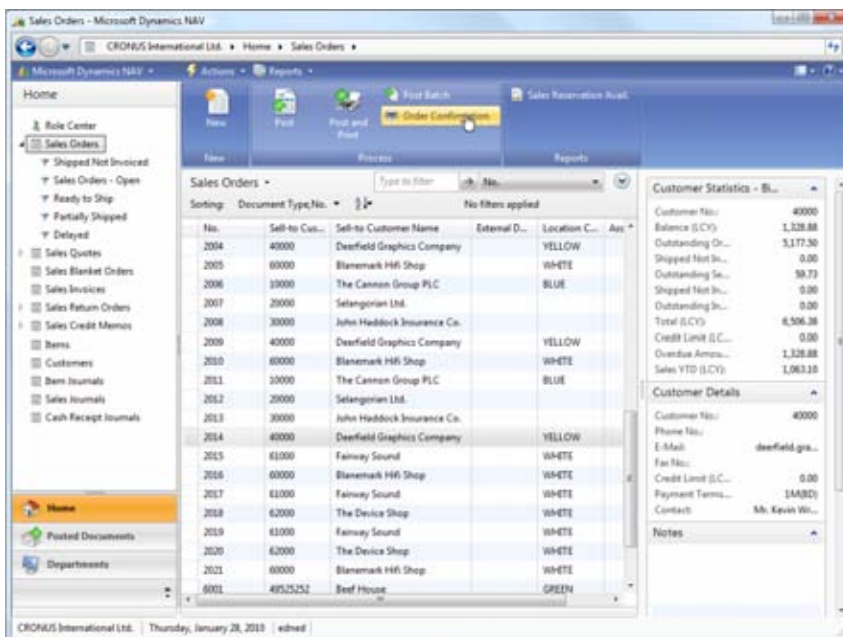


Figure 4 Familiar interface

FastTabs and FactBoxes

"I like having these (pointing to FastTabs) and having the important information on the right—and having their history." (User points to FactBoxes.)

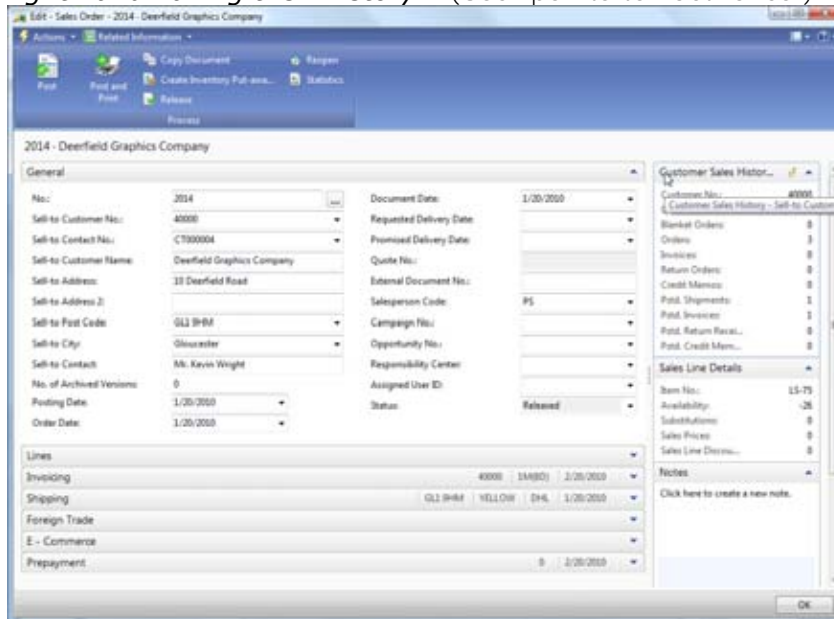


Figure 5 FastTabs and FactBoxes display the relevant information

Role Center – Navigation

"I really do like having these sales orders—just the way this is set up... having this screen—I really like it in this version. In a way I can look at the big picture and have the navigation pane on the left."

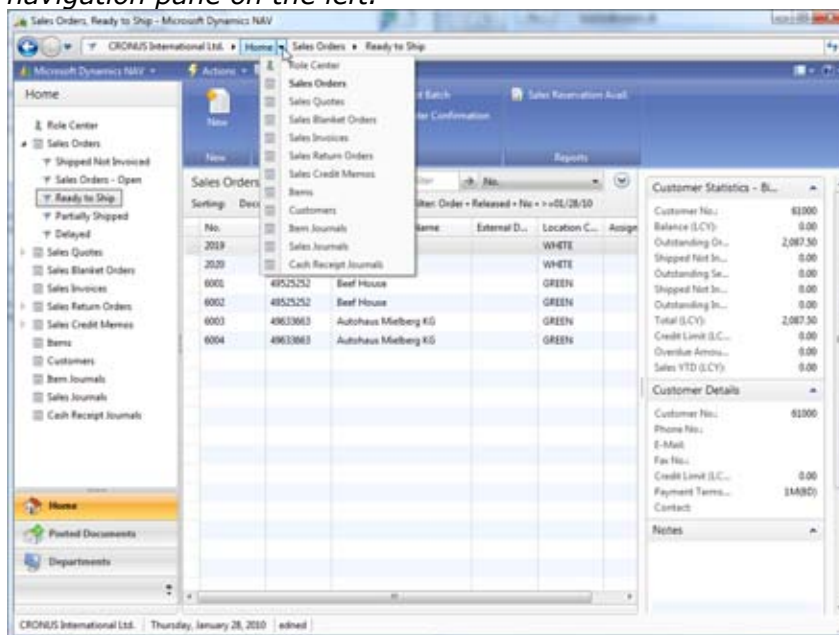


Figure 6 Easy navigation

Success Rates

Success rates help us determine whether we are performing up to our own standards when it comes to designing business applications that are easy to learn and help our customers enjoy an increase in productivity. When the results were in and benchmarking was complete, Microsoft Dynamics NAV delivered a 40% increase in overall success rate. **Let's have a look at each of the persona tests in detail.**

In the Susan test, Microsoft Dynamics NAV 2009 surpassed Microsoft Dynamics NAV 5.0 in 10 out of 12 tasks. Overall, the RoleTailored Client outperformed the Classic Client with a 68% success rate in the tasks attempted, compared to a 46% success rate for Microsoft Dynamics NAV 5.0. In 5 out of the 12 tasks, more than 80% of users were successful, and in only 4 out of the 12 tasks, were fewer than 60% of users successful.

In the Phyllis test, 9 out of 13 tasks were more successful in Microsoft Dynamics NAV 2009. In those cases where the RoleTailored Client was less successful, the Classic Client showed similar results. When comparing the mean average success rates for the two versions of Microsoft Dynamics NAV overall, participants were 14% more successful with Microsoft Dynamics NAV 2009. In particular, setup and maintenance tasks showed a 24% advantage with Microsoft Dynamics NAV 2009, and periodic and regular tasks showed a 10% advantage with NAV 2009. The only tasks that were more successful on the classic client were the annual tasks, which were only 6% more successful on the Classic client.

Overall, when we calculated the average of both tests, Microsoft Dynamics NAV 2009 significantly outperformed its predecessor with a 63% success rate.

Satisfaction

By studying satisfaction, we can start to see if we are delivering on the promise of making applications that are useful and desirable. In this study, the satisfaction rate was **calculated by using data from three different questions: "Please describe how difficult or easy it was to perform this task", "How satisfied are you with using the application to perform this task?" and "How do you rate the amount of time it took to perform this task?"** All of these responses were scored on a 4-point scale.

Not surprisingly, the results show that satisfaction with users' task performance was linked to the task performance itself. If people are able to perform a task on a new product without much difficulty, they are more satisfied with the product and vice versa. In the Phyllis test, in terms of overall satisfaction, the participants rated Microsoft Dynamics NAV 2009 13 points higher than Microsoft Dynamics NAV 5.0. The difference is most evident in the setup and maintenance tasks where Microsoft Dynamics NAV 2009 has a 31 point advantage. In the Susan test, overall participants rated Microsoft Dynamics NAV 2009 23 points higher than Microsoft Dynamics NAV 5.0. In only 2 out of the 12 tasks did users rate Microsoft Dynamics NAV 5.0 higher and both these were linked to the perceived time taken to complete the task. In one out of 12 tasks there was no difference in satisfaction. This data shows that Microsoft Dynamics NAV 2009, with its RoleTailored user experience, enhanced user satisfaction.

Test Results for Susan Profile

| Success Rates & Satisfaction scores for NAV 5.0 and NAV 2009 | | NAV 5.0 | | NAV 2009 | | Δ [†] | Δ [†] |
|--|--|------------|-----------|------------|-----------|----------------|----------------|
| | | %* | SAT | %* | SAT | | |
| 1 | Create a Sales Order (Basic) | 35% | 62 | 67% | 62 | 33% | 0 |
| 2 | Create an Invoice (Basic) | 56% | 44 | 69% | 80 | 13% | 36 |
| 3 | Create a Sales Order (special price) | 50% | 62 | 92% | 108 | 42% | 46 |
| 4 | Create a Sales Order (substitute item) | 45% | 50 | 94% | 69 | 49% | 19 |
| 5 | Provide information about an order (with shipments and customer ref #) | 23% | 71 | 46% | 82 | 23% | 12 |
| 6 | Provide information about an order (no shipments) | 54% | 88 | 77% | 125 | 23% | 38 |
| 7 | Check item availability | 66% | 65 | 97% | 106 | 31% | 41 |
| 8 | Check item prices | 25% | 50 | 39% | 69 | 14% | 19 |
| 9 | Create a basic return order | 6% | 29 | 7% | 29 | 1% | 0 |
| 10 | Create a new Customer price group and assign customers to this price group | 41% | 59 | 27% | 53 | -15% | -6 |
| 11 | Update information for one Customer | 75% | 113 | 100% | 160 | 25% | 48 |
| 12 | Find sales order and sales person | 75% | 140 | 100% | 164 | 25% | 24 |
| Average | | 46% | 69 | 68% | 92 | 22% | 23 |

* Percentage of people who were able to successfully complete a task (success rate)

† Difference between NAV 2009 and NAV 5. The higher the percentage, the better the result.

Test Results for Phyllis Profile

| Success Rates & Satisfaction scores for NAV 5.0 and NAV 2009 | | | NAV 5.0 | | NAV 2009 | | | |
|--|----|---------------------------------------|------------|-----------|------------|-----------|----------------|----------------|
| | # | Task | %* | SAT | %* | SAT | Δ [†] | Δ [†] |
| Setup & Maintenance | 1 | Add GL Account to Chart of Accounts | 78% | 78 | 94% | 150 | 16% | 72 |
| | 2 | Manage Dimensions | 44% | 76 | 39% | 39 | -5% | -37 |
| | 3 | Manage Currencies | 40% | 50 | 67% | 73 | 27% | 23 |
| | 4 | Manage Bank Accounts | 18% | 29 | 65% | 65 | 47% | 36 |
| | 5 | Check Fixed Asset | 61% | 100 | 94% | 161 | 33% | 61 |
| Regular, Periodic | 6 | Change Payment Terms for Customer | 78% | 117 | 94% | 156 | 16% | 39 |
| | 7 | Print Preview Statement for Customer | 33% | 56 | 72% | 67 | 39% | 11 |
| | 8 | Bank Reconciliation | 20% | 50 | 0% | 13 | - | -37 |
| | 9 | Periodic Depreciations | 17% | 29 | 11% | 16 | -6% | -13 |
| | 10 | Currency Exchange Rate Adjustments | 0% | 0 | 6% | 28 | 6% | 28 |
| | 11 | Print the Aged Receivables Report | 50% | 56 | 63% | 38 | 13% | -18 |
| | 12 | Create Print Preview of Trial Balance | 44% | 83 | 67% | 89 | 23% | 6 |
| Yearly | 13 | Close Income Year | 100% | 144 | 94% | 147 | -6% | 3 |
| Average | | | 45% | 67 | 59% | 80 | 14% | 13 |

* Percentage of people who were able to successfully complete a task (success rate).

† Difference between NAV 2009 and NAV 5. The higher the percentage, the better the result.

Conclusion

Overall, users were more successful and more satisfied with Microsoft Dynamics NAV 2009 compared to Microsoft Dynamics NAV 5.0. The obvious benefit to customers choosing Microsoft Dynamics NAV 2009 is that they can significantly reduce their training costs due to decreased learning time. New users are likely to have a very positive initial experience with the program, with increased efficiency in completing their tasks and added confidence using the Role Tailored user experience.

As the benchmark studies were conducted with users who had no prior experience of Microsoft Dynamics NAV, the issues encountered relate to new or novice users, mostly in the areas of understandability and learnability. The same issues are relevant for infrequent users of the program. It is important to note that since these tests only measure the initial performance of new users, they do not show us how, over time, performance will improve for new users of the program or how experienced users will react to, for example, an upgrade.

In conclusion, these important benchmark studies demonstrate that the RoleTailored user experience outperforms the Classic user experience and that with no prior knowledge of the program, users were able to carry out standard tasks successfully. These studies are therefore an excellent indication that companies who buy Microsoft Dynamics NAV 2009 for the first time will experience a decrease in learning time and reduced costs. Couple this with an increase in success rates and higher customer satisfaction and you have the right solution for increasing the productivity of your people.

Microsoft Dynamics is a line of integrated, adaptable business management solutions that enables you and your people to make business decisions with greater confidence. Microsoft Dynamics works like and with familiar Microsoft software, automating and streamlining financial, customer relationship, and supply chain processes in a way that helps you drive business success.

U.S. and Canada Toll Free (888) 477-7989
Worldwide (1) (701) 281-6500
www.microsoft.com/dynamics

The information contained in this document represents the current view of Microsoft Corporation on the issues discussed as of the date of publication. Because Microsoft must respond to changing market conditions, this document should not be interpreted to be a commitment on the part of Microsoft, and Microsoft cannot guarantee the accuracy of any information presented after the date of publication.

This white paper is for informational purposes only. MICROSOFT MAKES NO WARRANTIES, EXPRESS, IMPLIED, OR STATUTORY, AS TO THE INFORMATION IN THIS DOCUMENT.

Complying with all applicable copyright laws is the responsibility of the user. Without limiting the rights under copyright, no part of this document may be reproduced, stored in or introduced into a retrieval system, or transmitted in any form or by any means (electronic, mechanical, photocopying, recording, or otherwise), or for any purpose, without the express written permission of Microsoft Corporation.

Microsoft may have patents, patent applications, trademarks, copyrights, or other intellectual property rights covering subject matter in this document. Except as expressly provided in any written license agreement from Microsoft, the furnishing of this document does not give you any license to these patents, trademarks, copyrights, or other intellectual property.

© 2008 Microsoft Corporation. All rights reserved.