

Heuristic Evaluation of [InvestorScope]

1. Problem

The UI under evaluation is InvestorScope, a mobile app that helps investors find previously unknown equity investment opportunities they will like based on their investment preferences.

2. Violations Found

1. [H2-1 Visibility of system status] [Severity 2] [Found by: B]

It is not obvious how the equities are being sorted at first glance (i.e. which is selected). On closer examination, the selected option has an unfilled circle, which is opposite to expectation. Could have unselected options have unfilled circle (or no circle at all), and selected option with the filled in circle.

2. [H2-4 Consistency and standards] [Severity 1] [Found by: B]

The selected sorting parameter has an unfilled circle, but the selected tab of the table is darkened (intuitively this feels like filling in since the contrast is a lighter tab). Would make sorting parameter circles be filled in when selected to keep things consistent.

3. [H2-2 Match between system and the real world] [Severity 2] [Found by: A, B]

Unclear what “recommended, all, best” would mean in the case of search results. If users are searching for specific equities, then these tabs may not be helpful. Is the search bar also intended for a higher level searching that is not included in ‘Explore’? Would suggest having a separate page for search results to avoid this ambiguity.

4. [H2-7 Flexibility and efficiency of use] [Severity 3] [Found by: B]

Very limited information for equity page, especially for someone with an intermediate (or more) amount of knowledge in finance. Add more information to the page (e.g. PE ratio, market cap)

5. [H2-2 Match between system and the real world] [Severity 2] [Found by: B]

The presence of “Best” equities defeats the purpose of “Recommended”. What does “Best” here mean, and why does an investor want to take positions in investments that are weakly dominated by other options (why look at recommended when there are equally good, if not better options available)? Rename “Best” to something more concrete, e.g. Most traded.

6. [H2-4: Consistency and standards] [Severity 3] [Found by: A]

There are two separate sorting mechanisms on the homescreen. There are the categories and then also the “Recommended,” “All,” and “Best.” This is confusing and it is very unclear how selecting something on one bar impacts the others. The two sorting mechanisms are redundant and one should be deleted. Another option is to use the categories like filters.

7. [H2-1 Match between system and the real world] [Severity 3] [Found by: A, B]

The bottom icon that prompts the questionnaire is called “Explore”, but it seems more like “Find Recommendations”. It seems that saying ‘explore’ means you are willing to move outside of normal preferences, and ‘recommend’ is more similar to ‘give me

options that you think I would like most'. Would rename the "Explore" button to "Recommend", or add an 'explore' function.

8. [H2-1 Visibility of system status] [Severity 3] [Found by: A]

There is no connection between the "explore" button and the "Recommended" tabs. The "Explore" tab is used so that the "Recommended" tab works but there is no indication. The "Explore" button should only appear when the "Recommended" tab is open.

9. [H2-3 User control and freedom] [Severity 2] [Found by: A, B]

Users can't go back when they make a mistake on the questionnaire; may affect future recommendations since this app learns over multiple Explorations. Add back button on questionnaire.

10. [H2-1: Visibility of system status] [Severity 1] [Found by: A]

For each of the questions in the "Explore" questions, there is no indication for which answer the user selected. A solution would be to at least highlight which answer chosen before moving on to the next question. And maybe also allow people to change their answer.

11. [H2-8 Aesthetic and minimalist design] [Severity 3] [Found by: A, B]

The boxes for each answer on the questionnaire were really large, and it wasn't obvious initially that there were a lot of options and we had to scroll down to see them. The colors of the font and the square blend together so I didn't notice the half-concealed words at the bottom. Make the boxes smaller, and words more prominent. In addition, it might be good to limit the number of options.

12. [H2-2 Match between system and the real world] [Severity 2] [Found by: A, B]

What does 'Chillness' mean as a sorting parameter? Provide a less ambiguous parameter (the other ones are good examples).

13. [H2-6 Recognition rather than recall] [Severity 3] [Found by: B]

I cannot see past searches/results/viewed pages. Perhaps I liked an equity, and would like to view it at a later date, but don't remember how I got there. Add history/saved function.1. [H2-4 Consistency and standards]

14. [H2-4 Consistency and standards] [Severity 3] [Found by: B]

Some of the options on the questionnaire are ambiguous in terms (e.g. "Fire and Forget" for investment attitude), and not mutually exclusive (e.g. "Event Driven" and "Day Trader"). How should a user resolve a situation where multiple options can apply? Introduce fewer options for each question, and clearly divide different types of preferences/attitudes.

15. [H2-3 User control and freedom] [Severity 3] [Found by: B]

If system continually learns user's preferences, then it seems difficult to adjust for a sudden change in preference (e.g. typically risky-loving investor wants to find some low risk equities). Could introduce adding a new profile to account for different preferences.

16. [H2-1: Visibility of system status] [Severity 4] [Found by: A]

The app logo is not displayed on any of the screens. Was this a strategic choice? There is currently no way of knowing which application is currently in use. A solution is to find a place to display the InvestorScope logo.

17. [H2-3: User Control and freedom] [Severity 2] [Found by: A]

From “Apple” information screen, the only direction to go is “back.” It seems like there should be more options. Specifically, the “home” and “explore” button should still be visible and usable. Add the “home” and “explore” button in order to fix.

3. Summary of Violations

Category	# Viol. (sev 0)	# Viol. (sev 1)	# Viol. (sev 2)	# Viol. (sev 3)	# Viol. (sev 4)	# Viol. (total)
[H2-1: Visibility of Status]		1	1	1	1	4
[H2-2: Match Sys & World]			3	1		4
[H2-3: User Control]			2	1		3
[H2-4: Consistency]		1		2		3
[H2-5: Error Prevention]						0
[H2-6: Recognition not Recall]				1		1
[H2-7: Efficiency of Use]				1		1
[H2-8: Minimalist Design]				1		1
[H2-9: Help Users with Errors]						0
[H2-10: Documentation]						0
Total Violations by Severity	0	2	6	8	1	17

4 Evaluation Statistics

severity\evaluator		evaluator A	evaluator B
level 0		0	0
level 1		1	1
level 2		4	5
level 3		4	6
level 4		1	0
total (levels 3 & 4)		5	5
total (all levels)		10	12

evaluator # Ex. C	# problems found Ex. 7	# problems remaining & problem IDs Ex: 5 (1, 7, 11, 13, 17)
B	12	12
A	10	5

