Usability Testing Report
Note-Taking Apps: Notion & Obsidian

Team E.S.C.

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PTW 330 – PP04: Draft_PP04
Spring 2025

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Usability Report Deliverable – Part A

Team ESC PP04 Deliverable – Website

[Usability Report for Note-Taking Apps]

Click button to launch GitHub website

Usability Report Deliverable – Part B

Usability Results

Data Analysis of User Experience

A portion of the content from this section is on the website. The entire Data Analysis section is presented here for improved context. Duplicate content is grey.

In this usability test, we identified and applied:
- qualitative comments from interviews.
- responses from survey questions; and
- researcher observational analysis.

We used data triangulation to produce more precise findings relevant to our goals. Five users participated in the note-taking app usability test.

This analysis identifies patterns, trends, and details associated with a new user's experience of Notion or Obsidian. The following questions frame the analysis based on the compilation of data.

When does the user feel successful? What factors influence success with the note-taking app?

Users express delight when the app is functional, when it works within their mental model, and when it feels like it is designed for them. Participants in the usability test appreciate a sensible or familiar structure as they approach a new experience. They want success from the start and as they apply basic tasks within the app.

User Success in Notion
Notion users report a positive experience with the simplicity of steps and basic functionality of the app. Top positive experiences included:
- Completing essential note-taking tasks easily.
- Downloading and accessing the app with ease.
- Using basic functions (creating, formatting, locating, and maneuvering notes).

- Applying other intuitive skills (e.g., the plus sign to add item; the three-dot feature for contextual information).

User Success in Obsidian

Obsidian users need extra time to explore the features and design of the app before expressing appreciation for the tool. They recognize power and potential in the app - once their ability to do tasks picks up. Top positive experiences in Obsidian include:

- Applying previously learned tech skills.
- Exploring features to see their relevance.
- Approaching the new experience with curiosity.
- Some users mentioned the power and possibility of Obsidian.

What is a user experience like during onboarding of Notion or Obsidian?

Notion Onboarding

Users did not specifically mention training needed for onboarding. However, they did express confusion and curiosity about a series of onboarding questions when launching the app. Users were asked to make choices related to their purpose of using the app, their personal interests, and whether they wanted to collaborate or work individually in the app. Comments from users:
- *"I wish I could use the app for more than one purpose, but I'm asked to choose between work, personal, or school use."*
- *"I do not know if I want to use this app for collaboration or not. I do not want to be stuck with that choice."*
- *"I am wondering about the choices. Will this limit my app experience later?"*

Obsidian Onboarding

There is a strong desire to have training, a quick-start guide, or editorial notes to support the onboarding experience for Obsidian. Participants expressed a need to know how to find items, see where items are stored, and understand how to format text as they launch the app. Obsidian appears to new users as having a complex filing structure.

What tasks are confusing to the user?

Notion – Confusing Tasks
- Folders:
  - Notion uses a nested system for storing notes. There are no folders, per se. While participants in the usability test figured this out, they found it odd to search for notes inside of notes instead of searching by folders.
- Templates:
  - One user experienced confusion with a template that included pre-completed information already inserted into the template. This made the user wonder if the data was just an example or another user's data.
  - Another user was confused by finding crowd-sourced templates.

Obsidian – Confusing Tasks
- Jargon - Vaults:
  - Obsidian users were confused by jargon and did not understand vaults and templates. This was a point of repeated comments. Every Obsidian user wanted to know what a vault is, where it is located, and what is its function. They tried hovering over items to help them understand the functionality of a vault. The term "vault" may also create preconceived feelings or instincts. Comments from users:
    - *"What is the difference between a vault and a note?"*
    - *"I don't know what a vault is. How is a folder different from a vault?"*
    - *"'Vault sounds dark and ominous."*

- Templates:
  - Three users of Obsidian searched for access to templates but found no folder with options.
  - They noticed that templates were either not configured into the app or they gave up their search.

What app features or functionalities enhance the user experience?

Notion
- Getting Started: Easy to find in left navigation
- Use of background prompts (Title)

Obsidian
- Ease of use: Users can create new notes. When a user creates a note, Obsidian defaults to an automatic, ordered number list.
- Hover: Users can hover over icons to make decisions and locate menus.
- Borrowed user conventions: Obsidian uses keyboard shortcuts and ways of applying formatting options, similar to popular word processing apps.
- Interface: Obsidian appears basic and plain in appearance.
- Graph view: Individual users mention the visual appeal of the linking section and the monochrome interface.

How do users think AI might improve future experience?

Artificial Intelligence (AI) is a potentially powerful tool for future enhancements of both note-taking apps.
- Participants envision how AI might support searches as they ask questions in a chat bot.
- AI could help organize information within the app or provide innovative ideas for the user. "It might give me some ways [to organize] that I might not have considered."
- AI could streamline usage, as one user states, "AI might streamline my usage for the app and eventually I'd be able to use one app instead of multiples."

What app features or functionalities could be improved?

Users encountered screen actions that did not make sense. Unrelated pop-ups appeared, notes seemed to disappear, and there was confusion caused by jargon or naming conventions (e.g., vault, linking).

Notion
In Notion, it can feel offbeat when you start the app as there are questions and choices to consider before you experience the note-taking tasks. While the questions are clear, it slows the process of getting started and users would like flexibility with those three options. Additional enhancements for Notion could include:
- a way to check items off once complete;
- an alphabetized listing of items;
- a dashboard that prioritizes the location of items on the front page (to expedite navigation; can be overwhelmed with amount of content to view); and
- an option to turn on/off reminders.

Obsidian
For Obsidian, several users asked for a better menu bar and the linking feature's purpose to be clarified.
- Two users mentioned a message from the app store that said "Not compatible version" when they tried to download Obsidian.
- Others requested text highlighting, shortcuts, a formatting tab, and more color on the interface.
- Users wished the icons and windows view were more intuitive in functionality.

What limitations are seen from a user's point of view?

Because each user has prior experience with other note-taking apps, there are features each likes and dislikes. Users for this usability test know how to use Evernote, OneNote, Ink Pad, and/or Remarkable Pro. While there is interest in both Notion and Obsidian, users voiced reservations to continue use. The following statements highlight reasons for concern:
- *"I don't know its value yet and if it's a standout."*
- *"I need it to be above and beyond functionality if I'm going to change."*
- *"It's just easier for me to take a picture of my notes on my phone and access it there."*
- *"The cost of a plan is a factor for me."*
- *"The app froze while I was trying it out on my phone. That should not happen."*
- *"The integrative qualities need to work without chaos."*
- *"The app is too complicated. It's too developer minded."*
- *"What is this [app] doing that word isn't doing? Why would I [learn to] use this over that?"*

Content from this point forward is <u>not</u> included on the website.

What are the user's pain points?

Users feel confusion and frustration when nothing is obvious with navigation, structure is lacking, and formats are confusing.

Notion
Notion's initial setup steps involved choices the user had to make as mentioned earlier in this report. It was a pain point that slowed progress with onboarding the app.

Obsidian
Obsidian is generally viewed as complex in functionality. The opening and introduction to Obsidian is not what new users expect. As one user states, "Google Docs is simple. With Obsidian you have this graph view, linking, and a ton of stuff that's hard to understand."

Summary of Analysis:

Notion
Notion users viewed the app as a tool applicable to everyday use in their personal or work context. The navigation was simple, discoverable, and functional. Users prior experience with apps and other tech tools helped them be successful with this new content. While Notion has functions that could be improved, users found it easy to accomplish basic note-taking tasks. They stated the app was worthy of consideration for future use.

Obsidian
New users have mixed feelings about the usage of Obsidian. Some saw potential in the app while also expressing frustration with navigation, configurations, features, and/or functions. Some users shared that the format and functionality is better designed

for someone who is tech-savvy. As one user states, "It feels like it was designed for developers; not everyday users."

In conclusion, the audience's purpose, context, and values are substantial factors when considering what works and does not work with each app. For example, some of the new users may have approached the usability testing experience wanting to create quick notes for personal use with their spouses. Some expected to create extensive notes for work and in collaboration with colleagues. Others expected the note-taking experience to be quick and easy for both contexts. Each user brings expectations to the testing experience. One's biases, wants, and needs will be varied and may be noticeable.

Findings and Recommendations:

Our findings and recommendations include:
- how a user's needs might be translated into business goals;
- user needs that provide a competitive edge;
- considerations for the development of note-taking app prototype;
- usability features with Calm Tech principles; and
- recommendations that help businesses prioritize their action items.

Finding 1: Users need simple instructions, intuitive interfaces, and standard user conventions.

All users mentioned "simplicity" as a quality they value:

- 2 of 5 users reported taking notes with paper and pen due to its simplicity. The same users had previous experience with digital note-taking apps but largely preferred pen and paper due to ease of access and the proven connection to retention.

- 3 of 5 users take paper and pen notes frequently citing practicality.

Recommendation 1: Emphasize simplicity.

When users speak about the desired characteristics of apps they enjoy, they often describe the functions of the app as "simple". We observed users continually state how reluctant they are to change their current note-taking process because they think that process is "simpler." Overall, users view note taking as a simple task, therefore they expect to engage with a simple user interface and process.

Finding 2: Users seek a smooth onboarding process.

- 1 of 2 Notion users had a positive experience.

- 1 of 2 Notion users felt indifferent to their onboarding experience.

- 2 of 3 Obsidian users had a negative onboarding experience.

- 1 of 3 Obsidian users felt indifferent to their onboarding experience.

Notion users had a relatively positive onboarding experience which translated to a better overall experience. All of the Obsidian users experienced confusion with their onboarding experience. Obsidian users complained about corporate jargon and features that were not well explained in the onboarding process. Onboarding and explanation of features had direct cross-over. When users had a helpful onboarding experience, it translated to a better overall experience, which led to greater probability of conversion.

Recommendation 2: Provide a clear and intentional onboarding process.

Develop onboarding experiences that get users smoothly launched and make them feel successful from the start. Key ideas that promote success

include clear instructional content, overview of the user interface, and how-to guides explaining any special features exclusive to the app.

Finding 3: Users desire the ability to sync notes and have it accessible across devices.

Users request easier access and functionality with cross-platform operations. Users report:

- variation in types of notes created depending upon work, school, or personal errands/tasks, and
- variation in the method used to create and access notes. Some users only take notes on their laptop for work/school. Some users exclusively take and access notes using their phones.

Recommendation 3: Make experiences easy with cross-platform sync.

Provide the ability to sync across platforms, on multiple devices. We observed the numerous ways users create and access notes. Among five participants, the methods varied greatly. By creating cross-platform accessibility, a note-taking app opens a wide possibility of flexible solutions for the user.

For a Competitive Edge:

Consider these ideas that provide user-centered needs, a competitive edge over other organizations, and align usability features with Calm Technology principles.

User Need 1: Provide a surprising but useful feature for the user.

This is a feature that the user does not know they need in relation to the app's primary purpose. This type of feature creates a "hook" for long-term engagement.

- A primary example is Obsidian's Linking feature. 2 of 3 Obsidian users saw potential in its linking feature to connect or nest notes among each other. However, both users felt misled and confused

by the feature because they received no onboarding instructions prior to its appearance in the app.

User Need 2: Ability to switch from desktop to mobile seamlessly.

- Cross-platform accessibility: Not all users asked for this functionality. However, most users noted the use of both laptops and phones as their primary devices. Laptop usage dominates work and school related notes. Phone usage dominates for personal use.

- Only 1 of the 5 users preferred their phone as their primary device for personal and professional use.
- Most users noted the dominance of using their phone to capture or access a note.

User Need 3: Ability to sort/organize notes according to users' expectations.

- Each participant mentioned an instance where sorting/organizing would be beneficial to their experience of note taking. Some participants mentioned that the inability for apps and note-taking devices to sort/organize notes in a customized way hindered their desire to continue using the app or device on a regular basis.

User Need 4: Ability to upload, access, and sort paper notes.

- 3 of the 5 users tested (LB1, LB2, KL4) reported they take notes on paper.

- 2 of the 3 (LB1 and LB2) who took paper notes reported that they looked for solutions on how to manage paper notes within a digital note app or device.

Production Considerations:

Consideration 1: The act of note taking varies dramatically across users. From user observation, note taking is dominated by the task, what device is available, and the simplest method of capturing a note. Within the scope of product development, this means the app should provide cross functionality across various platforms and devices to promote easy access, sharing, and collaboration.

Consideration 2: UI and engineering features are critical to a prototype's development. Consider the following features:

- *UI feature:* A simple user interface relies on standard user conventions. Use of bullet points and checkboxes were formatting features mentioned by users repeatedly.
- *Engineering feature:* Build in flexibility to sort and organize notes according to users' expectations. This is critical for user satisfaction and how the user assesses the app's value.
- *Engineering feature:* Develop cross-platform accessibility from the beginning of product development to increase user engagement and conversion.

Consideration 3: Develop an effective onboarding process for conversion.

- 1 user of Notion felt the apps were designed for them.

- 1 user of Obsidian felt the apps were designed for them.

- All Notion users were willing to continue using the app.

- 1 of 3 Obsidian users were willing to continue using the app.

Usability Considerations that Align with Calm Tech Principles:

"*Technology should require the smallest possible amount of attention*."
- Through onboarding and instructional guides, a user is up to speed more quickly and able to do what they want to do without thinking about the interface and jargon.
- Note-taking apps need simple, elegant interfaces.
- Users should have the ability to personalize their layout.

"*Technology should inform and create calm*."
- Provide an onboarding process but let it be optional.
- Deliver clear instructions during onboarding.
- Avoid having users make choices during onboarding.

"*Technology should amplify the best of technology and the best of humanity. Design for people first.*"
- Apply best practices for user friendly interfaces and combine with traditional note-taking methods.
- Consider how the act of note-taking is integrated with lifestyle.

"*The right amount of technology is the minimum needed to solve the problem*."
- Build the app's core features focus on the three basic tasks of note-taking: write a note, store a note, and access a note.
- Shift the paradigm away from paper and pen by demonstrating the ease of connection to stored knowledge through value-added enhancements (sync, collaboration, tags, graphic interface).

"*Slim the feature set down so that the product does what it needs to do and no more.*"
- Increase features along with a user's understanding and support them with instructional content.
- Offer basic formatting options such as bullets, checkboxes, and highlighting.
- Have an option to view and sort notes by user's method of choice (alphabetical, date, search).
- Create an option to incorporate photo notes. Provide a feature to convert the photo into a text-based note.

Recommendations

## Designing and Engineering Note-Taking Interfaces

Installation Walk-through

Users in our testing primarily operated a laptop for convenience with screen-recording, with the exception of a single mobile device user. The laptop users all had neutral or negative installation and onboarding experiences. The mobile device user was the sole positive experience reported.
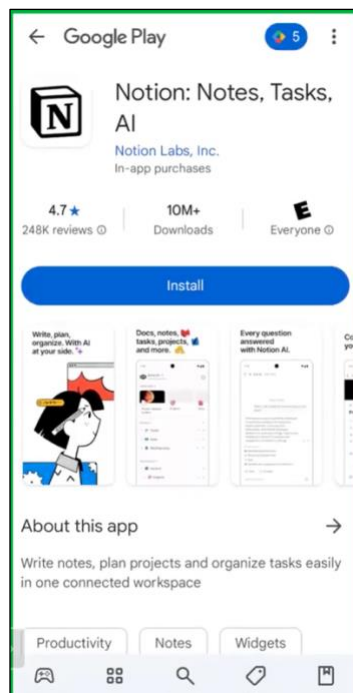

Screenshot of Notion (Google Play).

Another user experienced a critical error when trying to install Obsidian from the home page. Upon download, the following window appeared:
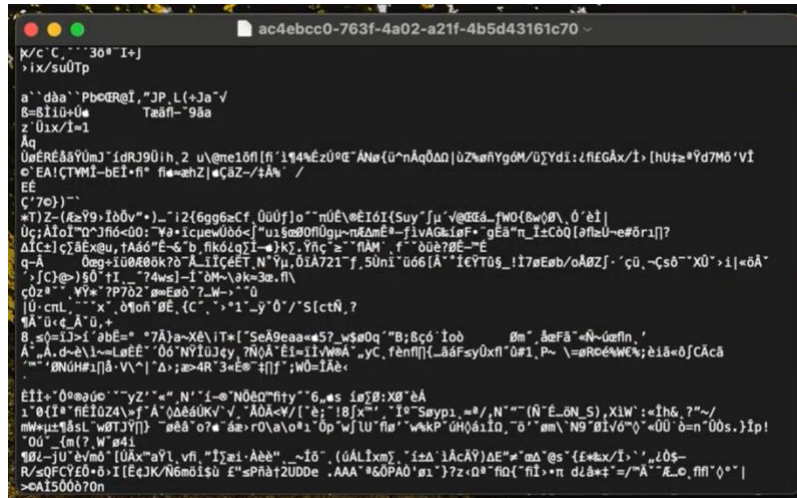
Screenshot of Obsidian error screen during installation (Obsidian Home Page).

Unprompted, the user then went to the Apple Store through a link on Obsidian's home page. However, since they were using a MacBook, they received this error message:
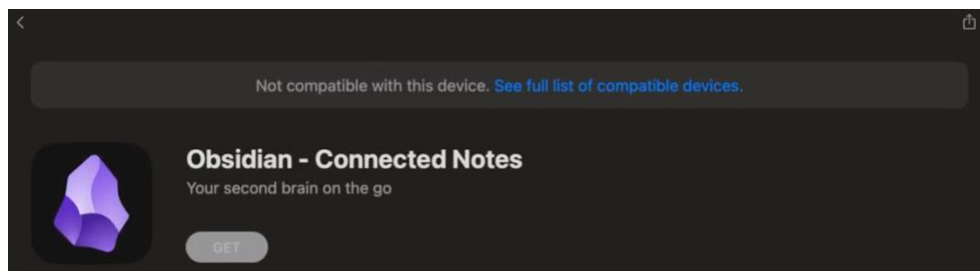
Screenshot of Obsidian error (Apple Store)

The user was then directed by the researcher to try re-installing the app from the home page, which was successful. This difficult onboarding experience highlights risks for note-taking app developers: without high installation success rates, apps risk losing users before the product is even fully installed on their devices.

Calm Recommendations

When designing a competitive product in this market, it is worth considering avoiding a standalone app, given the neutral or negative installation experiences from 4 out of 5 of our users. Instead, we recommend having the product make use of the periphery—the outer edges of the user's environment—as much as possible.

In *Calm Technology*, Amber Case emphasizes making use of the periphery by "decid[ing] whether your technology is a primary goal or task, or a secondary task during the pursuit of a primary goal" (Case 23). While note-taking apps such as Notion and Obsidian have been designed as standalone apps, these apps are fundamentally **purposed for secondary tasks (note taking) in pursuit of primary goals (often the content of notes)**. For example, writing a grocery list is a secondary task to help achieve the primary goal of shopping for groceries.

Because standalone apps require dedicated attention to use them, calm design can help minimize the required amount of attention and help integrate note-taking interfaces with the user's periphery and environment. **Rather than think of your product as a standalone app, think of it as a note-taking interface.**

This approach resonates with opinions voiced by users during testing. When asked about the potential of integrating AI into a note-taking app, two users expressed resistance to the idea. One user framed an AI app as the better primary tool and note-taking as a secondary task: "Why use a note-taking app with AI when I could use an AI app with note-taking capabilities?"

Users want notes to quickly toggle between the foreground of their attention and the periphery. They need to have quick access to their notes but also be able to store or discard them. Rather than delegating primary, secondary, and tertiary forms of attention to AI, an effective note-taking interface might closely follow the user's journey through before, during, and after their primary task. Depending on where the user is on their journey, the interface might utilize dynamic dashboard controls.

Given enough user context, the interface might fade in or push quick-access buttons to retrieve specific notes. For example, say a user writes a grocery list:
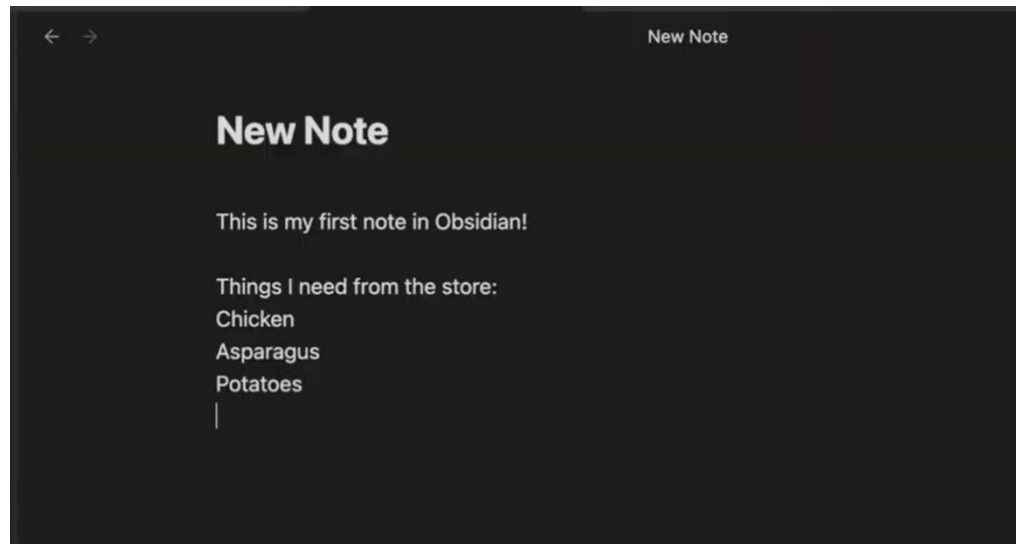

Screenshot of a new note (Obsidian).

This note might be saved in a folder on their personal device, but the interface could push the note to the user's lockscreen, enabling it to be opened immediately with a quick tap. There would be no need for the note app to use an auditory reminder in this context, given that the user will pull the contents of the note as needed. The note is intended to supplement the user's memory, not act as a substitute.

If, however, a user wrote a note with a reminder to call their parents at a certain time or date ("Call Mom on Mother's Day"), an AI-powered interface might deploy the user's alarm clock app or calendar app. Upon completion of the call, the interface might send a push notification for note deletion.

As of now, most competitors feature busy dashboard interfaces filled with static links. For example, while the Notion Mobile dashboard communicates things like recently used tools, it also features a lengthy list of all available tools and a chat box that reads "Ask, chat, find with AI…"
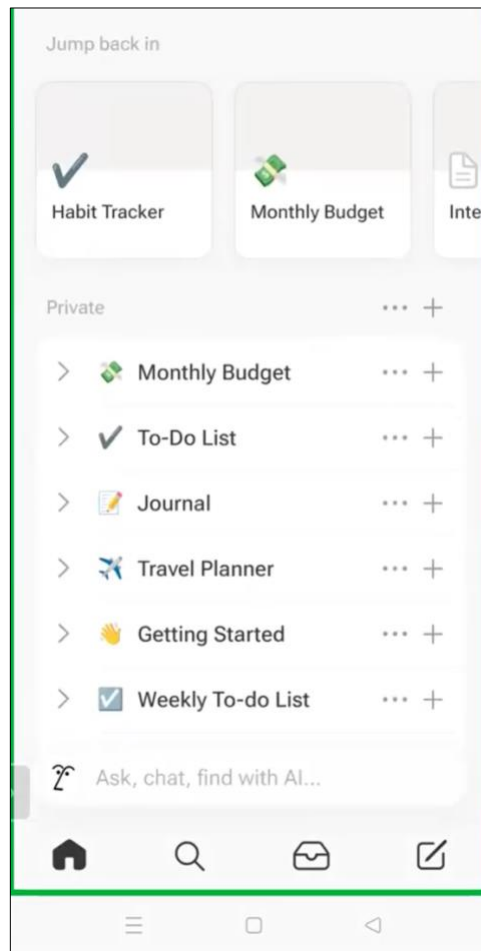
Screenshot of Notion dashboard (Mobile Phone).

This catch-all design isn't preferred by most users. Users want simple and minimal design. Users expressed preference for lists of their notes rather than lists of tools or features. In other words, a given task is the user's primary attention, note taking is their secondary task, and the note-taking app's tools or features are tertiary. Rather than dashboards that showcase all features or tools, the interface should work toward making them part of the ambient user experience—easily retrievable upon the user's request.

Obsidian's graph view feature attempts to create a similar kind of ambient awareness between user notes. Graph view is defaulted to appear to the right of the note window. Users can create "links" between notes or leave them unlinked, like so:
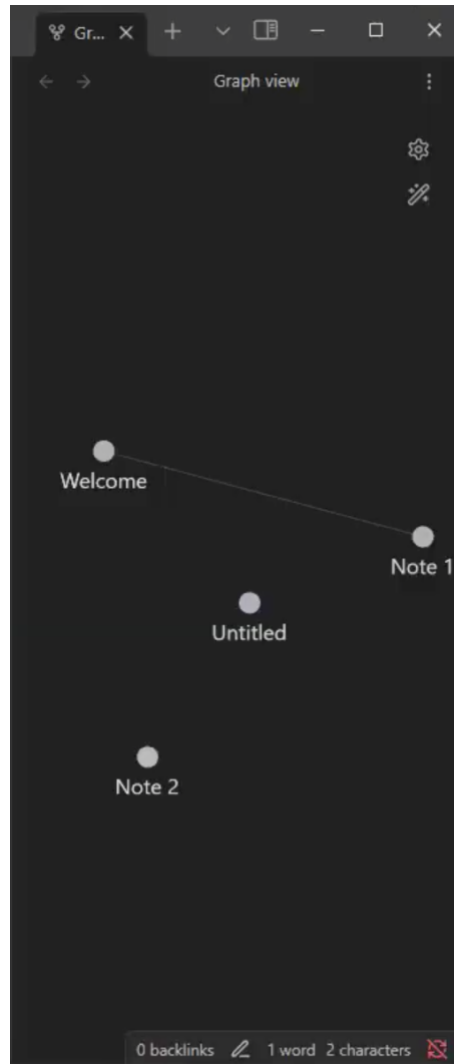
Screenshot of Graph View (Obsidian).

However, once graph view has been closed, there is no clear guidance on how to return to this view. Users were split in their opinions on graph view. Some users found it distracting or confusing, and the others were intrigued and curious to learn how it functions.

In this case, introduce features like graph view only after users have completed easier parts of the onboarding process. Having users unlock some features at strategic points will help guide the user to utilizing all features. Remember that novice users are often trying to master what some might consider basic, such as formatting:
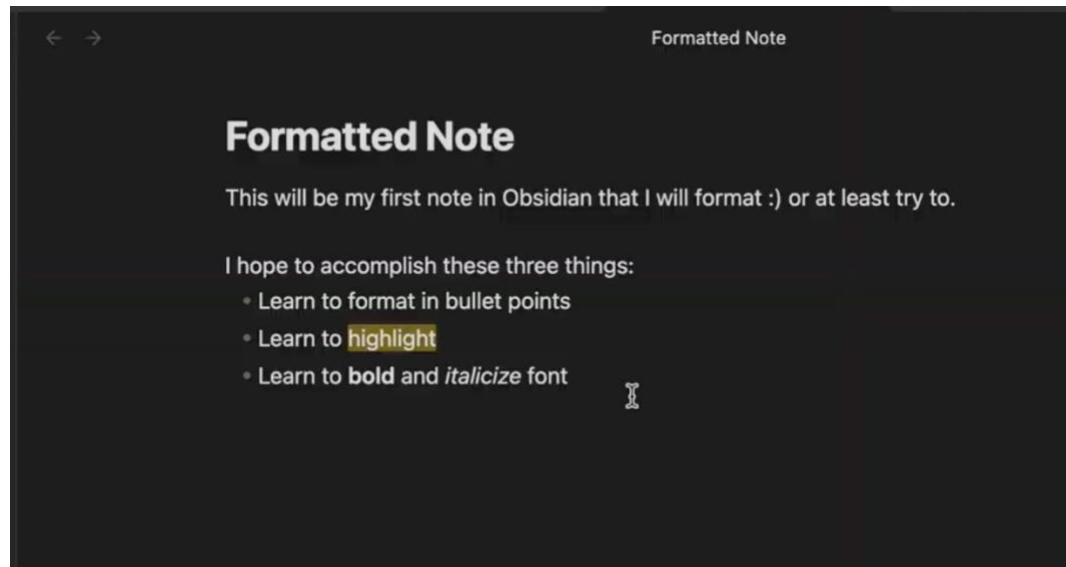
Screenshot of a formatted note (Obsidian).

By designing and engineering a note-taking interface that takes the periphery into account and eases users into toggling between an increasing number of features, your note-taking app can be refined iteration after iteration until a community has formed around it. This community will have mastered a number of technical and critical skills around information and literacy, and its members can become powerful advocates of your brand.

Conclusion

Notion and Obsidian are two popular note-taking apps. The results of the usability test were varied. Participants relied on their mental model to navigate both apps. Notion users valued the ease of use within the app. Participants in both groups were challenged by app-specific jargon, navigation, and folders. Participants appreciated easy completion of essential tasks and tools that were easy to find.

The development of a prototype to support note taking shows a need for easy access across platforms and devices, usability and design upgrades, and onboarding support for new and inexperienced users. Based on our research, upgrades will increase the number of users converting to note-taking apps. Thoughtful integration of Calm Technology recommendations will offer opportunities for the prototype app. For example:

- Use the organizational example of Facebook and grow along with consumers to overcome common user complaints, like too many features.
- Put more into the design process to spend less money on the app over time. "The more you put into a design process, the less you'll have to support the system in the future" (Case 114).

As shared in the beginning of this report, note taking is part of everyday life. We write notes for work, personal reasons, for business, and in school. While note taking is a common skill, developments are needed that speak to a diverse group of users.

Takeaways

- This project would have benefitted from a limited scope of user research. The problem statement should have been specific to one feature, interaction, or task.

- Having foresight to conduct a user survey with general questions focused on how users take notes and their lifestyle preferences. Incorporating questions that would generate quantitative data in the survey.

- The interview script was a successful tool to gather data consistently across participants, which was useful for comparison and pattern analysis.

- Affinity mapping: sticky notes would have benefitted from a standardized labeling structure. For example, labeling stickies with the markers: Obsidian/Notion, Participant #, timestamp. Labeling would have been beneficial to track data effectively and save time during analysis.

Deviations and Limitations

TBD – without time constraints we would document:
- Deviations
    - divergence
    - conflicting data
    - incomplete data
- Limitations
    - questions we should have asked
    - data we wish we had

Appendix

Consent form

Informed Consent for Research Project Participation | Note-taking App Usability Study

Questionnaire

Research Project Questionnaire | Note-taking App Usability Study

Interview Script

(Facilitator Guide and Task Instructions for Users below.)

Usability Field Observation (U.F.O.)
Facilitator Guide

Purpose

The purpose of this form is to standardize Team E.S.C.'s data collection method. Facilitators will conduct usability testing across two note-taking apps: Notion and Obsidian. Each team member will observe and interview one (or two) users for a total of six participants. The user will be asked to complete a series of tasks in either Notion or Obsidian. The findings will be compiled and organized into a Usability Report for a product manager. The product manager will make informed decisions using qualitative and quantitative user experiences to help develop a note-taking app prototype.

Participants

Each team member will recruit a user through their personal network.

Recruitment criteria

Priorities:
- Users who do not have experience with either Notion or Obsidian.
- Users may have experience with other note-taking apps.

Exclusions:
- Users who have previously downloaded Notion or Obsidian

Consent

Participants will sign a consent form. Consent will enable the facilitator to record the user's audio and screen activity for data-collection.

Procedure

- Choose one app for the user to test: Obsidian or Notion.
- Ask participant to complete the Pre-interview Questionnaire.
- Review Pre-Interview data for Exclusion Criteria.
- Ask participant to sign the Consent Form.
- Welcome the user.
- Ask opening questions.
- Introduce the "Think Aloud Protocol."
- Set up the recording.
- Ask user to complete tasks:
  - Download the app.
  - Create a New Note.
  - Format a note.
  - Assign a note to a category or move to a folder (Notion) or "vault" (Obsidian).
  - Access a note.
  - Use a template to create a note.
- Time Managements of User Tasks
  - Allow the user to proceed for up to three minutes - until you don't feel like it's producing any value or the user becomes highly frustrated.
  - Proceed with tasks until complete or time runs out.
  - Stop Tasks and move on to Closing Questions after 40 minutes.
- Ask follow-up Closing Questions.
- Thank the user.

About the Session:

Participants will join a 60-minute recorded session in person or in Zoom via their personal device. The 60-minute session will proceed in the following format:

- 5 minutes: Introduction
- 5 minutes: Initial questions
- 5 minutes: Set up screen-sharing
- 40 minutes: Tasks administered; researcher asks follow-up questions after each task
- 5 minutes: Final survey

Participants will be given the choice between completing the task on desktop or mobile device and then prompted to explain why they chose one over the other.

Usability Test

Pre-Test Checklist

☐ Before Test: Send Pre-Interview Questionnaire
☐ Review responses from Pre-Interview Questionnaire
☐ Note device selected for App download
☐ Arrange Zoom Meeting or other Recording tool
☐ Prepare to send copies of tasks: chat (Zoom) or paper (in person)
☐ Gather facilitator supplies

Welcome [5 minutes]

Hello. My name is _____. My team and I are preparing our capstone project for the UW Technical Writing Certificate program. Our research involves observing and learning how people use note-taking apps as first-time users. Your participation in this study will help us understand how you engage with the application. I will be an observer during the process, and I will also ask for your feedback.

The first thing I want to make clear right away is that we're testing the app, not you or how much you know about using the app. You can't do anything wrong

here. This is probably the one place where you don't have to worry about making mistakes.

As you use the app, I'm going to ask you to try to **think out loud** as much as possible. Say what you're looking at, what you're trying to do, and what you're thinking. This will be a big help to us.

Also, please don't worry that you're going to hurt our feelings. We did not build this app. We just want to improve the experience, so we need to hear your honest reactions.

If there's something that you think is confusing, or something you're not sure about, that is helpful for us to know. Please tell us honestly what you're thinking. You are encouraged to share.

In a moment, I am going to ask you to download [*the app*] and complete a few tasks. Then I will ask for your feedback. The session will take no longer than 60 minutes.

Consent & Recording [5 minutes]

- Before we begin, we ask that you complete a consent form. The form asks for your permission to allow your audio and screen activity to be recorded. This recording will only be re-played by this research team. We will watch later to properly analyze data related to your steps, actions, and responses - plus it helps me, because I don't have to take as many notes.

  [*Send link to consent form*]

  [*Set up any last minute equipment while they review the form,*]

- Do you have any questions about the Consent Form?

    [Check that Consent Form is complete. See Google Sheets]
- Thank you for signing the Consent Form.
- Do you have any questions before we begin?
- Just a reminder that this session is voluntary. If you need to stop or take a break, please let me know.
- Please close anything personal or sensitive on your device before we begin recording.

    [Prepare recording]
- I will begin recording now.

    (If they ask: This helps us to analyze the data from the session properly. We won't share the recording with anyone else.)

    [Start recording]

Facilitator Checklist: Consent & Recording

- ☐ Introduce questions
- ☐ Ask how they chose device for download
- ☐ Mention observers and recordings
- ☐ Send Consent Form link (if not already signed)
- ☐ Check Consent Form for completed opt-in boxes
- ☐ Start recording
- ☐ Ask participant to close anything personal or sensitive
- ☐ Ask participant to share screen

Opening Questions - Background [5 minutes]

- Before we begin, tell me about some of your interests or hobbies.
  - *See box on page 16 (last page) for misc follow-up questions*
- Walk me through a typical note-taking experience for you..
    - *What type of information do you jot down?*
    - *Is that what you typically write/track? What kind of notes do you keep?*
    - *What else do you write/type?*
  - Tell me how you typically create notes?
    - *Prompt: post-it, journal, productivity app?*
    - *How do you keep notes now? paper/book/pad/other apps*
    - *Prompt: class notes, notes-to self, thoughts while reading, journaling, lists (packing, groceries or tasks), reminders*
  - Where do you usually take/create notes?
    - *Home, coffee shop, commute/bus/train/plane, on the fly*
- Tell me about your use of productivity apps.
    - *Have you used a note-taking app before?*
    - *What were you trying to accomplish?*
  - Have you tried this [Obsidian/Notion] app before?
  - Have you ever used a *Remarkable Paper Pro*?
- Can you tell me about a time when you downloaded a new app?
    - *When was this? What was the experience like? How did it go?*
- Thank you for completing the Pre-Interview Questionnaire (Google Form)
    - *Please complete the Pre-Interview Questionnaire*
- How did you decide which device to use for the app download?
- Which operating system are you using today?

Tasks [40 minutes]

Just a quick reminder to think out loud while you work.

I'm going to ask you to do a few activities now. For each activity, I will read them out loud, and I'll paste the instructions in the chat feature here. In Person: I'll give you the instructions on a piece of paper.

Introduce Task Session

- I will give you several different activities to do. Try to imagine you're doing this in real life, and I'm not here. Do whatever you would naturally do. If there's a point where you would stop to go elsewhere, please let me know.
- I'm also going to ask you to do these tasks without using an internet search engine. We'll learn a lot more about how the app works that way.
- Once you've finished an activity, please say "I'm done" or "I would stop here."
- If you have questions during the session, feel free to ask. I might not be able to answer your questions immediately . I will be taking notes, and I will be mostly silent. However, I may stop you to ask a question now and then.
- Just a reminder: Tell me what you're thinking as you move through the app. If you're reading something, please try to read or paraphrase out loud. If you're clicking on a link, tell me what you're hoping or expecting to find there.
- If you forget to think out loud at any point, don't worry. I may remind you throughout the session.
- Before we begin, please close or minimize anything you don't want us to see...

[Setup screen sharing]

Facilitator checklist: Usability Test

- ☐ How activities will be given
- ☐ Ask for real behavior
- ☐ I cannot answer questions
- ☐ Ask for think aloud
- ☐ Not a test. We are not testing you
- ☐ All feedback is helpful
- ☐ Prepare to provide written instructions for task scenarios
- ☐ Manage the time for each task
- ☐ Allow time for Closing Questions and Closing remarks

[For Tasks:

- Allow the user to proceed for up to three minutes - until you don't feel like it's producing any value or the user becomes highly frustrated.
- Proceed with tasks until complete or time runs out.
- Stop Tasks and move on to Closing Questions after 40 minutes.]

Task 1: Download the app/Onboarding

- First, I'm going to ask you to download the app.

    https://www.notion.so

    https://obsidian.md/

- [Once download is complete] **Before you start doing anything**, look at the first screen and tell me what you make of it: What strikes you about it? What do you think you can do? What's it for? Look around and tell me what you see.
- You can scroll if you want, but **please don't "click" or tap on anything yet.**

    [Allow activity to continue for two to three minutes at most]

- Thanks.
- Follow the "Onboarding" prompts.

    [Reminder user, if needed:
    - Think out loud
    - Tell me when you are done]

Task 1 - Follow-up Questions:

- What stands out as particularly easy or difficult?

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Task 2: Create a New Note (User's Choice)

- For the next task, please create a note.
- You may choose the type of note. Write whatever you would like. Tell me when you're done
    - *A short note is fine.*

[Wait a moment to see if they choose or request assistance.]

Prompt:

- List	- Habit tracker	- Planning day, week,
- Phone number	- Journal entry	month, year
- Link(s)	- Reusable checklist	- Notes with attached
- Outline	- Reminder	image/scanned
- Class notes	- Process/procedure	document
- Meeting notes		

[Allow activity to continue for two to three minutes at most.]

- Thanks.

Task 2 - Follow-up Questions:

- What stands out as particularly easy or difficult when you were trying to complete this task?

Task 3: Create New Note & Add Formatting

- Now, please create a new note. This time add formatting to your note.
- Add bullets, indentation, headers, etc.

    [Allow activity to continue for two to three minutes at most.]

- Thanks.

Task 3 - Follow-up Questions:

- What stands out as particularly easy or difficult when you were trying to complete this task?

Task 4: Access a note

- Now you have multiple notes (from task two and three).
- Find a list of your contents.
- How are they sorted?
  - (prompt: alphabetically, by date, by category?
    [Allow activity to continue for two to three minutes at most
    Be attentive to how they search:
    - Scrolling
    - Search field
    - Look in folders/vaults
    - Search using metadata/tags]

- Select your first note and wait a moment.
- Thanks. [Go straight to task 5.]

Task 5: Assign a note to a category or move to a folder (Notion) or "vault" (Obsidian)

- Assign that note to a category or move it to a folder ("vault" in Obsidian)
- Add it manually or use tagging system
  - Is this participant an Advanced user ("Tech Trailblazers"):
    - Ask user to assign metadata to your note
      - Obsidian: frontmatter?
      - Notion: Master Tags?
        - Medium: How to use Master Tags in Notion

Task 4/5 - Follow-up Questions:

- What stands out as particularly easy or difficult when you were trying to complete this set of tasks?

Task 6: Use a template to create a note

- For this task, you will create a note using a template within the app.
- How would you find available templates?
- You may select any template you wish and create a note of your choice.

    [Allow activity to continue for two to three minutes at most.]

- Thank you.

Task 6 - Follow-up Questions:

- What stands out as particularly easy or difficult when you were trying to complete this task?
- TBD

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Closing Questions [After Tasks]

[Ask all questions in black. Prioritize Closing Questions over completing tasks]

1. How would you describe this app? List a few words.
   - *list several words that describe the app/content/design.*

2. Do you feel like this app was designed for you?
   - Tell me more.

3. What was your experience like? What worked well for you?
   - What did you feel successful doing?
   - Was anything unexpected?

4. **What** could be improved? What was missing?
   - What was confusing?
   - What needs more clarity?
   - Why is that important to you?

5. **Would** you use this product next time?
   - Why is that?
   - **What** alternate method would work better to keep you from abandoning the app (for paper and pen or other productivity app they previously described)?

6. How do you think AI might improve future experience?
   - Why is that important to you?

7. If you could change one thing about the visual design what would it be?
   - Tell me about that.
   - Why is that important for you?

8. Do you have any remaining questions or comments?

Closing - Test Complete

[After user answers all closing questions or at 60 minutes]

We have reached the end. Thank you so much for your time. This has been very helpful. You may leave the session now. Thank you again, for helping us understand how you engage with the app. We appreciate your time!

References

Usability Test Links

- Consent form: https://forms.gle/ELvjhXYbHreQXKiW6
- Pre-interview Questionnaire: https://forms.gle/BdDnJTV6wrkifPn2A
- Apps
  - Notion: https://www.notion.com/
  - Obsidian: https://obsidian.md/

Acknowledgments

This script was influenced by content and template samples from the Nielsen Norman group website and from Steve Krug (author of Rocket Science Made Easy and Don't Make Me Think).

Facilitator Quick Reference Questions:

When did this happen?

How long did it take you?

Has this happened before?

How did you feel during this experience?

Tell me more...

Why...

What is it you are trying to accomplish?

Task Instructions for Users

Facilitator instructions

Please give one task at a time to the user.

Zoom Interviews:

1. Copy one task at a time
2. Paste into the chat (Zoom)

In-person Interviews:

1. Print the tasks
2. Cut the pages into individual tasks.

Task 1: Download the app/Onboarding

Part A: Download the app.

https://www.notion.so

https://obsidian.md/

When download is complete:

- Do not click/tap on anything.
- Wait until the facilitator asks you to proceed.

Part B: (When requested) Follow the "Onboarding" prompts.

Task 2: Create a New Note (User's Choice)

- For the next task, please create a note.
- You may choose the type of note. Write whatever you would like.
- Tell the facilitator when you're done.

Task 3: Create New Note & Add Formatting

- Now, please create a new note.
- This time add formatting to your note.
- Add bullets, indentation, headers, etc.
- Tell the facilitator when you're done.

Task 4: Access a note

- Now you have multiple notes: Find a list of your contents.
- Select your first note then wait a moment.
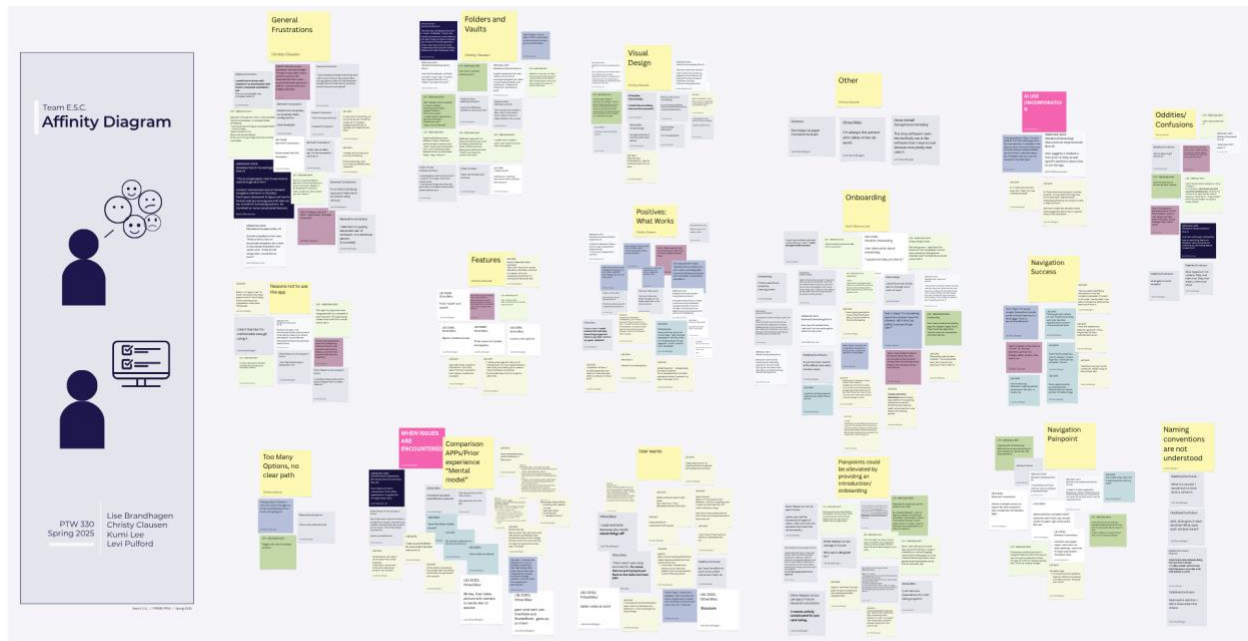- Tell the facilitator when you're done.

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Task 5: Assign a note to a category or move to a folder (Notion) or "vault" (Obsidian)

- Assign that note you just opened to a category or move it to a folder (Notion) or "vault" (Obsidian).
- Add it manually or use tagging system.

- **Advanced users**: Assign metadata to your note (Master Tags or Frontmatter).
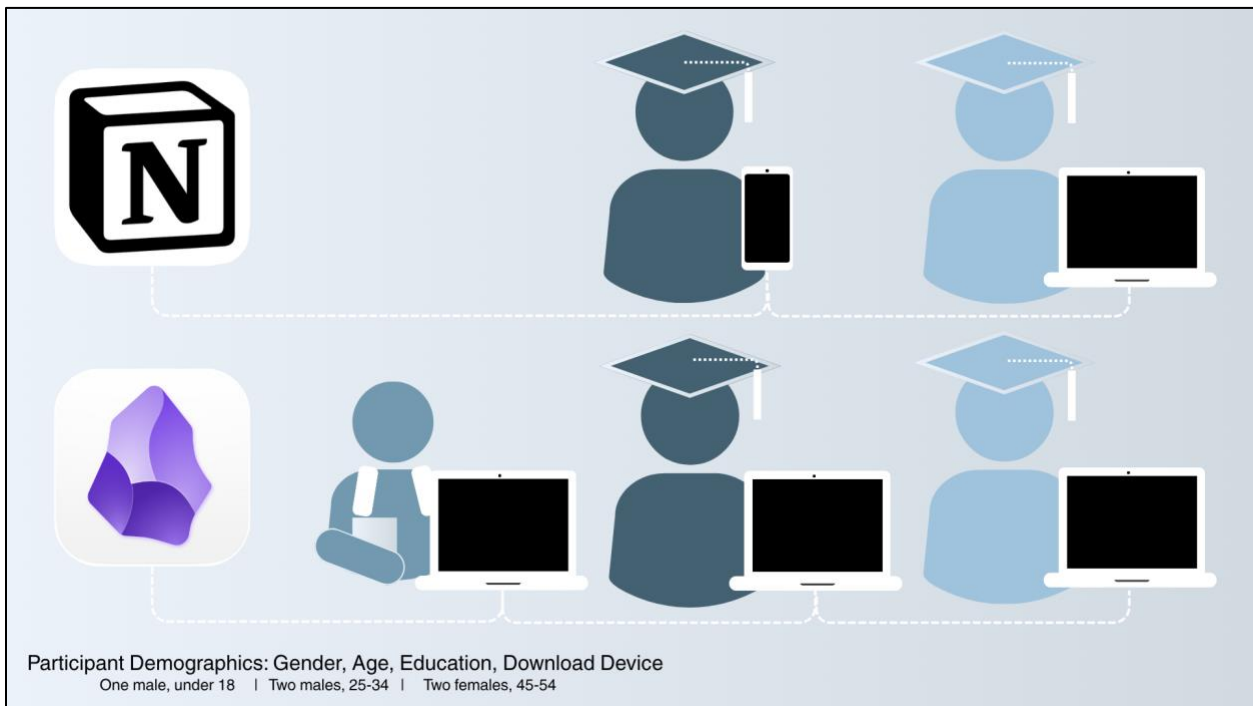

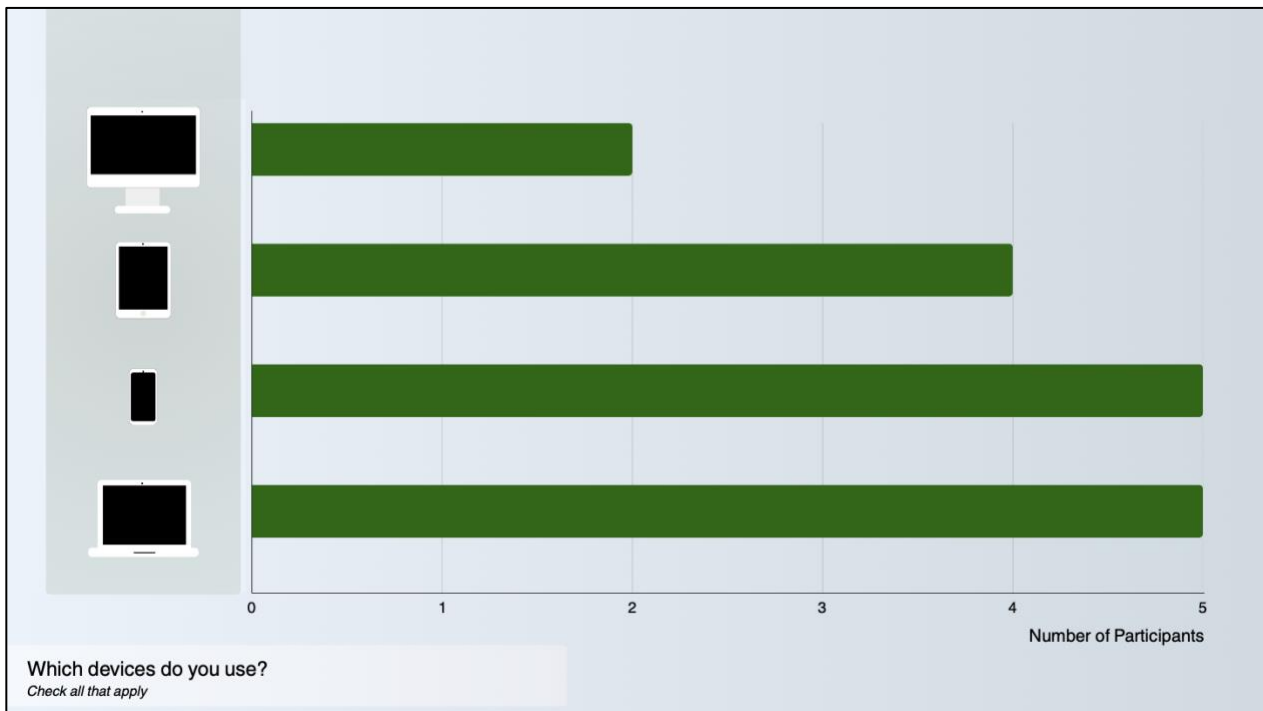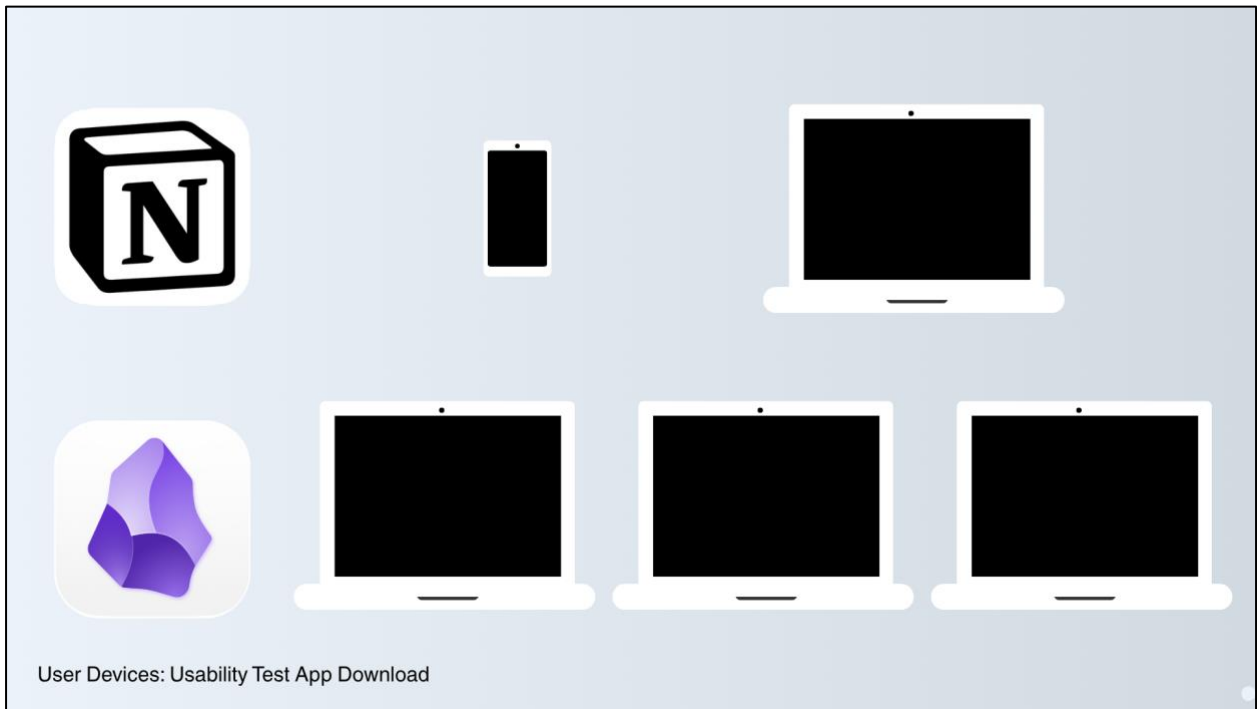
Task 6: Use a template to create a note

- For this task, create a note using a template within the app.
- You may select any template you wish and create a note of your choice.

Usability Test Affinity Diagram

Infographics

Participant Demographics: Gender, Age, Education, Download Device
One male, under 18 | Two males, 25-34 | Two females, 45-54

User Devices: Usability Test App Download

Which devices do you use?
Check all that apply

Number of Participants

Participant Comfort Level with Technology
Self-reported

Legend: Lets other go first | Curious and willing to try | Tech trailblazer

X-axis: Describe your comfort with technology

Participant Productivity Apps

Legend: Once a week | A few times a week | everyday | Never

X-axis: Calendar app | Alarm Clock app | List app (other) | Calorie/Workout tracker | Journal app

References

Apps – Usability Testing

Notion, *www.notion.so*

Obsidian, *obsidian.md*

Research

Nielsen Norman Group, *www.nngroup.com/articles*

Steve Krug, *Sensible.com*

Case, Amber (2016). *Calm Technology: Principles and Patterns for Non-Intrusive Design* (2nd ed.). O'Reilly Media Inc.

Hu, Charlotte (2024, February 21) *Why Writing by Hand Is Better for Memory and Learning*. Scientific American. https://www.scientificamerican.com/article/why-writing-by-hand-is-better-for-memory-and-learning/

Images

Notion Media Kit, *www.notion.so/notion/Media-Kit-205535b1d9c4440497a3d7a2ac096286* (Notion Logos)

Obsidian Brand, *obsidian.md/brand* (Obsidian Logos)

Credits

PP04 Team Credits (Alphabetical Order)

Chief Calm Technology Evangelist

Levi Pulford

Content Strategy

Lise Brandhagen
Levi Pulford

Content Writer

Lise Brandhagen
Christy Clausen
Kumi Lee
Adam Okoye
Levi Pulford

Data Analysis

Christy Clausen
Kumi Lee

Editor

Lise Brandhagen
Christy Clausen

Multimedia Specialist

Lise Brandhagen
Levi Pulford

Project Manager

Lise Brandhagen
Kumi Lee

Web Production Specialist

Adam Okoye

Return to Part A: Website

Skip the scroll: click a button