Report on Software Audit – Accomplish CashManager

Introduction

This report details the findings of the RNZFB audit of Accomplish CashManager 2009 in December 2008.The methodology was to examine a series of tasks as defined by Accomplish using sighted and blind testers and both JAWS version 10 (www.freedomscientific.com) screenreader and Zoomtext 9.1 (www.aisquared.com) reader/magnifier. The testers were not experienced with financial software and were not prior users of CashManager. They were both, however, experienced users of Adaptive Technology and IT literate. Whilst specifically tasked to look at accessibility this is closely linked to usability and recommendations have been made on both areas.

Install Software

Download CM from website.

The process is accessible however some minor usability changes would significantly improve it. After filling in the form the focus goes to the sidebar and it is not clear that a further download button is required. Both JAWs and Magnification users would find it difficult to know that further action was required without searching.

Install from CD.

A general usability issue through many dialogue boxes within Cash Manager is that they do not automatically read when presented. The JAWs user can access them using the JAWS – B (Read Box in Tab Order) command. It would improve usability if this were to be addressed in future builds.

Create new company

Whilst working through the 'New Company' wizard a JAWs user has to request the dialogue boxes using the JAWS – B (Read Box in Tab Order) command.
At step 6 the labelling of the fields is poor which could be confusing however the help text does explain what is required and why.

Bank account details

On entering the set-up screen it is not immediately obvious that a tabbed dialogue is presented which is potentially confusing however the process is clearly explained in the help system.

Enter starting balances, Statement Importing options, EFT Options & Other Details

No additional issues.

Preferences setup

GST set up

The Activate GST checkbox is reported as '3 State Button'. This could cause confusion initially and we would recommend that it be labelled as a check box if that is the appropriate control type.

Invoicing set up

Look-up button is accessible to screenreaders only via 'F2'.

Email set up

The TAB order in this screen, whilst perfectly logical to a screenreader user, differs from the visual representation significantly and could cause confusion to support staff and low-vision users.

Preferences

The RNZFB recommends that the option to 'remember size and position of windows' be checked if JAWs users implement scripting.

Features

3 State Button label on Checkbox.

Editing Customers, Suppliers and Products

The 'Contact' tab has an odd tab order. See previous comment around tab order. When entering address detail the second line is unlabelled.

Transaction Entry

F2 required for the search button in various fields.
Whilst creating an invoice the 'Gross Down' button is unlabelled.
Print preview in an accessible manner is not simple. (See later)

Run reports

Reports have the same drawback as invoicing as regards the Print Preview process – whilst screenreader users are able to access the majority of the output it is quite fiddly to have to save the report in an appropriate format and then open it with another program in order to check the information. No additional comments on GST or Other Reports categories.

Create a graphical report

The process is very accessible and, with use of the 'Values' button a screenreader user can gain a good understanding of the graph. It would be good, but not a showstopper, if this information remained available when saving to excel rather than merely embedding a graphic.

Create a transfer file and email it

In the 'Creating CashManager Transfer File' Dialogue box we were unable to access the browse button either using TAB or F2.
As previously discussed dialogues do not read automatically in JAWS.

Re index and validate files

The final pop-up box does not read automatically otherwise no problems.

Register product

The Help menu suggested that there should be a Help > Register menu which I was unable to find however restarting CM gave me the option to register which worked well as far as I was able. By entering a random number an error message was generated which did not auto read.

Set up budget

Process worked well and the ability to save as Excel is useful.

Import Bank statement and reconcile it / Match transactions manually

This is possibly the hardest part of the program for blind users but low-vision users will, depending on their degree of dependence on speech, cope well. The tick symbol is neither spoken nor can it be reached using an alternate cursor. It is possible to relabel the graphic using the mouse and sighted assistance and to persuade JAWS to speak using a frame therefore the scope is there for scripting. Alternatively a blind user may access the context menu on each line and the presence of the tick or the untick menu option would give the necessary information. It may also be that a CM expert could demonstrate a simpler method of accessing the reconciliation.

Create a recurring invoice

No additional comments.

Product statements

I was unsure of the meaning of this particular heading. Working with products was accessible with the usual caveats around pop ups and browse buttons.

Edit and create customer and/or product groups

No additional comments.

View and search the help file

Excellent – uses standard Windows conventions and reads well. As an aside the 'Send email to Accomplish Support' dialogue works well other than the pop up dialogues not reading automatically – i.e. when an error message is displayed the user merely hears 'OK Button' and could assume that his message had been sent.

Create a back up/Restore from a back up

Simple process however the browse button is inaccessible meaning that the user has to manually enter the desired path. F2 does not work.

Dashboard

Excellent summary of the current position. Tab order differs from the visual presentation however this may be logical in accountancy terms.

Common Issues.

1. Requirement to use the JAWS – B (Read Box in Tab Order) command.
2. All users, in particular blind and low-vision users, are strongly recommended to make use of the comprehensive help system.
3. Checkboxes labelled as 3-state buttons.
4. The use of the F2 key to access search and look-up dialogues should be emphasized in training material for blind and low-vision users and for support staff as the mouse access button is not in the Tab order on any screen. It should be noted that its use is not consistent and a number of instances have been noted.
5. In address fields some lines (usually the second line of an address) are unlabelled.
6. Print Preview uses an inaccessible form of what appears to be pdf representation. The pdf produced should the document (invoices, reports etc) be saved is accessible to a degree (other than graphs saved to .xls) but it would be a significant improvement to be able to choose an accessible format (e.g. Text, Word, csv or Excel as appropriate) as the default format for viewing documents either as a print preview or for checking.

Additional Observation

On the website the sign-up process for the newsletter requires the entry od a CAPTCHA code. This is well presented for low-vision users but no alternative is provided for screenreader users to whom it is inaccessible.

<u>Summary</u>

Accomplish CashManager 2009 is very accessible to JAWs and Zoomtext users. There are areas where a JAWs user may have to use slightly amended processes to those employed by most users however all the actions required to manage small business finances may be completed without sighted help. A degree of IT Literacy is required to access CashManager but no more than that required by a sighted user provided that care is taken to use the tools provided such as the help menus and support lines. All major operations, with the significant exception of Print Preview, are accessible with both mouse and keystrokes as desired. The help system is comprehensive and accessible. Accomplish have demonstrated a commitment to accessibility in their product and the RNZFB would recommend that Accomplish CashManager 2009 be seriously considered by any Blind and Low-Vision user for managing small-business finances. It should be noted that this recommendation relates to accessibility and the RNZFB is not qualified to advise on the Financial, Tax and Bookkeeping aspects of this software.

Whilst there are difficulties in using the Bank Reconciliation screens I am sure that they can be resolved by dialogue with Accomplish and that either scripting, a change in the software or expanded help text describing the simplest process can be provided.

Should you wish to discuss the conclusions of this report then please email me on kprince@rnzfb.org.nz .

Overall we were very pleased with the accessibility of Accomplish CashManager and its capabilities for Screenreader users.

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