

InvestEd – Prototype Midway Milestone

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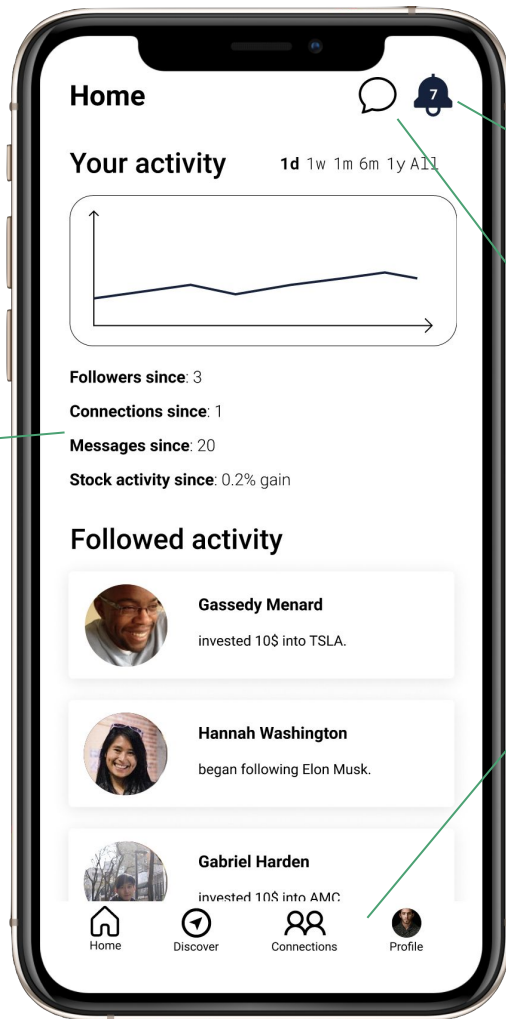
InvestEd Overview

Problem and Solution: Making your first investment is extremely daunting. There are many barriers to entry including social, economic, emotional, and mental. InvestEd helps like minded individuals come together and overcome these barriers by learning from investors that they can personally relate to.

Value Proposition: InvestEd creates a social ecosystem related to investing and finance, which allows people to learn about financial topics from each other. In addition to learning, people can become more excited about investing by sharing their investments with their friends.

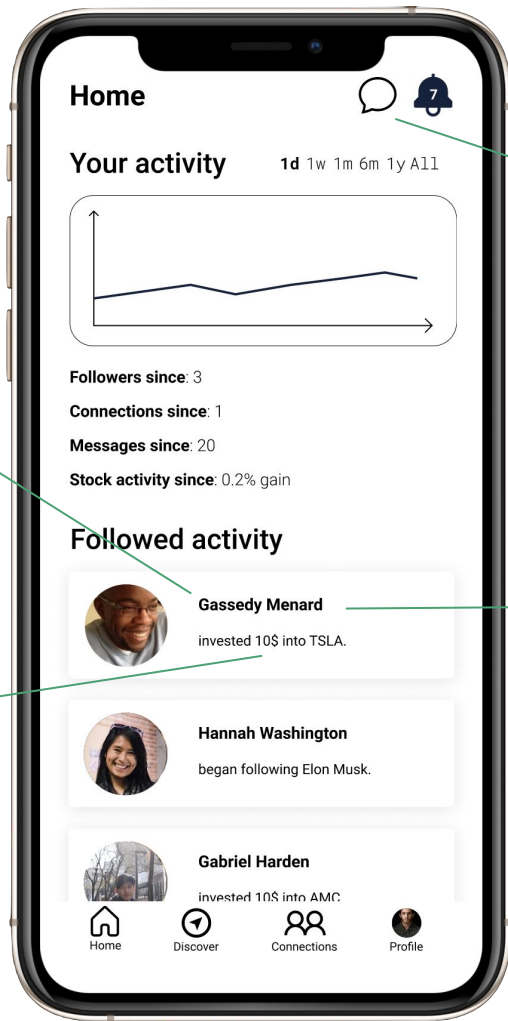
Heuristic Evaluation and Design Revisions

Problem: The headings are unclear and repetitive
Solution: Modify headings (“Since you have been gone”, “Updates”)



Problem: Number of notifications is not the same on the notifications screen
Solution: Fix the inconsistency

Problem: The chat button is only present at the top of the home page.
Solution: Add it to the bottom navigation bar.



Problem: Profiles in home page feed are not clickable
Solution: Make activity in the feed link to other profiles

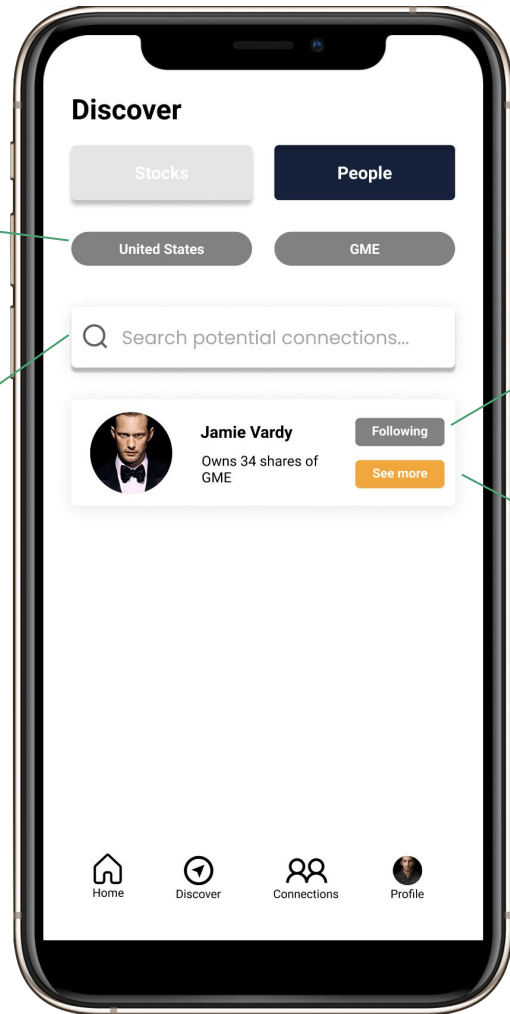
Problem: People may not want to share the exact amounts they're investing
Solution: Add privacy settings so users can modify this

Problem: No help/documentation available
Solution: Add a help page, accessible from the home page

Problem: Users want to know if activity they are seeing is from connections or people they follow
Solution: Add a tag identifying other users in the feed

Problem: Initially, unclear that you must pick filters before being shown other users
Solution: Add a message indicating this

Problem: Initially, presence of search bar is confusing
Solution: Hide search bar until users have chosen filters

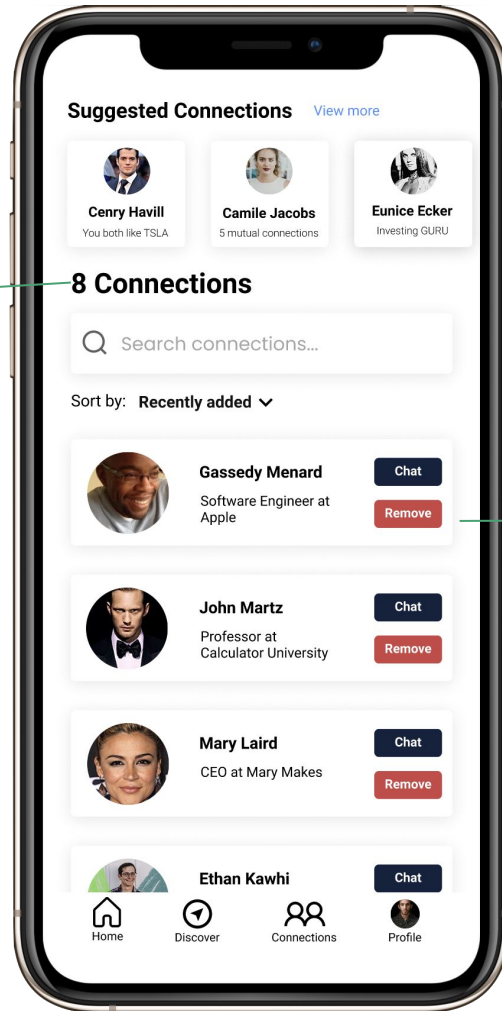


Problem: The following button goes from navy to gray when clicked, which is different from other buttons
Solution: Make all button colors consistent

Problem: Users can't unfollow others easily if they accidentally follow them
Solution: Add an unfollow button

Problem: The distinction between “following” and “connections” is unclear

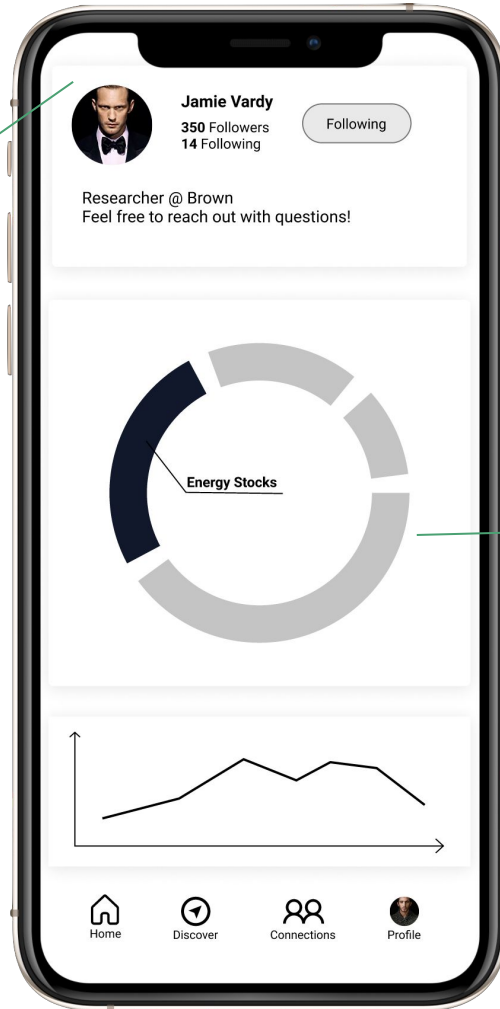
Solution: Offer documentation explaining the difference



Problem: After attempting to remove a connection, it is unclear if this was done

Solution: Add a message that a connection was successfully removed

Problem: Users cannot return to the discover page after viewing someone's profile
Solution: Add a back button



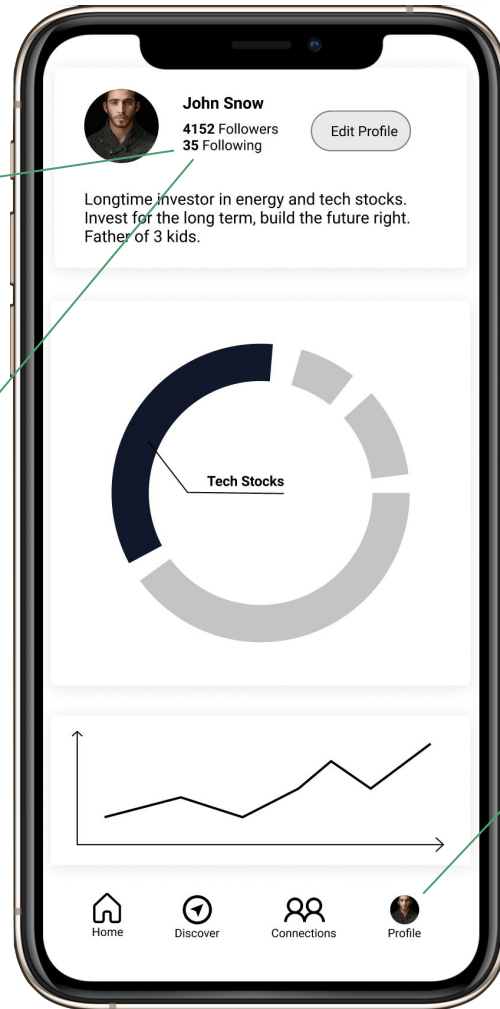
Problem: The pie chart representing someone's portfolio is unclear
Solution: Add labels, colors, and percentages to make the portfolio breakdown clear

Problem: Users can't see who they are following

Solution: Make the "following" information on one's profile clickable, leading to a page where users can see who they follow

Problem: Users can't unfollow other users

Solution: Add an unfollow button on the screen where users can see who they follow



Problem: Users don't know which tab they are on

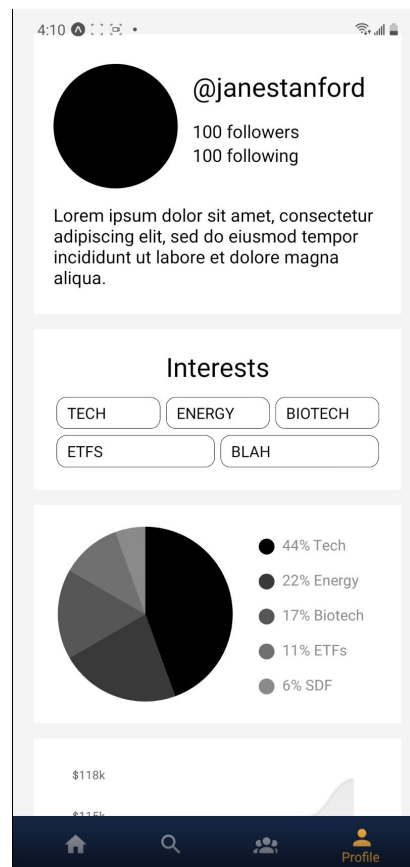
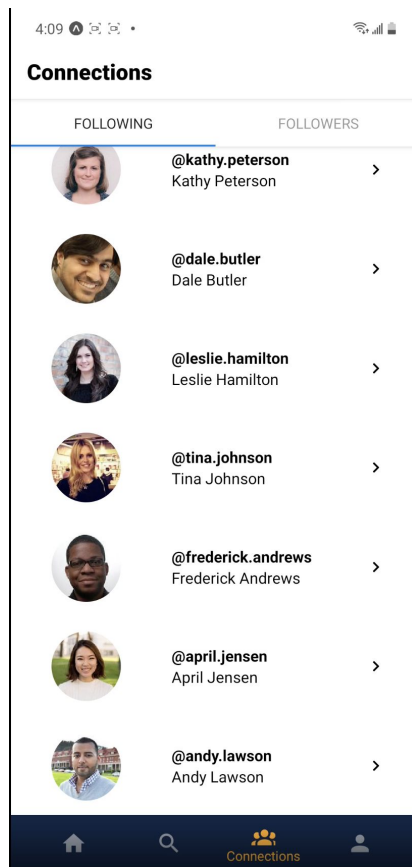
Solution: On the bottom navigation bar, indicate which tab is currently being viewed with colors or shading

Prototype Implementation

Prototype Overview

- Tools we are using:
 - Set up a React Native repository on Github
 - Using Expo v40
 - Navigation set up using React Navigation 5
- Work division:
 - According to expertise
 - By tasks
- Limitations:
 - Hard-coded mock users using json objects
 - Data isn't stored between sessions

What is Done So Far



Implementation Plan

Week 8	To Do	Owned by	Deadline	Status	Comments
3/1 - 3/7	App Development				
	Set up React Native repository on Github	Eric	March 6, 2021	Done	
	Set up application skeleton/codebase	Eric	March 6, 2021	Done	
	Create hard-coded data for users (on doc?)	Godsfavour	March 5, 2021		
	Create common components (navbar, header)	Jestin	March 6, 2021	In progress	
	Design				
	Take heuristic evaluation and split into tasks	Jestin	March 4, 2021	Done	

Week 9	To Do	Owned by	Deadline	Status	Comments
3/8 - 3/14	App Development		March 18, 2021		
	Create connections screen	Godsfavour	March 10, 2021	In progress	
	Create homepage	Jestin		In progress	
	Create notifications page	Jestin			
	Create discover screens	Godsfavour			
	Create view other profile screens	Eric			
	Create view own profile screens	Eric			

Implementation Plan

Connections	Homepage	Notifications	Discover	Other profile	Profile
<p>Add a pop-up message that the user has successfully removed the name of the connection when clicked</p>	<p>Add a chat icon to the horizontal navigation bar at the button</p>	<p>Have the icon with the number of notifications consistent between both screens</p>	<p>Perhaps make this the follow button turn orange when clicked on and have the "See more" button a standard lighter grey</p>	<p>Clearly add a label to what the portfolio breakdown is and add a key with colors to what each section of the pie chart represents. It might also be nice to add percentages to the section to get an even more thorough understanding of what the sections represent.</p>	<p>Have a "all connections" list in the "Connections" tab and the "following" text clickable in the "Profile" tab</p>
<p>Have a "all connections" list in the "Connections" tab and the "following" text clickable in the "Profile" tab</p>	<p>Add a clear heading to the section (e.i "Since you've been gone.." "Updates") and remove the repetitive "since"</p>	<p>Allow the user to click on the notification and take them to the relevant part of the system</p>	<p>Suggested Fix: Add some kind of message to indicate that users must now apply filters to populate their search of other users</p>	<p>Have the "remove" button as clickable text on the button left of a connections profile box</p>	<p>Allow a user to see the list of people they follow when "Following" is clicked on the "Profile" tab</p>
<p>Offer an unfollow button</p>	<p>highlight with color the screen that I'm on in the bottom bar</p>	<p>Add orange dots for unseen notifications on the "Notifications" screen</p>	<p>Hide this search bar until both filters have been chosen</p>		<p>Clearly add a label to what the portfolio breakdown is and add a key with colors to what each section of the pie chart represents. It might also be nice to add percentages to the section to get an even more thorough understanding of what the sections represent.</p>
<p>In the "Connections" page, briefly outline the difference</p>	<p>Consider removing the information about exactly how much users invested in different companies from the activity page or create a</p>		<p>Allow for users to navigate</p>		<p>Add a pop-up message that the</p>

Prototype Demonstration

Task 2: View someone else's investment habits and portfolio



Summary

- Based on the heuristic evaluation of our medium fidelity prototype, we identified several areas where we could change or improve our design.
- The most severe issues were largely related to ease of use and lack of explanation/help for users.
- We revised our designs with solutions to the problems we identified that should improve the InvestEd user experience.
- We have set up, planned, and divided our high fidelity prototype implementation effectively for a smooth development process.
- We have successfully implemented one of our three tasks for our prototype and are on track to complete the rest of them soon.