AccessMyMoney

Design Charette

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Original Help Page

• Text font inconsistent with rest of site
• Reading level at 9.7 with lines up to 21 words
• Links on far right violates norm
• Missing help options
• No separation of information
• Confusing sentences and missing information
Original Getting Started Page

- Inconsistent word usage – jumpstart and getting started
- No answer to question - What is AccessMyMoney?
- Options look like steps
- Missing navigation and inconsistent interface
- Wordy sentences with Reading Level of 9.8

What is AccessMyMoney?

getting started

Our Getting Started Guide steps you through the initial AccessMyMoney setup. The steps vary, depending on whether or not you have your information stored in a financial management application. Select a guide by clicking one of the options below.

How do you currently have your financial data stored?

1. New Users
   I have no current data, just show me how to get started.

2. Quicken® Users
   I currently have my financial information stored in Quicken® format.

3. Microsoft® Money Users
   I currently have my financial information stored in Microsoft® Money format.
Original Quicken Users Page

• Violates Grice’s Maxims: short, true, relevant
• Navigation bar is confusing and unnecessary
• Words per sentence= 14.3, Flesh-Kincade=10.4
• Seductive details: multiple images, fonts (size/color) distract learner
• Redundancies/False affordances: arrows and links
Second Quicken Users Page

• Information on this page important to previous page instructions
• Caution is placed too far down in the steps
• Language is verbose and inconsistent (*Upload Wizard* = *Upload Assistant*)
• Learner is directed to potentially unfamiliar pages
• Instructions are for the general interface
Learning Design Rationale

1. **Readability:** following Grice’s Maxims
   - 8-10 words per line, ragged right, 8.0 - 8.4 Flesch-Kincade reading level, left-hand orientation
   - 12pt. Serif font, pale background, uniform size and font style
   - Removed graphics for optimal reader speed

2. **Learnability:** responding to user forum requests: streamline, consolidate
   - Simplified language and instructions.
   - Clarified information and options
   - Used Quicken language (*Import* rather than *upload*)
   - Used consistent language (*Getting Started, Upload Wizard*)
   - Learner in control (navigation, printer friendly instructions)
User Testing

Help & Getting Started Pages

- User felt separation of help information made it more clear.
- Fuller descriptions of help options made them easier to understand.
- Headings and left placement made help options easier find and understand.
- Consistency of interface and navigation made user feel in control.
- Wording clear and easy to understand.
- User like the “pig” picture and wanted it returned.

Quicken Users Pages

- User liked the “print steps” option using .pdf
- Language was succinct and easier to understand
- User liked having instructions on one page
- Steps easier to execute due to new nav bar
- Instructions were too verbose and there were too many steps
- The “caution link” still needs more explanation
- Still didn’t like having to go to another page to download wizard