



**linkify**  
user testing summary  
and  
proposals for improvements

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## contents

**primary areas of user difficulty**

- initial orientation
- understanding that sharing is folder-based
- the item adding/creation process
- the Linkify move/location "language"
- sharing/sharing wizard
- number of clicks required to get things done is cumbersome
- getting/working with a document
- didn't know that they could send notifications, or how to do it

**details and proposed solutions**

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## initial orientation

**user behavior**

- users that were invited or plopped down in the middle of Linkify just didn't get what it was or what it could do for them
- didn't understand that this was their own account
- didn't get that things are stored remotely, and must therefore be uploaded to be made available to others

**proposed solutions**

- the Welcome to Linkify page when the user first registers or logs in must contain the following information in a very easy to digest format:
  - what is Linkify
  - roughly how does it work
  - what can I do with it
  - orientation around the fact that sharing is folder-based and the i button in the folder's helps you edit stuff
- the interaction design must be rethought with the initial user in mind.
  - need explanations throughout
  - will need to respin the various processes for doing things in a less error prone way

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## understanding that sharing is folder-based

**user behavior**

- when asked to share a document, users did not understand that they needed to create a folder first and put the document in the folder
- they added the document and then tried to share the document directly

**proposed solutions**

- the user understanding part can be partially addressed in the welcome page
- but we cannot rely on user understanding as a work around for a design that doesn't reflect an inherent method (constraint?) of our application.
- see adding/sharing rework #1
- see adding/sharing rework #2

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## the item adding/creation process

**user behavior**

- when asked to add an item, they clicked on [new], but didn't get that they had a menu across the top of items
- they would sometimes enter and URL or Doc in the Add Folder popup
- they would sometimes enter some folder information, then click on document to add a document to this folder

**proposed solutions**

- we talked about this before, and vetoed having a page before add item which chose the item to add. perhaps we chose wrong!

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## move/location language

**user behavior**

- very few people "got" that Location meant location in the tree.
- many did not associate the [move] icon with the Location field
- almost all tried to edit the Location field directly
- one person clicked on the [move] icon, selected a folder and thought she was done rather than having to save

**proposed solutions**

- part of this confusion can be alleviated by changing the wording of "Location" and the [move] icon, perhaps to:
  - "Choose a location in your tree for this item (optional)", and
  - [Select Folder] icon
- another solution is to rework the add item process to integrate the notion of Location a little better so that it removes the need for user understanding and reduces the number of clicks.

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### number of clicks required to get things done is cumbersome

#### user behavior

- creating items often doesn't get them into the right folder
- doing this right - to minimize the number of clicks - requires too much understanding of the interface
- there's too much moving stuff around in order to prepare for sharing

#### proposed solutions

- main source of extra clicks is in folder management: it's too easy to add things in the wrong place and when adding multiple things, the folder you've been working on is forgotten.
- see folder centric respin of UI

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### didn't know they could send notifications or how to do it

#### user behavior

- i would need to prompt people to send a notification
- when i did, it was hard for them to discover the (small text) notifications item at the bottom of the screen
- (once they did though, they really liked it).

#### proposed solutions

- notifications need to be raised visually to the importance of other things.
- in the UI respin, notifications are on par with all other activities as one of the "steps" the user takes in adding an item, and one of the equally weight actions a user can take when editing.

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### getting/working with a document

#### user behavior

- sometimes didn't understand why they wouldn't get to the document right away by clicking on it
- on edit doc info screen, didn't know to click on [Download] icon to get the doc
- once they downloaded it, they didn't know "where" the document was
- weren't sure how to get an updated copy of it back into Linkify

#### proposed solution

- this is primarily a problem for those less experienced with web-based applications.
- i have changed the "Edit Doc Info" popup to a "View Document/Edit Document Info" popup, and
- made "View/Download" the first and most prominent thing on this page.
- added language describing what will happen when they click this button
- added a hyperlink note that explains this a bit more

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### sharing/sharing wizard

#### user behavior

- many people added a name and then clicked [Invite] rather than [Add]
- those that clicked [Add] would get confused because the Add Contact popup came up
- sometimes they would click the buttons at the top of the Add Contact popup rather than the [Add to Invites] button at the bottom.
- people would then feel lost in the process
- many did not "get" the current step 1 and step 2 icon at the top of the Sharing Wizard

#### proposed solution

- when a user first sees the Sharing Wizard, there are instructions on the page where the list of names will go
- the Add button is now the Add to List button, and is grey until data is entered, but lights up when it is.
- The Invite button at the bottom is now the "List Complete" button
- We have eliminated the Add Contact step in the invitation: clicking add immediately adds the name to the list
- I've changed the Step 1/2 icon at the top, and call the whole popup Step 1, implying a step 2 later on but not showing it here.

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