

Sertifi

# Signer Usability Testing

This document is a review of the usability tests that were conducted to gain a deeper understanding of Sertifi's audience's needs and frustrations with its interface design. Usability tests help Sertifi to discover areas of confusion and identify opportunities for enhancement.

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**Moderators:** Anthony Michals  
Mandy Morgan

# Participant Profiles

Name	Job Title	Organization
Maggie Baum	Business Systems Analyst	Hyatt Regency
Zheralyn Zabat	Project Manager	Hyatt Regency
Cassie Flack	Property Solutions Delivery	Hyatt Regency
Brandon Kuta	Lead Gallery Host	Hyatt Regency
Catrina Knock	Reservations Manager	Hyatt Regency
Alyia Sultaninkarim	Auditor & Tax preparer	BrookWeiner LLC
Ana Che	Medical Researcher	Rush University Medical Center
Anand Kalamkar	Sr. Network Engineer	AT&T

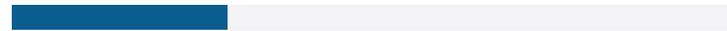
## Products Used in the Past



- 70% eAuthorizations
- 15% Bank Signing
- 15% DocuSign

## Motivations

Efficiency (insure accessibility for colleagues)



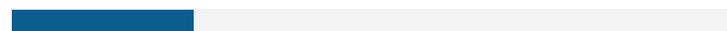
Growth (give feedback to make better)



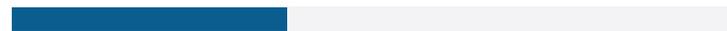
Excited to see new UI



Early Involvement



Curious about usability testing



# Scenario 1

The catering manager sent you an agreement for the conference you're hosting at the Windy City Hotel and you need to review and sign a document and submit payment. Perform the following:

- Review the Welcome Message, and then access the document you need to sign.
- View the document's thumbnails.
- Locate the version history for the document, and the summary of the document.
- View the conversation taking place on the document.
- Locate where you would post a response to the conversation on the document.
- Add markup.
- Find a way to add a comment to the address area.
- Submit your markup.
- Sign the document using your signature and initials.
- Access the payment you need to submit.
- Submit the payment.

Two testers, Anand Kalamkar and Ana Che were testing an updated prototype with one signing document, one linked payment, and one separate payment - *Document View - 101619* - with the following tasks:

- Review the Welcome Message, and then access the document you need to sign.
- Locate and view the conversation taking place on the document.
- Locate where you would add a markup to the document.
- Look for and find a way to add a comment to the address area.
- Look for and find a way to submit your markup.
- Get out of the markup.
- Search for the word "hotel" in the document.
- Look at bookmarks on the document.
- Close the bookmarks menu.
- Begin signing.
- Sign the document using your signature and initials.
- Look for and find where you would enter your deposit to submit.
- Finish paying the deposit and signing the document.

93%

of participants **understood the core** premise of the first scenario for this product.

85%

of participants **enjoyed** the overall experience related to the first scenario using the product.

## Breakdown

Usability



Enjoyability



Confusion

36%

of participants **were confused** on the conversation feature and thought it was a help box.

70%

of participants **looked for more information on the icons on right.**

## THE GOOD

- Found markup easily. Self-explanatory.
- Easy to find the next step - payment.
- Sign and submit was very clear.
- Easier to locate version history as it was visible at first view.
- Testers rated their overall experience as good.

*"Very easy to follow for the user side for someone who has never seen the contract/events side."*

*"Signing and submitting was very simple."*

*"I was able to complete all of the activities."*

## THE BAD

- There was a confusion on what thumbnails are. Didn't automatically look for it where the icons are on the right-hand side.
- Confusion with a conversation - not sure what the conversation is. Thought it was a help box or help chat, not a conversation that begins with a welcome message.
- The menu icons on the right were not prominent enough.
- Finish and submit should be the last CTA at the bottom of the document.
- Exit CTA was not separated enough from the right-hand side menu.

*"Want to be able to hover over icons to know what they are."*

*"Message and icon a different color when you have a message."*

*"I couldn't find the thumbnails."*

## Scenario 2

You're a guest staying at Hyatt Regency McCormick Place and you've been sent a credit card authorization form to fill out.

- Locate where you need to enter your payment details.
- Locate where you need to provide your signature.

95%

of participants **understood the core** premise of the second scenario for this product.

20%

of participants **were unable** to successfully complete all tasks related to the second scenario.

95%

of participants **enjoyed** the overall experience related to the second scenario using the product.

40%

of participants **tried thumbnail feature to move to signature location on the second page.**

## Breakdown

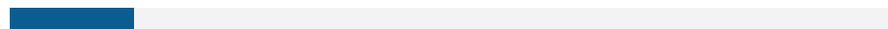
Usability



Enjoyability



Confusion



### THE GOOD

*"Like that, it guides the user on how to submit payment info."*

*"Very easy to understand."*

*"It's a nice update to what it currently is. It's a step in the right direction."*

### THE BAD

- One of the concerns was if the workflow would be mobile friendly.
- Make the top pieces of the form more visible for submitting.
- Confusion whether they need to fill out the top part of the form.

*"Blue button for submitting payment details should work the same as submitting here."*

*"Need some way to direct guests to the top of form too."*

# Bugs & Issues

## Scenario 1

- The testers were testing on static prototype and not all of the layout elements had interaction added to them.
- Tasks needed to be completed in certain order for the testers to move on to the next step and using the correct screenshots for specific interactivity and sometimes testers got stuck looking around the layout while not following the task order.
- The start CTA allowed testers to move on to the signature location, but when they tried to click straight into the signature location, they could not perform the tasks of signing. This was fixed.
- Tooltips could not be prototyped as Adobe Xd does not have a hover simulation.
- Not able to scroll since the layout was a static prototype
- Not able to use command + f to find something in the document - static prototype

## Scenario 2

- The testers were testing on static prototype and not all of the layout elements had interaction added to them.
- Tasks needed to be completed in certain order for the testers to move on to the next step and using the correct screenshots for specific interactivity and sometimes testers got stuck looking around the layout while not following the task order.
- The start CTA allowed testers to move on to the signature location, but when they tried to click straight into the signature location, they could not perform the tasks of signing. This was fixed.

# Recommendations & Action Items

## Scenario 1

- Leave the right menu collapsed at first (testers thought it was unnecessarily taking up space), but extend it upon clicking into markup to show the version history as well as extending the menu upon clicking on the right-hand side icons.
- Make the right-hand side icons more prominent (darker grey)
- In order to be able to add markup actions, move the markup submenu below the actions menu to add real estate.
- For the payment as the last step in required tasks, move the optional step CTA above the "Finish and Submit" so that "Finish and Submit" CTA is clearly the last step a user makes if they want to finish the user flow.
- Clearly, separate required and optional tasks.
- Move Zoom In/Out actions and pagination from the markup menu to the top action menu.
- Make a clearer divider between exit CTA and the right-hand side menu.
- Specify the purpose of the conversation CTA.
- Add animation to move the welcome message into the conversation CTA on the right bottom.
- Text on the welcome message needs to be bigger.
- To get out of the chatbox there needs to be an X in the right-hand corner.
- There needs to be a CTA to close out of markup - clicking again on the markup icon is not intuitive enough.
- Just double-clicking into page should trigger comments.
- Add tooltip to markup.
- Get started - sounds like the first step would be to walk through the layout, not to sign. Consider changing the CTA title to "ready to sign" or similar.
- Make sure the left-hand side menu can be utilized to switch in between tasks.
- Updated prototype with these changes can be found under - [\*\*Document View - 102319\*\*](#)

## Scenario 2

- Incorporate the payment form directly on the page (remove the blue box to remove extra click)
- Make payment as its own step.

# Appendix

## Source Files

- [Documentation](#)
- [PSD and XD](#)

## Media

- [Recordings of Tests](#)

Thank you.