

Evergreen Budgeting App Evaluation - Remote

This form is used to record the results of the evaluation of my dissertation budgeting app "Evergreen Budgeting". If there are any issues or questions, I can be contacted at 2635375B@student.gla.ac.uk

* Required

Introduction

Hello, and thank you for agreeing to take part in the evaluation of the Evergreen Budgeting App. The aim of this experiment is to assess the usability, functionality, and overall user experience of this app. I need the involvement of real users because I can't fully evaluate how well the app meets its goals without feedback from the people who are likely to use it. Your input will help refine the app and ensure it meets user expectations.

During the session, you will be asked to complete a set of tasks within the app, such as creating a budget, logging transactions, and setting savings goals. As you perform these tasks, you will be asked how the tasks went and if you faced any challenges or points of confusion. Afterward, you will be asked some questions about your experience. The data collected will include:

- Your interaction with the app during the tasks.
- Your responses to the post-evaluation questions.
- Any comments or feedback you provide.

Please note that this is **not** a test of your ability, there are no right or wrong answers. The goal is to evaluate the app, not you. If at any point you feel uncomfortable or wish to stop, you are free to withdraw from the evaluation without any consequences, though by doing so, you acknowledge that you won't be able to be debriefed at the end of the evaluation. I can be contacted at 2635375B@student.gla.ac.uk if you have any questions or queries during or after the evaluation.

Please Note: all task instructions will be contained within this form but you will be required to make use of my website/app so you may find it more convenient to either have 2 devices (e.g. a phone and a laptop) or a bigger screen while completing this evaluation.

1

Do you have any comments to make at this point?

2

Do you agree to take part in this evaluation and for your anonymised data to be used in my dissertation? *

☐ Yes

☐ No

Pre-Evaluation Questions & Demographics

3

What age range are you in? *

- ☐ 18-25
- ☐ 26-35
- ☐ 36-50
- ☐ 50-60
- ☐ 60+

4

How often do you review your budget or financial situation? *

- ☐ Daily
- ☐ Weekly
- ☐ Monthly
- ☐ When making a purchase
- ☐ Yearly
- ☐ Never

5

What methods do you currently use to manage your budget? *

- ☐ Pen and paper
- ☐ Spreadsheet
- ☐ Budgeting app
- ☐ Other

6

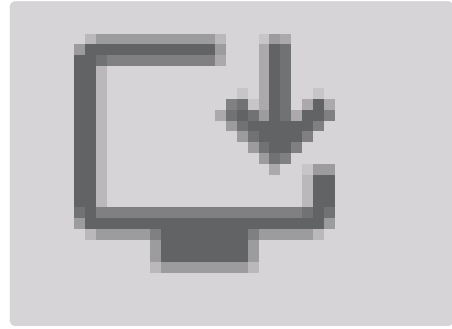
Have you used budgeting apps before? If yes, please list them *

7

Which device will you be using to conduct the evaluation today? *

- ☐ Phone
- ☐ Laptop/desktop
- ☐ Tablet
- ☐ Other

PWA Mobile App



1. Using your phone, visit <https://evergreen-budgeting-app.web.app> and download the app
 1. For Android, this should appear as a notification at the top of the page or click the symbol as seen above
 2. For iPhones, go to share and click add to home screen
 3. If these steps don't work, feel free to use the browser site instead of downloading the app

8

Are you making use of the website or downloaded app? *

☐ Website

☐ App

☐ Other

9

Why are you not making use of the app? E.g. couldn't download the app, didn't want to download it, etc *

Task 1 - Registration & Login

You can find the app here: <https://evergreen-budgeting-app.web.app/>

1. Navigate from the login page to the registration page.
2. Enter a username, email, password, default currency and a starting balance of your choice.
 - Nothing will be done with this information so it can be real or fake.
 - Make note of your username/email and password as this information will be needed at a later point.
1. Login with these details

10

Did you manage to successfully login and access the home page of the site? *

☐ Yes

☐ No

11

If you had issues logging in/registering, what was the issue?

12

Was there any error messages? And if so, were these informative?

13

Was your chosen username visible on the home page? *

☐ Yes

☐ No

☐ Other

14

If no, what was displayed instead?

15

Could your chosen currency symbol be seen displayed on the home page (e.g. in the income and outgoings table)? *

- ☐ Yes
- ☐ No
- ☐ Other

16

If no, what was displayed instead? Or could you not find where the symbol should be displayed?

17

Navigate to one of the transaction pages. Does the bank balance displayed at the top of the page match the starting balance you entered when registering? *

- ☐ Yes
- ☐ No
- ☐ Other

18

If no, what was displayed instead? Or could you not find one of the transaction pages?

Task 2 - Creating a Monthly Budget Part A

1. Navigate to the budget page and create a budget
2. You spend 40 on clothes each month, add this category to the budget
3. For the remainder of the budget, you can enter any amounts you like in any categories you like, but it must total 1,500.
 1. Only do this in the expense categories currently.
4. Once your budget is at 1,500 add 200 in any savings category you want

19

What is your total budgeted amount currently? *

20

Was it easy to tell how much your budget added up to when creating it? *

- ☐ Yes
- ☐ No
- ☐ Other

21

If no, why wasn't this easy? *

22

Did you make use of the desired monthly spending amount field (top)? *

- ☐ Yes
- ☐ No

23

What value did you put in this field? *

24

Did you get a warning that you had gone over your desired spending amount at any point? And was this message obvious? *

25

Did you manage to successfully create and save the budget? *

- ☐ Yes
- ☐ No
- ☐ Other

26

If no, what problems did you run into/what were the error messages? *

27

Were each of the categories you'd created in the budget viewable as watering cans on the budget page when the budget had been saved? *

- ☐ Yes
- ☐ No
- ☐ Other

28

If no, what was displayed on the budget page instead? *

29

Did this process feel intuitive to how you'd usually think to break down your finances for the month?
Why or why not? *

30

What did you like about this process? *

31

Was there anything you didn't like about this process? *

Task 3 - Setting Savings Goals Part A

1. Navigate to the savings page
2. Add a savings goal using the following information
 1. You're saving for a house down payment
 2. You want to save 30,000.00 and you currently have 17,600.00
 3. You're hoping to have this saved by the beginning of January next year.
 4. Save this goal

32

View the savings goal part of the page. How much do you have left to save? *

33

What percentage of the goal have you saved so far? *

Task 3 - Setting Savings Goals Part B

1. Add a new savings goal:

1. You're saving for a second-hand car and want to buy this before the end of August
2. You think this could cost about 10,000.00 in total and you currently have 4,500.00 put aside for it
3. Save this goal

34

Did you manage to enter and save each savings goal? *

- ☐ Yes
- ☐ No
- ☐ Other

35

If no, what went wrong? *

36

Is there any other information you would want to be able to display about your savings goals that isn't currently there? *

37

What did you like/dislike about this process and the way the goals are displayed? *

Task 4 - Adding Expenses Part A

1. Navigate to the expenses page
2. Your rent each month is 650 and is taken out of your account on the 1st of each month. Enter this repeating transaction from 01/01/2025 to 01/12/2025

38

Was it easy to figure out how to add a new expense? *

- ☐ Yes
- ☐ No
- ☐ Other

39

If no, why wasn't this easy? *

40

Was it clear what fields in the log transaction form were mandatory and which weren't? *

- ☐ Yes
- ☐ No
- ☐ Other

41

Why wasn't this clear? *

42

How easy was it to understand how to add repeated transactions? *

- ☐ Extremely easy
- ☐ Somewhat easy
- ☐ Somewhat tricky
- ☐ Extremely tricky

43

Are there any repeat schedules (e.g. monthly, yearly) that you feel would be useful that aren't included? *

Task 4 - Adding Expenses Part B

1. You went for a food shop yesterday at Lidl. You spent 28.98 and spent this on your credit card. Log this transaction.
2. Sorry! You actually spent 30.45 at Lidl as you had to go back in for milk. Can you update this?
3. You bought a gift for your Mum 4 days ago. You spent 45 at Amazon. Log this transaction
4. You went out to dinner with some friends last Wednesday at Wagamama's. Your meal cost 36.23. Log this transaction
5. You've been told by your landlord that your rent is going up by 50 a month from June onwards. Edit the rent transaction from the 1st of June onwards so that it's actually 700 a month instead
6. You went clothes shopping today and spent 64.58 at H&M and you bought this using your debit card. Log this transaction

44

Did you manage to edit multiple transactions in one go? I.e. task 5 *

- ☐ Yes
- ☐ No
- ☐ Other

45

If you answered no, what went wrong/what did you struggle with? *

46

Is the rent transaction on the 1st of May 650? *

- ☐ Yes
- ☐ No
- ☐ Other

47

Is the rent transaction on the 1st of June 700? *

- ☐ Yes
- ☐ No
- ☐ Other

48

If you answered no to either of the previous questions, what were these values instead?

49

Is there any information that you feel is missing from the transaction form? If so, what? *

50

How do you feel about the way the transactions are displayed e.g. the information shown, the ordering, etc? *

51

Would you prefer the transactions in one big table rather than split between past and future transactions? If so, why? *

52

How did you find searching the tables? Was this easy enough to do? *

Task 5 - Adding Income

1. Navigate to the income page
2. You get 2,000 a month from your job. Your pay day is the 28th of each month. Log this transaction from January to December of this year.
3. You've just gotten a side gig that pays 50 a week each Friday. Log this from January to December this year
4. Oh no, this fell through, delete any transactions that occur past February

53

Did you manage to delete the correct transactions in task 4? *

- ☐ Yes
- ☐ No
- ☐ Other

54

If no, what did you struggle with/what went wrong? *

55

Overall, what did you like and dislike about the process of adding income and expenses? *

Task 7 - Add Savings Transactions

1. Navigate to the savings page
2. You put 200 a month into savings and have been doing so since the beginning of January last year. Log these transactions until the end of this year.
 1. You can choose which date this repeats on and what category the savings fall under.
3. You've realised that you want to prioritise getting a car before a house. Reprioritise your savings goals and submit this new ordering

56

Did you manage to successfully reorder your savings goals? *

- ☐ Yes
- ☐ No
- ☐ Other

57

If no, what went wrong? Did you remember to click the submit this new ranking? *

58

Did you find it easy to tell how to reorder these goals? *

- ☐ Yes
- ☐ No
- ☐ Other

59

Can you tell me how reordering your goals has effected how much you have saved towards each goal? *

60

Is it obvious where this extra money towards the goals has come from? If so, can you tell me where you think the money comes from? *

Task 8 - Viewing the Budget & Home Page Part A

1. Navigate to the budget page

61

What categories have you overspent in (if any)? *

62

Roughly, as a percentage, how much have spent out of your budget for a category of your choice? (write the category and the percentage) *

63

Was it easy to tell at a glance the amount you'd spent of a category? *

- ☐ Yes
- ☐ No
- ☐ Other

64

If no, why wasn't this clear? *

Task 8 - Viewing the Budget & Home Page Part B

1. Navigate to the home page

65

Which page do you feel displayed the budget/category information more clearly? *

☐ Budget Page

☐ Home Page

☐ Other

66

Why did you find this page clearer? *

Task 9 - View Reports & Charts

1. Navigate to the reports page
2. You want to view how much you've spent in each of your expenses categories in the last year. Choose the relevant options in the drop downs to get this report.

67

The chart isn't very clear because the bills section is taking up most of the space. Can you remove this category from the chart? Note down how you did this or if you didn't *

68

What category have you spent the most in outside of bills? *

69

What day have you spent the most money in the last week? *

70

What's been your biggest income category in the last month? *

71

Did you like the charts used to display this information? Or would you have found other chart types clearer for certain information? E.g. a bar chart to display category information instead of the pie chart *

Post-Evaluation Questions

72

How easy was it to navigate between pages of the app/site? *

- ☐ Extremely easy
- ☐ Somewhat easy
- ☐ Somewhat tricky
- ☐ Extremely tricky

73

Were there any features you found confusing or difficult to use? *

74

Was there any feature that didn't work how you expected it to? E.g. a button taking you somewhere you didn't expect; savings page coming under transactions; symbols used having a different meaning than you expected; etc *

75

What did you like most about the app? *

76

Would this app replace your current budgeting method? Why or why not? *

77

Are there any features that you would want/expect that aren't there? If so, what are these features? *

78

Did you make use of the mobile version of the app during this evaluation? *

☐ Yes

☐ No

79

Was it convenient to use the app on your phone? Why or why not? *

80

What would you like done with your account after this evaluation has ended? *

☐ Keep it

☐ Delete it

☐ I don't mind

81

What was the username/email you used when creating the account? *

82

Is there any other feedback or comments you'd like to make? *

Debrief

Thank you for participating in this evaluation of my budgeting app. The main aim of this experiment was to assess the usability and functionality of the application and gather feedback on your experience. Your insights will be invaluable in improving the system.

Please take note of my contact details and my supervisor's details in case you have any further questions or concerns.

- Kirsty Balfour: 2635375B@student.gla.ac.uk
- Sofiat Olaosebikan: sofiat.olaosebikan@glasgow.ac.uk

Thank you once again for your time and input.

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Do you have any final comments or questions about the evaluation?

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