

6.6 Usability report

Testing environment

OS	IOS 16.1
Browser, version	Safari 16

Participant background data

Name	Andis Lejietis
Age	26
Education + area	High school
Income level	Middle
How much time do you spend online	8 hours per day
What device do you usually use	Mobile, laptop
Do you have any investing experience?	Yes

Testing

Scale of ease

1. *Very easy*
2. *Easy*
3. *Average*
4. *Hard*
5. *Very Hard*

Tasks

- Register as a new user
- Confirm the investments
- Do a research about the Loan Originators
- Check My account page
- Log out my account
- Creating an automated investing strategy

Post-test questions

• Register as a new user	
How difficult was this test assignment	1 - <i>Very easy</i>
How would you describe your overall experience with this product?	<p>Good</p> <ul style="list-style-type: none">• Easy to register• All information is provided for steps that need to follow• KYC is simple, understandable and as easy to use as any other KYC <p>Bad</p> <ul style="list-style-type: none">• Income selection gives an impression that it's possible to have multiple answers, but actually is a single option
If you could change one thing in this product, what it be and why?	I would change this fund selection box to make it visually clear that it's a single option only
What do you expect to see in this product in the future?	That registration process is kept simple and visually understandable

• Confirm the investments	
How difficult was this test assignment	2 - <i>Easy</i>
How would you describe your overall experience with this product?	I was able to add desired investment amount. Editing was more difficult, due to hiding amount in confirmation page.
If you could change one thing in this product, what it be and why?	I would make it more easy to edit cash amount due to some scaling issues
What do you expect to see in this product in the future?	To keep it as simple and intuitive but to address it visually so it does not seem broken.

• Do a research about the Loan Originators	
How difficult was this test assignment	3 - <i>Average</i>
How would you describe your overall experience with this product?	It was easy to have an explicit research about Loan Originators despite page wondering of to the side while scrolling, but it created a headaches when I tried to find individual Loan Originators in filters as they did not match those found in the main investment page by country
If you could change one thing in this product, what it be and why?	To clean up all the listings for country representation
What do you expect to see in this product in the future?	That all Originators can be found in Investment page and their information is still very easy to research













• Check My account page	
How difficult was this test assignment	4 - <i>Hard</i>
How would you describe your overall experience with this product?	I did get most of my information that I needed in My account page, but when I needed to create statement of my account, because my accountant asked about it, I was left hanging, because no download was made, and I missed the deadline.
If you could change one thing in this product, what it be and why?	To make sure all exports trough out the site can still be accessed on a mobile device, because that can be vital sometimes for an a Investor, as I have had needed such access on alternative investment platforms.
What do you expect to see in this product in the future?	That all investors needs are met for being able to generate all correct information for Tax purposes

• Log out my account	
How difficult was this test assignment	2 - <i>Easy</i>
How would you describe your overall experience with this product?	I was able to Log out with ease, only because I remembered where was my log in option and I clicked in that direction on my account name, where I found Logout button.
If you could change one thing in this product, what it be and why?	I think this function serves it's function and would not change it, as maybe I as an user would just close the tab to remain logged in for ease of use
What do you expect to see in this product in the future?	I think I would expect to see similarly simple and easy to use interface

• Creating an automated investing strategy	
How difficult was this test assignment	3 - <i>Average</i>
How would you describe your overall experience with this product?	It was easy to understand how to create basic strategy. I had to explore filtering system to better understand it and make better strategies



If you could change one thing in this product, what it be and why?	Some countries were on the main view but were not accessible trough filtering system Assignment agreements worked only partly
What do you expect to see in this product in the future?	I expect that system should be checked to reduce discrepancies like missing documentation and filtering options

Bugs

Key	Summary	T	Reporter	P	Status
INC2-232	[Create new strategy page EN] Loan Originator Terms of Assignment Agreements unaccessible		Andis Lejietis		TO DO
INC2-216	[My account page EN] Account statement can't be downloaded		Andis Lejietis		TO DO
INC2-181	[Loan originators page EST] heading changes between "Lisa/Võta raha" and the sum randomly		Maia Nurme		TO DO
INC2-180	[Invest page ENG] some countries are missing from the "Countries" filter list		Maia Nurme		TO DO
INC2-163	[Loan Originators page EN] Page scaling unresponsive		Andis Lejietis		TO DO
INC2-109	[Confirm Investment page EN] Desired investment amount not fully visible		Erkki Loginov		TO DO

6 issues

Recommendations

Key	Summary	T	Reporter	P	Status
INC2-217	User registration - Source of funds formatting not clearly understandable		Andis Lejietis		TO DO

1 issue