

Infor FMS / HMS

Heuristic Evaluation June 2022



BACKGROUND & METHODOLOGY



Background



Usability Sciences - User Research & Usability, was contracted to assess the overall usability (ease of use) of the Infor HR Talent and Infor Financials & Supply Management interfaces for the purpose of identifying opportunities to streamline the design process and improve user experience.

User-friendly interfaces are:

- Easy to learn
- Efficient to use
- Memorable
- Prevents errors
- Provides an acceptable level of satisfaction



Methodology

The assessment is essentially a 100-point inspection, otherwise known as the Heuristics of Interface Design

1. Visibility of system status
2. Match between system and real world
3. User control & freedom
4. Consistency & standards
5. Error prevention
6. Recognition rather than recall
7. Flexibility & efficiency of use
8. Aesthetic and minimalistic design
9. Help users recognize, diagnose and recover from errors
10. Help & documentation

Methodology

Heuristics are scored using the following scale:

| Problem Severity Ratings | | | | |
|--------------------------|-----------------------|-------------------------|-------------------------|-----------------------|
| 0 | 1 | 2 | 3 | 4 |
| Not a problem | Cosmetic Problem Only | Minor Usability Problem | Major Usability Problem | Usability Catastrophe |



About This Document

What is involved in a Heuristic Evaluation?

- A Heuristic Evaluation involves having two or more user experience / usability experts review user screens, navigation flows, etc.
- Collaborative evaluation occurs and observations as well as suggestions are provided to the client, based solely on the opinions of the experts involved in the review.
- Heuristic Evaluations are appropriate for identifying potential interface issues and non-compliant usability best practices but should not be used as a replacement for end-user testing.

What is not involved in a Heuristic Evaluation?

- A Heuristic Evaluation does not involve user testing. Therefore, only observations and suggestions are presented in this report.
- Additionally, a Heuristic Evaluation may not cover all use cases of a product for a particular group of target users.

What are the next steps?

- We highly recommend that all suggestions in this document are validated in the usability lab with end-users from the target market.

Heuristics Explained

| # | Principle | Expectation |
|---|-------------------------------------|---|
| 1 | Visibility of system status | The system should always keep users informed about what is going on, through appropriate feedback within reasonable time. |
| 2 | Match between system and real world | The system should speak the users' language, with words, phrases and concepts familiar to the user, rather than system-oriented terms. Follow real-world conventions, making information appear in a natural and logical order. |
| 3 | User control & freedom | Users often choose system functions by mistake and will need a clearly marked "emergency exit" to leave the unwanted state without having to go through an extended dialogue. Support undo and redo. |
| 4 | Consistency & standards | Users should not have to wonder whether different words, situations, or actions mean the same thing. Follow platform conventions. |



Heuristics Explained, cont.

| # | Principle | Expectation |
|---|---------------------------------|--|
| 5 | Error prevention | Even better than good error messages are a careful design which prevents a problem from occurring in the first place. Either eliminate error prone conditions or check for them and present users with a confirmation option before they commit to the action. |
| 6 | Recognition rather than recall | Minimize the user's memory load by making objects, actions, and options visible. The user should not have to remember information from one part of the dialogue to another. Instructions for use of the system should be visible or easily retrievable whenever appropriate. |
| 7 | Flexibility & efficiency of use | Accelerators — unseen by the novice user — may often speed up the interaction for the expert user such that the system can cater to both inexperienced and experienced users. Allow users to tailor frequent actions. |



Heuristics Explained, cont.

| # | Principle | Expectation |
|----|--|--|
| 8 | Aesthetic and minimalistic design | Dialogues should not contain information which is irrelevant or rarely needed. Every extra unit of information in a dialogue competes with the relevant units of information and diminishes their relative visibility. |
| 9 | Help users recognize, diagnose and recover from errors | Error messages should be expressed in plain language (no codes), precisely indicate the problem, and constructively suggest a solution. |
| 10 | Help & documentation | Even though it is better if the system can be used without documentation, it may be necessary to provide help and documentation. Any such information should be easy to search, focused on the user's task, list concrete steps to be carried out, and not be too large. |





FINDINGS & RECOMMENDATIONS



Key Opportunities/ Recommendations



Though the majority the design elements are mechanically correct, the following will improve overall usability of the platform:

Improve overall consistency and intuitiveness of design/ user interaction/ and process flows so that it is easy to learn (without extensive training), find and complete tasks.

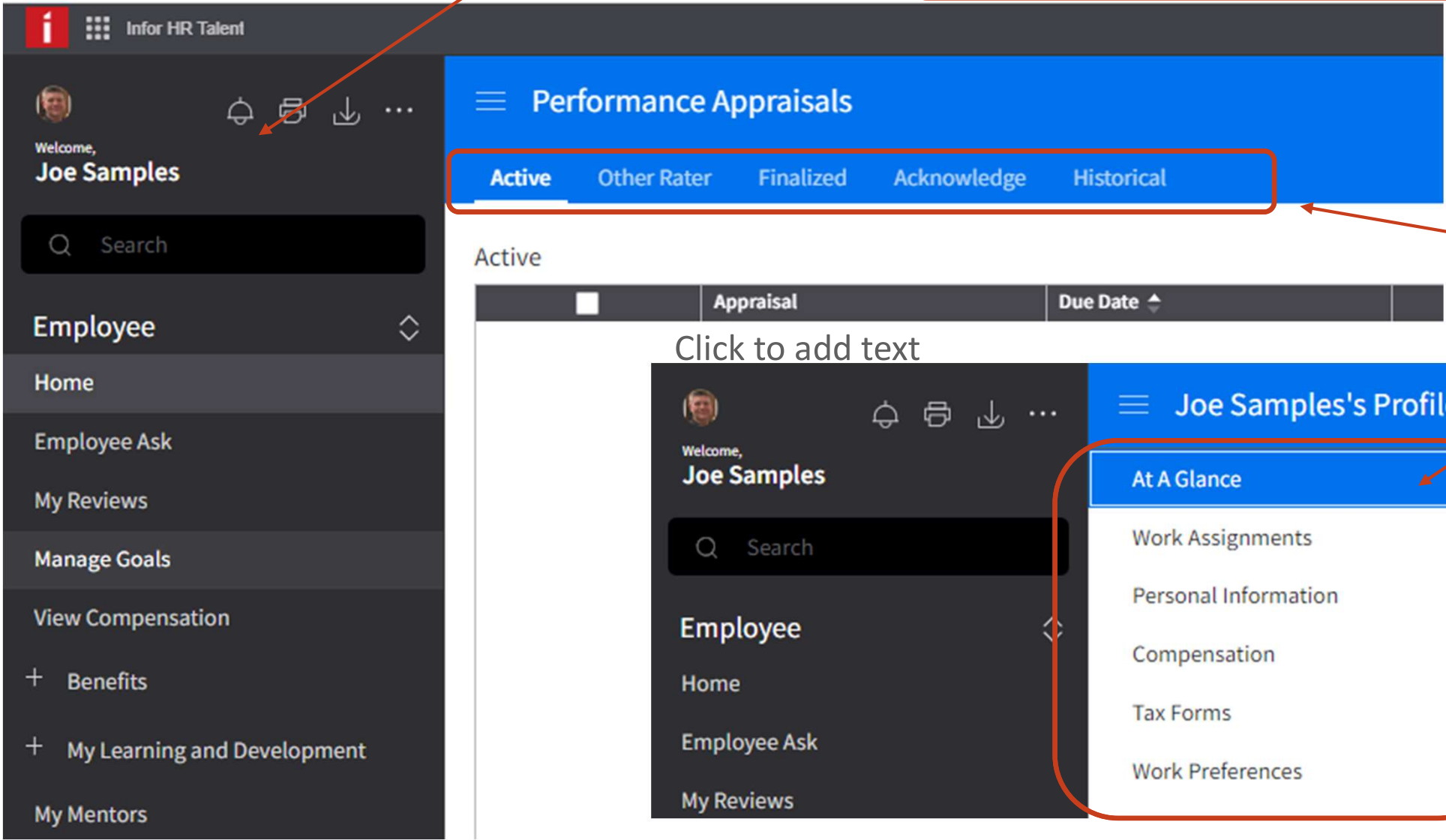
Simplify navigation so that users can locate the features/ functions they need, maneuver within the site without getting lost, or make mistakes.

Improve learnability and discoverability of features and functionality that would increase overall efficiency and ease of use. Examples: 'Search' (main nav), 'Coleman' & 'Smart Help'



Improve Consistency

Left nav (black) is a different color, design, and includes a different set of features than page-level nav (blue).



Location and treatment of navigation varies.



Improve Consistency, cont.

Some forms are embedded into the interface (C), others appear as pop-ups (D).

Use and treatment of tables vary. (A) appears to be a drop-down of options, whereas (B) is a way to view and access information.

| Goal | Goal Type | Entere... | Start Date | Due Date | Action Plan Status | Action Plan Results Status | Include... | Weight |
|---|------------------|-----------|------------|------------|----------------------|----------------------------|------------|---------|
| <input type="checkbox"/> *Accountability Category: *Performance Type: *Performance Objective | *PERF. OBJECTIVE | Manager | 1/1/2018 | 12/31/2018 | Action Plan Not Used | 0 % | No | 30.00 % |
| <input type="checkbox"/> *Improve Internal Communication Category: *Service Type: *Organizational | *ORGANIZATIONAL | Manager | 1/1/2018 | 12/31/2018 | Action Plan Not Used | 0 % | No | 40.00 % |



Simplify Navigation

Some page titles do not match the navigation label on the black panel and do not accurately describe the purpose of the page. Ex: Employee Asks appears to be a page to log concerns and issues, not ask a question.

Profile appearing in two places, with different features will likely cause confusion.

A



The screenshot shows the Infor Financials & Supply Management 4.0 Soho interface. The top navigation bar is blue and contains the title 'Inventory Manager' and a search bar. The left sidebar is black and contains a hamburger menu icon (A) and a search bar. The main content area displays a table of items within 10 percent of reorder point. The table has columns for Item, Item Description, Vendor, and various inventory metrics.

| Item | Item Description | Vendor | Vendor Name | Active | Bin | Stock... | Reor... | Allocate... | On O... | SOH ... | SOH ... | Major... |
|------|---------------------------|--------|--------------|--------|-----|----------|---------|-------------|---------|---------|---------|----------|
| 1 | File Cabinet, 4 Drawers | 2 | Staples | Yes | | 10 | 10 | -18 | 1 | No | No | |
| 116 | HOODIE TWITCH LIGHTWEIGHT | 5 | Amazon, INC. | Yes | | 6 | 10 | 0 | 0 | No | Yes | |
| 128 | 6 ft cable | | | Yes | | 1 | 10 | -1 | 0 | No | Yes | |
| 129 | 12 ft cable | | | Yes | | 8 | 10 | -1 | 0 | No | Yes | |
| 130 | 18 ft cable | | | Yes | | 5 | 10 | -1 | 0 | No | Yes | |

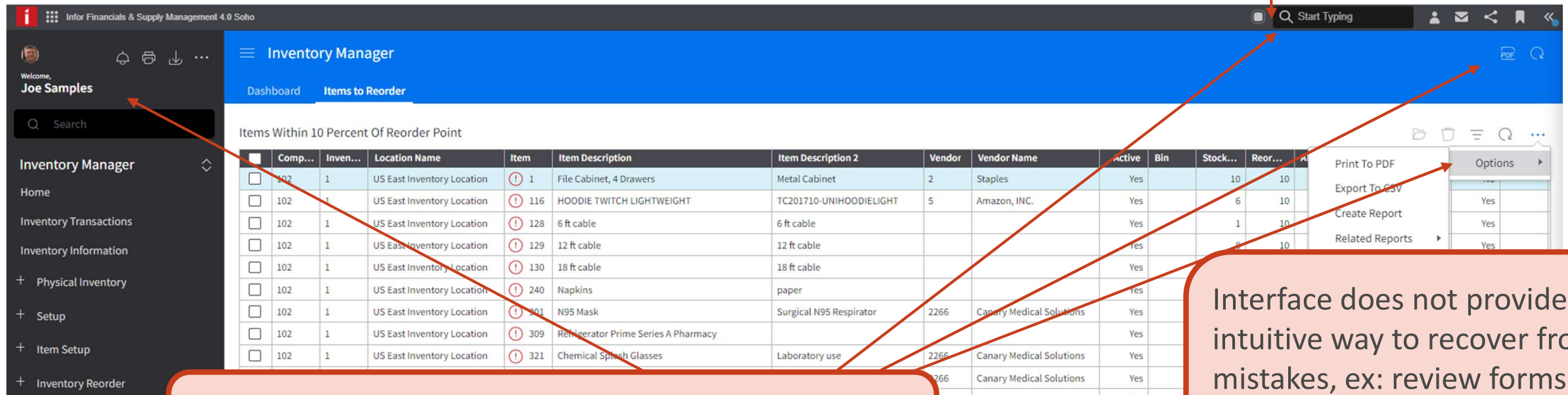
Not intuitive to click the hamburger menu (A) to open and close navigation. If closed (ex: User wants to see more of a table or page), it's difficult to orient themselves or return to a previous screen.

Not clear how using the back button may impact entry or functionality of site which may cause errors or hesitancy on the part of the user.

Improve Learnability

The interface appears to have been written for experienced/ trained users, evident in the language and absence of contextual help.

Purpose of 'Search' (main nav), 'Coleman' & 'Smart Help' unclear, which may users to overlook or not use them.



The screenshot shows the 'Inventory Manager' interface. The top navigation bar includes a search bar with the text 'Start Typing'. The main content area displays a table titled 'Items Within 10 Percent Of Reorder Point'. The table has columns for 'Comp...', 'Inven...', 'Location Name', 'Item', 'Item Description', 'Item Description 2', 'Vendor', 'Vendor Name', 'Active', 'Bin', 'Stock...', and 'Reor...'. The table lists various items such as 'File Cabinet, 4 Drawers', 'HOODIE TWITCH LIGHTWEIGHT', '6 ft cable', '12 ft cable', '18 ft cable', 'Napkins', 'N95 Mask', 'Refrigerator Prime Series A Pharmacy', and 'Chemical Splash Glasses'. A sidebar on the left contains navigation options like 'Home', 'Inventory Transactions', 'Inventory Information', 'Physical Inventory', 'Setup', 'Item Setup', and 'Inventory Reorder'. An 'Options' menu is visible on the right side of the table, with items like 'Print To PDF', 'Export To CSV', 'Create Report', and 'Related Reports'.

Each page is packed with features that require prior knowledge, training, and awareness (often hidden in 'more options' at the page, content, or header level.)

Interface does not provide an intuitive way to recover from mistakes, ex: review forms or undo requests. It appears that users must have access to and awareness of audit functionality.



NEXT STEPS



Next Steps

- Identify common use cases for roles to streamline options
- Re-word or rephrase page titles to better align to the functions
- Identify and standardize page & table types
- Understand overall usability of filter/ search functionality on tables (appearing below column header)
- Standardize the location of call-to-action buttons/ controls
- Standardize navigation so that users can find what they need and orient themselves quickly
- Create a review page that allows users to review the information before finalizing it
- Provide introductory/ explanatory text for 'Search', 'Coleman' & 'Smart Help'



THANK YOU



Account Executive

Peter Welpton

pwelpton@usabilitysciences.com

Research Lead

Adrienne Guillory

aguillory@usabilitysciences.com

Confidential – For Internal Use Only - Not for distribution