

Heuristic Evaluation of [Finu]

1. Problem/Prototype Description

We evaluated the medium-fi prototype of Finu, an app that lets young adults more effectively seek help from their family through text, audio, and visual annotation.

2. Violations Found

1. H1: Visibility of System Status / Severity: 2 / Found By: B

- **Task:** Annotating a project
- **Problem Description:** Once you've added an annotation, it's not clear it was successfully added or that it was yours
- **Rationale:** It would be nice to have a message or toast notification informing you your annotation was successfully added, or failed to be added. At present, the line in the document is highlighted, but if there were already many highlighted lines, the user may not notice or recall where their annotation was or whether it was successful.
- **Suggested Fix:** Add some design elements to note the user's annotation was either successfully added or failed to be added. Also, make it clear whose annotation is whose, e.g. by using different colors of highlighting, putting a user's profile picture next to their line, putting a collapsible box with their name on it next to the page like Google Docs and MS Word do, etc.

2. H1: Visibility of System Status / Severity: 3 / Found By: A, B

- The initial sign-up page simply leads to a page with many documents, and this is confusing for a new user as I don't know what is the best way to make use of Finu and what the benefits are of creating a new document.
- **Fix:** Add a quick tutorial or a step by step clickthrough tutorial walking through what happens when you create a document.

3. H1: Visibility of System Status / Severity: 2 / Found By: A

The New Doc page simply has a search-bar looking tool and it is not clear why there is a search bar when we are creating a new document. Only when I click the search bar does the option to select text come up, and this is a bit illogical as a workflow to a user who is trying to create a new document.

Fix: If the user is required to make a selection before creating a Text Document within New Document, then the search bar should be removed and this functionality should be explained to the user.

4. H1: Visibility of System Status / Severity: 1 / Found By: B,A

When the Apt Utility default file opens up, there are two buttons at the button. It is confusing to the user what these buttons mean and nothing pops up when I click or hover over these buttons.

Fix: Add what the two buttons mean below or add a quick note when you hover on top of them.

5. H1: Visibility of System Status / Severity: 4 / Found By: A

On the home page, the message icon simply lies there without much initial direction of what it holds. It doesn't catch the user's attention and the users might not initially understand that message requests are present on the platform.

Fix: Add a Manage Collaborators Button on the home page where the user can go in to check their workspaces and collaborators.

6. H2: Match b/t System and World / Severity: 2 / Found By: B

- **Task:** Creating a new project
- **Problem Description:** The user can presently sort by projects, but there's no clear way to add or remove tags to the project itself.
- **Rationale:** The lack of ability to add or remove tags could confuse the user.
- **Suggested Fix:** Let the user add, choose, or delete tags as part of the initial flow to create a project

7. H2: Match b/t System & World / Severity: 2 / Found By: A

The New Doc page has a "placeholder insert screen" and it is unclear to the user what this means. The user might be confused whether they're supposed to upload a document or if a document from Finu's end might show up.

Fix: Add an upload button if your intention is to upload a new document.

8. H2: Match b/t system and the real world / Severity: 3 / Found By: A

The message icon on the home page typically means messages from contacts but it actually seems to include invites.

Fix: I would state on the home page that you have 3 Invites Pending or something like that and add a contacts tab on the home page altogether.

9. H2: Match b/t System & World / Severity: 3 / Found By: B,A

When the AptUtility default file opens up, the + button could usually mean, by convention, that the user can add a new file. As a user, it was surprising to me when I clicked on the button that it means that I can add a new module.

Fix: Add a label saying Add New Module or explain button functionality

10. H3: User control and freedom / Severity: 2 / Found By: A

The messages tab lets you accept and decline contacts but there doesn't seem to be a clear option from there on to manage your existing contacts & friends.

Fix: The Home page should have a friends or Finu contacts tab that lets you accept and delete contacts

11. H3: User Freedom and Control / Severity: 4 / Found By: B

- **Task:** Annotating a project
- **Problem Description:** Unclear what the user can do after successfully adding an annotation, besides going Home
- **Rationale:** Once the user adds an annotation, they should be able to edit it, delete it, perhaps change the color of the highlighting to denote it's of a certain category (e.g. really important vs. not as important), or add a new one. Currently, there's blank space below the document with only a "Share" button, and users may not realize they can access additional functionality or go home.

- **Suggested Fix:** Add some additional buttons or text so users know what functions they can perform, and where they can navigate, after adding an annotation. E.g., you could add an Undo button, a Delete button, a Change Color button, etc.

12. H3: User Freedom and Control / Severity: 3 / Found By: B

- a. **Task:** Creating a new project
- b. **Problem Description:** Allow users to manage and organize projects and sort by additional factors
- c. **Rationale:** The Home screen may become cluttered and confusing to navigate as people accumulate projects. Sorting is nice, but enabling the user to organize them (say, by folder) and delete them could help the user feel in-control and not overwhelmed by choices.
- d. **Suggested Fix:** Let users organize project by folder, like in Google Docs. Also, let users delete projects from the Home screen and once they tap on them. At present, it isn't clear how a user could delete a project. Something like iPhones do, where you can press "Select" and then click an X to send a project to trash, could help the user manage their space.

13. H3: User Freedom and Control / Severity: 4 / Found By: C

- **Task:** Creating a document
- **Problem Description:** You can't delete the initial module/file when you create a document, you can only delete additional modules you add later.
- **Rationale:** Since you can add modules at any point, users shouldn't be required to create a new file to upload the original module.
- **Suggested Fix:** Allow users to delete the original module/file.

14. H4: Consistency and Standards / Severity: 3 / Found By: B

- **Task:** All
- **Problem Description:** On the Home screen, once the user has sorted by a category, they may not realize they can tap the category again to un-sort it
- **Rationale:** Although the blurring of non-selected categories is nice, some users may not realize they need to tap the category again to un-sort by that category.
- **Suggested Fix:** The "Current Group" screen allows you to press a red X to remove a collaborator, so that could be replicated when sorting by category. Placing an X by the sorted category would make it apparent how to remove the sort.

15. H4: Consistency and Standards / Severity: 2 / Found By: B,A

- **Task:** Sharing a project with a contact
- **Problem Description:** Wording for the concept of a "project" isn't the same across screens
- **Rationale:** As far as I can tell, multiple words are used across the app that are getting at the same fundamental concept. For example, the screen to accept an invite states that you've been invited to join another user's "workspace." However, the home screen of the app contains "documents." What's the difference between a document and a workspace? For me, they have different

connotations -- are workspaces intended to hold multiple documents, like how Google Drive uses “team drives”? Clarifying this distinction could avoid confusion.

- **Suggested Fix:** Ensure wording across screens is consistent when referring to the same idea. Incidentally, I think implementing workspaces, like a workspace for your immediate family holding all their financial documents, could be a great idea. But if this is not the concept Finu had in mind for the “invites” screen, make sure the wording uses “document” instead.

16. H4 : Consistency and Standards / Severity: 2 / Found By: A

When a text module is selected, two buttons pop up : Insert Text and Compose Text. The difference between the two can be confusing to many users.

Fix: Add an upload file button on the same page for adding an existing file and add a word-type text-box below to enter and compose text.

17. H4: Consistency & Standards / Severity: 2 / Found By: A

Because many collaboration tools mean users work together in groups on documents, users might wonder if their documents are being edited by other group members.

Fix: Add a panel with recent changes made by the user and other members.

18. H4: Consistency & Standards / Severity: 2 / Found By: C

- **Task:** Creating a document
- **Problem Description:** “Cancel” button should take you back to the home screen.
- **Rationale:** If you’re canceling the create document flow users should be taken back to the beginning otherwise you’re not really canceling anything.
- **Suggested Fix:** Change button title to “Back” or update functionality.

19. H4: Consistency & Standards / Severity: 1 / Found By: C

- **Task:** Creating a document/Adding an Annotation
- **Problem Description:** Confirm create document button doesn’t match send button on annotation page.
- **Rationale:** They’re the same type of button (go from disabled to enabled), but they have different formats
- **Suggested Fix:** Choose on button format and apply to both buttons

20. H5: Error Prevention / Severity: 3 / Found By: A

On the Current Group page, a user might mistakenly share by clicking on a contact. This can create security concerns and it might be easier to avoid this error altogether. The check boxes might be unintuitive to non-tech savvy users.

Fix: Instead of adding check boxes, you could add an Invite to Share Document button and then a confirmation page pops up asking if the user wants to share the document with the user.

21. H5: Error Prevention / Severity: 4 / Found By: A

There is a home screen button on the new doc page. The user might click on it and lose all their progress.

Fix: Add a confirmation blurb prompting the user to accept that changes might be lost if they go back to home page.

22. H6: Recognition rather than recall / Severity: 2 / Found By: A

When the AptUtility Default file or any other file opens up, the user needs to click on the group button below to see the group members. It can be a little hard to keep clicking that button to see who all have access.

Fix: Add a note next to document saying “Shared with 3 People” or something and then the user can click on that note or expand it to see who all have access.

23. H6: Recognition rather than recall / Severity: 2 / Found By: A

The filter menu when the user is on the home page involves remembering who family, friends, etc. (i.e. which specific family members or friends the documents were shared with). This can make users rely on their memory or confused about who these documents have been shared with.

Fix: Instead of having the filter menu shared with tags “family” or “friends”, the user could have a list that opens up with documents and the respective names of collaborators on the main page.

24. H6: Recognition rather than recall / Severity: 3 / Found By: B

In the messages tab, the users click on the invite to see how they could join workspaces. But on the home page, there is no indication of workspaces. This can be confusing to a user managing different workspaces

Fix: I would add a tab like Slack does on the Home page for users to manage different workspaces if you want to opt to do workspaces

25. H6: Recognition rather than recall / Severity: 2 / Found By: A

When users are working on a document, they might have to recall that they can share documents with new users and collaborate with them.

Fix: Add a reminder blurb when editing documents that the user can add new collaborators to work with them.

26. H7: Flexibility & Efficiency / Severity: 2 / Found By: C

- **Task:** Creating a document
- **Problem Description:** When you create a document you must always follow the steps of naming the document, choosing the type, then choosing method (insert/compose) before you can upload a file.
- **Rationale:** One of the main functions of the app is uploading documents so allow users the option of doing it quickly.
- **Suggested Fix:** Let users upload files instantly, use file type and name to save it

27. H7: Flexibility & Efficiency of Use / Severity: 2 / Found By: A

The way the prototype is set up, it seems like a new document can only be created with text modules.

Fix: It would be nice to either indicate your rationale for why only text modules can be created or fix the usability to span other kinds of modules.

28. H7: Flexibility & Efficiency of Use / Severity: 2 / Found By: A

On the home page where all the documents might be found, users have to click to explore what is in the documents. This can create inflexibility and inefficiency in use and time.

Fix: Add an insight page to each document so that the user can add a short description about that document.

29. H7: Flexibility and Efficiency of Use / Severity: 3 / Found By: B, C

- **Task:** All
- **Problem Description:** It's not clear what "Modules" are for a first-time user; there's no blurb explaining it
- **Rationale:** I was confused by the "Module" functionality and how "Projects," "Modules" and "Documents" relate to one another. Do modules allow you to add additional content to your document? If so, I think a short blurb explaining what a "Module" is could help users understand it as they're adding them.
- **Suggested Fix:** Maybe add a short blurb explaining how "Modules" work to the screen to add one, so users grasp their purpose and function and how they add to the document.

30. H8: Aesthetic and Minimalist Design / Severity: 1 / Found By: B

- **Task:** Creating a new project
- **Problem Description:** First read should be "Name" input field on "New Doc" screen
- **Rationale:** On the "new doc" screen, my eye was drawn to the Text/Sound/Visual options first instead of the Name input field, so I didn't see I had to type a name first. The design is elegant, but the blue color attracted my attention first. I thought I could press the document type, then pick a name like Google Docs lets you do. This could confuse some users.
- **Suggested Fix:** It could help the user to somehow emphasize the Name field over the document types when you're creating a new doc. The consistency of blue for input fields is great.

31. H8: Aesthetic and minimalist design / Severity: 2 / Found By: A

Whenever a new module is adding to an existing module, it shows the different modules in a list which can then be edited to remove a module. **It can be difficult when a user adds multiple text and sound modules to have them all show up in a list.** It can send across too much information to the user and it would be user to make this feature more minimalistic and aesthetically pleasing.

Fix: Perhaps add a collapsible section where a user can click on Text files to open the different text files and apply similar implementation for the other two modules.

32. H8: Aesthetic and Minimalist Design / Severity: 1 / Found By: A

The Messages panel has combined both Invites and Requests sent. It displays both Accepted and Declined invites, which can be too much information for the user when dealing with multiple contacts.

Fix: Create a column with Requests Received and Requests Sent

33. H9: Help users with errors / Severity: 2 / Found By: A

Even though you let a user delete a module, a user might click by accident and might wonder if their action of deletion can be undone

Fix: Add a note on the deletion screen saying this action cannot be undone or that it can be redone pressing certain keys.

34. H10: Documentation & Help / Severity: 3 / Found By: A, B, C

- **Task:** Creating a document

- **Problem Description:** Modules are confusing and could benefit from some documentation.
- **Rationale:** Before inserting a new module I didn't understand that inserting a module would create a new section below the text I already had.
- **Suggested Fix:** Add a list of steps or a video of how to interact with adding sound platform

35. H10: Help and documentation / Severity: 4 / Found By: B,A

There is no way for users to get help or receive answers for FAQs. Users might have questions when navigating and creating modules.

Fix: Add a button for HELP at the bottom or an AI chatbot that answers FAQs.

[...create your numbered list of violations here]

3. Summary of Violations

Category	# Viol. (sev 0)	# Viol. (sev 1)	# Viol. (sev 2)	# Viol. (sev 3)	# Viol. (sev 4)	# Viol. (total)
H1: Visibility of Status	0	1	2	1	1	5
H2: Match Sys & World	0	0	2	2	0	4
H3: User Control	0	0	1	1	2	4
H4: Consistency & Standards	0	1	4	1	0	6
H5: Error Prevention	0	0	0	1	1	2
H6: Recognition not Recall	0	0	3	1	0	4
H7: Efficiency of Use	0	0	3	1	0	4
H8: Minimalist Design	0	2	1	0	0	3
H9: Help Users with Errors	0	0	1	0	0	1
H10: Help & Documentation	0	0	0	1	1	2
Total Violations by Severity	0	4	17	9	5	35

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
Sev. 0	[e.g. 10%] 0%	0%	0%		
Sev. 1	9%	14%	17%		
Sev. 2	57%	21%	33%		
Sev. 3	22%	50%	33%		
Sev. 4	13%	14%	17%		
Total (sevs. 3 & 4)	35% (8 violations)	64% (9 violations)	50% (3 violations)		
Total (all severity levels)	~100% (23 violations)	~100% (14 violations)	~100% (6 violations)		

*Note that the bottom rows are *not* calculated by adding the numbers above it.

5. Summary Recommendations

Creating Documents:

The process of creating a document seems like it could be further improved upon. The idea of creating a document should be a super simple process. It's unclear why a user must go through multiple steps to upload a text document as that is likely something a user would do frequently. Additionally it's unclear why users are restricted to only creating text documents, what the difference is between inserting and composing text, or why you must enter a name before selecting a document type.

Home/Viewing Documents:

The current version of the home screen looked really good visually with the 9 documents it contained. The concern is that as more documents are added it may start to look cluttered. The searching and filtering are great additions to this screen, but it seems like even with filtering someone who had a lot of documents may struggle to find the one they want. Especially since the documents have no preview of the text so we're relying on people to remember what they named the document that they're looking for.

Modules:

When creating a new document user's have the option to add additional modules. However, it's not obvious to a user what a module even is. It's cool to give users the opportunity to combine different types of content into one document, but this needs to be explained better to the user. Some explanatory text or introductory videos that explain to users what a module is and how to use them could really help clear this up.

Filters:

The filters on the home page don't seem to be fully designed yet. There is nowhere for a user to update the groups that they want to filter by, and nothing that shows how someone could add different documents to different filters. Additionally, when a filter is active there should be a more

obvious way to cancel the filtering. Since filters seem like they would be highly important as they help you open the document you want to access, they should be explored in further detail.

Design Scheme:

Blue colors were consistently used to denote areas of the app users could interact with, which is good. The Home button was also always present at the top left, which helps to build users' familiarity while navigating around the app. While the design did a great job in avoiding unnecessary clutter, some areas would benefit from additional text and interface controls. For example, users should be able to easily undo adding annotations, and there should be a blurb or Help button so users can learn about key features like modules.

Severity Ratings

- 0 - not a usability problem
- 1 - cosmetic problem
- 2 - minor usability problem
- 3 - major usability problem; important to fix
- 4 - usability catastrophe; imperative to fix

Heuristics

H1: Visibility of System Status

- Keep users informed about what is going on

H2: Match Between System & Real World

- Speak the users' language
- Follow real world conventions

H3: User Control & Freedom

- "Exits" for mistaken choices, undo, redo
- Don't force down fixed paths

H4: Consistency & Standards

- Words, actions, and UI elements should be consistent across the entire platform
- Follow platform and industry conventions

H5: Error Prevention

- Minimize error-prone conditions
- Remove memory burdens, support undoing, and warn your users when necessary

H6: Recognition Rather Than Recall

- Make objects, actions, options, & directions visible or easily retrievable

H7: Flexibility & Efficiency of Use

- Accelerators for experts (e.g., gestures, keyboard shortcuts)
- Allow users to tailor frequent actions (e.g., macros)

H8: Aesthetic & Minimalist Design

- No irrelevant information. Focus on the essentials.

H9: Help Users Recognize, Diagnose, & Recover from Errors

- Error messages in plain language
- Precisely indicate the problem
- Constructively suggest a solution

H10: Help & Documentation

- Easy to search
- Focused on the user's task
- List concrete steps to carry out
- Not too large