

PactSafe Final Presentation

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Agenda

- Product Description
- Usability Problems Addressed and Why
- Research Questions
- Methods for Identifying Usability Issues
- Results/Findings
- Recommendations
- Limitations
- Summary/Conclusions

Product Description

- PactSafe helps companies track terms of service on an application or website.
 - Helps companies with legal defensibility in court
- Provides a web based software to help users:
 - Create contracts
 - Update contracts
 - Send contracts to signers



Terms of Service Update

A change in our [Terms of Service](#) takes effect on February 12, 2014. Please read them carefully. A high-level summary of the changes is available [here](#).

☐ I accept the new Terms of Service.

Continue Decline

Product Description Through Personas

Nancy



- Website Manager
- Updates terms of service contract and tracks it

Ray



- Lawyer
- Writes terms of service
- Defends company in court with data in PactSafe

Aaron



- HR Manager
- Sends employee handbook and tracks who agreed to it

Usability Problems Addressed and Why

1. Address if new users understand what actions and terms mean in the system
2. Identify if navigation within the application is intuitive to new users
3. Analyze if new users of PactSafe understand what consecutive tasks they need to take to achieve their goals within the system

Why?

Based on data from the previous methods, we found that these three were the main issues users had, and we wanted to further analyze them to give more targeted recommendations.

Research Questions

1. To what extent is the user able to accomplish tasks without assistance?
 - a. Count of errors of omission
 - b. No of mistakes
2. How and in what form does the user seek help in case of confusion?
 - a. Navigation to homepage
 - b. No of prompts given
 - c. No of help and direction
3. During a task, is the guidance towards next steps effective?
 - a. Selecting next stage buttons
4. Is the experience of completing tasks positive?
 - a. How easily (all ratings)

Methods - Participant Recruitment

Based on our three personas.



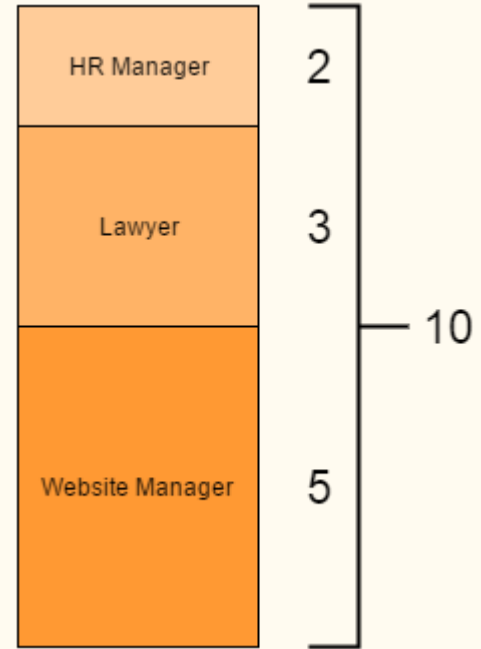
Lawyer



Website Manager



HR Manager

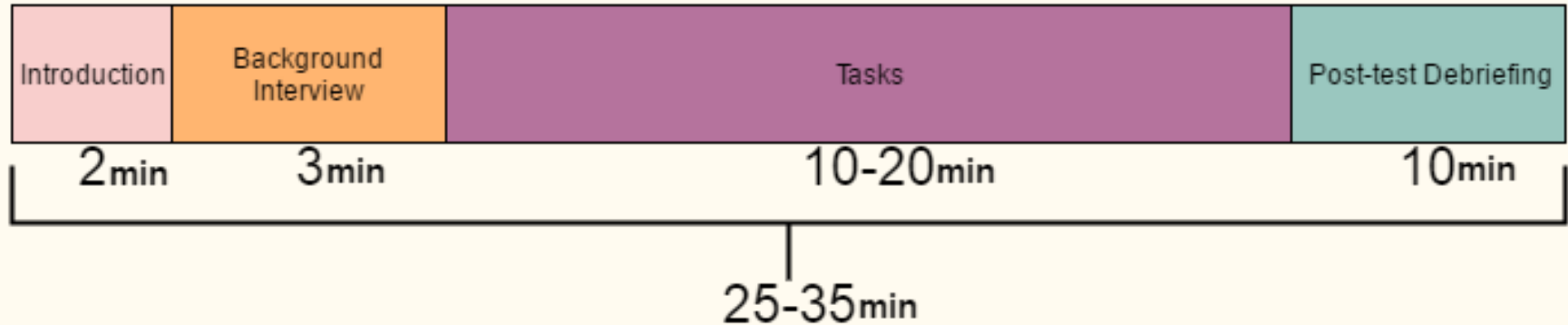


Methods - Tasks Evaluated

1. Create and publish a sample contract
2. Update an existing contract
3. Send an existing contract to a signer

Methods - Study Design

Participants are requested to perform one/two tasks based on their background.

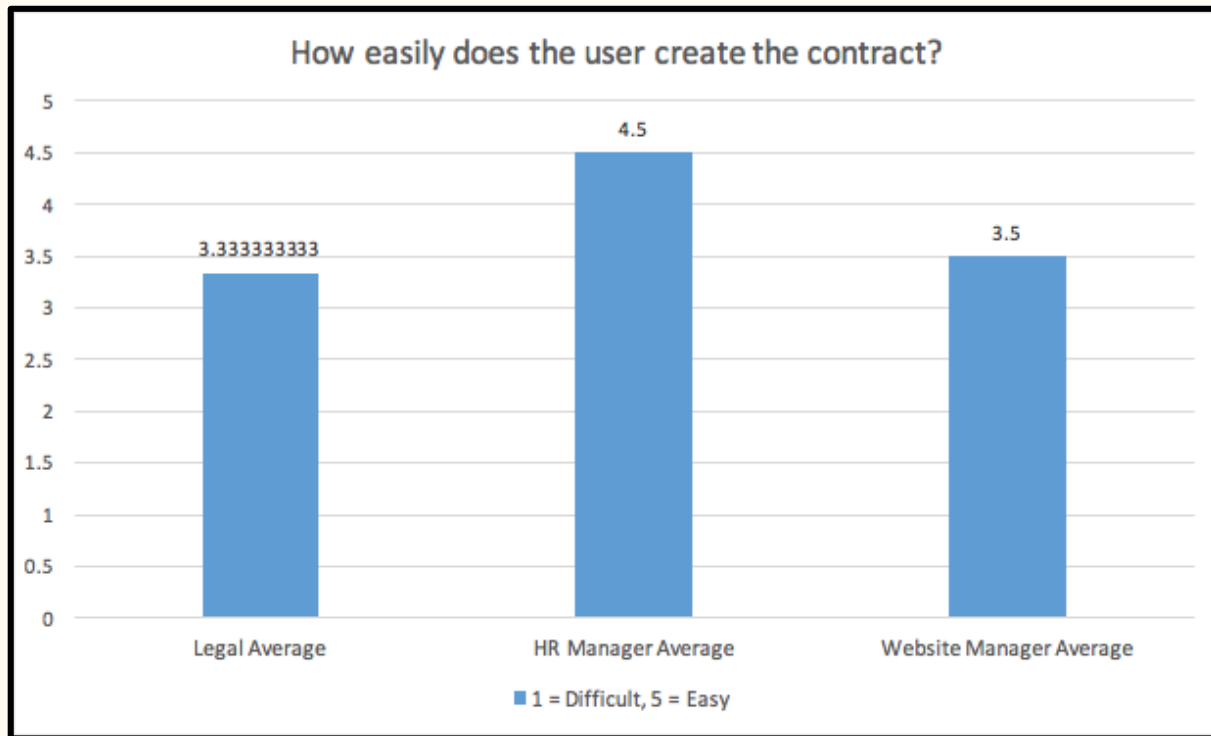


Methods - Data Collection and Analysis

1. Conducted *Think-Aloud* technique with participants.
2. Based on think aloud, got *quantitative* and *qualitative* data.
3. Created charts based off quantitative data metrics.
 - a. Evaluated ease of each task
 - b. Evaluated ease of subtasks
 - c. Counted amount of times users asked for help
4. Compiled qualitative data.

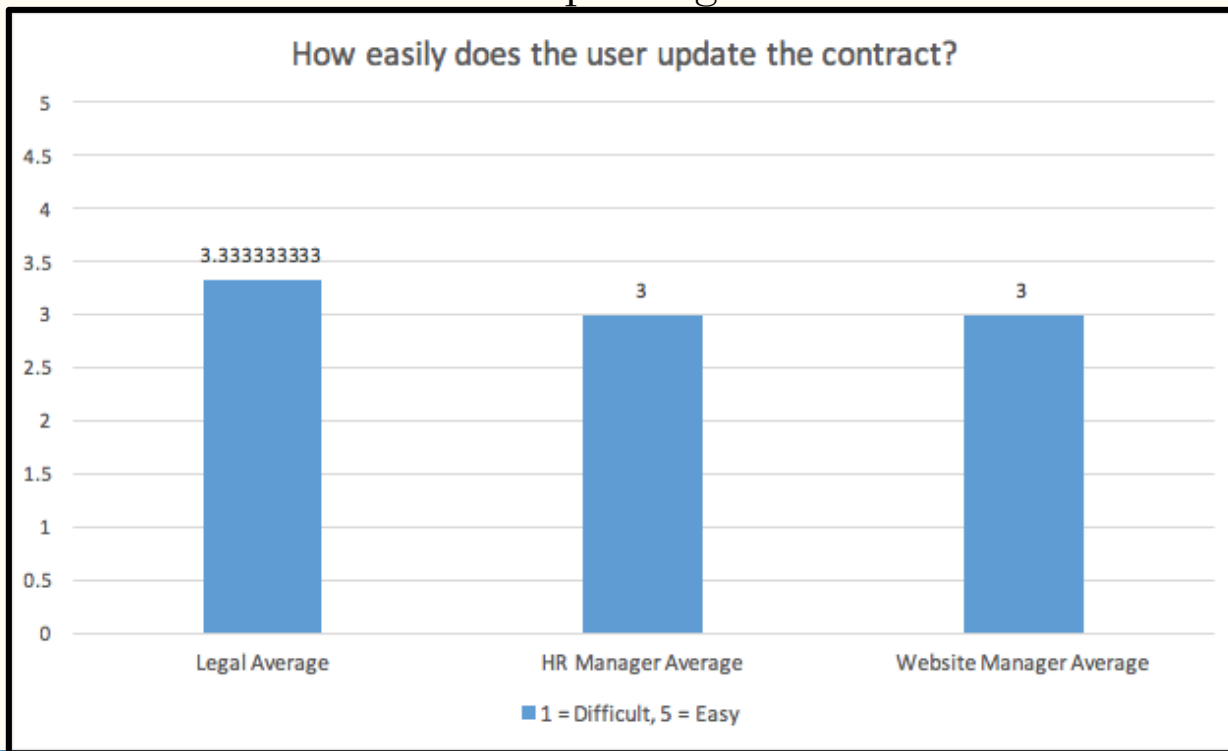
Results/Findings

Process of creating a contract



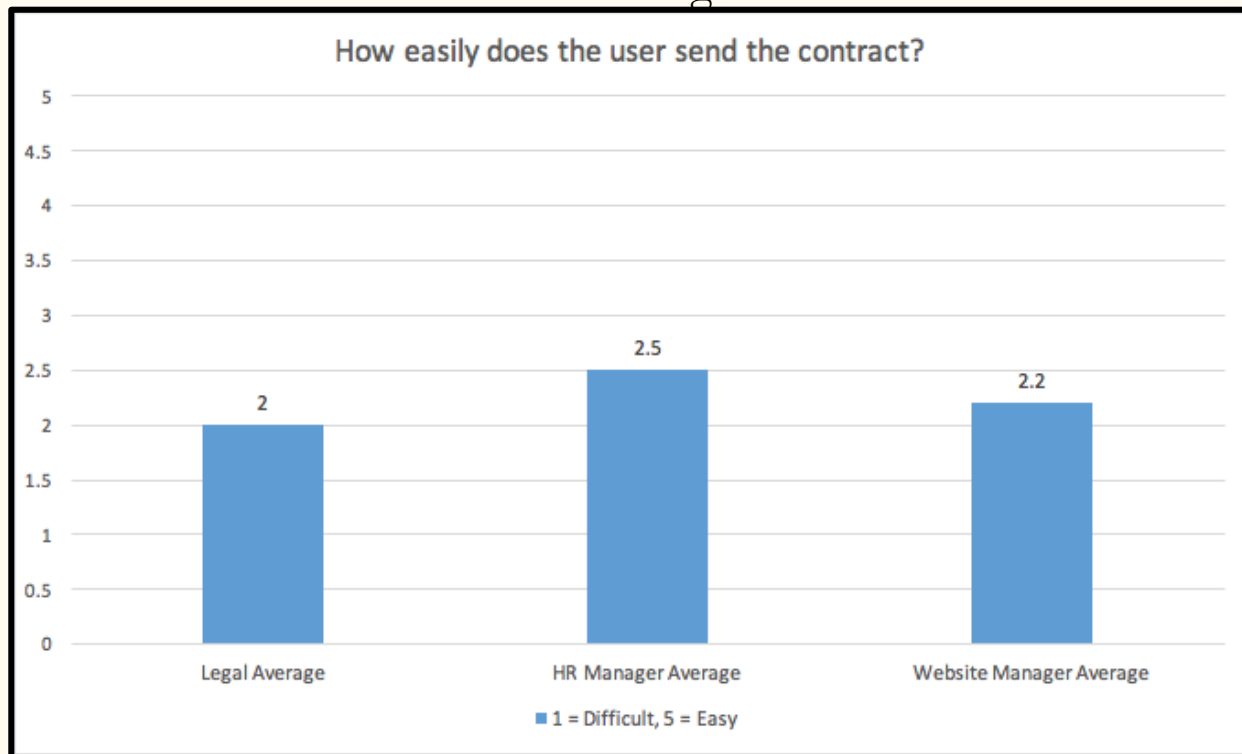
Results/Findings

Process of updating a contract



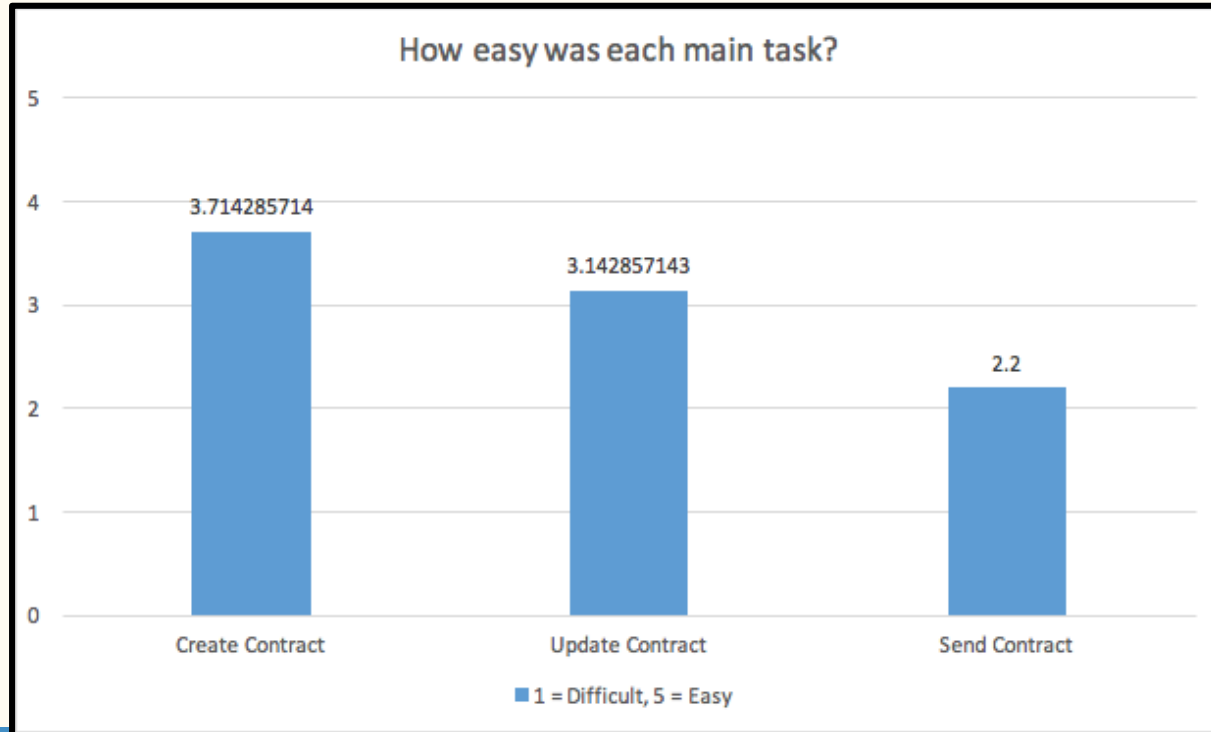
Results/Findings

Process of sending a contract



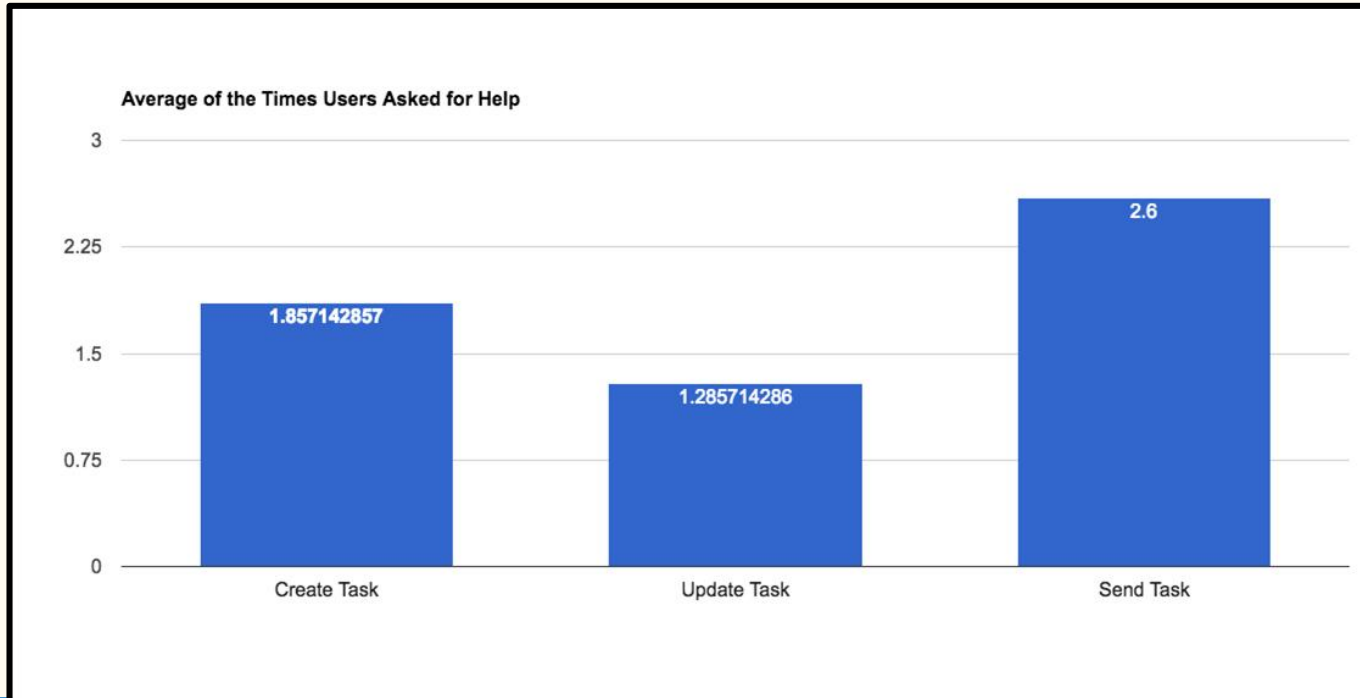
Results/Findings

Overall ease of a task



Results/Findings

Tasks which required the most help



Recommendations

High Impact - Recommendations based on

Issues that hinder/prolong Task Completion process.

Issues that create confusion for users and cause them to make several mistakes.

Issues where the users refer to help frequently and require most assistance.

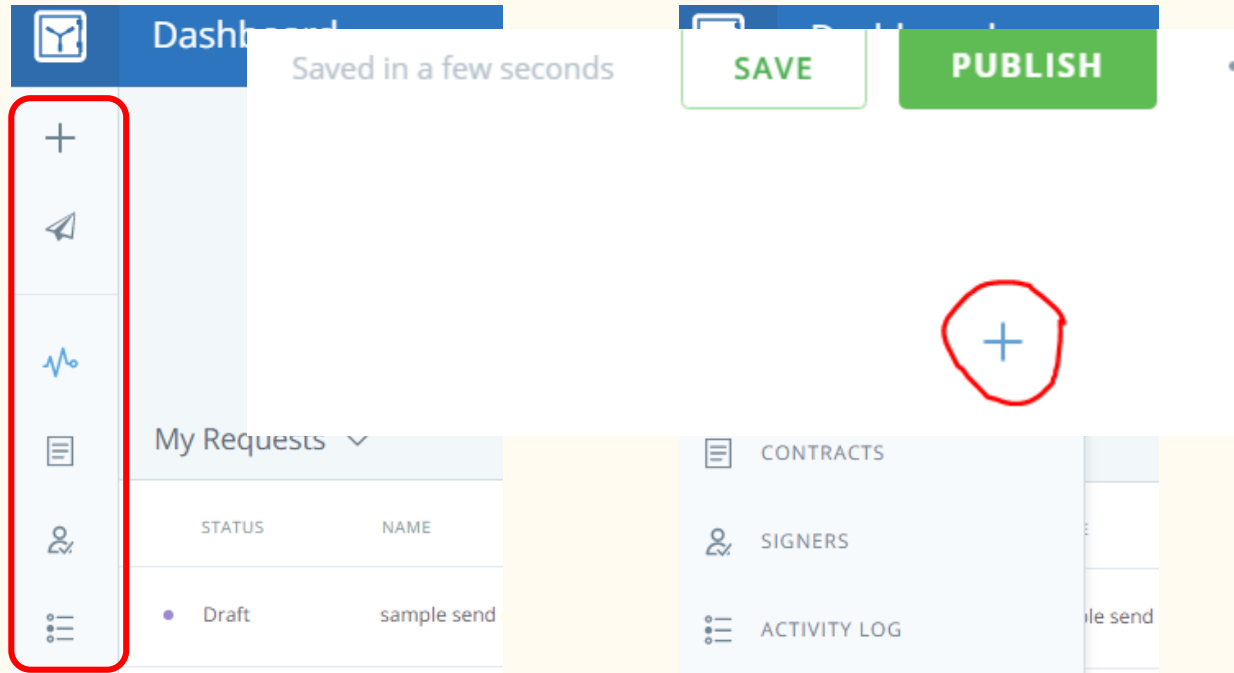
Low Impact - Recommendations based on

Issues that cause mild confusion for users

Issues where users accomplish tasks with very few mistakes.

High Impact - Recommendations

Use words instead of symbols to avoid users from clicking on unintended objects.



High Impact - Recommendations (cont.)

Provide Navigational Consistency in terms of “Next” Button where applicable.

The image shows a two-step form process. The first step, titled "Provide details about the request", contains input fields for "NAME" (with the value "Example Send") and "DESCRIPTION (optional)" (with the value "Description for Example Send"). A red arrow points to the right-pointing chevron button in the top right corner of this step. The second step, titled "What needs to be signed?", displays a contract card. The card has a green border and contains the text "Contract", "Contract- This is my description", a green checkmark, a user icon, "6 minutes ago", and "v3". A red arrow points to a green "FINISH" button in the top right corner of the second step.

Provide details about the request

NAME

Example Send

DESCRIPTION (optional)

Description for Example Send

What needs to be signed?

Contract

Contract- This is my description

6 minutes ago

v3

FINISH

High Impact - Recommendations (cont.)

Provide Correct feedback for options selected.

The image shows a screenshot of a web form with a feedback message and a required field. On the left, a feedback message box is highlighted with a red arrow. It contains the text "Contract", "Contract- This is my description", a green checkmark, and a user profile icon with the text "33 minutes ago". In the center, the form has a "TYPE" dropdown menu set to "Checkbox". Below it, the text "REQUIRED" and "Is this field required?" is circled in red. To the right of this text is a toggle switch. On the far right, there is a green "FINISH" button.

What n

Contract

Contract- This is my description

33 minutes ago

TYPE

Checkbox

REQUIRED

Is this field required?


FINISH

High Impact - Recommendations (cont.)

Give a tooltip/description around terminology.

The screenshot shows a user interface for managing contracts. At the top, there is a light blue header bar with the word "TITLE" on the left and a search input field. Below this is a main content area with a light blue background. On the left side of this area, there is a list item for "Test Person" with the email "example@gmail.com". To the right of this list item is a dropdown menu. The dropdown menu has a light blue header with the word "Signer" and an upward arrow. Below the header, there are two options: "Signer" and "Recipient". Two red arrows point to these options. To the right of the dropdown menu, there are two icons: a blue pencil and a red "X". Below the main content area, there is a light blue footer bar. On the left side of this bar, there is a toggle switch labeled "SHARED". A red arrow points to the toggle switch. Below the toggle switch, there is a text label "Share this contract with other Sites in your Account?".

TITLE

1  **Test Person**
example@gmail.com

Signer ^

Signer

Recipient

SHARED

Share this contract with other Sites in your Account?

High Impact - Recommendations (cont.)

Avoid using technical terms that may not cater to every user profile.

The image shows a web interface with a form for sending a contract and a modal for details. The form has a header "Sending 1 Contract" and a "CANCEL" button. The modal shows details for a "sample send request".

Form Fields:

- NAME: Example Send
- DESCRIPTION (optional): Description for Example Send

Modal Details:

- ID: 58448978bd6093c11f83c6c6
- NAME: sample send request
- DESCRIPTION: first sample send request - 01
- STATUS: (partially visible)


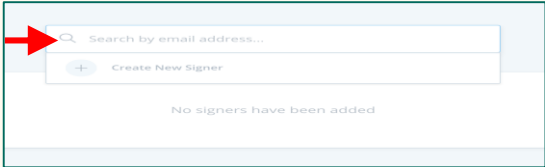

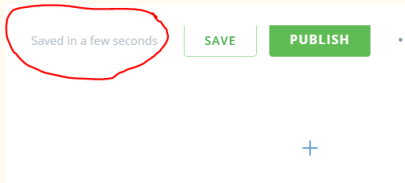
Email Details:

- FROM: Test <notifications@pactsafe.com>
- REPLY-TO: test@gmail.com
- TO: adasd asdsads <regina@gmail.com>
- SUBJECT: Test Account sent you "asdsad"
- TEST: (partially visible)

Annotations:

- A red box highlights the header "Provide details about the request" with left and right arrows.
- A red arrow points to the "SUBJECT" field in the email details.
- A red arrow points to the "DESCRIPTION" field in the modal details.

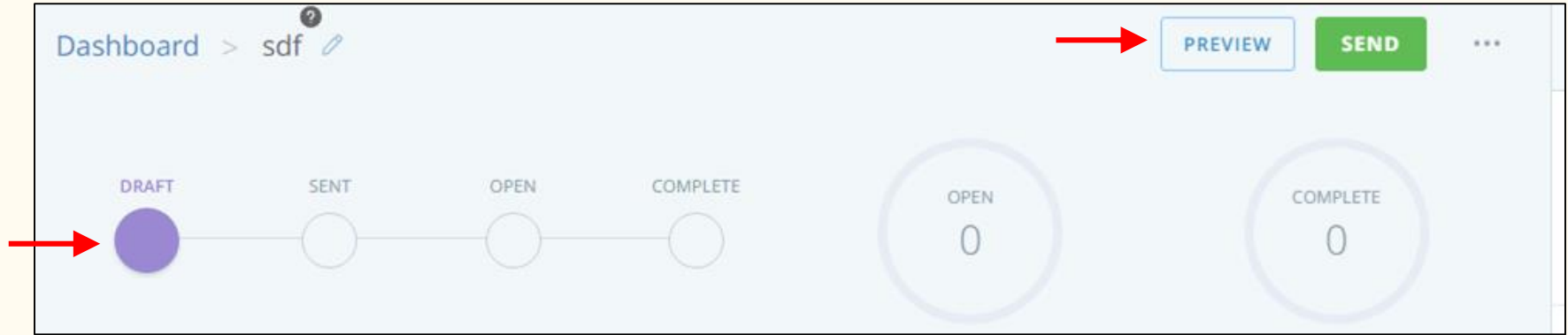
Low Impact - Recommendations (cont.)

Table options not very familiar	
Separate the tasks of adding signer and creating a new signer	
Edit Terminology of “New Version” button	
Irrelevant Information	

Good Aspects

Preview feature on sending contract was useful

Status indicator is useful and transparent to user



Good Aspects (Continued)

Aesthetically pleasing - Upon initial login, users had a good first impression of the system.

“I like how the site looks. It seems simple and easy to use.”

-John Doe, Technical Recruiter



Limitations

User behavior might be different when they are not watching

Think alouds slows down the thought process of users, so they might be more careful when analyzing the system

Participants were in the same field as our personas, but not 100% representative

Interviewed Law Students instead of Lawyers

Interviewed a Technical Recruiter and HR Specialist instead of HR Managers

Environment is not identical to where real users would use PactSafe

Summary/Conclusions

The overall goal of our usability study was to explore how people use PactSafe and provide suggestions which will improve the usability of the product.

By understanding PactSafe's goals, we gathered data through various usability observations and have framed recommendations which will improve the user experience with the product.

Our study will be provided to PactSafe hoping that our work will be beneficial for subsequent iterations of the product.

Questions?