User Research Plan
Procure-to-Pay Process

Version 1 (10-28-2022)

1. Background

- The AP team is working on a feature to automate purchase order entry, similar to AP automation. As part of that feature, the system links purchase orders to corresponding vendor invoices and flags discrepancies in quantity, price, rate, etc. (called “2-way matching”). Then a human reviews the flagged transactions and resolves them. This task is performed during the procure-to-pay process. Just automating purchase orders is a big benefit to customers, since 21% of bills in Intacct are initiated in Purchasing.

- The UX design team does not have a journey map of the procure-to-pay process, and the UX designer assigned to the project does not have deep knowledge in the Purchasing domain. To design the feature, the designer needs to understand the users’ context -- business process, the actors, and any pain points.

- The Supply Chain Management team received requests for a 3-way matching feature, which is like the 2-way matching but also includes comparing the purchase order to the receiver document (after the shipment of goods is received).

- The 3-way matching SCM feature was released in an Early Adopter program in 2021 R1. After enabling the feature, nearly all smart events and many triggers stopped working. In addition, it was not compatible with the PO price variance feature. Based on these issues, early adopters turned off the feature and the SCM team removed the code from production.

- The UX team proposed a user study, specifically a contextual inquiry, with current users from companies using the Purchasing module. This will be used to understand the business process steps, the players, and pain points, and potentially some of the needs causing accounting departments to implement smart events.

2. Objectives

Business Objective & KPIs

Objectives	KPIs
Understand the actors and steps in the procure-to-pay process.	A journey map is created of the procure-to-pay process showing the actors and steps.
User thoughts, questions, motivations, and information needs are identified.	The journey map of the procure-to-pay process includes user mindset information.

Users' emotions about the procure-to-pay process are noted.	The journey map of the procure-to-pay process shows the "ups and downs" of the user experience.
Identify users' pain points in the procure-to-pay process.	Specific areas of focus for the UX designer are documented in the analysis document.
Any significant user needs that differ between 2-way matching and 3-way matching in Intacct are identified.	Differences in the processes are documented in the analysis document or in a flowchart.
Identify opportunities for LockStep integration.	The analysis document calls out areas where LockStep could make tasks easier.
Identify if there are additional steps which could be automated.	If there are additional automation opportunities, they are documented in the analysis document.

Research Success Criteria

- What qualitative and quantitative information about users will be collected?
    - No planned collection of quantitative information.
    - Qualitative information will include:
        - Process steps, the actor performing them, the order and any dependencies
        - Material used or referenced during the process
            - Intacct pages
            - Other references – applications, cheat sheets, documents
            - Examples of anything physical, such as a packing slip
        - Policy regarding variances
        - Notes on why the process works as it does or why the actor performs their part as they do
        - Pain points
        - User emotions
        - User comments
- What documents or artifacts need to be created?
    - Study script
    - Consent form
    - Tagged session recordings
    - Journey map
    - Findings report
    - Presentation
- What decisions need to be made with the research insights?
    - Is there a way to provide both the 2-way matching and the 3-way matching and allow customers to choose which to configure? Or should Intacct only offer one matching solution? Or phased implementation, making 2-way available, followed by 3-way (replacing 2-way?).
    - Are the user roles/permissions aligned with roles in the process and their needs?
    - Can LockStep be integrated to make the process easier for users? Where in the process?
    - Are there additional automation opportunities?

3. Research Methods

Secondary research

- Document review
  - Requirements for AP automation with 2-way match
  - Original requirements for 3-way match
  - Early Adopter feedback from original design
- Competitive analysis
  - Mai has performed competitive analysis for the matching feature in the following products: Acumatica, NetSuite integrated with Fast Four Scan (3rd party), Tipalti, Timberscan, and Stampli.
- Ecosystem/Sage products compatibility
  - Is there a need to be able to share data to or from other systems in our ecosystem?
  - Sage X3 includes a comprehensive 3-way matching capability.

Primary research

- Contextual inquiry – remotely, since it's likely the participants are working at home.
- Interviews if contextual inquiry is insufficient or follow-up is required.

4. Research Scope & Focus Areas

Question themes

- 3-6 high-level topics of questions.
- What are the primary tasks in the procure-to-pay process for your company? What tasks do you perform? Can you show and tell me about your process, including any tools you use (calculator, email, etc.)
- Is there someone responsible for comparing discrepancies between purchase orders and vendor invoices? And what about comparing purchase orders and receiver documents? Is the matching automated or are you doing it manually? Are there scenarios when you don't do matching and comparison, other than bills that don't have an invoice like utilities, rent, phone?
- Tell me about what happens when a discrepancy is found. Do you correct the receiver or purchase order? Do corrections require approval?
- As an approver, what information do you reference to make your decision?
- If you had a magic wand and wanted to make this process better, what would you wish for?

Design focus components

- Utility: Is the functionality useful to intended users?
- Efficiency: Identify time-savers in current process or opportunities to create a time-saver design

- Persuasiveness: Are desired actions supported and motivated?

Primary user scenarios

- Employee wants to purchase a product or service for business purposes, or the company needs to purchase stock for reselling. How is that request initiated? Is there a request form? (a web form? sent to whom?). Is there an approval process after a request is submitted?
- When a purchase request is created/approved, where/to whom is it routed? Is there a vetting process to determine which vendor to select? If it is a new vendor, is there an approval process?
- How does the purchasing document get into Intacct? (Entered manually? Scanned and interpreted?)
- When goods are received, who receives it? When there is a receiving document (packing slip) what is done with it? Where is it routed? Does someone compare the receiving document to the purchase order? If there are discrepancies between the documents, who resolves it? Is there an approval process for documents which were discrepant? What information does the approver reference?
- When the vendor invoice is received, is it a physical or electronic document? Where is it routed and what steps are done prior to making the payment?
- Does someone compare the vendor invoice to the purchase order? If there are discrepancies between the documents, who resolves it? Is there an approval process for documents which were discrepant? What information does the approver reference?
- Who makes the payment? What does the approver reference?
- Is the process any different when purchasing inventory stock?
- Are there other exceptions or variations on this process, aside from vendor invoices that don't have a matching purchase order (like a utility bill or rent payment)?

5. Research Participant Profiles

Since there are multiple actors in the procure-to-pay process, the study requires participants who collectively cover the process from beginning to end. Because companies having different staffing and assignments, the recruiting will be done by asking interested people to identify any of the major activities they perform. We'll then select 2 participants per activity.

The activities listed in the survey screener are:

- Create purchase orders
- Manage vendor purchases
- Receive vendor invoices
- Resolve differences between PO and vendor invoice
- Approve or reject vendor invoices
- Approve or reject new vendors
- Issue payment to vendors
- Manage the accounting processes for AP and/or Purchasing
- Define the configuration of Intacct AP or Purchasing modules for your company
- Other. Please specify ____________

It's likely that some participants perform more than one of the activities, so there might not be a two-to-one correspondence between the number of activities and the participants. For instance, an AP staff accountant might be responsible for receiving vendor invoices and issuing payment to vendors.

Ideally the study will include participants who have integrated 3rd party AP automation with Intacct and others who enter transactions manually; some who only review transactions automatically flagged due to discrepancies and others who manually compare the transactions to find the discrepancies; some participants from small companies (low end of Medium segment) who have people wearing many hats, and some from larger companies that have entire departments to make purchases and payments. A few "nice to have" characteristics are companies who use the inventory functionality, and people who participated in the Early Adopter program for 3-way matching.

To constrain time and cost, participants will not exceed 15 people.

6. Study Session Setup

To participate, people must have the following setup:

- The computer they use to access Intacct, with Teams meeting software already installed.
- Call into the meeting from their desk/work area, located where they conduct their day-to-day work responsibilities.
- Logged into Intacct and other systems they use as they conduct procure-to-pay activities (such as email, storage system for electronic documents).
- Physical materials they use to perform their work, such as cheat sheets, calculators, etc.
- Ideally, a headset.

Facilitators setup:

- Computer with two Teams meetings initiated, sharing the screen of one. (*need to find the instructions for how Melanie did this*).
    - Electronic consent form
- Schedule of participants: know the participant's name and their company.
- Study session script
- Tagging instructions
- Timer
- Headset

7. Plan Schedule

Activity	Start date – Due date	Notes
Write study session script	11/2 – 11/3	
Prep for sessions		Consent form, instructions on how to run 2 meetings concurrently (1 for observers), timer, headset. Practice, practice, practice.
Review of study session script	11/4	By someone in Research team (Brandon, Carly, Daphne)
Recruit and schedule participants	11/3 – 11/7 (can continue if needed until 11/15)	
Practice session with someone acting as customer	11/7	
Conduct study sessions	11/8 – 11/16	Record sessions, review/edit transcript ASAP after session
Analyze findings	11/8 – 11/23	Can start as soon as first session is complete
Thanksgiving holiday	11/24 – 11/25	
Create journey map	11/28 – 12/5	
Create report	12/5 – 12/8	
Present findings	Prior to 12/15	