

Advanced Financials

User Testing Study

This study looks at the create supplier and enter invoice workflow. Specifically focusing on how quickly the users learn how to interact with the new UI.

Amie Wilson
UX Designer



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Overview

Topics included in the tasks

Task One

Create supplier

- Search a supplier
- Add new supplier
- Edit supplier

Task two

Invoice entry

- Add header details
- Add line details
- Save entry

Objectives

- How intuitive is the selected panel?
- Can the user find the page actions?
- Does the user interact with the anchors? (Tabbing order)
- How quickly does the user see and understand the page tabs (Search/Results and Header/line)?
- Do the users understand the Fast prompt button on the inputs?
- Do the users understand the shortcut chip next to the page tabs?



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Financials UX findings



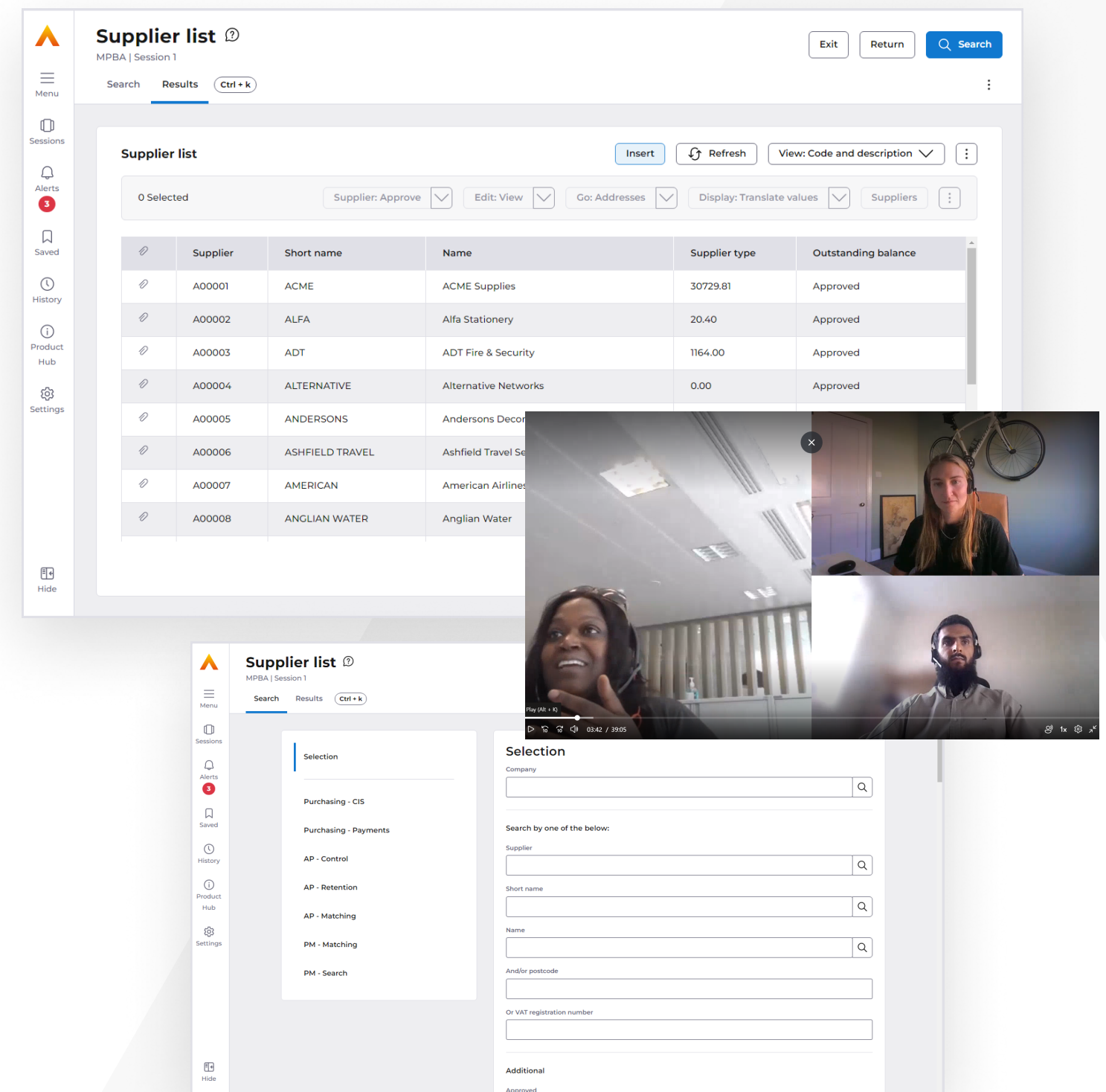
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Task 1

High level learnings

- ✓ • The main search button on the supplier list page was located easily
- ✓ • Once on the results tabs, the users knew how to get back to the search criteria tab
- ✓ • When asked to add a new supplier the users located the insert button easily
- ✓ • Users moved quickly from screen to screen understanding what/where the next step was on the screen
- ✓ • Users use a mix of mouse and tabs to move through the data entry screens
- ✓ • Users knew when the process was finished and used the saved and exit button



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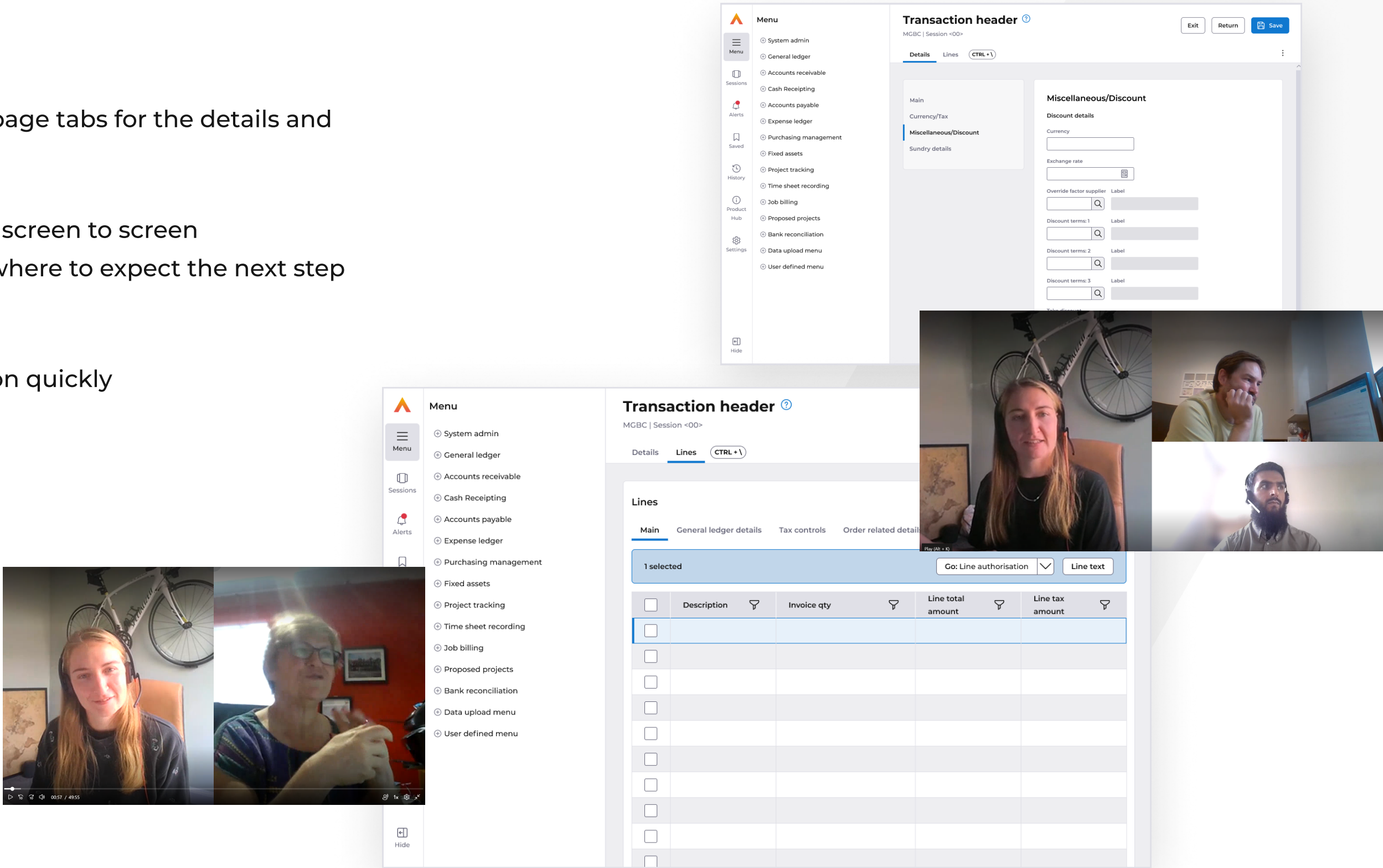


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Task 2

High level learnings

- Users quickly located the page tabs for the details and lines of information
- Users moved quickly from screen to screen understanding what and where to expect the next step on the screen
- Users found the save button quickly



Global

High level learnings

Inputs

- ✓ • Users recognised the inputs with the search button as fast-prompt
- ⚠ • Users asked to hide the inputs that didn't apply to them, and said there's always too many input
- ⚠ • Users said it takes them a while to learn where things are, and the groups and labels aren't consistent across screens
- ⚠ • Users requested mandatory fields shown at the start

Page structure

- ⚠ • Users didn't interact with the anchors, they tabbed down the screen instead. When asked they suggested they would interact with them if wanted to skip past blocks
- ⚠ • The page actions weren't found straight away
- ⚠ • Only 1 user understood the page tab shortcut chip

Grid

- ✓ • Users quickly found the selected panel and learn how to enable it
- ✓ • Users understood the grid tabs



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Financials UX findings



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UX recommendations

Onboarding

Learnings

1. All users said they felt there were lots of inputs that didn't apply to them and would like the option to hide them.
2. Without any instruction all users understood where and what the page tabs did on the search screen and data entry screen.
3. Users moved around the supplier workflow quickly without guidance. However, this flow surfaced the 'Go' pulldown as a split button, this would be a manual edit which wouldn't apply to every screen.

UX recommendations

1. Use Pendo data to drive a decluttering project in the current UI (via soft paint). This will ensure the issue isn't brought forward into the new UI whilst avoiding dev effort and existing customers will see improvements sooner than the first release
2. Add a 'More' label to the kebab menu to support findability
3. Make sure labels and locations are consistent across all screens
4. Reach out to the COBOL team to assess the development time to implement mandatory fields on page load
5. Access development time to implement page tab short cut.



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