



Symform User Centered Design

The UX Challenge

Symform, a cloud based storage solution, posed 2 user experience challenges at the start of the user centered design process:

1. They were expanding their offering to include a new target user type. In early versions they targeted value add partners (IT consultants) who would sell Symform services as part of their consulting packages. The product had matured to a point they were ready to start selling directly to companies but they didn't know enough about IT pros in small to medium companies. They wanted 3T Interactive to provide user profiles/personas they could leverage in making technical, business, and design decisions.
2. They had developed early versions of the product thinking primarily of technical requirements rather than UX requirements. They wanted help in making incremental and long term UX improvements. They asked for majority of focus to be on system configuration and for some consideration be given to cloud management UI.



The Approach

To address challenge #1, helping Symform know more about their target users, we developed persons. We used ethnographic site visits and in-depth interviews to identify which personas to develop and to flesh out persona details. The personas were delivered to the entire company via a PowerPoint presentation and hard copy in a “magazine” format.

To address incremental and near-term UX improvements. 3T Interactive performed a detailed cognitive walkthrough and heuristic review of the current version of the product. Findings and recommendations were given to Symform executives and engineers via a PowerPoint presentation.

In considering a long-term UX direction, the newly developed IT persona was used to help drive user requirements. An online card sort was completed with 16 users, half of them existing Symform customers, to help define layout, navigation, and labeling (information architecture). A wireframe prototype was developed and a remote usability was conducted with 6 IT Pros. Findings from the study were used to revise the wireframe prototype.

3T Interactive worked closely with Symform executives to iterate on the wireframe and achieve balance between UX requirements, business requirements, and technology constraints. Once we agreed on final layout, navigation, UI text, and all other UI elements, 3T interactive delivered a CSS file and HTML templates to allow Symform to easily complete their newly designed configuration UI.



Symform Personas



Direct IT Persona

I work for a company that manufactures products for boats and ships.

My main job is to manage all of the technology for our company. I also manage the one other IT guy who works here. I wear many hats and that is something I love about my work.

We have 130 PCs and 15 servers, most of those are virtual.

Making sure our data is archived and protected is an important component of my job. Because it is a small part of what I deal with, it is important that it be easy for me to store, backup, and recover our data.

Full persona available for review upon request.



Consultant Persona

I own an IT service provider company. I have one fulltime employee . We have 20 clients and have 8 of those backing up their data via Symform cooperative cloud storage. Most of our clients have around 20 PCs but a couple of over 50 and one has less than 10.

I spend a lot of time in a day Working through reports on client systems and looking for anomalies. I also spend a fair amount of time each day researching new technologies and keeping abreast of solutions that might help my clients.

It is critical that I respond immediately to server or internet outages and that I bring things online quickly. It is also imperative that I keep client servers up to date with patches and that I keep anti-virus running on all of their computers.

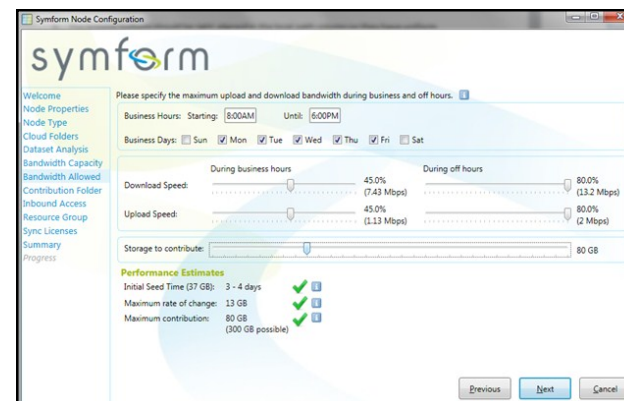
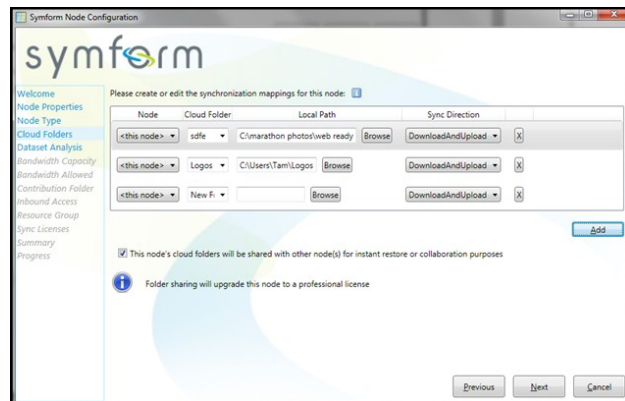
Full persona available for review upon request.



Original Configuration UI

The current install and configuration UI is a Windows based wizard. Users run the wizard to get the Symform service installed on their computer and to configure initial settings. If the user wishes to change configure settings, they launch the wizard and navigate to the proper step then make configuration changes. Feedback from existing users and findings from the cognitive walkthrough show that launching the wizard after install is not intuitive. Additionally, the experience of defining bandwidth settings and setting up folder sync relationships is not intuitive.

Sample Screens



UX Framework

Prior to beginning the wireframe process, 3T Interactive proposed a UX framework to Symform executives so we would have mutual agreement direction. We agreed on these guiding principles:

- The first run experience is optimized to give users a positive perception.
- Initial configuration adheres to the 80/20 rule—make it very easy for the majority of users to get Symform working and doing something.
- Provide consistency of experience across platforms and devices.
- Effects of user action are always visible—the user tells Symform to do something and it is clear that Symform is doing something.
- Provide a hub for local operations beyond configuration & make them discoverable (e.g., diagnostics, restore).
- Creates clear demarcation between configuration and operations.
- Overlap of some global and local operations is a good thing as long as context is very clear.



The Wireframe

A Web Page

symform Device Manager Cloud Dashboard

Home | Environment | Folders | Contribution | Bandwidth | Data Seeding | Diagnostics

Getting Started

Complete the steps below to configure Symform. You can configure this device to sync data with the Symform cloud and to contribute excess storage to the Symform cloud. After you have successfully configured Symform on this device, you can use this dashboard to change configuration, perform device level diagnostics, download folders from the cloud, and more.

Step 1: Go to [Environment](#) and tell Symform what your current network download and upload speed is and indicate your business hours.

Step 2: Choose [Folders](#) on this device to sync with the Symform cloud.

Step 3: Setup [Contribution](#) to enable this device to contribute excess storage to Symform.

Step 4: Tell Symform how much [Bandwidth](#) to use during business and off hours.

Local Folder	Cloud Folder	Files Pending	Synced Files	Errors	File in Progress	Reported
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A Web Page

symform Device Manager Cloud Dashboard

Home | Environment | Folders | Contribution | Bandwidth | Data Seeding | Diagnostics

Enter the speed of your Internet connection. If you're not sure of the exact speed, you can find out by performing a quick test at speedtest.net

Download Speed: mbps

Upload Speed: mbps

Specify business hours and days.

Business Hours: Starting Ending

Business Days: ☐ Sun ☒ Mon ☒ Tue ☒ Wed ☒ Thu ☒ Fri ☐ Sat

Network Download Speed: 22 mbps
Network Upload Speed: 7 mbps
Maximum Contribution Allowed:
Pledged Contribution:

Data Set Size:
Daily Rate of Change:
Estimated Sync Time:

Step 2: Folders

A Web Page

symform Device Manager Cloud Dashboard

Home | Environment | Folders | Contribution | Bandwidth | Data Seeding | Diagnostics

Choose local folders that you would like to sync with the Symform cloud. If you would like to add an existing cloud folder to this device, choose "Download Cloud Folder." If you want to use this device for contribution only, select "No" for "Synchronize data with the cloud."

Synchronize data with the cloud: ☒ Yes ☐ No

Sync Folders:

Local Folder	Cloud Folder
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Network Download Speed: 22 mbps
Network Upload Speed: 7 mbps
Maximum Contribution Allowed:
Pledged Contribution:

Data Set Size:
Daily Rate of Change:
Estimated Sync Time:

Step 3: Contribution

A Web Page

symform Device Manager Cloud Dashboard

Home | Environment | Folders | Contribution | Bandwidth | Data Seeding | Diagnostics

Symform allows you to exchange cheap local storage for valuable cloud storage at an affordable prices. You will specify the amount of storage you wish to contribute from this device on Bandwidth settings. If you do not want this device to contribute storage, choose "No" for "Contribute storage to the cloud." If you choose not to contribute you will pay more for the cloud storage you consume.

Contribute storage to the cloud: ☒ Yes ☐ No

Contribution Folder Location:

Amount of excess storage available on the device: 688 GB

In order for this device to contribute storage to the cloud, you need to open firewall ports to allow Symform to distribute contributed data to the contribution folder you specified above. [Learn More](#)

Step 1: Specify the port you will open on your firewall. You can use the default generated by Symform. Port:

Step 2: Open the specified port on all firewalls that sit between this device and the internet.

Step 3: Use the Test button to ensure that your firewalls are configured correctly.

☒ This device is able to contribute storage.

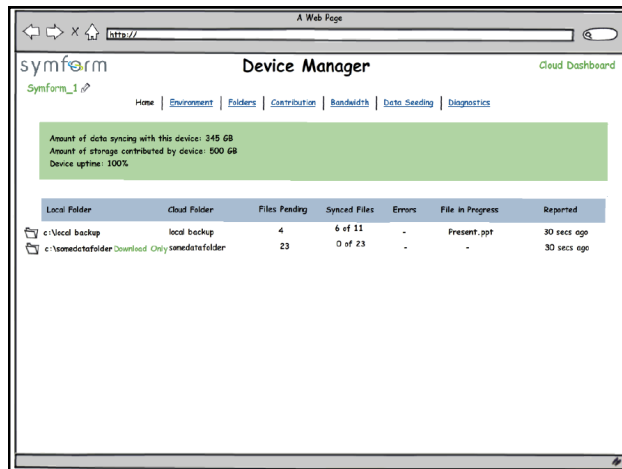
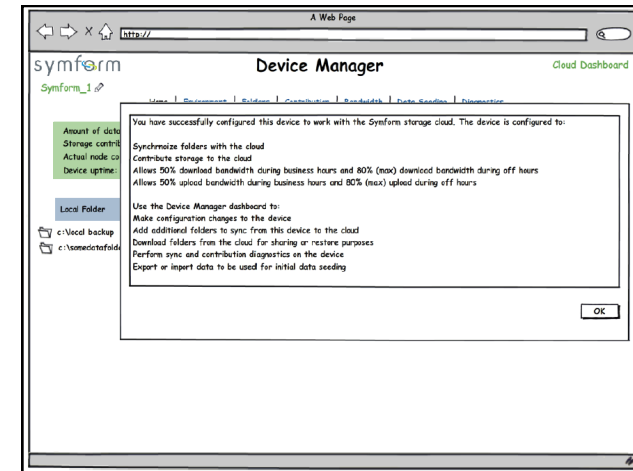
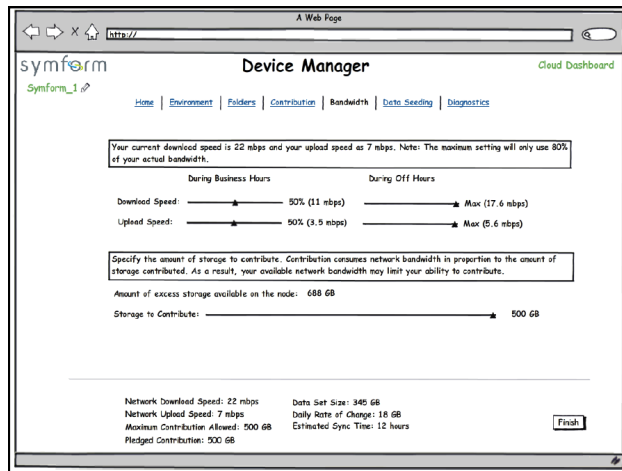
This icon and status text will only appear if the user has tested on the test was successful. If the test is unsuccessful or, if at some point Symform fails to communicate with the device, the icon should be red and an error should be displayed along with helpful info on how to address.

Network Download Speed: 22 mbps
Network Upload Speed: 7 mbps
Maximum Contribution Allowed:
Pledged Contribution:

Data Set Size: 345 GB
Daily Rate of Change: 18 GB
Estimated Sync Time:

Step 4: Bandwidth

The Wireframe



Samples of Final HTML

symform

Symform_1 1440

Device Manager

Cloud Dashboard

[Home](#) | [Environment](#) | [Folders](#) | [Contribution](#) | [Bandwidth](#) | [Data Settings](#) | [Diagnostics](#)

Green box for system setup process

Step 1: Enter your current internet speed and setup your business hours. [speedtest](#) [Done!](#)

Step 2: Specify folders to sync between this device and the Symform cloud. [folders](#)

Step 3: Configure this device to contribute excess storage to the Symform cloud. [contribution](#)

Step 4: Test Symform how much bandwidth to use during business and off hours. [bandwidth](#)

Local Folder

Cloud Folder

Files Pending

Spent Files

Errors

File in Progress

Reported

symform

Symform_1 1440

Device Manager

Cloud Dashboard

[Home](#) | [Environment](#) | [Folders](#) | [Contribution](#) | [Bandwidth](#) | [Data Settings](#) | [Diagnostics](#)

Enter the speed of your internet connection.

Enter the speed of your internet connection. If you are not sure of the exact speed, you can find out by performing a quick test at [speedtest.net](#)

Download Speed: mbps

Upload Speed: mbps

Specify business hours and days.

Business Hours: Starting AM PM Ending PM

Business Days: ☐ Sunday ☒ Monday ☒ Tuesday ☒ Wednesday ☒ Thursday ☒ Friday ☐ Saturday

Network Download Speed: 22 mbps
Network Upload Speed: 7 mbps
Maximum Contribution Allowed: 22 mbps
Pledged Contribution: 22 mbps

Data Set Size: 345 GB
Daily Rate of Change: 18 GB
Estimated Sync Time:

Save Changes

symform

Symform_1 1440

Device Manager

Cloud Dashboard

[Home](#) | [Environment](#) | [Folders](#) | [Contribution](#) | [Bandwidth](#) | [Data Settings](#) | [Diagnostics](#)

Choose local folders that you would like to sync with the Symform cloud. If you would like to add an existing cloud folder to this device, choose "Download Cloud Folder." If you want to use this device for contribution only, select "No" for "Synchronize data with the cloud."

Synchronize data with the cloud: ☐ Yes ☒ No

space reserved for folder interaction

Add Local Folder to Sync with

Download from Cloud

Network Download Speed: 22 mbps
Network Upload Speed: 7 mbps
Maximum Contribution Allowed: 22 mbps
Pledged Contribution: 22 mbps

Data Set Size: 345 GB
Daily Rate of Change: 18 GB
Estimated Sync Time:

Next step button

symform

Symform_1 1440

Device Manager

Cloud Dashboard

[Home](#) | [Environment](#) | [Folders](#) | [Contribution](#) | [Bandwidth](#) | [Data Settings](#) | [Diagnostics](#)

Symform allows you to exchange cheap local storage for valuable cloud storage at an affordable price. You will specify the amount of storage you wish to contribute from this device in Bandwidth settings. If you do not want this device to contribute storage, choose "No" for "Contribute storage to the cloud." If you choose not to contribute you will pay more for the cloud storage you consume.

Contribute storage to the cloud: ☐ Yes ☒ No

Contribution Folder Location: [space reserved for folder interaction](#)

Amount of excess storage available on the device: 688 GB

In order for this device to contribute storage to the cloud, Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. [Learn More](#)

Step 1: Specify the port you will open on your firewall. You can use the default generated by Symform. Port: 34588

Step 2: Open the specified port on all firewalls that sit between this device and the internet.

Step 3: Use the Test button to ensure that your firewalls are configured correctly.

🟢 This device is able to contribute storage

Network Download Speed: 22 mbps
Network Upload Speed: 7 mbps
Maximum Contribution Allowed: 22 mbps
Pledged Contribution: 22 mbps

Data Set Size: 345 GB
Daily Rate of Change: 18 GB
Estimated Sync Time:

Next step button