

Evaluation Participant Notes

▼ Type	Evaluation
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☑ Written Up	✓

Participant 1 - 14/02/2025 @ 10:45am - 12:00pm

Introduction

Pre-Evaluation Questions & Demographics

Task 1 - Registration & Login

Thought the password field was going to be another email field as people are often asked to confirm their email.

Likes that you can tab between the form fields in registration.

Not a fan of the number up and down thing for amount.

Password strength error occurred as no upper case character initially used, error noted and helped.

More likely to use a username than an email as its shorter to login.

Clicked transactions initially rather than the drop down options, not clear it's going to be a drop down.

Task 2 - Creating a Monthly Budget

Managed to find the set budget form easily

Initial thoughts: wasn't immediately sure what to enter for the monthly income field. Tend to want to save rather than spend all their income. Not obvious that this field wasn't mandatory as tend to work field by field so didn't look at the rest of the page

Adding categories not immediately obvious how much they had left to add to her budget due to the automatic savings field being populated

Error - Adds a miscellaneous savings when things are deleted

Task 3 - Setting Savings Goals

Savings page location not clear or

Would prefer savings goal button to be at the top

Task 4 - Adding Expenses

Switch between transactions pages not immediately apparent

Repeated transaction: not clear the transaction date is the start date

Likely to only use shop field for regularly used shops

Assumed could edit any rent transactions for specific dates rather than having to find the specific one due to filtering

Filtering on date not clear, especially after isn't inclusive

Would potentially like to have separate tables for different months. So like a drop down at the top of the page that allows the time period to be changed

Task 5 - Adding Income

delete repeated transactions not clear 'after' is inclusive

Device Usage

Task 6 - PWA Mobile App

Process was easy to set up - iPhone

Task 7 - Add Savings Transactions

Task 8 - Viewing the Budget & Home Page

Switched back to laptop at this point to gain a better view of the budget table on the home page.

Task 9 - View Reports & Charts

Not obvious reporting period drop down applied to the entire page

Would prefer a bar chart for categories

Post-Evaluation Questions

Once they knew to hover over transactions it was easy

Hamburger menu on the phone easier to use

Prefers computer as that's how they normally budget and also screen space

Debrief

Participant 2 - 14/02/2025 @ 1:45-3:00pm

Introduction

Pre-Evaluation Questions & Demographics

Task 1 - Registration & Login

Noticed the mandatory fields due to the star

Picked the Czech Koruna currency, one I haven't tested yet

- Led to errors in the set budget page as this is a 2 character currency symbol and I'd made the assumption that they would only ever be single character

Task 2 - Creating a Monthly Budget

Understood total budget amount field

- Use of it confused them though
- Part of this may have been due to the errors that occurred due to the currency symbol

Accidentally saved budget too early but easily managed to figure out how to edit the existing budget

- Due to the reflex of pressing enter submitting the form rather than just moving onto the next field

Error - Error about being over budget didn't appear, seems to be an issue with the currency type

- Lots of errors around the total spending amount in this case
- Caused by 2 character symbol

Delete button should have a confirm popup for the categories

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

- Felt intuitive but had to think about it as this isn't usually how they budget
- But thinks it works for setting aside certain amounts of money, just not what they usually do

Task 3 - Setting Savings Goals

Only knew savings was under transactions because they scrolled along but even if they hadn't known that, wouldn't have taken too long to figure it out.

Task 4 - Adding Expenses

Started trying to add the transaction in the filters of the table.

- Either make button bigger or more preferably only display the tables when there's data in them

Realised that the shop field wasn't required without prompting

Would prefer drop down items were capitalised

Trying to scroll when the last field entered/used is the amount field, changes the amount value which is annoying

Pages (pagination) of data in tables wasn't immediately obvious that there were multiple pages.

Edited the rent transaction by clicking the one in March, changed the date to June and this fully updated all the transactions correctly

- Wasn't the intended functionality, but a desired one
- Needs further testing to ensure this is actually working correctly

Tried to search for 'rent' in the amount column

Had to explain date filter as not intuitive.

Didn't make use of the shop field at all

Task 5 - Adding Income

Annoying that you can't add a repeat after creating a transaction as easy to accidentally save a transaction early by pressing enter

Device Usage

Task 6 - PWA Mobile App

Process was easy - iPhone

Task 7 - Add Savings Transactions

Managed to navigate to the savings page using the link on the home page without any prompting

Easy to tell how to reorder the goals but may not have saved the new ordering without prompting

Trickling down money works for small amount of goals but would get confusing to figure out optimum ordering with many goals

Task 8 - Viewing the Budget & Home Page

Task 9 - View Reports & Charts

Post-Evaluation Questions

Preferred the phone navigation system

Preferred the phone version as easier to get to the page you wanted and there's more going on on the home page

Debrief

Participant 3 - 15/02/2025 @ 11:30am-12:00pm

Introduction

Pre-Evaluation Questions & Demographics

Task 1 - Registration & Login

Clicked transactions first and not the drop down item

Task 2 - Creating a Monthly Budget

Knew what the top field meant.

- Predicted what it would be used for

When entering amounts, put full stops at the end of them

- Did this break the form? No, caused no issues by having a decimal point with no digits after it

Wasn't sure what amount their budget was when they were creating the budget due to savings being added automatically. Had to explain that the remaining amount could be seen in the savings miscellaneous category.

Felt intuitive: yes if they were to budget in this way

Task 3 - Setting Savings Goals

Task 4 - Adding Expenses

Took a second to find the repeat transaction check box

Easy to figure out how to add a transaction but bit confusing that the button was in a different place than the add savings goal button

Also edited repeated transactions by going to a random transaction and changing the date to the one they wanted there

Task 5 - Adding Income

A lot of people get paid on the last e.g. Friday of the month so would be cool if this could be done

Didn't think they'd be able to edit every transaction by clicking on 1 so doubted their action on clicking on 1

First instinct to delete many was to edit transactions and just change the amount to 0. After some prompting about it being a delete action, managed to figure out how to delete on their own.

- Would be more convenient to be able to select the delete from date in the popup

Device Usage

iPhone: managed to download

Task 6 - PWA Mobile App

Task 7 - Add Savings Transactions

Navigated to the savings page by clicking on the savings link on the home page

Task 8 - Viewing the Budget & Home Page

Prefer the watering can display on phone or computer, but the computer home budget view is better than the phone as can see the information more clearly

Task 9 - View Reports & Charts

Post-Evaluation Questions

Debrief

Participant 4 - 15/02/2025 @ 12:30-13:30pm

Introduction

Pre-Evaluation Questions & Demographics

Task 1 - Registration & Login

Clicked transactions rather than the drop down

Also clicked to the budget screen first on the home page when trying to navigate to a transaction page

Task 2 - Creating a Monthly Budget

Knew what the field meant but not how it might be used

Clear that it was over due to the message

The categories were easy to understand and relevant to how they'd budget

Task 3 - Setting Savings Goals

Managed to navigate to the savings page but took a second to find it

Originally thought to enter the goal in the table and then went to the transaction button instead. Had to be prompted to click the correct add goal button

Entered amount as 017600 and no errors occurred

Task 4 - Adding Expenses

Took a second to find the repeat thing and originally put yearly for the monthly transaction

Managed to find the transactions in the table fine, used the pages but had to have the date filter explained

To delete multiple transactions, also went to the edit and went to set the amount to 0

Wouldn't have thought of the delete button to delete multiple ones so required some explanation

Task 5 - Adding Income

Device Usage

Task 6 - PWA Mobile App

Task 7 - Add Savings Transactions

Task 8 - Viewing the Budget & Home Page

Navigated to the home page using the logo

The home page better because it has more information about each of the categories and likes that they come up in red for the categories you've over spent on Same for the phone and computer

Task 9 - View Reports & Charts

Post-Evaluation Questions

Easier to navigate on the computer as the phone is a smaller screen

Debrief

Participant 5 - 15/02/2025 @ 2:30-3:45pm

Introduction

Pre-Evaluation Questions & Demographics

Task 1 - Registration & Login

Immediately managed to go to the expenses page with no difficulties

Task 2 - Creating a Monthly Budget

Top field: expects to enter what they earn a month; treat it as the figure to not go over or to meet

When adding categories, didn't click the plus, simply kept changing the information in the 1 field

Found it difficult to add up the budget because of the automatic savings bit. This was off the page so didn't realise it was there. More likely to put in what they know they spend rather than aim for a certain amount.

Task 3 - Setting Savings Goals

Wouldn't have thought to find savings under a transaction as this is more about money coming in and out

Had to scroll down to find the goal part

Would prefer if the box didn't initially have a 0 in it as means have to delete it

Task 4 - Adding Expenses

Find it odd that the button to add a new transaction is the top right. Assume the tables should be clicked instead.

Repeated transactions - easy because I'd instructed the transaction to be repeated otherwise wouldn't have looked for it. Would be better next to date or amount

Didn't realise you could scroll along to see more columns in the table

Went to the 1st of June transaction and updated correctly

Managed to search for the name but struggled with the date filter. Managed to spot the filter button though.

Knew where to go to search multiple fields. Would like an option to search both tables from one search bar

Task 5 - Adding Income

Selected the edit button in order to delete. Rather than the delete. Used to clicking edit in this system. Was going to edit the repeat dates

Device Usage

Task 6 - PWA Mobile App

Task 7 - Add Savings Transactions

Easy to tell how to reorder but not save.

Not clear where the money going into goals was coming from.

Task 8 - Viewing the Budget & Home Page

Task 9 - View Reports & Charts

Post-Evaluation Questions

Debrief

Participant 6 - 15/02/2025 @ 4:10-5:30pm

Introduction

Pre-Evaluation Questions & Demographics

Task 1 - Registration & Login

Clicked on transactions rather than the drop down

Task 2 - Creating a Monthly Budget

Understood what the top field might be used for

Not obvious that they went over the desired spending amount at the bottom, had to scroll up to see the warning

Would be useful if the actual categories were turned red

Task 3 - Setting Savings Goals

Task 4 - Adding Expenses

Went to the June transaction to update rent

Figured out the date filter but wasn't intuitive

Page arrows pointing left to right when the data is listed vertically feels confusing

Understood how to delete multiple straight away

Likes the required error messages

Could do with extra income categories as side gig doesn't really fall under any of them

Being able to move the columns on a touch screen is annoying

Task 5 - Adding Income

Device Usage

Task 6 - PWA Mobile App

Couldn't figure out how to download the app - Android. Made use of the phone website instead

Task 7 - Add Savings Transactions

Task 8 - Viewing the Budget & Home Page

Prefers budget page on phone but home page on computer due to screen space

Task 9 - View Reports & Charts

Reports make more sense on the phone due to layout and sizing than on the computer

Post-Evaluation Questions

Preferred the computer as would prefer to sit down and think about their budget

Debrief

Participant 7 - 16/02/2025 @ 3:00-4:10pm

Introduction

This participant has made use of the app briefly before

Pre-Evaluation Questions & Demographics

Task 1 - Registration & Login

Task 2 - Creating a Monthly Budget

Task 3 - Setting Savings Goals

Task 4 - Adding Expenses

Understood credit to be a payment into the account rather than credit card.
Credit card and credit options would maybe be more clear. Rephrase to credit card or paid by credit card

- Because if it's on your credit card it won't come out of your account at a later date

Got mixed up between the 2 tables when looking for the Lidl transaction but object partially obscuring the screen

Had to be told that more columns could be viewed.

Didn't see the gift category

Searched by name fine but struggled with the date filter and didn't notice the wee filter button

Task 5 - Adding Income

Logged each income as credit as it's going into the account

Went to edit to delete initially. Worked it out themselves

Device Usage

Task 6 - PWA Mobile App

Made use of the website. Didn't try to download

Task 7 - Add Savings Transactions

Took a second to find the save button

Task 8 - Viewing the Budget & Home Page

Turned phone landscape to view table on home page. Prefer the budget page

Switched fully to the laptop once comparing the budget page and home page

Task 9 - View Reports & Charts

Bottom graphs titles don't quite match the graphs

- understood after a second, but had to properly look and think about it

Could be nice to save the drop down settings so they can change the default templates e.g. save the reports

Post-Evaluation Questions

Interested in the data security measures in-place for trial app

Debrief

Participant 8 - 18/02/2025 @ 10:15-11:00am

Introduction

Pre-Evaluation Questions & Demographics

Task 1 - Registration & Login

Triggered the password error but didn't immediately read it until trying to submit the form

Pressed transactions rather than the drop down but didn't find it annoying or confusing once they knew how it worked

Task 2 - Creating a Monthly Budget

Didn't understand the top field, had to have it explained

Task 3 - Setting Savings Goals

Test what happens to savings goal when starting amount > goal amount

People expect a specific rent category

Task 4 - Adding Expenses

Wanted repeat schedules means repeat on a Tuesday and Thursday. Multiple days a week

Went to the June transaction to update

Managed date filter fully on their own other than inclusive of the 1st of June.

Took them a second to figure it out as first did the equals date thing. Would be easy to do in the future now they know how it works

Check what happens on a monthly repeat that repeats on a date not in February

Task 5 - Adding Income

Managed delete first go

Would quite like an undo button when deleting transactions.

Device Usage

Task 6 - PWA Mobile App

Managed to download the app - iPhone

Task 7 - Add Savings Transactions

Task 8 - Viewing the Budget & Home Page

Still prefer budget page on the computer but the home page view is better on the computer

Switched to computer once comparing budget and home page (onwards)

Task 9 - View Reports & Charts

Took a second to realise the drop downs had to be selected to get the correct charts

Post-Evaluation Questions

Navigation easier on the computer

Debrief

Participant 9 - 18/02/2025 @ 12:00pm-13:00pm

Introduction

Pre-Evaluation Questions & Demographics

Task 1 - Registration & Login

Clicked transactions rather than the drop down

Task 2 - Creating a Monthly Budget

Top field - thought the slash might be a mathematics thing. Had to have it explained

Delete any categories that are at 0.

Confused about the watering cans, they look like cocktails

- Would prefer symbols that match the categories

- Have savings on a different line

Task 3 - Setting Savings Goals

Calendar, would prefer separate drop downs for the month and year rather than it being in one

Would prefer to add savings to the goal rather than having to update the starting amount

- So they don't have to do the maths themselves

Task 4 - Adding Expenses

Took a second to find the repeat tick box

- Would prefer repeat to be under the transaction date
- Put rent in the shop as wasn't sure what else to put

Somewhat easy because they took a second to find the box so it wasn't extremely easy

Should be able to unselect value in payment type drop down as it's not mandatory

Doesn't really understand why the name field has to be mandatory as often what they name the transaction is either the same as the category or the shop

Scroll bar to see more columns wasn't obvious, had to be pointed out. Scroll bar blends in with the total row

Figured out the date filter straightaway but didn't initially see the filter line in the table.

Would prefer the tables be on a line each and have links at the top of the page to allow the user to jump to them

Task 5 - Adding Income

Accidentally typed 31/01 instead of 31/12 so created only one transaction. But managed to delete and then recreate this correctly

- Would prefer to be able to update repeats when editing transactions

Used the name search to find all side gigs and used delete functionality fine

Device Usage

Task 6 - PWA Mobile App

Managed it, iPhone

Task 7 - Add Savings Transactions

Change 'submit' to 'save', took a second to find the button

Task 8 - Viewing the Budget & Home Page

Task 9 - View Reports & Charts

Had to have the drop downs pointed out and that the pie chart was the graph to view

Post-Evaluation Questions

Navigation was easier on the phone but already knew where everything was due to navigating to things on the computer

Debrief

Participant 10 - 18/02/2025 @ 8-9:50pm

Introduction

Pre-Evaluation Questions & Demographics

Task 1 - Registration & Login

Initially clicked the transaction menu but only once before realising that you had to hover over it instead

Task 2 - Creating a Monthly Budget

Didn't fully understand the top field but worked it out after some prompting

Used the number arrows to set the amount

- Liked the arrows, didn't really think about typing

Struggled with the maths of adding up to the budget amount

Task 3 - Setting Savings Goals

Clicked budget first and then tried transactions drop down to find the savings page

- Felt budget implied savings

First tried to type into the filters of the tables and then once told it was wrong found the goals button

Task 4 - Adding Expenses

Had to have the edit multiple transactions explained but that's because they clicked to edit one before they heard the date and then tried to work it out from that transaction. Said their first thought would've been to click the June transaction however, if they'd heard this date first

First clicked the category filter to search for the rent name. Immediately said that they felt they were using Excel when doing the date filter, which they find confusing.

Struggled to figure out how to use the date filter

- Found it confusing, not that helpful
- Said that their parents would never be able to figure it out

Task 5 - Adding Income

Wasn't sure what to put for the name of their salary

- Felt like this field was kind of pointless and repetitive info

Device Usage

Task 6 - PWA Mobile App

Phone doesn't allow access to the site at all? Possibly due to their iOS version because they haven't updated their phone since before 2022. Will check it's not a safari issue by testing on a different iPhone. Made use of my phone instead

- Works on a iPhone with safari, so must be the update issue as can't even download google chrome on that phone
- The phone is on iOS 15

Task 7 - Add Savings Transactions

Didn't immediately see the submit button as was expecting a save button

- Expected the reranking to be saved automatically

Task 8 - Viewing the Budget & Home Page

Used the computer from this point onwards

Looked at the numbers first to figure out what they'd overspent in rather than the red dots and overflow

Wasn't sure what line in the watering can was the top

Wasn't immediately sure what they were looking for in the home table as there's a few tables on the Home Screen

Task 9 - View Reports & Charts

Didn't realise they had to look at the pie chart. Overall just a bit lost what chart to look at

Post-Evaluation Questions

Debrief

Participant 11 - 19/02/2025 @ 11:40am-1pm

Introduction

Pre-Evaluation Questions & Demographics

Task 1 - Registration & Login

Wasn't sure if the passwords matched as they looked like they didn't but no error showed up so trusted it

Clicked the drop down menu item rather than transactions

Task 2 - Creating a Monthly Budget

Top field - understood what to enter not so much what it might be used for

Realised the savings amount at the bottom was the remaining amount of the budget without being told

Had to scroll up to see the over budget message, would be helpful to have it near the bottom too

Task 3 - Setting Savings Goals

Had to guess where the savings page would be in the nav bar but got it on the first guess. Would make more sense for it to be its own button

Liked how simple the adding the savings goal form was. All the forms so far have been nice and simple and clear

Task 4 - Adding Expenses

Like that you can enter the shop you spent money in

Went to the June transaction to edit multiple

Figured out the month filter but took a moment. Did it by having an equals-or-after condition

Task 5 - Adding Income

Managed to do the delete immediately

Device Usage

Task 6 - PWA Mobile App

Managed to download the app - iPhone

Task 7 - Add Savings Transactions

Got frustrated by the calendar on the phone as clicking too quickly zoomed in

Had to be reminded to save the new ordering. Expected saving to happen automatically

Moving columns around on the touchscreen caused issues, accidentally got rid of all the columns in one of the tables. Don't feel like this feature is really needed

Task 8 - Viewing the Budget & Home Page

Switched fully to using the computer after trying to find the button for adding a new savings goal

Task 9 - View Reports & Charts

Post-Evaluation Questions

Much easier to navigate on the computer than the phone. Still easy on the phone just easier on the computer

Debrief