FOLIO Usability Test - 06/2021

Acquisitions & eHoldings

Summary:

1. Users were able to understand the interface or become familiar with as they were working through the various tasks.
2. All users had issues with serials and had trouble being able to complete that task. No user fully completed it as far as we could tell.
3. Users were much more comfortable in the eHoldings section, even users who had not used it before.
4. Users seemed to understand the various apps necessary to complete the tasks but would sometimes miss the navigation within the apps. With time and looking in them, though, users were able to complete most of the tasks given.
5. A couple of users mentioned training and needing to understand some of the quirks that FOLIO has to be able to work around what they may need to do.

Recordings of all tests completed can be found here:
https://cornell.box.com/s/0yrertm5mmikbxksq7720o3u2pis5wu7

Full Report:

You have to create a purchase order for the book "ICARDA-Caravan [x]" provided by ICARDA. The order should be billed and shipped to LTS Acquisitions. We expect to pay $100 for the book and to charge it to fund "310 Sciences". Please use the template "Monograph Order (LTSMono)" for this purchase order.

Orders to Actions and then goes with New - noticed that it all gets filled in. Does not know how it came up with the PO numbers. No sure what all the checkboxes mean. Tried clicking on Vendor to fill it in but then found Look-up and found ICARDA. Copied the PO from this screen before Save & Close. Found the PO Line and then went to Add new PO Line and tried to save before filling out all the info. Wasn't sure what to do with all the sections and had to look through them.

Moves to the Orders app and clicks on Orders in the left search area, then goes to Actions and New. Selects the template and then finds the vendor. Tries to type it in but then goes to lookup when can't and searches for it/selects it. Going through all the various information one by one to make sure it is correct. Went ahead and clicked approve and then saved. Scrolls down to add the PO Line. Reading the information on the page, then wasn't sure about the title but was prompted it from the questions. Looked through the other information but didn't add optional items. Checked on some of the pre-filled items, then found the cost details and input them. Saw the Fund distribution and went to add it. Searched for 310 and found it/selected it. Scrolled back up to make sure everything was there before clicking Save & Open Order. Clicked on that button but then saw the required material type and selected it. Then saved and opened the order.

Went to orders and then stopped on the page. Clicked Orders in the search area and then went to Actions and new. Selected the appropriate template and for vendor went right to Lookup – searched ICARDA and found it. Saved and closed that and got the notification that it was saved. Exapnded the sidebar for this PO to see better. Clicked on PO line and then went to the title lookup. Was told to just type it in for the purposes of the test. Scrolled through the information and then got to cost section to input that information. Added a fund distribution, searched for 310 and found it. Found and changed material type to book then scrolled back up to double check information. Saved and closed.

Went to Orders and then New, clicked on Monograph Order. Went right to vendor lookup and searched for icarda. Found it and selected. Clicked approved for the summary and then saved. Went to look up title for PO Line and couldn't find it so just typed it in. Added in the information for physical unit cost and then found the fund and added it. Selected material type and scrolled back up through then saved.

(original notes lost due to page change) Clicked through all of the steps easily. Added the title with a lookup instead of typing it in (is this common?).

You may now approve and open the purchase order you created in the previous step.

Looking for what to do with the order itself to be able to do this. Updated the purchase order but wasn't sure what else to do to complete this set of tasks. Not sure how to go back to the purchase order, had to be guided to it and chose to search for the number. Purchase order line suggested she could get to the purchase order. Found the actions and chose Approve – received the notification. Wasn't sure where to click to open – didn't know why to be asked if really wanted to open it.

Did this in the previous step.

In the line details went to actions but didn't see what they were looking for. Used the back arrow and then actions. Hovered over Approve and then clicked on it to show that it was approved. Clicked actions again and clicked open.

Approved and opened from the last screen, selected that so it would automatically approve it.

Went to click actions on the Line Details page but then did back arrow and selected Actions then Approve. Then Actions and Open, followed by Submit.

Find and note the PO Number.

Moused around on the Line Details but then found the back around, found the PO number at the top of the PO – 12489

Found it, 12487

Found it, 12443. Writing down on own end to keep track of for future use.

Found it, 12441

You have approved the purchase order. Please input and process the provided invoice for “ICARDA-Caravan [x]” from ICARDA. - Link to Invoice (should be made available to the participant): https://docs.google.com/document/d/1foxw7SihX4rCv362M0g8C2Mj_GerwFQLEkxaOLcxy1A/edit?usp=sharing

Goes to edit but then doesn’t think that’s correct. Goes back to the purchase order and then tries Received. Not sure where to put in the invoice – found way to inventory. Went to edit the PO but the related invoices went away. Found the way to the invoices app with prompting. Filled in all the information and found the way to do it. Then saved and closed and invoice was saved.

Opened the invoice from the link and then was looking around the screen for where to click. Found Invoices and went there. Clicked on New. Going back and forth between invoice to add this information. Looking at the optional items for invoices and add them in as known. Locks the total amount at 100. Found the vendor information and added the invoice number and tried to paste the name but had to use the lookup. Went there and pasted then searched and selected. Checked to export to accounting. Should upload the invoice in this area? Would usually save it and upload the file and would upload it but couldn’t figure out how to download it. Scrolled back through and made sure that the information was accurate and then Saved. Notice that this appears to be a duplicate invoice. Cancels and goes back to the edit screen and changes the invoice number to 5 and then saved. Scrolled down to the invoice lines and was looking in that area, made way to Add. Looking for the purchase order number but didn’t write it down – supplied the number and searched for it. The item came up and clicked the checkbox then saved. Read the invoice information and made sure the item was there.

Went to invoices and then searched for the PO number but no results. Thought it might be tricky because of current role. Went to New to create an invoice, input a date and then selected some other information. Went to click on vendor name and couldn’t so went with lookup, searched and found it. Clicking on things that remember from training around invoicing. Saved the file to the computer and then uploaded it. Saved the invoice. Scrolling through the information and was looking for adding the item. Went to edit and then back out, clicked on new Invoice line, searched for the invoice number and didn’t get the correct thing. Searched for PO number and found it, clicked the check box and saved. Looking at the sub-total and it still reads 0 and is curious why it doesn’t read 100. Needed to update somehow, didn’t do it automatically after adding the Invoice line.

Went to invoice and searched for the 001 and found previous test. Just doing 002 for this one. Hovered over vendor name before clicking on organizational lookup. Changed all of the information and exported to accounting. Prompted to just add a link and found button then added it. Saved the information. Went to the order lines and searched for the purchase order number. Found the one that was created and then selected it. Checked that all info was correct in PO.

Went to Invoices, New, adding the correct information from the invoice into the required fields. Looked up the vendor information again and added it in. Both users have chosen to export to accounting. Added the link easily. Saved and closed. Hadn’t added the line item to the invoice (I didn’t know this was a step). Adding that, searched for the PO number, found it and added it to the invoice.. Clicked on the invoice line information then clicked edit.

You have confirmed that what was ordered has been received in expected condition. Complete receiving the order for “ICARDA-Caravan [x]” from ICARD.

Goes back to Orders and looks at it, wasn’t sure about related invoices so went back to invoices and found the FOLIO invoices number and copied it. Went back to order and then found the item, went to Receive. On Receiving, collapse doesn’t work on the first loading of receiving item. Have to fill out all the items in the line to save? Had to click on the checkbox to save the receive item.

Looking on the invoice page still, then going through the apps but didn’t find what they were looking for. Back to the Invoice information and scrolled to the Invoice Line, clicked on the item, then selected the PO number to open in a new window. This opened the Orders window to the PO Line Details. Is looking for Receiving but didn’t notice Apps until prompted. Clicked on the Title from the PO Line Details in Order and then got put into Inventory at this specific items. Went back to Apps and clicked on Receiving. Looking at the keyword search area, switched to PO number and searched for it. Found it in the results and clicked on it. Read the POL details and then found the Receive button. Clicked on that and clicked the checkbox, made up some information for barcode, verified other information, then clicked Receive.

Went to Apps and Receiving, searched for icarda. Found the item that was created and collapsed some information. Scrolled down and wasn’t quite sure where to click. Tried clicking on the title but didn’t actually do it. Found the expected section and the Receive button. Thinking from the training that there was something else. Clicked on the title and ended up on the Inventory app. Clicked on the item for the expected receiving instead of Receive button and got the pop-up. Clicked on Quick Receive.

Went to Orders and then searching by PO number. Selected PO and then went to Actions and Receive. Clicked on the item, clicked Receive. Checked the box, made up a barcode, and clicked Receive.

Went to Apps and then Receiving, searched for “icarda caravan” and clicked on it, selected the item and then clicked on the checkbox. Set the location and caption as needed and clicked Receive.

Ensure that you can find “ICARDA-Caravan [x]” now in the available resources in the library.

Goes to inventory and then swaps to item. Searches for item name. Went to Instance and tried that. Then went and found the item and clicked on it.

Clicked on the Title in the middle section of Receiving and then found the link to the title in the details. Clicked on it and went to Inventory, then viewed holdings. Scrolling through this individual holding looking for some information but not finding the barcode. Having trouble finding this barcode, could not find.

Clicked on the title and went to the Inventory item. Expanded the holdings and found it there.

Clicked on the title in the Receiving and went right to it in the Inventory.

Went directly to Inventory and searched for icarda caravan. Found it in the list.

You are receiving the order for the new issue (issue [x] (2021)) for Journal of the International Association of Buddhist Studies from EBSCO. Please check in this new issue

Went to receiving and then swapped to search by title. Was thrown off by 2 different items and then wasn't sure what to click. Ended up clicking on the PO line to be taken to that. Then wasn't sure what to do in the receiving area. Not sure what to do with it and was frustrated and did not do this task to completion.

Goes to Receiving and then Title. Searches for it but has an extra space at the end so it found no results. Clicked on the item in the list with expected receipt date. Didn't find an expected items and went to edit. Reading through the information but not finding anything there. Expecting to have the issue in the received section to mark it as received, trying to find the place to enter the issue that is being received. Decided to call it here and then go with it.

Went to apps and Receiving. Went to Title search and typed out the full title. Found the item in the search. Not quite sure what to do here with nothing showing up under expected. There's nothing set up to actually receive it. Not sure what to do in this case.. What would happen when creating new. Went to Orders and then searching for Ebsco but clicked off of that. Went to a new order and started filling it out. Searched and added EBSCO, added the PO as ongoing. Added a PO line with the title for the issue. Searched for the title and added it. Saw the acquisition method and order format required. Made up the price for this item and then added a location. Changed material type to serial. Went through and approved and opened. Went to the inventory to add the item. Prompted that we hadn't received it yet so closed that and went back to receiving. Found the item that was created and clicked on it in Receiving. Recalls having an option to add volumes and the Expected field was filled in. Not sure that what they were receiving because it didn't have the information for the volume.

Typed out the full title and then couldn't find it. Said to go to any EBSCO and went to search by vendor and found it. Went to the Receive and then updated that journal to receive the item. This wasn't how they do it, will be manually adding pieces for receiving instead of doing the order that they did.

Went to receiving and then searched by keyword for the journal. Trying to spell it out and not finding it – is on the Keywords option.

Add the title below to the package Brill Journal Online Collection – Biology from the provider Brill. Crustaceana IAWA Journal Seeing and Perceiving Contributions to Zoology Insect Systematics & Evolution

Went to eHoldings and searched for the title, opened up the edit screen and then went to packages. Tried to look at only not-selected packages but it didn't show up. Went and searched for this and found it. Clicked to Add Holding.

Reading and double checking the task and then copied the package name. Found eHoldings at the top and then found Packages in the search area, and then pastes in the package name. Scrolled a bit but then back to the top and clicked on the package. Looked at the Add all titles then went to actions and edit for this. Decided not to edit and tried to Cancel but it didn't do anything. Just clicked the X instead and it took out of this. Clicked add all titles and said no for that. Scrolled down further and found titles, then understood that section was for these. Found the specific title and opened it. Clicked Add to holdings.

Clicked on Packages and searched for that. Found it at the top. Scrolled down through the information and was reading it. Tried clicking to add all titles, didn't want to do that. Scrolled to Titles and used the search feature to look through them. Selected the appropriate title and then added it to holdings.

Searched for the provider and saw Brill but then switched to Title then Packages. Searching for brill online collection. Scrolled down and found the package. Went into the package and scrolled to find the titles. Tried to click on edit but then that wasn't what they needed. Scrolled and found the Seeing and Perceiving. Thought they would need to add new and type it in. Clicked on that and then clicked Add to Holdings.

Went to eHoldings and searched for the package title, almost clicked to add all holdings but then scrolled down to find IAWA. Went into it and then scrolled through the item to read info. Went back to check that it wasn't selected before adding to holdings.

Add the package below from the provider listed to holdings. Engineering for Medicine and Biology Journals, American Society of Mechanical Engineers (ASME) Oxford University Press Journals (VIVA), Oxford University Press ImechE Journals (JISC), Sage Royal Society of Medicine Press, Sage Sage Premier Journals (EIFL), Sage

Went and searched for this, found it and then clicked Add Package to Holdings.

Reading and double checking the task before starting. Closes out of the previous title and package, then searches for the package. Finds it at the top and opens it. Adds package to holdings and then not sure so cancels. Goes back and clicks that button again and then agrees to add all titles.

Continued to search for packages. Found the correct one at the top of the list and added all titles.

Searching by provider and found Sage. Found some but not the right one, then found the correct one and then went add package to holdings. Added all titles.

Searched for it and then found the journal. Added all to the holdings.

Add coverage dates of 2020-01-01 to 2023-01-01 to this package.

Went to Edit and then found coverage settings. Used the calendar to select the dates and then saved it.

Went to actions and edit, scrolled down and found Coverage Settings. Clicked on the calendar icon and then used the navigation items to change year and month for both start and end date. Added both dates and then saved and closed.

Scrolled through the information but wasn't seeing any information about this (Facilitator note: is there a heading that should be there for coverage on the information page for a package since it exists in the edit screen?). Went to edit and then found the coverage information and added it. Looked at a title to make sure that it reflected there.

Went into edit and had to read the headings but found coverage quickly. Typed in the dates. Saved and closed.

Went to edit the package, found the coverage date section and used dropdowns to select year and month, then calendar area for date.

Remove the title below from the package “The American West” from the provider “Adam Matthew Digital Ltd.”   Collection of papers by William Thornton Parker A day with the cow column in 1843 A descriptive sketch of the Spirit Lake region (northwestern Iowa) A vocabulary of the Snake or Shoshone dialect A journal of the overland route to California, and the gold mines

Searched for the title and found it, clicked on collapses and didn't think they were attached. Selected packages and saw it, went to edit that and removed it from package. Went back to the search and then found it and clicked on it to confirm that it was indeed removed.

Went to the package search and searched for that package. Found it and then went to the Titles and used the search icon to get a narrowed list. Clicked out of it to scroll and then found the title. Clicked into it and went to Actions and then Remove title from holdings and confirmed.

Searched in packages again but didn't see that it was selected. Filtered by only selected, went that the package was not selected. Searched for the title and noticed that it was not selected already so was already good.

Searched by Package for the american west, found and clicked on it. Went to the Titles scrolled, wasn't sure they were in order. Clicked on the appropriate item and went to actions and remove, then confirmed.

Searched for the package and then found the specific title. Clicked the Actions and then removed it from holdings and confirmed.

Remove the package below from EBSCO from holdings.   Ebsco eBooks Consumer Health Reference eBook Collection eBook History Collection (EBSCOhost) - North America Science Reference eBook Collection Biomedical Reference Collection: Expanded

Searched for this and found it, went to Actions and then Remove from Holdings and then clicked it. Taking a while because there is a lot in that package, she guessed.

Went back to the package search and pasted that in. Found it at the top of the list and clicked on it. Went to actions and then Remove from Holdings. Confirmed to remove it.

Went back to package search and found the package at the top. Went into it, chose actions and remove from holding and confirmed.

Went back to the search box and searched for ebook history collection, was already not in holdings.

Went to search for Consumer Health and found it. Clicked on Actions and then confirmed to remove.

Additional Comments

(Note: This pertains to serials in the task that had to be skipped and then gone back to later) Went to Receiving and then the vendor lookup and selected EBSCO. Selected Aboriginal history. Clicked on Receive and then put in a caption v.2 no.3 at Olin, selected and clicked Receive.

Not really anything to add except that sometimes when someone is watching it can feel like a little pressure and frazzled but that's really it.

More knowledge and training with the acquisitions might be helpful. First impression of eHoldings is that it's much easier to figure out despite not using it before.

Frustrating with the receiving and not sure that many/any people have done this so far. Has some knowledge of eHoldings for putting in notes but not for receiving and is in the dark of it. Thinks a lot of it will be understanding how this goes with the training to be able to do this. Trying to figure it out on your own is next to impossible - not intuitive enough and still too clumsy to figure out on your own. Need to figure out where the interface is clumsy and how to work around with that.