

**Policy and Issue
Management (8.5.2)
Customer Feedback
Sessions
Findings Presentation**

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About Customer Feedback Session

- Customer Feedback Session
 - A qualitative method for evaluation of products at an early stage of development
 - Usually conducted with a small group of participants (about 5 -7). In this case 6 sessions were conducted with a total of 8 participants. All the participants were internal and external customers.
 - The sessions were task based
 - Participants gave verbal feedback as well, while doing the tasks
 - No performance data was collected
- Rationale
 - Focus on issues, not on metrics
 - Product was “semi-interactive” – it was in the form of a HTML prototype
 - Participants needed to be guided through the session. More formal evaluation methods would have been confounded by this.
- More info on FUA can be found at http://apps-ux/usability/Methods/Customer_Feedback_Session.htm

Procedure

- Participants were welcomed and introduced to the test session
- They were introduced to the test interface, which was a series of HTML image maps based on snapshots taken from a MS Visio wireframe.
- Participants were explicitly told that the interface was just a wireframe and not a fully functioning prototype – setting expectations on what to expect regarding interface behavior
- Each participant had to do a set of tasks on a task list.

Procedure (continued)

- Each task was followed by a Q & A session where participants were asked to give feedback about the interface with specific reference to the task they just performed
- At the end of the test, participants were asked to provide an overall assessment of the interface
- They were then thanked and debriefed

Notes about the wireframe

- High level framework
- The content of the actual work area is actually a placeholder – not to be taken literally
- Most links don't work
- Product was shown using HTML
- Users sometimes needed UE's help in navigating the wireframe

Key Findings: Usability Issues

Task 1
Simultaneously deploy two
controls

Some users were wondering why they did not go to a “create model” page

It was not immediately apparent to the users that this page was not editable

Many users completely ignored the Next button

“Multi-select” was not obvious

Name	Description	Type	Created By	Updated	View Results
Vendor Invoices Exceeding \$500k	Show Vendors or Buyers where (Vendor.Location = U.S.	Defined	P.Starr	23-Feb-08	🔍
Three-Way Match	Three-Way Match	Defined	P.Starr	22-Feb-08	🔍
Invoices on Hold	Invoices on Hold	Defined	M. Parr	20-Feb-08	🔍
Invoices greater than 200k	Invoices greater than 200k	Defined	P.Starr	15-Feb-08	🔍
Inactive Inventory	Inactive Inventory	Defined	M. Parr	10-Jan-09	🔍
Model 1	Model 1 Description	Defined	M. Parr	21-Dec-08	🔍
Model 2	Model 2 Description	Defined	M. Parr	04-Dec-08	🔍
Model 3	Model 3 Description	Defined	M. Parr	04-Dec-08	🔍
Model 4	Model 4 Description	Defined	M. Parr	04-Dec-08	🔍
Model 5	Model 5 Description	Defined	M. Parr	21-Oct-08	🔍

Vendor Invoices Exceeding \$500K: Model Logic

Logic: Output Parameters

Description: Show Vendors, Buyers, Invoices where (Vendor.Location = U.S. or Buyer.Location = U.S.) and the Sum of Invoice.Amount > \$500k

```

graph TD
    A[Objects: Vendors, Buyers, Invoices] --> B[Location = US]
    A --> C[OR]
    A --> D[Buyer.Location]
    B --> E[OR]
    C --> E
    D --> E
    E --> F[Function: Sum Invoice Amount > 500,000]
    F --> G[Label: Sum of Invoice.Amount > $500k]
  
```

Create Transaction Control

Recommendations

- Let users deploy models from the manage models page in addition to what they are doing right now
- Explore alternative designs to the two-step process (for the Next button issues)
- Add a column with checkboxes to select the rows

“It never occurred to me to click the 'next' button”. P1

“It's not really intuitive as to how you proceed from here”. P4

Home: Main Menu | You are logged in as <UserName> | Preferences Help Logout

Manage Controls | Manage Controls | Create Control

Create Control: Define Control Details

Back | Next | **Submit** | Cancel

Models

Name	Description
Vendor Invoices Exceeding \$500k	Vendor Invoices Exceeding \$500K
Invoices greater than 200k	Invoices greater than 200k

View - Show Logic

Details

*Priority
 *Status Active
 *Data Sources
 Related Controls

Tags

Available Tags

- Business Process
 - Financial Management
 - IT
 - Manufacturing
 - Order to Cash
 - Procure to Pay
- Risk
 - Breach of Security
 - Financial Fraud
 - Regulatory Compliance
 - Theft of Assets
 - Theft of Services
- User-defined

Selected Tags

Move All
Remove
Remove All

Participants

Actions + - Manage Groups

Participant	Type	Effective Date	Assign Issues	Notify	Status
<input type="text"/>	User		Yes	Yes	Active

Comments

Add Comments

Two participants wanted to be able to change the name and description of the control in this page (not just at the model level)

The submit button was not readily visible

Two users wanted to see the sections in a different order

Users were not sure if the edits applied to both the controls selected or not

Define Control Details

Recommendations

- An alternative design to the two-step process would mitigate the submit issue. Plus, the button will appear at the bottom of the page too (in the actual product)
- Reconsider the order of different elements on the page
- Design change is required to make it look less like a Master-Detail. The table on top should be removed
- Repeat the name and description and make them editable

Key Findings: Usability Issues

Task 2

Create an Access Control for
segregation of duties

- Home: Main Menu6
- Manage Controls
- Manage Access Entitlements
- Manage Access Global Conditions
- Create Access Control
- Create Transaction Control
- Manage Transaction Models
- Create Transaction Model
- Manage Participant Groups

Manage Controls **Create Control**

Create Access Control: Define Control Details Submit Cancel

Details

Control Information

* Name: Create Supplier & Pay Supplier
 Description:
 * Priority: 5
 * Status: Active
 * Enforcement Type:
 * Data Sources: Approval Required Prevent Monitor
 Related Policies:

Tags

Available Tags: Business Process, Financial Management, IT, Manufacturing, Order to Cash, Procure to Pay, Risk, Breach of Security, Financial Fraud, Regulatory Compliance, Theft of Assets, Theft of Services, User-defined

Selected Tags:

Move All, Remove, Remove All

Manage Tags

Participants

Actions: + - ✗ Manage Groups

Participant	Type	Effective Date	Assign Issues	Notify	Status
Bob James	User	1/21/2010	Yes	Yes	Active
NA-Purch	Group	1/21/2010	Yes	Yes	Active

Control Logic

Logic **Conditions**

Create Supplier & Create Payments or Vouchers

Element Name	Description	Database	Platform	Element Type	Control	Operator
<input type="checkbox"/> AND						
<input type="checkbox"/> OR						
<input type="checkbox"/> Create Payments(R12 Create Payments)				Entitlement		OR
<input type="checkbox"/> Create Vouchers(1) People Soft Create Vouchers				Entitlement		OR
<input type="checkbox"/> OR						
<input type="checkbox"/> People Soft Create People Soft Create Suppliers				Entitlement		OR
<input type="checkbox"/> Create Suppliers(1) R12 Create Suppliers				Entitlement		OR

((Entitlement)Create Payments(1) - ((Function)AP_APPRANK_SALTO(Instance: ESS R12-TMP)) - ((Function)AP_APPRANK_CHECK_ACT(Instance: ESS R12-TMP)) - ((Function)AP_APPRANK(Instance: ESS R12-TMP)) - ((Function)AP_APPRANK_INVOICE(Instance: ESS R12-TMP)) - ((Function)AP_APPRSET(Instance: ESS R12-TMP)) - ((Function)AP_APPSUMT(Instance: ESS R12-TMP))) OR ((Entitlement)Create Vouchers(1) - ((Page Definition)CHE_PAYMENT_PAI(Instance: PSFT 9.0 FIN-202)) - ((Page Definition)CHE_STATUS_PA(Instance: PSFT 9.0 FIN-202)) - ((Page Definition)CHE_EXPRES(Instance: PSFT 9.0 FIN-202))) AND ((Entitlement)People Soft

Comments

Add Comments

Define Control Details

Users were comfortable with the idea of using the same interface for creating both access and transaction controls

No recommendations as there were no usability issues on this page

Key Findings: Usability Issues

Task 3
Edit controls and create tags

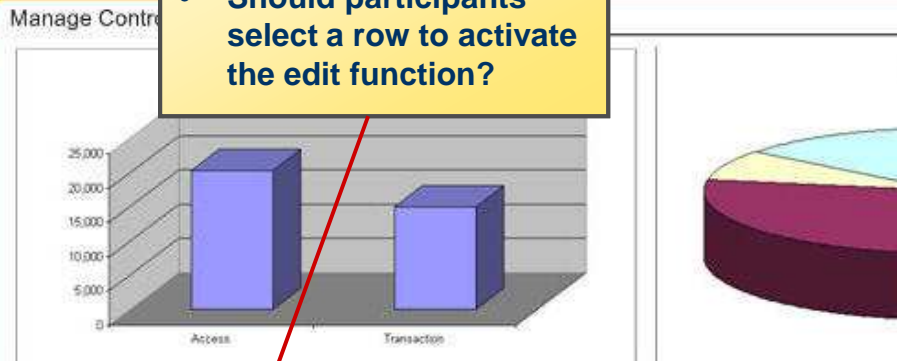
Define Control Details

There were no issues with task 3a (simple edit)

Recommendations

- Move Manage Tags to another page (you could make it its own task) or give it a separate place on this page
- Figure out which columns need to be displayed by default. If the problem persists across the product, consider making the hidden columns

- The Edit pencil was not easy to notice
- Should participants select a row to activate the edit function?



Controls

Saved Views: All Controls

Actions: View | [Pencil] | [Add] | Assign | Add Comments | Run | Schedule | Cancel Process

Open	Edit	Copy	Assign	Add Comments	Run	Schedule	Cancel Process	Manage Tags	Create Access Control	Create Transaction Control	Import Policies	Export Policies	Priority	Status	Type	Risk	Comments	Run S
Opening ...													1	Active	Transaction	Financial Fraud		Ni
200k													5	Active	Transaction	Financial Fraud		Nc
y Sup...													2	Active	Access	Breach of Security		Nc
													1	Inactive				
cate...													1	Active				
atching													1	Inactive				
it Limit													3	Active				
unt Mis...													2	Active				
													2	Active				
P010 New Policy 21													1	Active				
P011 New Policy 22													1	Active		Breach of Security		N
P012 New Policy 23													1	Active		Financial Fraud		N
P013 New Policy 24													8	Active		Breach of Security		N
													2	Inactive		Financial Fraud		N
													1	Active		Financial Fraud		N
													2	Active		Financial Fraud		N
													4	Active		Financial Fraud		N
													1	Active		Breach of Security		N
													1	Active		Financial Fraud		N

Columns Hidden: 0 | Columns Frozen: 0

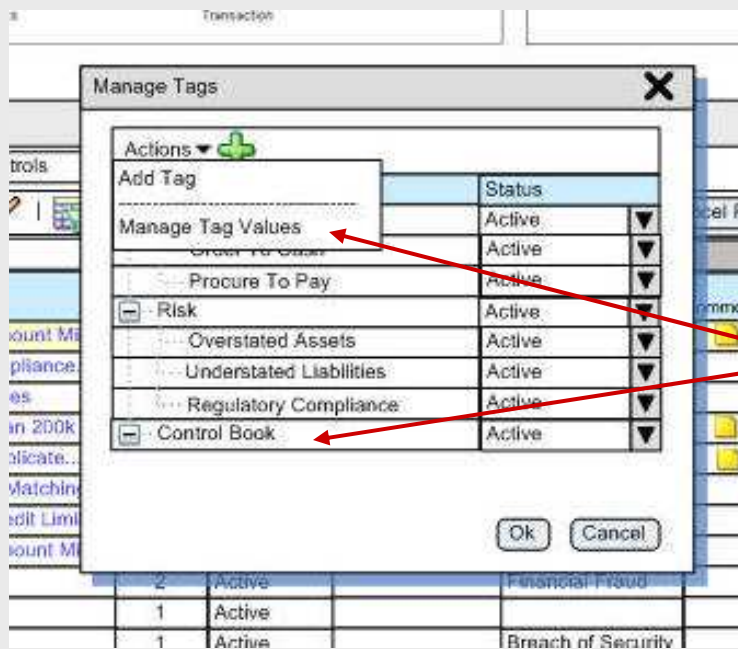
Participants did not notice hidden columns. Two of them didn't want any columns to be hidden

It was a little hard for most participants to figure out what Manage Tags did. The whole process of creating tags and sub tags and assigning them was not very intuitive

Define Control Details

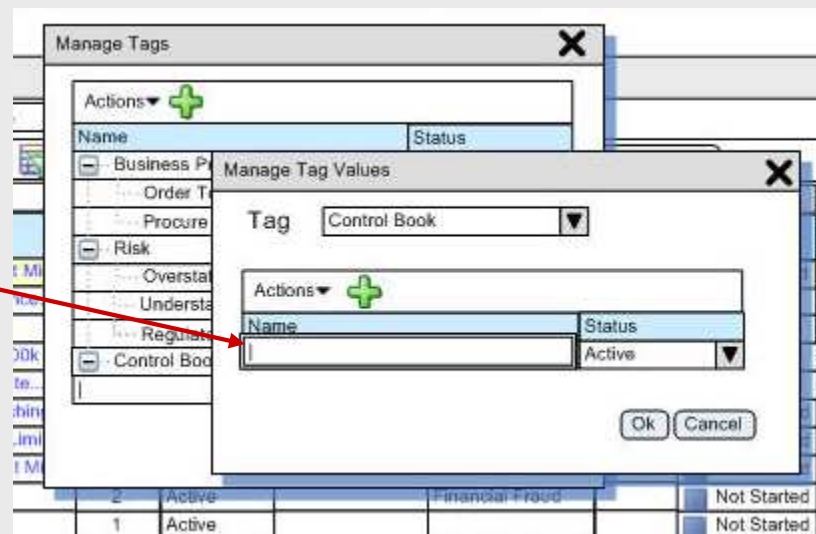
Recommendations

- Either scrap the tree paradigm, or follow fusion guidelines completely for editing a tree



Adding child-level tags was a little bit problematic for some participants (the process was not intuitive). Participants also clicked the Control Book tab to add a child tag

The fact that they were adding a child-level tag was not immediately apparent on this dialog box



Key Findings: Usability Issues

Task 4
Managing Issues

Manage Issues

Recommendations

- Consider different names for the “View by” options
- Alternative designs can be explored to resolve the “View by” problem

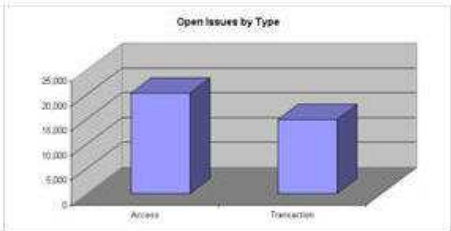
Home: Main Menu6

Issue Management

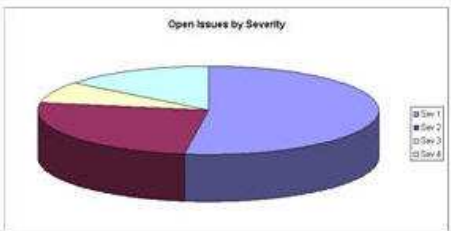
Manage Issues

Tasks

- Analyze Control Issues
- Manage Approvals
- Manage Simulations



Open Issues by Type



Open Issues by Severity

Search Results: Control Issues

View By: Control Summary

Actions View | Assign Add Comment Extract Control Summary

Control Name	Pending Issue Count	Control Type	Control Priority	Issue Type	Assigned To	Control Last Run
Monthly Vendor Payments exce...	5	Transaction	5	P2P	P.Starr	14-Jan-08
Year-End Sox Compliance...	21	Transaction	2	Compliance	P.Starr, S.A...	30-Jan-10
Create Supplier and Pay Supplier	6	Access	2	Compliance	P.Starr, S.A...	30-Jan-10
Invoices greater than 200k	1	Transaction	1	P2P	P.Starr	21-Apr-08
Some policy	4	Access	1		P.Starr	
Some other control	36	Access	1		P.Starr	
Yet another control	25		3		P.Starr	

A couple of participants were not very sure what “Issues” were

The “View By” was not noticed by most of the participants. A lot of them chose to use the filter icon instead

Questions and Answers

A large, stylized graphic of the letters 'Q&A'. The 'Q' and 'A' are in a dark blue, bold, sans-serif font. The ampersand '&' is in a lighter blue, also in a sans-serif font, and is positioned between the 'Q' and 'A', overlapping them slightly. The entire graphic is centered on the page.

Q&A