Helix Sync User Research & Synthesis

UX Research & Design

Sean Ardley, Eric Smith

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Overview

1. Goals of the research

2. Test and interview methodology

3. Interpretation of findings: user needs

4. Product design recommendations: Principles, solutions

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Goals of this Research

- Learn about our target users' workflows surrounding file handling/sharing.

- Get the test subject to understand the product.
    - Involved educating the participant on Manual vs. Auto Upload.

- See if the product aligns with our target users' real workflows.
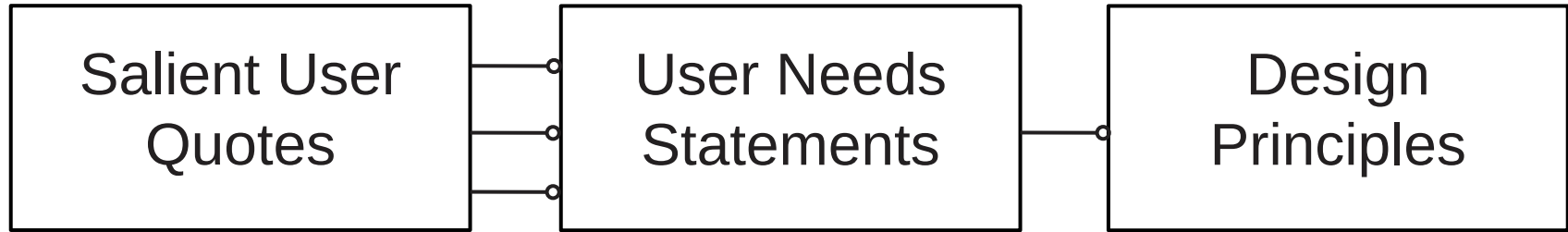
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Test Setup

- The test itself consisted of:

  - **Pre Task Analysis Quantitative Interview.** Collect hard numbers.

  - **Task Analysis with Prototype.** 1 identical task w/ both Manual/Auto.

  - **Post Task Analysis Qual. Interview.** How did "X" make you feel?

- **10** total test participants.

  - **4** Internal participants. **6** External participants.

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Some of our lovely test subjects...

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Synthesis Process

Salient User Quotes	User Needs Statements	Design Principles

EX. "They want to know what's going on with a file but they don't want to know specifically what's changed." BG

EX. "Users need to communicate at the appropriate resolution because information overload leads to over-filtration."

EX. "The product should encourage senders to use the notification system for whatever info is best suited to the case."

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Design Principles

- Choose meaningful, actionable challenges.
  - **EX.** "Users need to communicate at the appropriate resolution because information overload leads to over-filtration."

- Restate needs from the perspective of the product
  - **EX.** "Solutions should encourage the user to communicate at whichever level of resolution feels best for the situation."

- - or - Abstract from compelling solutions. What is it about existing or hypothetical solutions that gets at the selected challenges?
  - **EX.** "Solutions should allow opt-out of non-custom communications"

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" My hesitation may be that I'm not used to thinking of it in that way. The behavior of the folder needs to be clear so I can tell what it's doing without even thinking. " TW

" The menu bar is for hardware options like volume. I would never think to look there. " IG

" 2% of artists write a description. It's just not the task at hand. " MT

" Everything I drag in is shared automatically. I want the average case to be easy, I don't want to have to think about it. " MT

Lead us to believe that…

Users <u>need</u> to have their primary workflows highlighted and other options understated <u>because</u> confusion leads to lost time and broken workflows.

" Because I'd be working with the same people on the project I'd prefer auto-sync because I assume we'd already have this folder set up. I'd assume there could be subfolders with different permission settings. " MH

" When starting a project, the tool we use really comes down to who initiated that project. " KB

" I would have those paths ready for the artist. They would never use P4V, or the file manager. " MT

" I'm OK with notifications for people who have signed up for them. " IG

Lead us to believe that…

Users <u>need</u> to collectively have some control over project setup, <u>because</u> through customization users can trust that the tool is operating efficiently for their use case.

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" Nobody uses Dropbox and Box officially, we're not allowed to because of security… I'll drop stuff into a WFH folder to work from home. Artists do this too. " **MT**

" I could foresee a ton of different communication needs for different people in my team. " **TW**

" This could just be a property of the "Alpha" folder. Everything I drag in is shared automatically. I want the average case to be easy, I don't want to have to think about it. " **MT**

Lead us to believe that…

Users <u>need</u> to utilize different workflows for different projects or tasks <u>because</u> workflows get optimized for the task's participants and content.

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" The only reason I drag a file to my desktop is to make sure that no one else sees it. If I really trust that no one else is going to see it then I would feel comfortable editing inside my project folder " TW

" In my real workflow I'd most likely start the document outside of the folder and then drag it in [to Sync]" TW

" ...Keep everything in this project in it, but obviously not share it with everyone involved..." "I'd assume different permission settings" TW

MT on unofficial Dropbox use

Lead us to believe that…

Users <u>need</u> to feel they have control over the privacy of files.

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" They want to know what's going on with a file but they don't want to know specifically what's changed." **BG**

" I'm ok with notifications for people who have signed up for them." **IG**

" I think it would depend on the importance of the file. I'd want email notification if the addition was life-or-death." **MH**

Lead us to believe that…

Users <u>need</u> to communicate at the appropriate resolution.

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Needs Summary: Users need to...

- Have their primary in-app workflows highlighted and others understated

- Have some control over project setup

- Utilize different workflows for different projects or tasks (We couldn't find a single-workflow user)

- Have some control over the privacy of files

- Communicate at the appropriate resolution

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- Users need to utilize different workflows for different projects or tasks (We couldn't find a single-workflow user)

- Users need to have their primary in-app workflows highlighted and others understated

Lead us to believe that…

The product should encompass a wide set of workflows rather than attempting to focus on one very specific flow. (Auto-upload)

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The product should encompass a wide set of workflows rather than attempting to focus on one very specific flow.

- For primary functionality, auto upload was consistently preferred and understood better. (10/10)

- Most users could find special cases in which the communication functions of manual sync could be useful. (7/10)

- These were special cases.

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- Users need to have some control over project setup

- Users need to have some control over privacy of files

Lead us to believe that…

The product should involve some onboarding/setup which make the users feel ownership, and if possible, should set the basis for file permissions/ privacy.

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How might we?

Encompass more workflows with the primary in-app user flows?

Auto Upload by default. Avoid complications of manual upload unless customized to include it.

Encourage ownership and trust through setup?

Allow permissions to be set by admin on admin-created folders, by users on user created folders.

Encourage communication at the appropriate resolution?

Leave wording open to different types of message, types of content, if enabled

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- Encompass more workflows with the primary in-app user flows?

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- Allow permissions to be set by admin on admin-created folders, by users on user created folders

- Leave wording open to different types of message, types of content, if enabled

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Links for your reference...

TEST SCRIPT

PROTOTYPE

DAVID'S TEST

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