TransACT User Testing Script

Thank you for volunteering for our usability test! Throughout the test, please think aloud so that we can see into your experience using our software. Do you have any questions before proceeding? (*Pause)* You will now be given a series of tasks to complete.

On the screen in front of you, you can see a login window. Your first task is to create a new database file and password. This will create your user session and log you in. (*Wait up to 2 minutes.)*

Now that you’ve logged in, you’ll see a popup instructing you on what you should do next. Follow those instructions to create a new account. (*Wait up to 2 minutes.)*

Now we would like you to import a set of transactions into your newly created account. You would normally get a CSV or QFX file from your bank containing transaction information, but in this case, we have provided one for you. It is located on the laptop’s Desktop and called “ChaseCSV.csv”. (*Wait up to 3 minutes.)*

With all transactions imported into the table grid, we will now ask you to perform some basic table operations. For the last transaction in the list, change the payee to some other payee. (*Wait.)*

Now hide the check number and account columns in the table. (*Wait.)*

Add some notes to a few transactions of your choice. (*Wait.)*

Now for the first transaction in the list, add one tag to describe for what the transaction was used. (*Wait up to 2 minutes.)*

Next, go into the Payee Editor and provide tags for 5 different payees. (*Wait up to 3 minutes.)*

Now create another new account and import the same CSV file into it. (*Wait up to 3 minutes.)*

Since you’ve tagged a few transactions, let’s visualize the data. Find the expenditure charts page and view only the pie chart. (*Wait up to 3 minutes.)*

Now restrict the pie chart to only show transactions between September 1st, 2016 and September 30th, 2016. *(Wait.)* Now filter even further by only showing transactions in your second account during that period. (*Wait up to 2 minutes.)*

Your next task is to select all the transactions in your second account and delete them. (*Wait up to 1 minute.)*

Now import the same CSV file into that account again, but first ignore all transactions with payee TACO BELL (make sure it’s all caps so that it matches the payee data). (*Wait up to 3 minutes.)*

Upon importing those transactions, an information modal should have popped up asking you if you’d like to review the automatically ignored transactions. Go ahead and review them. Feel free to change any of the fields in the resulting window if you’d like. Go ahead and click import when done. (*Wait up to 2 minutes.)*

In the first account you created, manually add a single transaction. Be creative! (*Wait up to 3 minutes.)*

Sort the table alphabetically by the payee column. (*Wait up to 1 minute.)*

Now delete the second account you created. (*Wait up to 2 minutes.)*

Export everything that you’ve done up to this point. Leave the file on the computer’s Desktop. (*Wait up to 2 minutes.)*

Now log out of TransACT. (*Wait up to 1 minute.)*

Select the same file you were just working in and log back into it. (*Wait up to 2 minutes.)*

Once you verify that the data is as you left it, search for only transactions with Java Haute as the payee. (*Wait up to 2 minutes.)*

Again, log out of TransACT. Now find your exported file on the Desktop and log into TransACT with it. Verify that it is a duplicate of the original, then log back out. (*Wait up to 2 minutes.)*

That’s all we have for you to test. Thank you again for volunteering!