



INTERACTIVE

# 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 personas. 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.

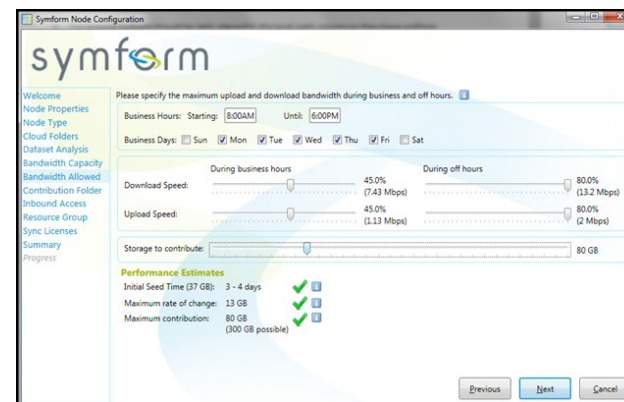
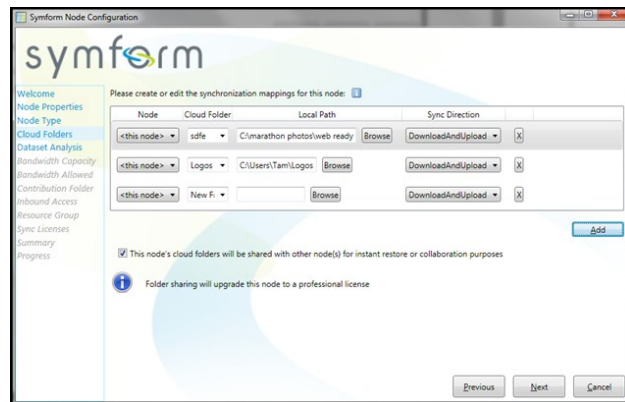
*Full persona available for review upon request.*



# 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



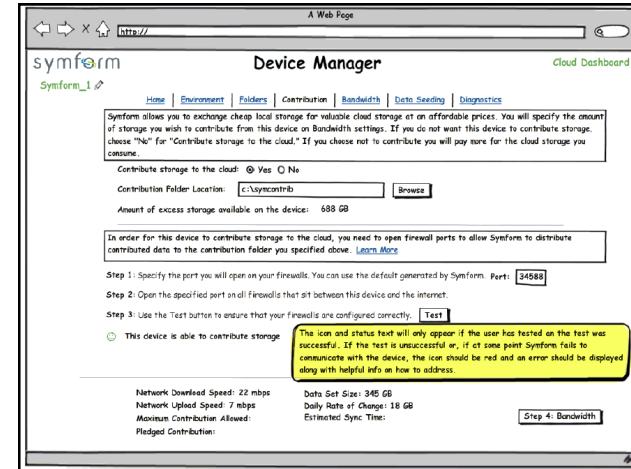
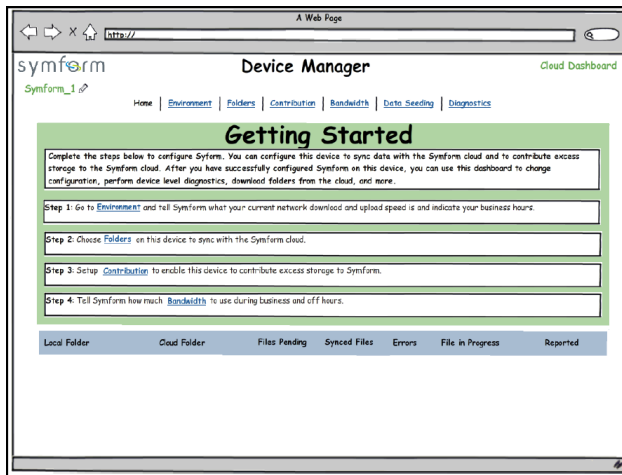
# UX Framework

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:

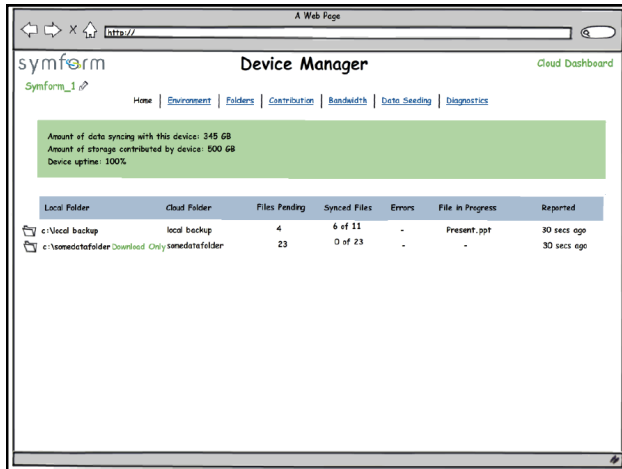
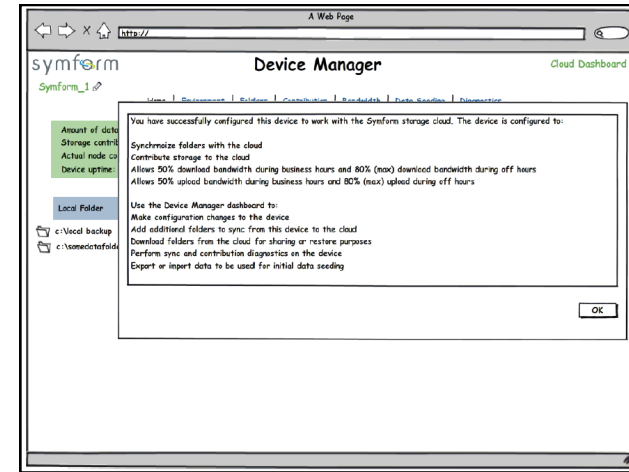
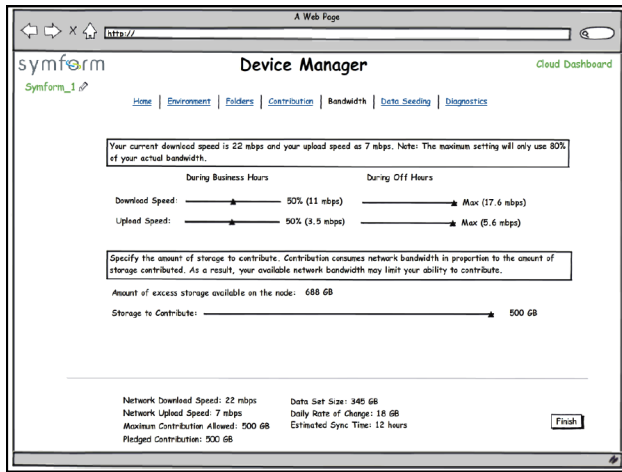
- The first run experience is optimized to give users a positive perception.
- Initial configuration adheres to the 80/20 rule—make it very easy for the majority of users to get Symform working and doing something.
- Provide consistency of experience across platforms and devices.
- Effects of user action 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



# The Wireframe



# Samples of Final HTML

The screenshot shows the 'Device Manager' page with a green box highlighting the setup process. The steps are:

- Step 1: Enter your current network speed and set up your business hours. [Skip/Cancel \(Done\)](#)
- Step 2: Specify folders to sync between this device and the Symform cloud. [Folders](#)
- Step 3: Configure this device to contribute access storage to the Symform cloud. [Contribution](#)
- Step 4: Test Symform how much bandwidth to use during business and off hours. [Bandwidth](#)

At the bottom, there is a navigation bar with tabs: Local Folder, Cloud Folder, Files Pending, Synced Files, Errors, File in Progress, and Reported.

The screenshot shows the 'Device Manager' page with the following content:

### 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  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](#)

The screenshot shows the 'Device Manager' page with the following content:

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](#)

The screenshot shows the 'Device Manager' page with the following content:

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 on Bandwidth settings. If you do not want the 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, 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:

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. [Test](#)

### 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](#)