

# Usability Goals

# Personal Finance

# Tracker

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## Introduction:

Personal finance management is essential for achieving financial goals, such as saving for a down payment on a house, retiring comfortably, or starting a business. However, many people find it difficult to track their income and expenses, create a budget, and stick to it. We have developed a Personal Finance Tracker to help you overcome these challenges.

## Usability Goals:

For a Personal Finance Tracker **Usability goals** become paramount for creating an effective and user-friendly tool that empowers individuals to manage their finances effortlessly. Usability goals might involve streamlining the onboarding process to swiftly acquaint users with the application's features, reducing the complexity of financial data input to minimize errors, and ensuring intuitive navigation for accessing various financial insights. Additionally, the tracker could aim to provide clear and easily understandable visualizations of financial data, promoting quick comprehension of spending patterns and budgeting trends.



## Qualitative Goals:

### Learnability:

- Users should express a sense of ease and understanding when navigating through the application for the first time.
- Users should find it easy to add, categorize, and edit expenses, expressing a quick understanding of the expense tracking process.
- Users should quickly grasp how to input, categorize, and manage their income sources within the application.
- Develop onboarding processes and support materials that comprehensively guide users in understanding and utilizing all features of the financial tracker effectively.
- Assist users in creating yearly and monthly financial plans through intuitive features, guiding them in allocating funds and managing expenses proactively.

### User Satisfaction:

- Users should provide positive feedback regarding the overall experience, indicating satisfaction with the design and functionality.
- Users should appreciate and utilize the customization features for budgeting, expressing satisfaction with the ability to tailor budgets to their specific needs.
- Users should express satisfaction with the budgeting tools, finding them helpful for managing and controlling their spending.
- Ensure that the presented spending, income, and net worth reports are easily interpretable, allowing users to quickly grasp their financial status and progress towards goals.

### User Engagement:

- Users should express an interest in regularly using the application for managing their finances, setting goals, and exploring insights.
- Users should express an interest in regularly updating and reviewing their budgets, indicating engagement with the budgeting features.
- Users should receive timely notifications when they exceed budget limits in specific categories, facilitating prompt corrective actions and financial discipline.

- Enable users to set up bill payment reminders, ensuring these notifications are well-timed to prevent missed payments and associated penalties.

### Perceived Security:

- Users should feel confident about the security measures in place for protecting their financial data.

### Visual Appeal:

- Users should appreciate the visual design of the application, finding it aesthetically pleasing and conducive to a positive user experience.
- The finance tracker should have a user-friendly interface that is visually appealing and engaging. This will help to keep users motivated to use the app and track their finances.
- Implement visual indicators that clearly communicate users' progress against their budget, providing a quick and comprehensible overview of their financial performance.

### Error Handling:

- Users should express satisfaction with how the application handles errors, finding error messages clear and recovery options intuitive.

### Customization Satisfaction:

- Users should appreciate and utilize customization features, expressing satisfaction with the ability to tailor the application to their preferences.

### Consistency:

- Users should recognize and appreciate the consistency in navigation elements across different sections of the application.

### Intuitiveness:

- Users should navigate the expense tracking section intuitively, minimizing confusion and frustration when managing their spending.
- Users should find the income tracking features intuitive, with a minimal learning curve for adding and managing different income streams.

- Users should navigate between expense tracking, income tracking, and budgeting sections intuitively, without feeling disoriented.

### Navigation:

- Users should be able to seamlessly navigate through the financial tracker, locating key features and reports without unnecessary clicks or confusion.

## Quantitative Goals:

### Satisfaction Goals

- Users, after utilizing the report sharing feature, should rate their satisfaction with the ease of sharing as an average of 4 ("Very satisfied") on a 5-point scale.
- Novice users, after initial use, should rate their overall satisfaction with ease of learning with the finance tracker as an average of 4 ("Very satisfied") on a 5-point scale.
- Users, when asked about the security measures implemented for protecting financial data, should rate their satisfaction with an average score of 4 ("Very satisfied") on a 5-point scale.
- Users, when prompted about the intuitiveness of the income tracking tools, should rate their satisfaction with an average score of 4 ("Very satisfied") on a 5-point scale.

### Relative Goals

- Novice users, when entering their expenses into the finance tracker, should complete the task 30% faster than if they were manually recording and calculating expenses on paper.
- Users, when generating financial reports with the finance tracker, should be able to compile and analyze data 25% faster than if they were manually collecting and organizing the same information.
- Novice users, after their first-time use, should complete the login/sign-up process in the finance tracker 15% faster and with 10% fewer errors than the competitors' applications in the market.

- Novice users, when comparing the efficiency of using your finance tracker for expense tracking to manual processes, should complete the task 25% faster and with 15% fewer errors.

## Goal 1:

### Calculate Income: -

#### Operational Definition

Expert	Two trials
Novice	First trial
Learn	Error-free tolerance
Satisfaction	1 Very unsatisfactory to 7 Very satisfactory

#### Ease of Learning Goals

Measure	Priority	Goal
Novice Time	1	5
Novice Errors	2	<2
Novice Trials	-	-

#### Ease of Use Goals

Measure	Priority	Goal
Expert Time	2	<3 sec
Expert Errors	2	Null

#### Satisfaction Goals

Measure	Priority	Goal
Expert	3	6
Novice	3	5

## Goal 2:

Generate Income: -

### Operational Definition

Expert	Three trials
Novice	First two trials
Learn	Error-free tolerance
Satisfaction	Very unsatisfactory to Very satisfactory

### Ease of Learning Goals

Measure	Priority	Goal
Novice Time	3	5
Novice Trails	2	1
Novice Error	-	-

### Ease of Use Goals

Measure	Priority	Goal
Expert Time	2	<4 sec
Expert Error	2	Null

### Satisfaction Goals

Measure	Priority	Goal
Expert	2	6
Novice	3	5

### Goal 3:

Expense Calculation: -

#### Operational Definition

Expert	Two trials
Novice	First trial
Learn	Error-free tolerance
Satisfaction	Very unsatisfactory to Very satisfactory

#### Ease of Learning Goals

Measure	Priority	Goal
Novice Time	2	-
Novice Errors	1	<2
Novice Trials	-	-

#### Ease of Use Goals

Measure	Priority	Goal
Expert Time	2	<4 sec
Expert Error	2	Null

#### Satisfaction Goals

Measure	Priority	Goal
Expert	2	6
Novice	2	5

### Goal 4:

Budget Setting: -

#### Operational Definition

Expert	Three months
Novice	First two months
Learn	Error-free tolerance
Satisfaction	Very unsatisfactory to Very satisfactory

#### Ease of Learning Goals

Measure	Priority	Goal
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Novice Revenue	1	>\$5,000
Novice Errors	2	<2
Novice Months	-	-

#### Ease of Use Goals

Measure	Priority	Goal
Expert Revenue	2	>\$10,000
Expert Errors	2	Null

#### Satisfaction Goals

Measure	Priority	Goal
Expert	1	3
Novice	1	4

### Goal 5:

#### Bill Payment Reminder: -

#### Operational Definition

Expert	Monthly bills
Novice	First two months
Learn	Error-free tolerance
Satisfaction	Very unsatisfactory to Very satisfactory

#### Ease of Learning Goals

Measure	Priority	Goal
Novice Accuracy	1	>90%
Novice Errors	2	<2
Novice Months	-	-

#### Ease of Use Goals

Measure	Priority	Goal
Expert Accuracy	2	>95%
Expert Errors	2	Null

#### Satisfaction Goals

Measure	Priority	Goal
Expert	2	5
Novice	1	4

## Goal 6:

### Notification and Reminder: -

#### Operational Definition

Expert	Daily notifications and reminders
Novice	First week
Learn	Error-free tolerance
Satisfaction	Very unsatisfactory to Very satisfactory

#### Ease of Learning Goals

Measure	Priority	Goal
Novice Accuracy	1	>90%
Novice Errors	2	<2
Novice Days	-	-

#### Ease of Use Goals

Measure	Priority	Goal
Expert Accuracy	2	>98%
Expert Errors	2	Null

#### Satisfaction Goals

Measure	Priority	Goal
Expert	1	98%
Novice	1	<2

## Goal 6:

Log on with Security: -

### Operational Definition

#### Operational Definition

Expert	two logins
Novice	First three logins
Learn	Error-free tolerance
Satisfaction	Very unsatisfactory to Very satisfactory

#### Ease of Learning Goals

Measure	Priority	Goal
Novice Accuracy	1	>95%
Novice Errors	2	<2
Novice Logins	-	-

#### Ease of Use Goals

Measure	Priority	Goal
Expert Accuracy	2	>99%
Expert Errors	2	Null

#### Satisfaction Goals

Measure	Priority	Goal
Expert	1	98%
Novice	1	<2

