

Evergreen Budgeting App Evaluation - In-Person

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 the budgeting 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 this session, I will ask you 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, I will be observing how you interact with the system, noting any challenges or points of confusion. Afterward, I will ask you 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. Feel free to ask me any questions during the session, and if at any point you feel uncomfortable or wish to stop, you are free to withdraw from the evaluation without any consequences. I can be contacted at 2635375B@student.gla.ac.uk if you have any questions or queries after the end of the evaluation.

1

Do you have any questions at this point?

2

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

☐ Yes

☐ No

3

If you consent, please sign below: *

Pre-Evaluation Questions & Demographics

4

What age range are you in? *

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

5

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

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

6

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

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

7

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

Task 1 - Registration & Login

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

Using your laptop/desktop:

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

8

Did the user manage to successfully login and access the other pages of the site? *

- ☐ Yes
- ☐ No
- ☐ Other

9

Was the user's chosen username visible on the home page? *

- ☐ Yes
- ☐ No
- ☐ Other

10

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

- ☐ Yes
- ☐ No
- ☐ Other

11

Navigate to one of the transaction pages. Can their starting balance be seen as their bank balance? *

- ☐ Yes
- ☐ No
- ☐ Other

Task 2 - Creating a Monthly Budget Part A

1. Navigate to the budget page
2. Set the desired monthly spending amount to be 2000
3. You spend 40 on clothes each month, add this category to the budget
4. For the remainder of the budget, you can enter any amounts you like in any categories you like. Only do this in the expense categories currently.
5. Once your budget is at 2000 add 200 in any savings category you want

12

What is your total budgeted amount currently? *

13

Was it clear that you had gone over your desired spending amount after adding the savings? *

- ☐ Yes
- ☐ No
- ☐ Other

Task 2 - Creating a Monthly Budget Part B

1. Delete or edit any of your expense categories, other than clothing, so that you're back within your desired spending amount.
2. When you're happy, save the budget.

14

Did the user successfully create a budget that displays on the budget page? *

- ☐ Yes
- ☐ No
- ☐ Other

15

Did the user manage to add/delete/edit their budget categories as needed? *

- ☐ Yes
- ☐ No
- ☐ Other

16

Was there a warning at the top of the screen when the user went over their desired budget amount? *

- ☐ Yes
- ☐ No
- ☐ Other

17

Could the user view each of their budget categories as watering cans once created? *

- ☐ Yes
- ☐ No
- ☐ Other

18

Was the user's monthly budget amount displayed as 2000 when they submitted their budget? *

- ☐ Yes
- ☐ No
- ☐ Other

19

Did this process feel intuitive to how you'd usually think to break down your finances for the month?

*

- ☐ Yes
- ☐ No
- ☐ Other

20

What did you like about this process? *

21

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

22

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

23

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
2. You forgot to take into account the savings you have in a separate account.
 1. There's 5,000.00 in this account.
 2. Edit one of the goals and add this amount onto the starting amount

24

Did the user manage to enter both savings goals with no issues? *

- ☐ Yes
- ☐ No
- ☐ Other

25

Were the created goals able to be viewed with the correct information? *

- ☐ Yes
- ☐ No
- ☐ Other

26

Did the user manage to edit the starting amount of a goal from the goals list? *

- ☐ Yes
- ☐ No
- ☐ Other

27

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

Task 4 - Adding Expenses Part A

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

28

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

- ☐ Yes
- ☐ No
- ☐ Other

29

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

- ☐ Yes
- ☐ No
- ☐ Other

30

Please list the mandatory fields (feel free to go back and look at the form in order to answer this) *

31

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

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

32

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. Your electricity is 75 a month and council tax is 50, enter these for the same repeat period as you did for rent (i.e. from 01/01/2025 to 01/12/2025)
2. You went for a food shop yesterday at Lidl. You spent 28.98 and spent this on your credit card. Log this transaction.
3. Sorry! You actually spent 30.45 at Lidl as you had to go back in for milk. Can you update this?
4. You bought a gift for your Mum 4 days ago. You spent 45 at Amazon. Log this transaction
5. You went out to dinner with some friends last Wednesday at Wagamama's. Your meal cost 36.23. Log this transaction
6. 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
 1. Check this change to 700 has been done correctly by searching the upcoming expenses table for transactions named rent and for transaction dates from the 1st of June onward.
7. You went clothes shopping today and spent 64.58 at H&M and you bought this using your debit card. Log this transaction

33

Did the user manage to create all transactions correctly? *

- ☐ Yes
- ☐ No
- ☐ Other

34

Did each transaction appear in the correct upcoming or past tables with all the correct information? *

- ☐ Yes
- ☐ No
- ☐ Other

35

Did the repeat transactions create the correct number of transactions (i.e. 12)? *

- ☐ Yes
- ☐ No
- ☐ Other

36

Were any edits to transactions shown immediately in the tables? *

- ☐ Yes
- ☐ No
- ☐ Other

37

Did the user manage to successfully edit information about repeating transactions? *

- ☐ Yes
- ☐ No
- ☐ Other

38

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

- ☐ Yes
- ☐ No
- ☐ Other

39

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

- ☐ Yes
- ☐ No
- ☐ Other

40

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

41

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

42

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

43

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 actually make 1,800 each month. Update all these transactions
4. You've just gotten a side gig that pays 50 a week each Friday. Log this from January to December this year
5. Oh no, this fell through, delete any transactions that occur past February
6. Your gran has very generously given you 500 on the 4th of February. Log this transaction

44

Did the user manage to create all transactions correctly? *

- ☐ Yes
- ☐ No
- ☐ Other

45

Does each transaction get displayed in the correct past/future table with the correct information? *

- ☐ Yes
- ☐ No
- ☐ Other

46

Were the correct number of transactions generated by the repeated transactions? (i.e. 12 for the monthly and 52 for the weekly) *

- ☐ Yes
- ☐ No
- ☐ Other

47

Were any edits to transactions displayed immediately? *

- ☐ Yes
- ☐ No
- ☐ Other

48

Was the user able to edit multiple repeated transactions in one go? *

- ☐ Yes
- ☐ No
- ☐ Other

49

Did the delete operation only delete the transactions after the selected date? *

- ☐ Yes
- ☐ No
- ☐ Other

Device Usage

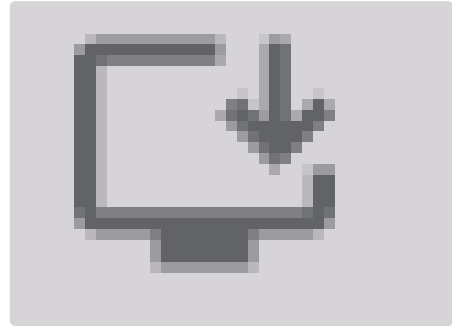
50

Will the user be making use of their phone for the next part of the evaluation? *

☐ Yes

☐ No

Task 6 - 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 as the symbol seen above
 2. For iPhone, 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
2. Login to the account you made using the laptop/desktop

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 save this new ordering

51

Did the user manage to successfully log each transaction correctly? *

- ☐ Yes
- ☐ No
- ☐ Other

52

Did the user manage to successfully reorder their savings goals? *

- ☐ Yes
- ☐ No
- ☐ Other

53

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

- ☐ Yes
- ☐ No
- ☐ Other

54

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

55

Is it obvious where this extra money towards to goals has come from? *

Task 8 - Viewing the Budget & Home Page Part A

1. Navigate to the budget page

56

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

57

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

Task 8 - Viewing the Budget & Home Page Part B

1. Navigate to the home page

58

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

☐ Budget Page

☐ Home Page

☐ Other

59

Why did you find this page clearer? *

60

What would you click to change your budget from the home page? *

61

I want you to add a new savings goal from the home page. What would you click to do this? *

62

Can you show me what buttons you would click to add a new expense transaction from the home page? *

63

Can you show me what buttons you would click to add a new income transaction from the home page? *

64

Can you show me what buttons you would click to add a new savings transaction from the home page? *

65

Could the user easily tell at a glance what each category in the budget page is telling them? *

- ☐ Yes
- ☐ No
- ☐ Other

66

Could the user easily determine how to edit their budget and add transactions from the home page? *

- ☐ Yes
- ☐ No
- ☐ Other

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? *

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

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

72

What does the bottom left/middle graph represent? *

73

What does this graph tell you about your spending and income? *

74

Could the user easily read each chart? *

- ☐ Yes
- ☐ No
- ☐ Other

75

Could the user easily customise what data was displayed by the charts? *

- ☐ Yes
- ☐ No
- ☐ Other

76

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 *

Post-Evaluation Questions

77

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

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

78

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

79

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 *

80

What did you like most about the app? *

81

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

82

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

83

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

☐ Yes

☐ No

84

Did you prefer the computer or phone version of the app? *

☐ Computer

☐ Phone

☐ Other

85

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

86

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

87

Would you like your account to be kept after the evaluation ends or can I delete it? *

- ☐ I would like to keep it
- ☐ Delete it
- ☐ I don't mind

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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