

Two Thumbs Presents:

MeetingFinder



Project Three: R685/I300

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DESIGN MESSAGE

“Our goal is to provide a seamless application that emphasizes user intelligence while maximizing the power of the technology.”

What this means:

1. Scheduling a meeting should be an efficient process that fits into typical user social interactions.
2. Meetings will be set for times agreeing with the current schedules of all required members.
3. Convenient meeting times will be found through the direct manipulation of parameters.
4. Users have ultimate control over their own schedules.

ASSUMPTIONS

Assumptions about intended audience:

- They are Palm users with beginning to moderate experience.
- They are people who often schedule meetings with other people, who understand issues involved in managing their own schedules.
- They will become frustrated with and refuse to use a system which allows other users to bypass them and manipulate their schedules¹.
- They are willing to give up a minimal degree of privacy for the convenience of an improved scheduling process.
- People who are comfortable, perhaps savvy, with technology

Intended Use:

There are many different scenarios in which users will want to arrange meetings with other people. After developing an extensive list of usage scenarios and role-playing those scenarios, we identified a general set of decisions which users follow in going about the process of scheduling a meeting with other people. These decision steps, in roughly the order in which they are made, are²:

- Are several people physically present (or temporally present—e.g. talking on the phone) and working together to decide a meeting time, or is one person trying to set up a meeting, to which the other participants will be invited?

¹ Several authors identify this as the number one reason why shared calendar/scheduling systems fail, including Sproull, L. & Kiesler, S. (1991). *Connections: New ways of working in the networked organization*. Cambridge, MA: MIT Press and Preece, J., Rogers, Y. & Sharp, H. (2002). *Interaction design: beyond human-computer interaction*. New York: John Wiley & Sons.

² It is important to point out that many of these decision steps are tacit or built in to the particular context of use, rather than items which the user consciously considers.

- Who are the participants in the meeting? This is generally established early on, but can vary (e.g. “I want to meet with Joe and whoever else from the team can be there” or “We need a time to meet with our client when at least two of us have to be there.”)
- When should the meeting be held? There is wide variation regarding this factor—depending on the urgency of the meeting, as well as other factors. It might range from “any time” to “next week” to “as soon as possible.”
- Is there a minimum time necessary for the meeting? What is it? Depending on how critical this factor is, it often interacts with the decision of when the meeting should be held.
- What is the meeting for? What should the meeting be called? Where will it be held? These factors will also be more or less important depending on their interplay with the issue of when the meeting should be held.

DESIGN SPECIFICATIONS

Our goal was to make the system integrate as transparently as possible into the process users normally follow to schedule meetings, improving on the areas which are difficult for users, and allowing the users to use their own intelligence in making scheduling decisions. Major specifications³ for the design include:

- The system should function primarily as a “search” tool to facilitate the process of finding open times to hold a meeting. Other activities in the process of scheduling a meeting (e.g. deciding exactly what time to hold it, who to invite, where to hold it, etc.) will be left for the users to decide. In other words, a group of people sitting trying to plan a meeting would use the system in the part of their conversation when they are trying to find a commonly available meeting time—then would return to talking to each other as the primary means of deciding other factors.
- However, the system will have a facility to simplify the process of entering data in their Palm, by automating that data entry within limits.
- The users will be able to access the system from the built-in Date Book application as well as via the main application selection screen.
- The order in which users will be prompted to enter information or make decisions will follow the order of social use. Users will first pick who will be involved in the meeting (automatically if possible—see below) then will find an open time.
- In choosing who to involve in a meeting, users can press the “detect local” button which will use Bluetooth to automatically detect MeetingFinder users in the local proximity (final prototype screen 4).
- For the calendar (finding available meeting time) interface, standard Palm conventions as used in the Date Book application will be used for labeling and navigation (final prototype screens 6-8).
- For finding available meeting times, a “direct manipulation” interface⁴ will be used, allowing users to manipulate controls representing various scheduling factors in

³ A complete listing and description of specifications would be unwieldy—see the prototype for more detailed explanations.

⁴ Based on the work of Ben Shneiderman—see Shneiderman, B. (2000, March). “Creating creativity: User interfaces for supporting innovation.” *ACM Transactions on Computer-Human Interaction* 7(1) pp. 114-138 and other works by the same author.

combination with immediate feedback as to what affect that factor has on the availability of meeting times.

- Once an open block of time is identified, users can enter details which will be sent to invitees in the form of a “meeting request” (final prototype screen 9).
- A meeting request appears on the user’s Palm in a pop-up screen similar to a Date Book reminder. When a meeting request is received by a user, they are shown information about the requested meeting and have the option of either accepting or rejecting immediately or postponing a decision until a later time (final prototype screen 11).
- When a user accepts a meeting request a corresponding appointment is automatically placed in his or her calendar.

FOCUS FOR USABILITY

We structured our usability into two phases. The first phase was designed to determine if users could recognize the elements of the design, and if their conceptual models of the system corresponded with the intended use. This was conducted by showing users screen shots of various steps in the process, and engaging them in a brief dialogue about their perceptions of the items on the screen and their purposes. The second phase was designed to test how users would interact with an interactive prototype.

One very important consideration with the first phase of usability was to come to understand users’ perceptions about the software. We decided that the most efficient way to conduct this was through dialogue and discussion with users. We gave them a basic overview of the software, then showed them screen shots, asking them what they thought the purpose of that part of the software might be and asking them particular questions about each major feature on the screen shot. We could then be certain we were incorporating their thoughts and attitudes when creating the interactive prototype. It seemed critical to have a stronger basis for moving ahead with the design before dedicating hours to developing a higher fidelity mockup.

The second round of usability dealt more specifically with users’ ability to actually use the system and navigate through it successfully. Due to the extreme amount of variability with tasks in this type of software, users were given a few specified tasks based on the usage scenarios we had developed which would require them to manipulate several aspects of the interface. Users were then granted the freedom of accomplishing these tasks however they wished within the system.

GOALS FOR USABILITY

Round One Goals

- Determine if the features we were creating would be recognizable to users and fit within expected Palm conventions
- Determine if users could identify the purposes associated with specified features on the software
- Determine if users could simply understand what types of tasks were associated with specific screens
- Determine if users would understand how to navigate from a familiar page (in the calendar) to the software

- Determine if the following features would be clear to users: “detect local”, address book, selecting users from address book, selecting available times, sending a request
- Identify any other potential problematic areas that we had not considered

Round Two Goals

- Determine if users could manipulate the interface controls to find appropriate available times (this process matches with typical meeting scheduling scenarios that people use)
- Determine if users could select appropriate individuals from the address book and find users from a variety of other sources (company listing and detect local users with Bluetooth wireless)
- Determine if users could understand the time listings and recognize the difference between available times and unavailable times.
- Determine if the features that might have been initially confusing in Round One would still be “learnable” through process of experimentation with the system.
- Identify any other problematic areas that we had not already considered

METHODOLOGY FOR USABILITY

Round One Methodology

- Four different subjects were utilized ranging from non-Palm users to active Palm users.
- A script was developed to maintain consistency between the testing efforts. (See Appendix A.) The script included specific instructions and necessary background, contextual information for the subjects.
- Usability subjects completed a demographic pre-testing questionnaire (Appendix B) and a post-testing reactionnaire (Appendix D).
- Users were shown screen shots from the prototype where they were asked a general question about what they believe would be happening on that screen. Also, users were asked specific questions about features on that screen shot.
- Team members who conducted the usability completed a process evaluation form that included all features and specified questions for each screen shot. (See Appendix C.)

Round Two Methodology

- Three different subjects were utilized ranging from non-Palm users to active Palm users.
- Usability subjects completed the same demographic pre-testing questionnaire (Appendix B) and post-testing reactionnaire (Appendix D).
- Instead of utilizing a script, evaluators simply shared the same background information from the previous usability and then asked users to complete two tasks (Appendix E). Usability was less structured as participants had a variety of methods in which they could accomplish the said tasks.
- As the usability subjects completed, the tasks, the evaluators documented their steps in writing.

RESULTS AND CONCLUSIONS FROM USABILITY

Round One Results

- Users wanted to select multiple people from the address book at a time.
- Users were unsure of the purpose of the magnifying glass icon (which was designed to access a “search” page).
- Users expressed some initial confusion about the “Req’d” checkboxes.
- Users were especially confused about the time slots that showed. They thought that the black blocks on the calendar indicated times NOT available (instead of the times that were available, which is what they were intended to indicate).
- Users were nearly all successful in understand the detect feature to find other nearby Bluetooth users.

Round One Conclusions

- Users are generally quite comfortable with the style in which this software is currently designed. We decided to make specific changes to features to make them clearer and more intuitive naturally. The users tended to think a bit when faced with each page. By asking them to share their thoughts, we were able to uncover particular areas of confusion. Round One provided us with enough confidence in our design to proceed as planned.
- A few changes we made were to help the users identify exactly what it was they were seeing when the calendar views appeared. Since they were perplexed about what the blocks of time meant, we decided to change the appearance of the display of available times by placing boxes with crossed out lines on all the unavailable times and leaving the open spaces free. Another change to help users understand the purpose of the “find available times” section was to change the label of the button used to access that screen from “Pick Date” to “Show Avail. Times.” We felt this would make it much clearer exactly what they were about to see when they moved to the manipulation/selection page. Finally we changed the magnifying glass icon representing “find users” to a button with the label “Find User.”

Round Two Results

- Users sometimes made mistakes when first trying to accomplish a task, but trying out an interface element and seeing what does they were able to accomplish the task correctly.
- Users still had some initial concerns about the indication of free times, but this was alleviated when they began manipulating the variables or by viewing the “Show My Appointments” feature.

Round Two Conclusions

- Users tended to move quickly throughout the process and tried clicking on a variety of different things—even when they weren’t sure what the feature would do. However, this usually resulted in a reaction like, “Oh...so that’s what that does.”
- There is a different thought process used when people are examining software and “trying” it out. While many of our features were clear to the users, ones that were not were often quickly clarified by simply trying the feature and seeing what it did.

- Users did admit to some confusion about using the software, but all felt that it would be a great tool and easy to use.
- We learned that we made a good decision in sacrificing some simplicity/intuitivity for power/flexibility for this software. We feel that the power of the software and the ease with which a user can learn what interface elements do by trying them out (without causing any problems or loss) is a fair sacrifice for initial simplicity as this is software that would be used potentially under a great variety of circumstances.
- While we currently do not have any help features in the software, we feel that the inclusion of a basic help feature could be of assistance to novice users but would rarely if ever be needed by more seasoned users.

APPENDICES

Appendix A: Round One Usability Plan
Appendix B: Pre-Usability Questionnaire
Appendix C: Evaluation Checklist for Round One
Appendix D: Post-Usability Questionnaire
Appendix E: Round Two Usability Plan
Appendix F: Paper Sketches
Appendix G: Round One Prototype
Appendix H: Round Two Prototype

Usability Testing Project 3, 1st Round Team R

Process:

1. Be sure candidate is a PDA user before beginning

2. Have them complete the demographic questionnaire

[Give user questionnaire]

3. Give background on software

The software we're designing is made specifically for the Tungsten T Palm Pilot. [Show image.] The software is made to help the busy professional in scheduling meetings with other software users. The purpose of the software is to simplify the process of trying to schedule meetings with other people. The way this system operates, users will have the opportunity to request meetings with other people based on their available free times listed in their own calendar. Also, it's important for you to understand that the Tungsten T has wireless capabilities using Bluetooth, so this design will be taking advantage of this benefit. Also, you will be able to send automatic requests to people to attend a meeting, and you will receive them yourself when other people want you to attend a meeting.

4. Instructions

You will be viewing a variety of screen shots taken from the new software. On these pages, we will be asking you to tell us what you think you will be doing on this screen and what items on the screen do what. Again, please remember that it's not you who's being tested; rather, we are testing our design to see if it's intuitive and makes sense for PDA users who are familiar with Palm conventions. If at any time you'd like to stop or ask a question, please feel free to do so.

5. Screen Shot Talks

You will guide them through the screen shots. At times you will need to ask them particular questions. There is space to document if they give the "desired" response...our desires being designated by our design ideas. If a user describes a feature while talking about the page as a whole, you need not ask them again about that feature. Also, the users may prefer to go out of order. This is fine. Just be sure to document what they say.

6. Reactionnaire

[Give user Reactionnaire...and ask follow up questions]

Appendix B

Pre-Testing Questionnaire

Please rank your skills on the continuum below by placing an X in the appropriate space.

Computer Skills: Expert ___|___|___|___|___|___|___ Novice

Palm Skills: Expert ___|___|___|___|___|___|___ Novice

What type of calendar system do you currently use? _____

How often do you look at your calendar? _____

How often do you check your email? _____

What benefits could you (or others like you) gain from using a scheduling software on their Palm to arrange meetings with other people?

What concerns might you (or others like you) have about using an automatic scheduling software on their Palm to arrange meetings with other people?

Appendix C

Evaluation Checklist for Round One Usability

Screen Shot 1: Calendar Page from Palm		
<p>“This page is a typical daily view of the calendar using Palm’s calendar application. If you wanted to schedule a meeting with other people, and were on this page, how do you think you might go about starting the process?”</p> <p>Desired Action: Select the NEW button.</p>	<p>YES</p> <p>NO</p>	
<p>If user doesn’t indicate use of the “NEW” button, guide them. Ask follow up if they selected a different action to find out why.</p>		
Screen Shot 2: New Button Options		
<p>“So now what do you do to schedule a meeting with multiple people?”</p> <p>Desired Action: Select “Arrange Meeting”</p>	<p>YES</p> <p>NO</p>	
<p>If user selects incorrectly, find out their understandings of “Arrange Meeting” and “Appointment”</p>		<p>ARRANGE MEETING –</p> <p>APPOINTMENT--</p>
Screen Shot 3: Who Page		
<p>“What do you think you are supposed to do on this page?”</p> <p>Desired Response: Something about selecting people to be included in the meeting.</p>	<p>YES</p> <p>NO</p>	
<p>“How would you go about selecting people from your address book to be included in the meeting?”</p> <p>Desired Action: use the right arrow to move them over.</p>	<p>YES</p> <p>NO</p>	
<p>“What do you think the small magnifying glass does?”</p> <p>Desired Response: allows user to find other people in the system who aren’t already in their address book.</p>	<p>YES</p> <p>NO</p>	

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<p>“What do you think the “Detect Local” button does?”</p> <p>Desired Response: Allows users to automatically find other Bluetooth users in the local vicinity to schedule a meeting.</p>	<p>YES</p> <p>NO</p>	
<p>“If you changed your mind, and decided not to schedule a meeting, what do you think you would do on this page?”</p> <p>Desired Response: Touch the cancel button.</p>	<p>YES</p> <p>NO</p>	
<p>“What do you think the “Pick Date” button does?”</p> <p>Desired Response: Confirms your choices for people to be included, and moves you to the next page.</p>	<p>YES</p> <p>NO</p>	
Screen Shot 4: Daily View		
<p>“What do you think this page is all about? What should you do now?”</p> <p>Desired Response: Something about finding times that would be available for each of the people.</p>	<p>YES</p> <p>NO</p>	
<p>“For the sake of this activity, pretend that you selected Dustin, Matthew, Paul and Holli on the previous page because you wish to schedule a meeting with them. How do you think you could change the people included in this meeting?”</p> <p>Desired Response: Use the Change Button</p>	<p>YES</p> <p>NO</p>	
<p>Follow-Up Question: “Where do you think the Change button would take you?”</p> <p>Desired Response: Back to the previous screen.</p>	<p>YES</p> <p>NO</p>	
<p>“What do you think the “Req’d” checkboxes do?”</p> <p>Desired Response: Allows you to view the schedule times available without including someone as a required participant at the meeting.</p>	<p>YES</p> <p>NO</p>	
<p>“What do you think the large black boxes with 8:00-9:45 and 11:45 to 12:50P indicate?”</p> <p>Desired Response: They are the times that are available for those four individuals to meet.</p>	<p>YES</p> <p>NO</p>	

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<p>“What does the Mtg. Length item indicate?”</p> <p>Desired Response: The required amount of time requested for a meeting time for the individuals.</p>	<p>YES</p> <p>NO</p>	
<p>What does the down arrow next to 30 minutes do?”</p> <p>Desired Response: allows the user to select an amount of time for the meeting different than 30 minutes by bringing up a drop down menu.</p>	<p>YES</p> <p>NO</p>	
<p>“What do the four boxes in the lower left hand corner do?”</p> <p>Desired Response: Change the view for the display of available times.</p>	<p>YES</p> <p>NO</p>	
<p>Follow-up Question: “What type of view do each of the boxes provide?”</p> <p>Desired Response:</p> <p>1st-daily</p> <p>2nd-weekly</p> <p>3rd-monthly</p> <p>4th-list of available times</p>	<p>YES</p> <p>NO</p>	<p>1st Box -</p> <p>2nd Box -</p> <p>3rd Box -</p> <p>4th Box -</p>
<p>“How could you view times later than 1:00 on this page?”</p> <p>Desired Response: By using the scroll arrows in the bottom right hand corner.</p>	<p>YES</p> <p>NO</p>	
<p>“If you touched on one of the different letters for the days of the week on the bar, what would happen?”</p> <p>Desired Response: You would view that day of the same week.</p>	<p>YES</p> <p>NO</p>	
<p>“If you touched one of the arrows to the right of the S or the left of the S, what would happen?”</p> <p>Desired Response: You would view the same day of the week for the next or previous week.</p>	<p>YES</p> <p>NO</p>	
<p>Screen Shot 5: Weekly View</p>		
<p>“How does this page differ from the previous?”</p> <p>Desired Response: This one shows the weekly view instead of daily.</p>	<p>YES</p> <p>NO</p>	

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<p>“Again, what do the black boxes indicate?”</p> <p>Desired Response: They show the blocks of time that are open for all four people to attend a meeting.</p>	<p>YES NO</p>	
<p>“What do you think the “Show my Appointments” button would do?”</p> <p>Desired Response: Would overlay your own personal calendar on top of the other so you can see a better picture of your own day in conjunction with available times for all parties.</p>	<p>YES NO</p>	
<p>Follow up Question: “Can you see how this feature could be beneficial?” (the Show my Appts. Button)</p>	<p>YES NO</p>	Why/how?
Screen Shot 6: Monthly View		
<p>“How does this page differ from the previous?”</p> <p>Desired Response: This one shows the monthly view instead of weekly.</p>	<p>YES NO</p>	
<p>“Again, what do the black boxes indicate?”</p> <p>Desired Response: They show the blocks of time that are open for all specified people to attend a meeting.</p>	<p>YES NO</p>	
Screen Shot 7: List View		
<p>“How does this page differ from the previous?”</p> <p>Desired Response: This one shows the list view instead of monthly.</p>	<p>YES NO</p>	
<p>“What do the times listed for each day indicate?”</p> <p>Desired Response: They show the blocks of time that are open for all specified people to attend a meeting.</p>	<p>YES NO</p>	
<p>“Now, if you wanted to select a particular block of time that was open to request a meeting with the other four people, how would you do that?”</p> <p>Desired Response: Touching any of the open blocks of time from any of the views.</p>	<p>YES NO</p>	

Appendix C

Screen Shot 8: Request Meeting Pop-Up		
<p>“Say you have selected an open block of time by touching it...this pop up screen appears. Now what?”</p> <p>Desired Response: fill in any additional, pertinent information and send request.</p>	<p>YES</p> <p>NO</p>	
<p>“How could you change the meeting time within that block of free time?”</p> <p>Desired Response: change the times using the arrows next to the 8:00 and 8:30</p>	<p>YES</p> <p>NO</p>	
<p>“How would you input information for the location line?”</p> <p>Desired Response: write using the graffiti pad after touching on the line.</p>	<p>YES</p> <p>NO</p>	
<p>“How would you add a title for the meeting?”</p> <p>Desired Response: write it in using the graffiti pad after touching on the line.</p>	<p>YES</p> <p>NO</p>	
<p>“What do you think the Note button does?”</p> <p>Desired Response: allows you to add any additional text explanation about the meeting.</p>	<p>YES</p> <p>NO</p>	
<p>“How do you send the request to the other parties?”</p> <p>Desired Response: touch the “send request” button</p>	<p>YES</p> <p>NO</p>	
<p>“If you change your mind and want to select another time, what do you do?”</p> <p>Desired Response: touch the Cancel button</p>	<p>YES</p> <p>NO</p>	
Screen Shot 9: Pop-Up Meeting Request Response		
<p>“If you received this pop up on your Palm while doing other activities, what do you think it would signify?”</p> <p>Desired Response: you have been invited to a meeting scheduled by Matthew Eisenstadt...it’s now up to you to decide whether you would want to attend it or not.</p>	<p>YES</p> <p>NO</p>	

Appendix C

<p>“What do you think the “All Invitees” button would show you?”</p> <p>Desired Response: it would show you who else was invited to attend the meeting.</p>	<p>YES</p> <p>NO</p>	
<p>“What do you think the “view in context” button would show you?”</p> <p>Desired Response: it would show you the actual day in your calendar with this meeting added so you can see how the whole day would be.</p>	<p>YES</p> <p>NO</p>	
<p>“If you wanted to accept or reject the meeting, how would you do that?”</p> <p>Desired Response: touch the appropriate button.</p>	<p>YES</p> <p>NO</p>	
<p>“If you touch the “accept” button, what do you think will happen with your own calendar?”</p> <p>Desired Response: the meeting time will show up on your calendar.</p>	<p>YES</p> <p>NO</p>	
<p>“If you touch the “reject” button, what do you think will happen?” (Hint...what about the person who requested the meeting...)</p> <p>Desired Response: they’ll get a rejection notice.</p>	<p>YES</p> <p>NO</p>	
<p>“What do you think the snooze feature does?”</p> <p>Desired Response: it automatically reminds you in the designated amount of time to respond to the request for the meeting.</p>	<p>YES</p> <p>NO</p>	
<p>“If you wanted to have the alarm alert you again in one hour to respond to the meeting request, how could you do that?”</p> <p>Desired Response: use the down arrow next to 30 to select a different amount of time.</p>	<p>YES</p> <p>NO</p>	

Appendix D

Post-Testing Questionnaire

Please circle the response that best describes your feelings about the statement.

The design for the software is easy to understand.	Strongly Disagree	Disagree	Undecided	Agree	Strongly Agree
Comments:					

The features included seem typical for Palm interfaces.	Strongly Disagree	Disagree	Undecided	Agree	Strongly Agree
Comments:					

I never felt unsure about what the design would be requiring of me as its user.	Strongly Disagree	Disagree	Undecided	Agree	Strongly Agree
Comments:					

I would be comfortable using the interface for this software.	Strongly Disagree	Disagree	Undecided	Agree	Strongly Agree
Comments:					

I never felt "lost" while viewing the screen shots.	Strongly Disagree	Disagree	Undecided	Agree	Strongly Agree
Comments:					

It was easy for me to figure out what the features of the software do.	Strongly Disagree	Disagree	Undecided	Agree	Strongly Agree
Comments:					

I would be comfortable using this software to schedule meetings.	Strongly Disagree	Disagree	Undecided	Agree	Strongly Agree
Comments:					

I would be comfortable using this software to accept meeting invitations from others.	Strongly Disagree	Disagree	Undecided	Agree	Strongly Agree
Comments:					

How could we improve the software design to meet your needs?

What areas seemed most confusing about the design?

What did you like the most about the design?

Round Two Usability

Directions:

1. Give users demographic questionnaire
2. Explain background (from first round usability)
3. Ask for "thinking aloud."
4. Give them Task 1; document their progress and process.
5. Give them Task 2; document their progress and process.
6. Ask users to complete the post-testing reactionnaire

Note: The notes included below were not given to subjects.

Task 1:

Today is Monday, December 2. You are working alone in your office. You remember that you need to set up a meeting with your project team and with your supervisor for sometime next week. Using the MeetingFinder software, find a time **next week** when your supervisor and as many of your team members as possible can get together. Your supervisor wants to meet for at least 30 minutes, though he would prefer to meet for an hour.

Your supervisor: Paul Robertson

Team members: Holli Whitt, Dustin Arnold, Matt Eisenstadt, Josh Moline

(Note: This task will require them to uncheck Josh and make the meeting length 45 minutes or less in order to find a meeting time. Also, the team members will all be in the address book, but the supervisor will not be. You may need to prompt them that they may not always find everyone they need to meet with already in their address books....)

Task 2:

Later that day you are in another meeting with another team (your company is encouraging inter-departmental teams to encourage idea sharing). In the interest of making some new connections with people at work, you suggest that the four of you should get together for lunch sometime in the next couple of weeks. Everyone agrees, and the race is on to find a time when everyone can meet.....

(Note: The point of this task is to try and get them to use the Bluetooth "detect local users" feature. They will not be progressing beyond the select who page.)