# Heuristic Evaluation of InvestorScope

## 1. Problem

*Application for discovering interesting investment opportunities catered to amateurs*

## 2. Violations Found

### 1. [H2-4 Consistency & Standards] [Severity 2] [Found by: A]
The percentage change on screen 10 lacks context. +2.14% since when? Fix: Label the percentage change with additional information, such as week-to-date, month-to-date, etc.

### 2. [H2-6 Recognition Rather Than Recall] [Severity 2] [Found by: A]
Screen 7 list each stock by its symbol. The user have to recall the link between a security and its ticker. Fix: Add both labels. For example, AAPL would be AAPL: Apple.

### 3. [H2-4 Consistency & Standards] [Severity 3] [Found by: A]
Meaning of "chillness" on screen 7 is not clear. Fix: have a help section where each of symbols are explained

### 4. [H2-10 Help and Documentation] [Severity 2] [Found by: A]
The meaning of some terms on screen 4 is not clear. Fix: have a help section where each of the terms are explained for both beginner and advanced users

### 5. [H2-5 User Control and Freedom] [Severity 3] [Found by: A]
The "Explore" feature doesn't allow the user to change his/her selection for attitude, sector interest, and favorite movie unless he/she starts the process over. Fix: Add the ability to go back to previous selections

### 6. [H2-4 Consistency and Standards] [Severity 2] [Found by: A]
The meaning of the icon next to each ticker is not clear. Fix: Replace the icon with the company logo to aide in recall.

### 7. [H2-4 Consistency and Standards] [Severity 3] [Found by: A]
The difference between "Recommended" and "Best" is not clear. Fix: Change the label of "Best" to something that clearly differentiate the two features.

### 8. [H2-1 Visibility of System Status] [Severity 4] [Found by: A]
Screen 10 lacks indication of whether the market is open or closed. Fix: If the market is closed, add a label that indicates the number of hours until market open. If the market is open, indicate that the market is open.
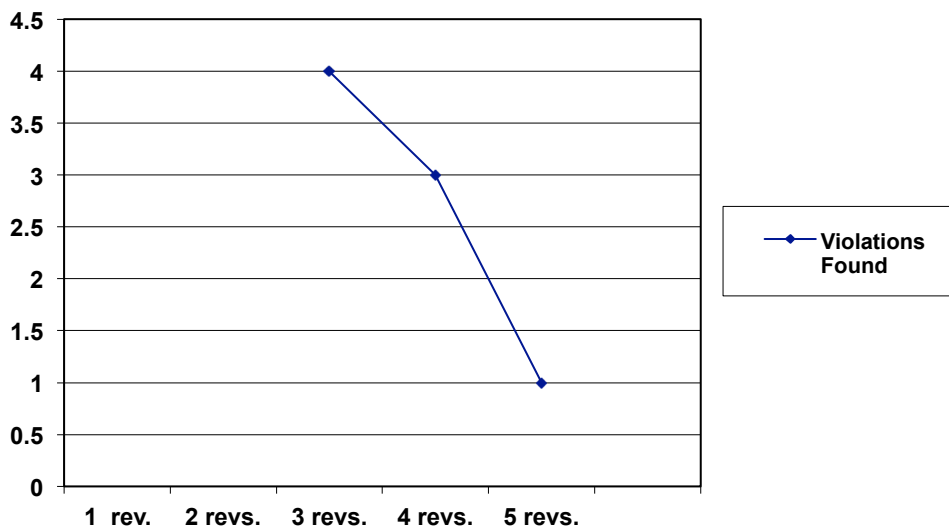
## 3. Summary of Violations

| 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 |
| [H2-2: Match Sys & World] | | | | | | |
| [H2-3: User Control] | | | | | | |
| [H2-4: Consistency] | | | 2 | 2 | | 4 |

| | | | | 1 | | 1 |
|---|---|---|---|---|---|---|
| [H2-5: Error Prevention] | | | | 1 | | 1 |
| [H2-6: Recognition not Recall] | | | 1 | | | 1 |
| [H2-7: Efficiency of Use] | | | | | | |
| [H2-8: Minimalist Design] | | | | | | |
| [H2-9: Help Users with Errors] | | | | | | |
| [H2-10: Documentation] | | | 1 | | | 1 |
| **Total Violations by Severity** | | | **4** | **3** | **1** | **8** |
| Note: check your answer for the green box by making sure the sum of the last column is equal to the sum of the last row (not including the green box) | | | | | | |

## *4 Evaluation Statistics*

| severity\evaluator | evaluator A | evaluator B | evaluator C | evaluator D | evaluator E |
|---|---|---|---|---|---|
| level 0 | | | | | |
| level 1 | | | | | |
| level 2 | 4 | | | | |
| level 3 | 3 | | | | |
| level 4 | 1 | | | | |
| total  (levels 3 & 4) | 4 | | | | |
| total  (all levels) | 8 | | | | |

| evaluator #<br>Ex. C | # problems found<br>Ex. 7 | # problems remaining & problem IDs<br>Ex: 5 (1, 7, 11, 13, 17) |
|---|---|---|
| A | 8 | |
| | | |
| | | |
| | | |
| | | |

Right right-click on the chart and select "Edit Data…"

## *Recommendation*

This application has great interface that is easy to use and navigate, which is supported by the use of colors and large, bold fonts. One thing that I would recommend is a help section for some of the vocabulary used in your application that might be unclear to first-time investors. Although for a seasoned investors most of that information would be unnecessary. Conversely, some investors might be interested in how "chillness" or "security" relates to directly to the selection stocks, so some information about your methodology might be helpful. Another thing that I might consider is a section for disclaimer that the user is investing at their own risk.

## *Severity Ratings*

0 - don't agree that this is a usability problem
1 - cosmetic problem
2 - minor usability problem
3 - major usability problem; important to fix
4 - usability catastrophe; imperative to fix

## *Heuristics*

**[H2-1: Visibility of System Status]**
- keep users informed about what is going on

**[H2-2: Match Between System & Real World]**
- speak the users' language
- follow real world conventions

**[H2-3: User Control & Freedom]**
- "exits" for mistaken choices, undo, redo
- don't force down fixed paths

**[H2-4: Consistency & Standards]**

**[H2-5: Error Prevention]**

**[H2-6: Recognition Rather Than Recall]**
- make objects, actions, options, & directions visible or easily retrievable

**[H2-7: Flexibility & Efficiency of Use]**
- accelerators for experts (e.g., gestures, kb shortcuts)
- allow users to tailor frequent actions (e.g., macros)

**[H2-8: Aesthetic & Minimalist Design]**
- no irrelevant information in dialogues

**[H2-9: Help Users Recognize, Diagnose, & Recover from Errors]**
- error messages in plain language
- precisely indicate the problem
- constructively suggest a solution

**[H2-10: Help & Documentation]**
- easy to search
- focused on the user's task
- list concrete steps to carry out
- not too large