Empathize

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Expert interviews

Question: How does the JSON setup data work within the web application?

Research method: Expert interview.

Why: The expert can point out sources, give a sense of direction.

How: Conducting an interview with an expert about the current state of the settings' interface.

Interview with the Lead Developer

What are those five channels from the setup?
Channels work as adds, currently there are five different channels: Display, Social, Video, Mobile, Email. They can be used in a specific campaign. Each of them unlocks new tab with its own specification that can be edited.

What do multi market, channel, brand, department stands for?
Those modules, markets, languages, brands, and departments work as functionalities. Each of them does a specific function inside the tool based on the user's rights. Multimarket gives a permission to assign different markets to the campaign, languages – shows in what language it will be displayed but there is an extra functionality of it that auto translates the text from one language to another.

What kind of user roles are there?
Roles are tailored for the user and later configurable. Permissions are applied based on the subscription that client pays.

What are types, status, tags, categories used for?
Categories are short descriptions that can be filtered to find the desired campaign. Previously, it was being filtered by types. Tags are just another way of filtering as well as adding extra information to the description of a campaign. Status defines the current campaign is upcoming, live of offline. It defines its state.

What is the status and where does it appear?
Status defines the state of campaign. It can be either online, offline, draft or review, it is also used as a filtering type.

Interview with the Chief Technology Officer

Are types of users tailored per client or fixed?
Roles for all the clients should be fixed and editable by Cape team.

Are all those keys from the setup's file fixed?
Those are not fixed there are many more that can be used, there is documentation on the Confluence that gives an overview.

Are those setups created manually?
Those setups are created manually by the team.

For whom is the interface going to be created? What is the target audience?
The target audience going to be for cape's team as well as clients? Clarify which one is more important and if it should be created for both parties?

Will it be possible to test it with users?
Testing part will be done with the Cape's team.

Do you use any tool like "use Berry" for testing new designs?
No, designs are being tested by the user experience and user interface team. No such a tool is used.

Conclusion and next steps

The tool for managing campaigns utilizes various channels, including Display, Social, Video, Mobile, and Email, each of which has its own editable specifications within a campaign. These campaigns can encompass modules, markets, languages, brands, and departments, each serving distinct functionalities based on user permissions. The Multimarket functionality allows for the assignment of different markets to a campaign, while languages determine the display language and offer automatic translation capabilities. User roles are customizable and configurable, with permissions determined by the client's subscription. Categories and tags provide filtering and additional information for campaigns, replacing the previous categorization by types. Lastly, campaign status indicates whether a campaign is upcoming, live, or offline, defining its current state. User roles should be fixed for the customers with a space for creating a personalized role. This comprehensive understanding of the tool's components and features is essential for effective campaign management.

Document analysis of the JSON

Question: What is the database consisted of?

Research method: Document analysis.

Why: To understand the functionality of setup's account settings and the JSON format.

How: By requesting documentation from the company that describes the setup and outlines its functionality within the web application.

Configuration of the setup

This configuration is consisted of modules that have an impact on the behavior of the tool. These are the main settings of the account:

Modules – contains all the features that can be used by the customer:
- Dashboard – access to the dashboard interface
- Notifications – access to receiving notifications
- Campaign planning – access to overview of all the campaigns
- Multi market
- Multi department
- Campaign concepts
- Campaign chat
- Campaign setup screen
- Campaign info screen
- Decision tree
- Assets unsplash

Markets – defines different markets and their corresponding labels. Each market is represented by a two-letter country code (e.g., "GB" for Global, "NL" for Netherlands) and its associated label. It is used for assigning a certain campaign to the market. For instance, campaign that advertises a product that is popular only in the Netherlands, will have a Dutch market assigned to it.

Languages – specifies different languages and their corresponding labels. Each language is represented by a two-letter language code (e.g., "EN" for English, "NL" for Dutch) and its associated label. Languages are used for the auto translation of campaigns. Instead of re-creating it for a certain language, it can be translated by the tool and save the relevant time.

Departments – defines different departments and their corresponding labels. For example, "ecommerce" represents the E-commerce department, and "marketing" represents the Marketing department. Users can be assigned to different departments and then these can be assigned to certain campaign.

Channels – lists different channels available for use. Each channel is represented by a key (e.g., "facebook," "instagram") and its associated label (e.g., "Facebook," "Instagram"). This is used for defining the publishing part, consequently the customer can connect the tool to a certain social media platform.

User Management – contains user settings. In depth analysis was done in the *User Management* section.
Sub settings of the user management:
- Validate origin – whether to validate the origin of the request.
- Google Authenticate – whether to use Google Authenticator for 2FA.
- SSO – Whether to use single sign on. If so, the standard login is not showed anymore.
- Types – Defines different types of users and the permissions that belong to them.

Campaigns – includes settings related to campaign management.
Sub settings of the campaigns section:
- Setup screen– A screen where the setup of the campaign is made.
- Info screen– A screen where additional information regarding the campaign can be added.
- Tags – Can be used for filtering campaigns in the overview.
- Categories – Can be used for filtering campaigns.
- Calendar – A screen with an overview of the entire planning.

Dashboard – defines settings specific to the system's dashboard. In depth analysis was done in the *User Management* section.

Publish – defines publish account settings for different social media platforms.

Resource setup

Resource

```
setup
```

Data

```json
1  {
2      "url": "https://acceptance.campaigndesigner.io/",
3      "welcomeScreen": {
4          "videoUrl": "https://storage.googleapis.com/content-space/account-12.
5      },
6      "email": {
7          "logo": "https://templates.campaigndesigner.io/cape/general/logo-dar
8          "buttonColor": "#f80"
9      },
10     "channels": {
11         "display": "Display",
12         "social": "Social",
13         "video": "Video",
14         "mobile": "Mobile",
15         "email": "Email"
16     },
17     "modules": [
18         "assetsUnsplash",
19         "assetLibrary",
20         "visualAnalysis",
21         "campaignPlanning",
22         "dashboard",
23         "comments",
24         "notifications",
25         "conceptManagement",
26         "conceptGallery",
27         "reporting",
28         "translateAuto",
29         "multiDepartment",
30         "multiBrand",
31         "multiMarket",
```

Figure 1. Example of the JSON interface setup.

Conclusion

Currently, the customer's setup is located inside of the "Recourses" page, under the name of "setup". Previously mentioned settings are configurable per customer. Every single one unlocks various functionalities that can be used by the customer. Those settings are being updated by Cape's employee which requires knowledge of JSON format. Currently, there are only two people in charge of it because of the needed knowledge of the JavaScript Object Notation.
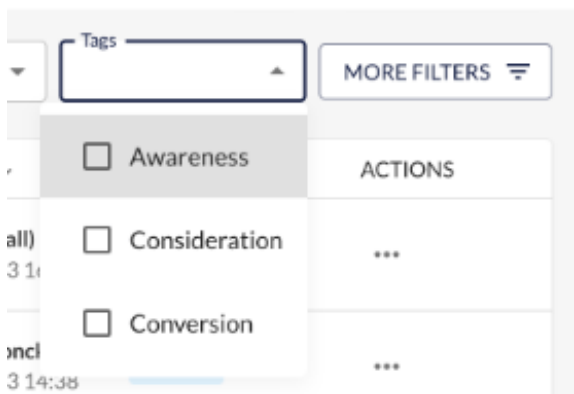
Configuration of the campaigns.

Configuration of the campaign's settings includes:
Tags – The tags can be assigned to a campaign and can later be used to filter.
- During the setup of the tool, predefined tags are created.
- While editing the campaign setup, those tags can be selected. **(Check the figure 2)**
- If those tags are selected in the campaign, it can be filtered based on them. (**Check the figure 2)**

Figure 2. Example of the selected tags and the filtering option based on them.

Categories – Similar to the tags. How does this work?
- During the setup of the tool, predefined categories are created.
- In the campaign setup the category field is added. **(Check figure 3)**
- Campaigns are being filtered based on the selected category. **(Check figure 3)**

Figure 3. Example of the selected category and the filtering option based on it.

Calendar – The campaign calendar in Cape's Tool offers a centralized solution for effectively managing campaigns. **(Check figure 4)** With this tool, you can easily gain an overview of all the live campaigns and these are the key features:
-   Visual overview – The campaign calendar provides a clear and visual representation of all life campaigns.
-   Customizable Filters – filtering campaings based on specific criteria such as campaign type, funnel phase, or channel.
-   Multiple time intervals – tool allows to toggle between different time intervals, including weekly, monthly, and quartetly views.
-   Export functionality – posibility to export the calendar as a excel file.
-   Seamless campaign management: campaings can be open from the calendar by a simple click.
-   Channel-Specific Subplanning – for futher optimazation the tool allows the user to add planning and subplanning.
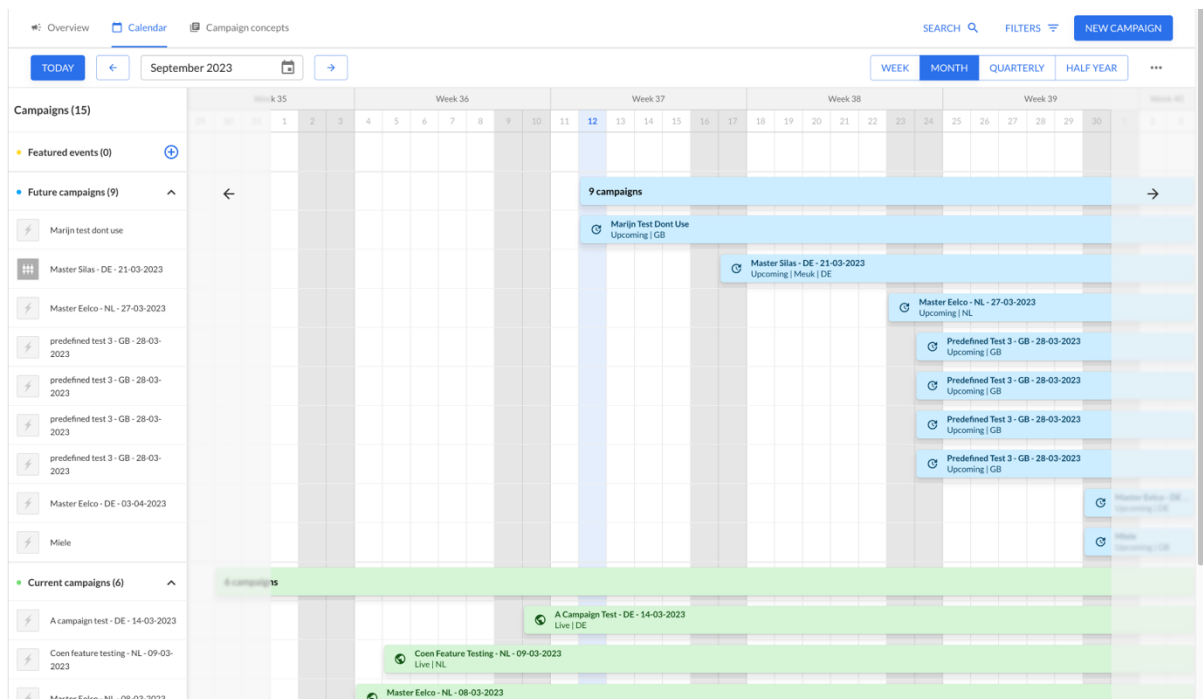

Figure 4. Example of the calendar and its overview on the entire plan.

Setup screen – defines the fields that are being displayed when creating a campaign. These settings are:
- Display**:** whether to display the setup screen or not.
- Editor**:** which fields to display inside of the setup screen. **(Check figure 5)** These can be:
  - Market**:** for market dropdown where you can select needed markets for the campaign.
  - Department**:** for a department dropdown where you can select department that will work on it.
  - Brand**:** for a brand dropdown where you can select which brand should it use.

Figure 5. Example of the campaign setup with "market", "brand" and departments included.

Info screen – this screen is displayed when creating a new campaign. Here customer can show additional inputs from the concept settings. **(Figure 6)** This gives more insights into what the purpose of the campaign is before starting it. In this screen customer can display data from the campaign concept in an information page. These are the possible types:
- Rich text – text element that doesn't constrain the characters limit.
- Text – text element that constrain characters limit.
- Link – text element that contains link.
- Decision tree – page that shows possible decisions for campaign management.
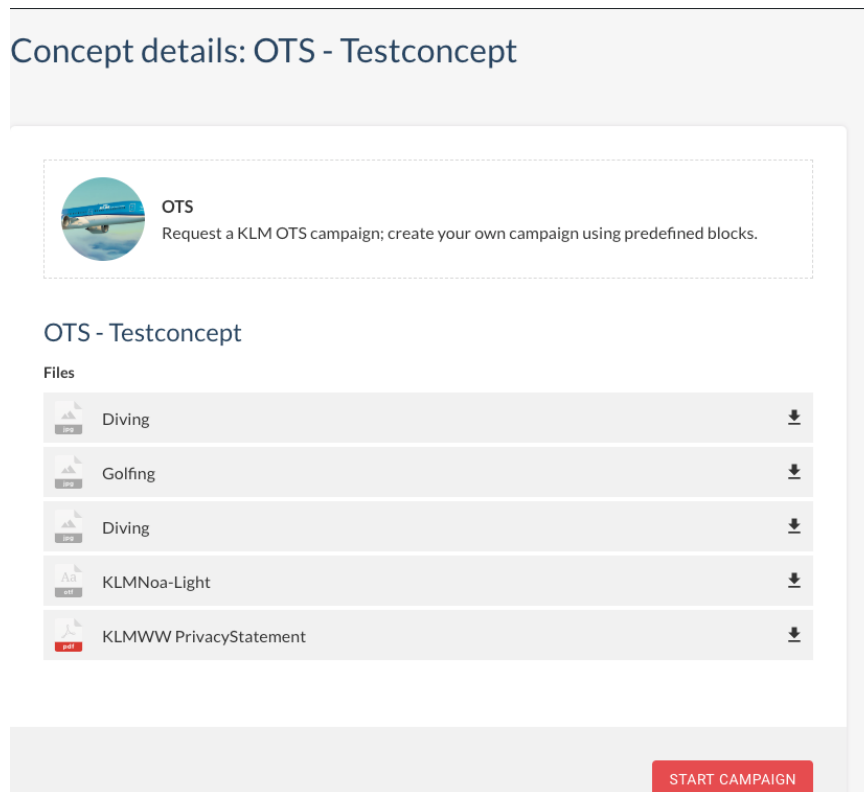- Files – element that contains files inside of it.

Figure 6. Example of the campaign info screen containing the rich text, text, and the decision tree.

Conclusion
The campaign module is consisted of different features. Setup where you can select needed markets, brands, and departments. Info screen which allows the user to setup the campaign and give necessary insights. Calendar a feature that allows the user to have a better understanding and overview of each campaign and the entire planning as well as filtering functionality that uses categories and tags.

Configuration of the user management.

Configuration of the user management's settings includes:
User types – there are predefined user roles that contain certain permissions. The customer can request tailored user roles for certain activities. These can be configured manually.
User object has a title and an array of rights. **(Check figure 7)**.

```
user: {
  title: 'Local user',
  rights: [
    'campaigns',
    'campaignCreate',
    'campaignRemove',
    'multiDepartment'
  ]
},
```

Figure 7. Example of user type with a title and an array of rights.

Feature for origin validation – it checks whether the use is logging in to the right subdomain.
Two factor authentication – display two factor authentication is turned on. **(Check figure 8)**
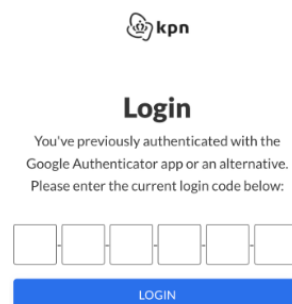

Figure 8. Example of a two-factor authentication dialog.

SSO – when the single sign on is used the standard login screen is removed and replaced by a button. **(Check figure 8).**
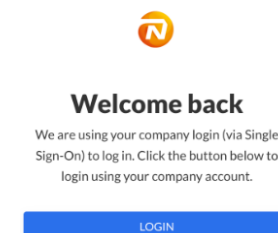

Figure 9. Example of a single sign on component.

Conclusion

Users can have different roles based on the task they are meant to do. The setup includes predefined user roles but there is always a possibility for creating tailored roles for customer's needs.

Configuration of the dashboard.

Configuration of the user management's settings includes:

Header cards – show some statistics and allow users to quickly navigate to the corresponding pages.
- **Display** – if turned on, it displays cards.
- **Cards** – a collection of cards displayed on the top of the dashboard. **(Check figure 10)**
  - Upcoming campaigns
  - Feeds
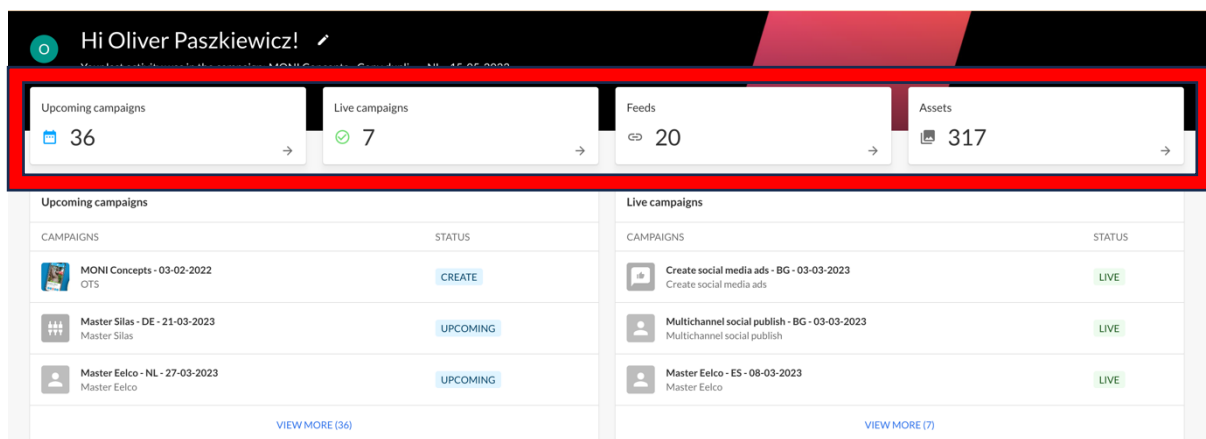 - Assets to review
  - Assets
  - Live Campaigns

Figure 10. Example of the four cards showing some statistics and acting as a navigation.

Campaign blocks – allows the user to quickly see a certain type of campaign and navigate to the corresponding pages with preselected filters. **(Check figure 11)**
- **Block** – first block to show. If only one is added, it takes the full width of the screen. There can be only two blocks in total. Block contains:
  - Title – the title of the block
  - URL – the URL to navigate to after clicking view more.
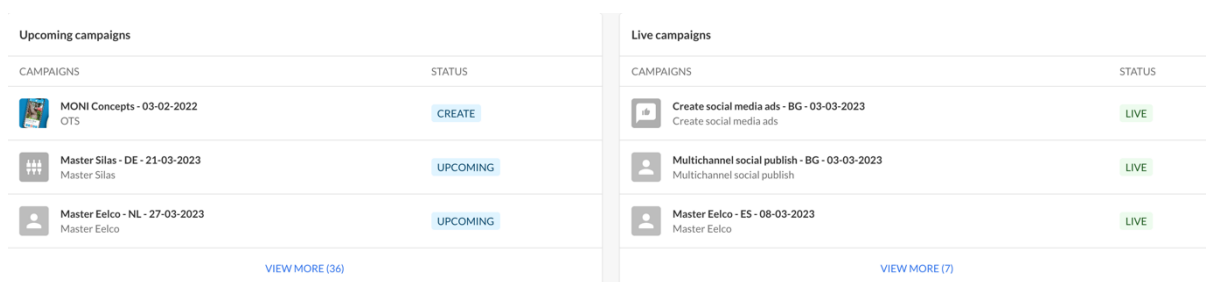 - Status – the statuses of the campaign that are shown in the list.

Figure 11. Example of two blocks containing a title, URL, and status.

Conclusion

Headers improves the user experience of the application regarding the navigation. Blocks allow the user to have a quick overview of a certain type of campaign, to check its status and click on view more to get all the campaigns from the upcoming group.

Conclusion of Document analysis

Cape's campaign management system offers a robust and flexible solution for customers to efficiently set up and manage their campaigns. The customization options provided in the customer setup, with configurable settings and the use of JSON format, empower users to tailor campaigns to specific departments, markets, and brands. The incorporation of categories and tags as metadata enhances campaign description and facilitates effective filtration. Moreover, Cape's campaign calendar tool acts as a centralized hub, streamlining management efforts through visual overviews, customizable filters, and channel-specific sub planning. The system's user-friendly design, including predefined user types, headers, and permissions, contributes to an enhanced user experience, promoting quick navigation and informed decision-making. Overall, Cape's platform equips customers with the tools needed to stay organized, optimize campaign performance, and gain valuable insights.

Key-takeaways:

1. The system allows customers to configure campaign settings per customer, unlocking various features tailored to specific needs, with updates performed in JSON format. This is still happening on the cape's side.
2. Categories and tags serve as additional metadata, aiding in campaign description and facilitating efficient filtration of campaigns.
3. Cape's campaign calendar tool provides a centralized hub with visual overviews, customizable filters, multiple time intervals, export capabilities, and channel-specific subplanning to streamline campaign management.
4. The campaign setup tool enables customers to create campaigns for specific departments, markets, and brands, with the option to create info screens for additional insights.
5. Different users with varying rights can be assigned, and the suggestion to create predefined user types enhances interface usability by presenting users with already checked-in rights.
6. The inclusion of headers improves the overall user experience by facilitating quick navigation and providing a convenient overview of specific campaign types.
7. Cape's platform empowers customers to make informed decisions, stay organized, and optimize campaign performance through its comprehensive set of tools and features.

Survey

Research method: Survey.

Why: Collect, mostly quantitative, information from a large sample of your target group.

How: A questionnaire is developed and handed to a representative sample of participants through the right channels. A variety of online tools can be used to analyse the responses.

Analysis

1. How frequently do you need to adjust or modify settings in the JSON configuration files for this application. (Figure 12)
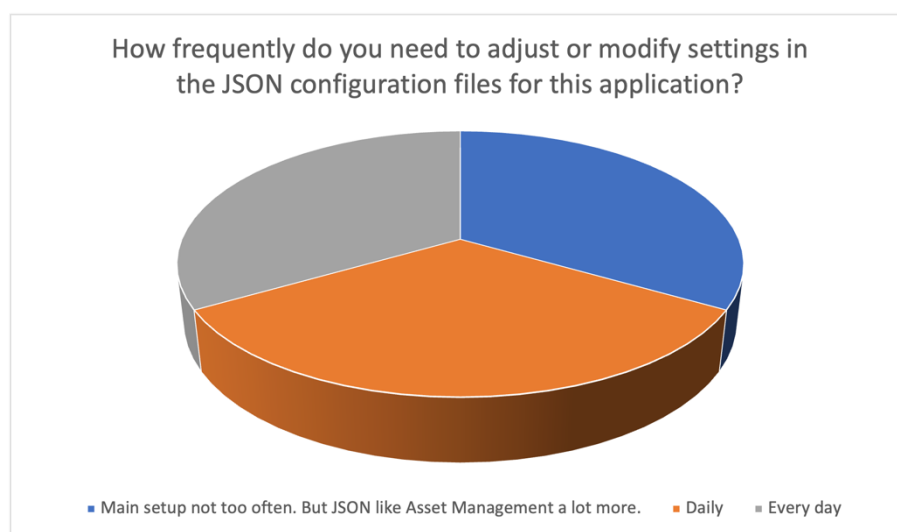

Figure 12. Pie chart showcasing answers for the first question.

2. Can you describe a recent experience where you had to modify settings in the JSON configuration file? What challenges did you face? (Figure 13)
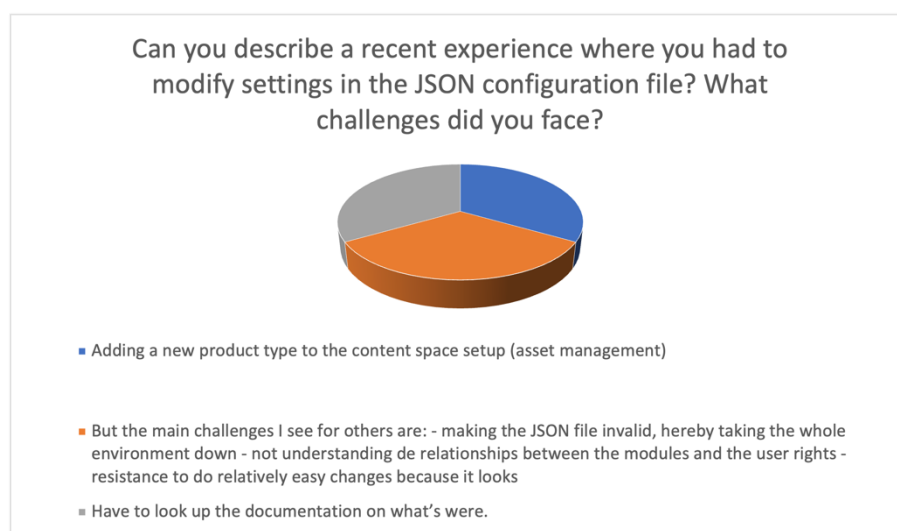

Figure 13. Pie chart showcasing answers for the second question.

3. What are the most critical settings you typically need to modify in the JSON configuration? Please list them. (Figure 14)
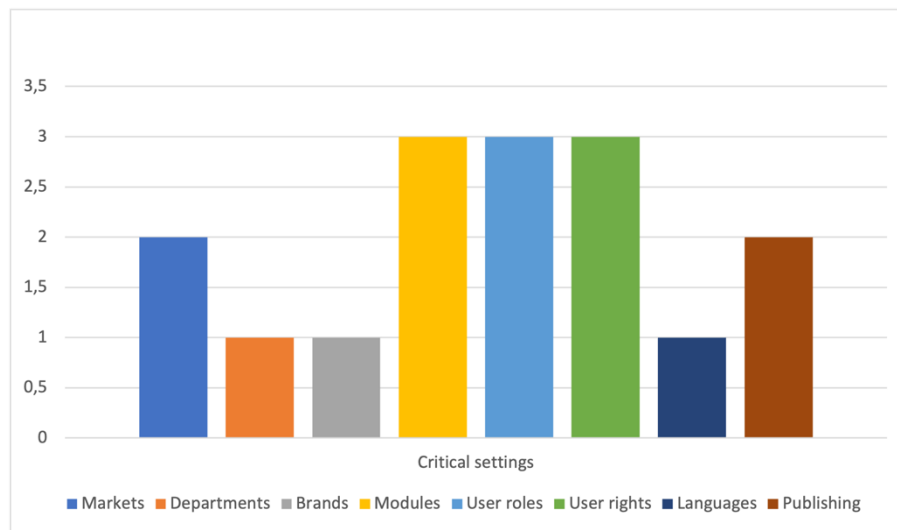

Figure 14. Pie chart showcasing answers for the third question.

4. What types of errors or issues have you encountered while editing the JSON configuration files, if any? (Figure 15)
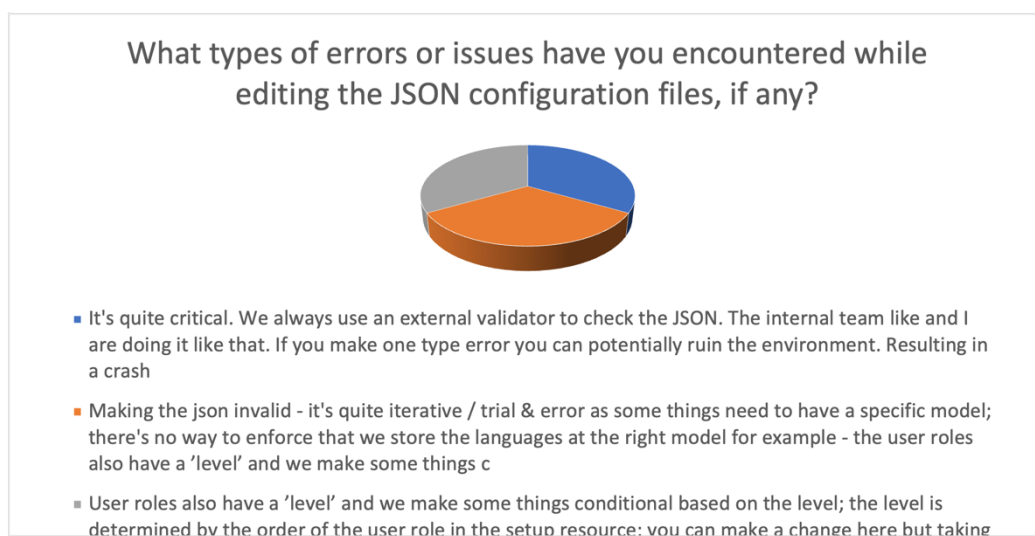

Figure 15. Pie chart showcasing answers for the fourth question.

5. How confident are you in your ability to validate the correctness of JSON code when editing the configuration file? (1 being not confident, 5 being very confident) (Figure 16)
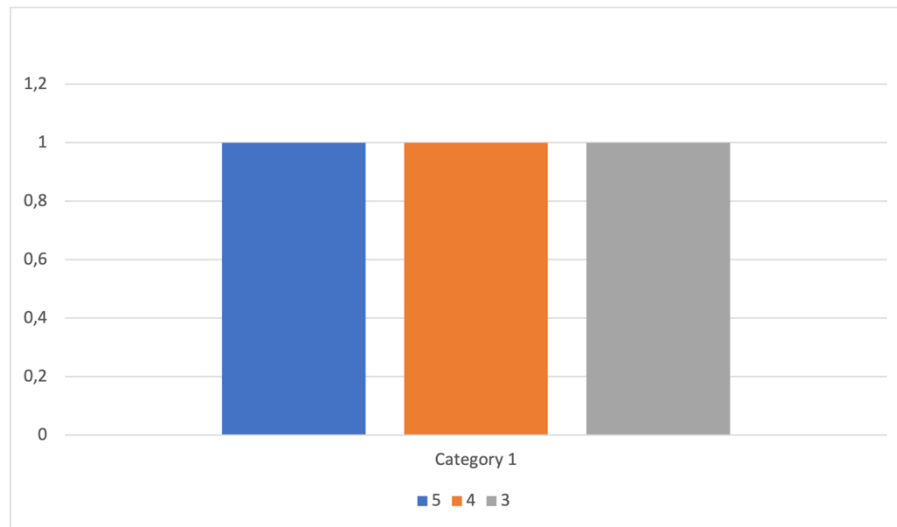

Figure 16. Pie chart showcasing answers for the fifth question.

6. What do you find most frustrating or challenging about the current JSON-based settings configuration process? (Figure 17)
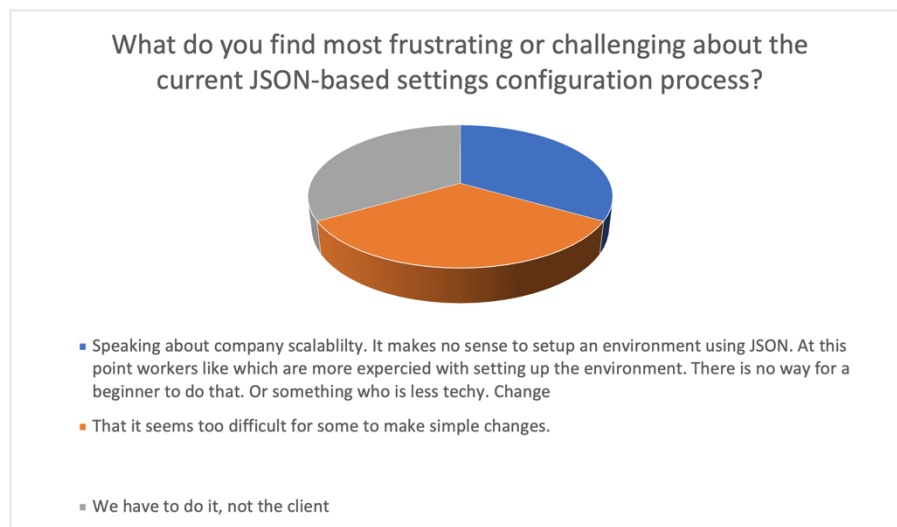

Figure 17. Pie chart showcasing answers for the sixth question.

7. Are there any specific features or functionality you wish the settings configuration interface had to make your job easier? (Figure 18)

Are there any specific features or functionality you wish the settings configuration interface had to make your job easier?

- Its needs to be a no code solution There can be an interface for all kinds of thing.

- It could be a user interface (we have at once made POC for it), providing more guardrails to the user - for me, integrating default values (e.g. 'market default values' as we store as templates) with the environment setup makes sense
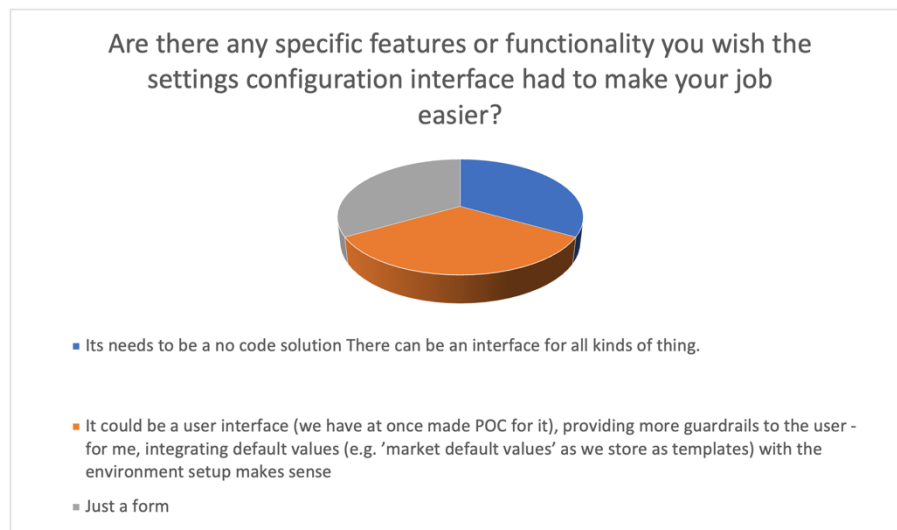
- Just a form

Figure 18. Pie chart showcasing answers for the seventh question.

8. How would you prefer to interact with settings in the future? Please rank the following options by preference: a. A user-friendly web form b. A graphical interface with drag-and-drop functionality c. A wizard-style step-by-step configuration process d. A code editor with syntax highlighting and error checking e. Other (please specify). (Figure 19)
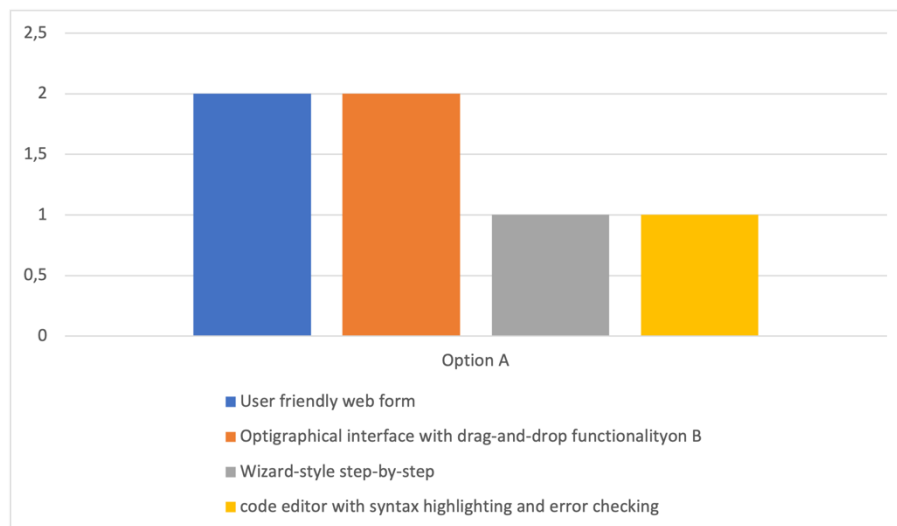

- User friendly web form
- Optigraphical interface with drag-and-drop functionalityon B
- Wizard-style step-by-step
- code editor with syntax highlighting and error checking

Figure 19. Pie chart showcasing answers for the eight questions.

9. What level of customization and flexibility do you think the new settings interface should offer? (Figure 20)
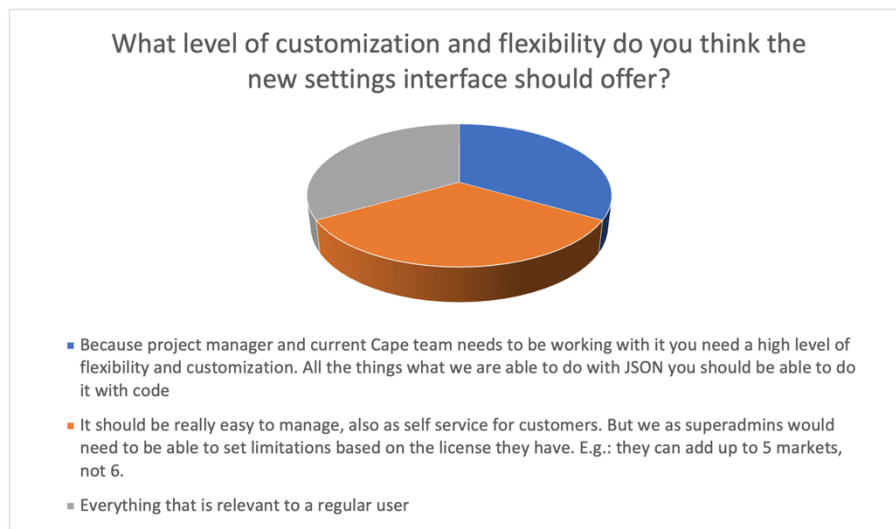

Figure 20. Pie chart showcasing answers for the ninth question.

10. Do you have any concerns about transitioning from the JSON format to a new interface? If so, please share your concerns. (Figure 21)
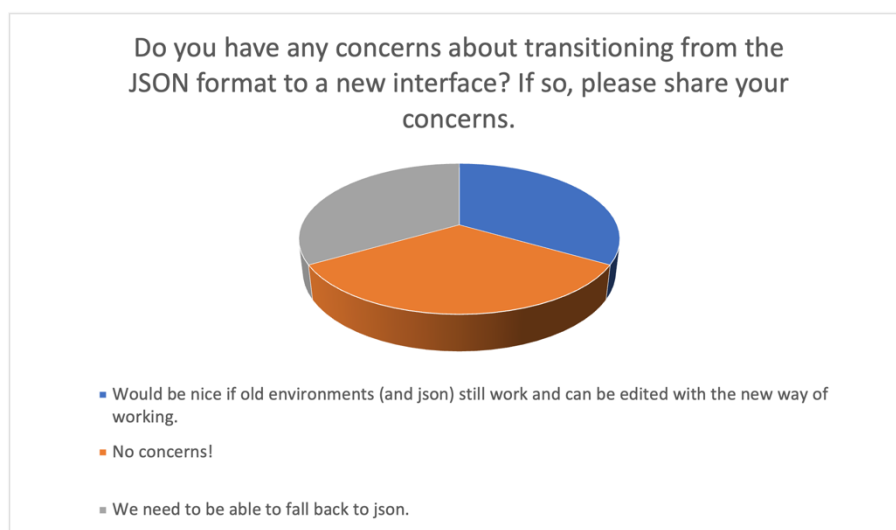

Figure 21. Pie chart showcasing answers for the tenth question.

11. Do you know any other self-service tool setups? If yes, please list them below. (Figure 22)
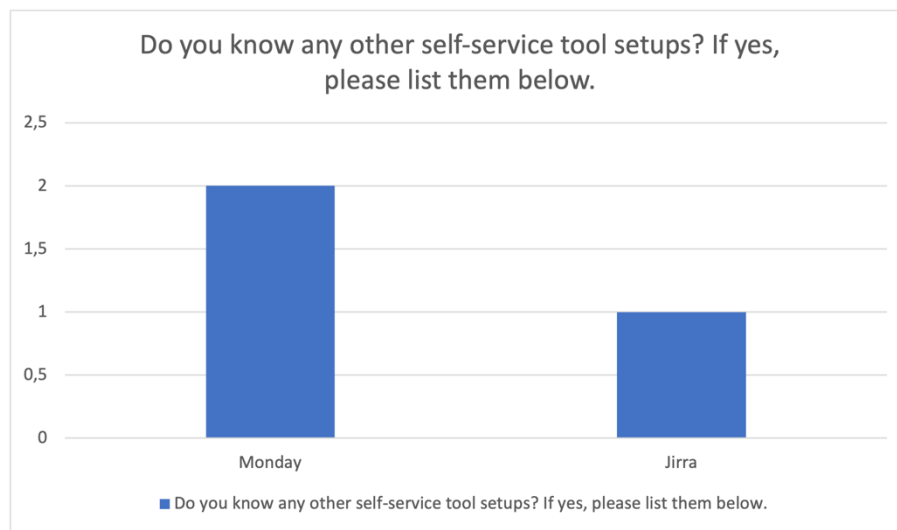

Figure 22. Pie chart showcasing answers for the eleventh question.

12. Would you be open to participating in usability testing sessions to provide feedback on the new settings interface as it's being developed? (Figure 23)
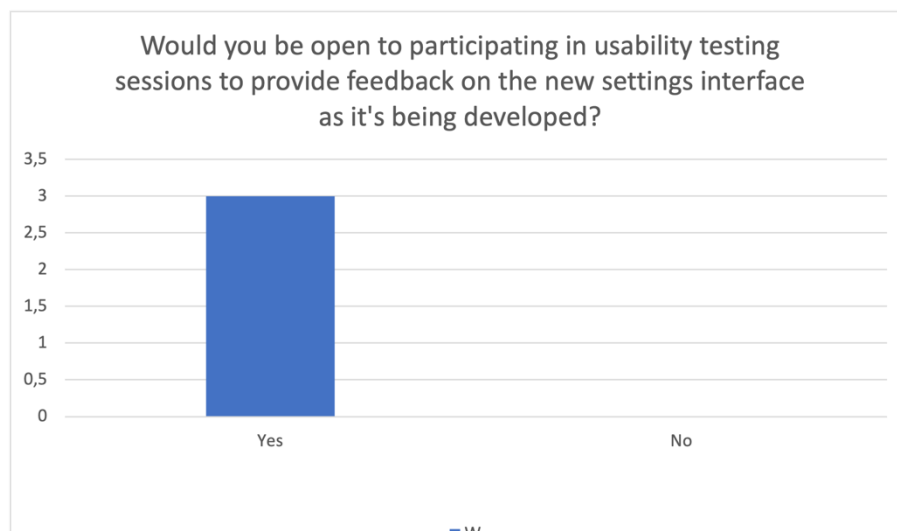

Figure 23. Pie chart showcasing answers for the twelfth question.

Conclusion

The survey analysis on self-service main setup indicates varying frequencies of JSON configuration adjustments, with users reporting daily or infrequent modifications, often focusing on Asset Management configurations. Challenges include the risk of making JSON files invalid, difficulties understanding module relationships and user rights, and a reliance on documentation. Critical settings for modification encompass markets, departments, brands, modules, user roles, and rights. Errors are considered critical, with potential to crash the environment, and confidence levels in validating JSON code varied. Frustrations include the perceived complexity for beginners and non-tech individuals. Desired features include a "no-code" solution, user-friendly web forms, graphical interfaces, and integration of default values. Preferences for interaction include web forms and graphical interfaces, with flexibility and customization emphasized, but with the option to fall back to JSON. Concerns include backward compatibility and transitioning from JSON, while respondents also cited familiarity with other self-service tools and willingness to participate in usability testing for a new interface.

Persona

Research method: Persona (Figure 24)

Why: Represent the user in discussions about the design in an elegant way.

How: A persona can function as an archetype to represent a group of users that would use your product in a similar manner based on their shared features, characteristics, attitudes, or goals.
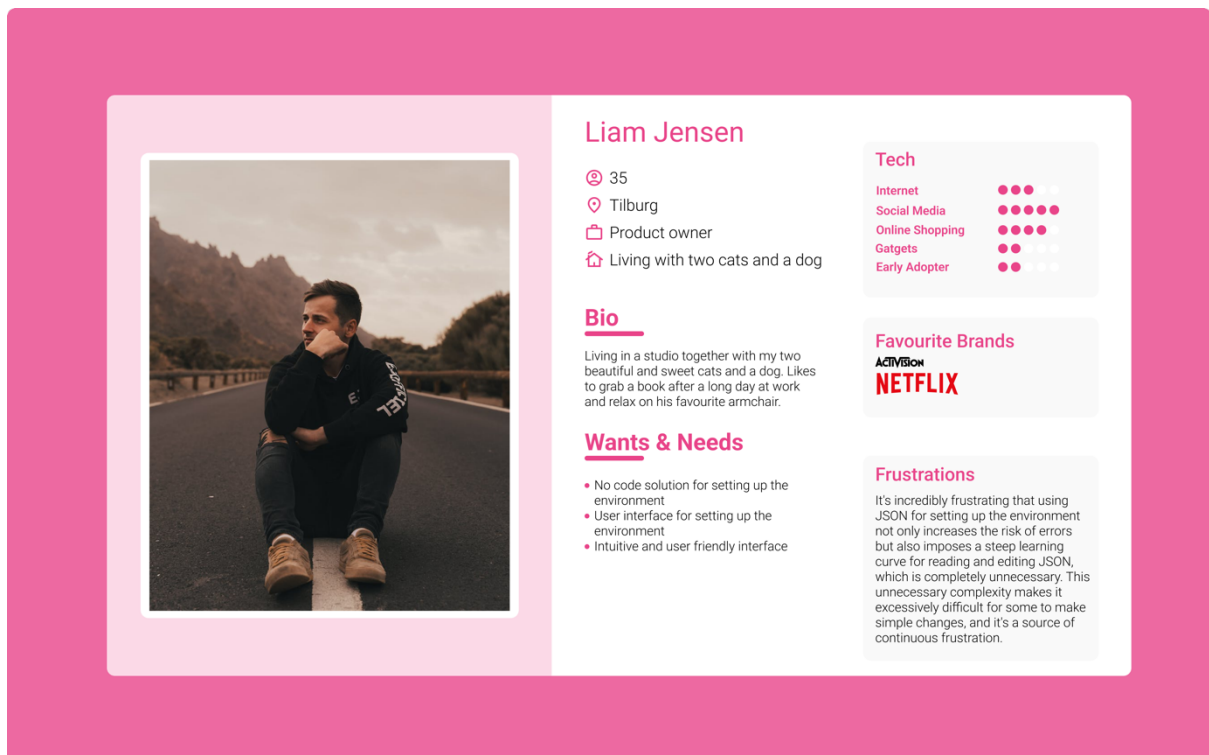

Figure 24. Persona

Wants & Needs
- No code solution for setting up the environment.
- User interface for setting up the environment.
- User friendly interface that eliminates the need of understanding JSON syntax.

Frustrations
It's incredibly frustrating that using JSON for setting up the environment not only increases the risk of errors but also imposes a steep learning curve for reading and editing JSON, which is completely unnecessary. This unnecessary complexity makes it excessively difficult for some to make simple changes, and it's a source of continuous frustration.

Overall conclusion

Cape's campaign management system offers a robust and flexible solution, providing customers with efficient campaign setup and management capabilities. The platform's customization options, facilitated through JSON configuration, allow for a high degree of flexibility in tailoring setups. The incorporation of categories and tags enhances campaign descriptions and enables effective filtration. The campaign calendar tool acts as a centralized hub, streamlining management through visual overviews and channel-specific sub-planning. However, there are areas for improvement, such as the need for fixed and editable client roles, and some essential settings are missing in the current setup. Access to comprehensive documentation is crucial for further research, with links expected to be provided. The survey analysis highlights user challenges, including the risk of invalid JSON files and difficulties in understanding module relationships. Critical settings, such as markets, departments, brands, modules, user roles, and rights, require careful attention. Users express a desire for a "no-code" solution and user-friendly interfaces, driven by frustrations with perceived complexity, especially for people without a JSON knowledge. Concerns about backward compatibility and transitioning from JSON are noted, presenting an opportunity for Cape to explore alternative interfaces that align with user preferences. In summary, while Cape's campaign management system is powerful, addressing these areas for improvement could enhance its usability and accessibility for a broader audience.