Figma Guide

29 Nov 2023

Document changes

Author	Date	Description	Version
Lucas toh	29/Nov/2023	File created	1.0.0

Purpose & Objective

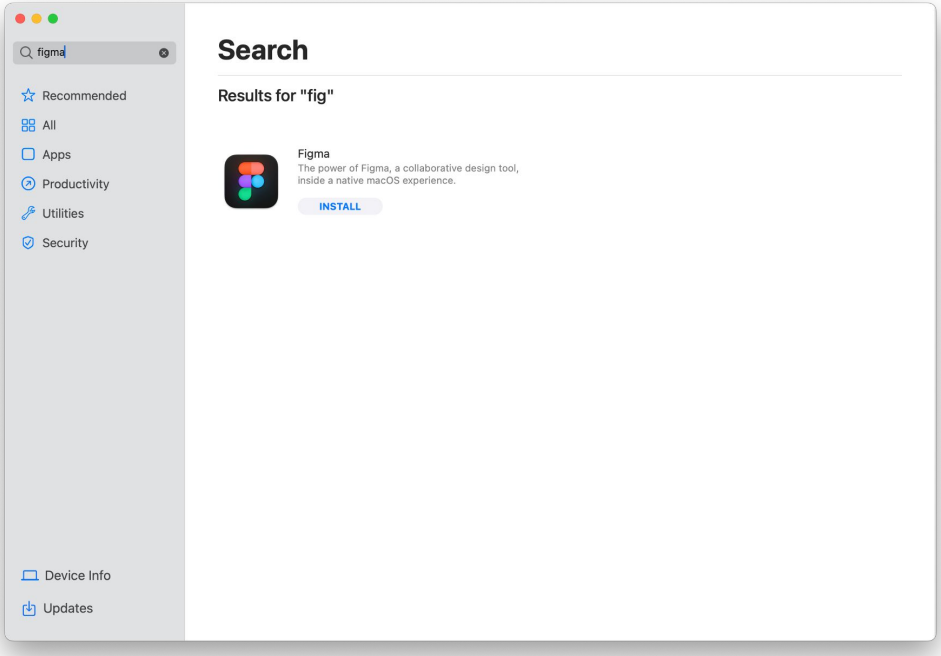
Be able to use Figma, not as a designer but as someone like developers, product managers, etc.

- At the end of this guide you will understand:
- Figma app Installation through Kandji
- Login to Figma via browser or app through Okta
- Figma focus and purpose
- Figma folder structure and navigation
- Approved vs work-in-progress designs
- Design file navigation
- User flow navigation with symbols following ISO standard
- Instruction guides on design
- Developer mode on Figma to find changes in the design
- Access to merged design
- Handshake with developers

Installation

How to install Figma?

1. Open Kandji and search for "Figma".
2. Click the install button.

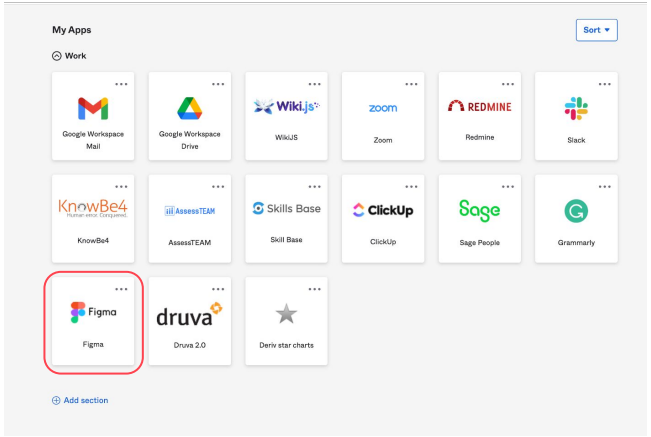


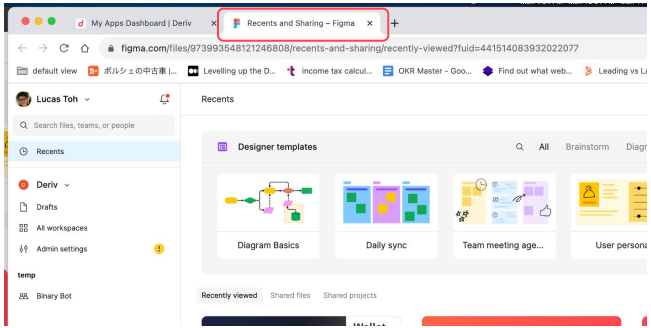
Login

Figma Guide

Login via browser

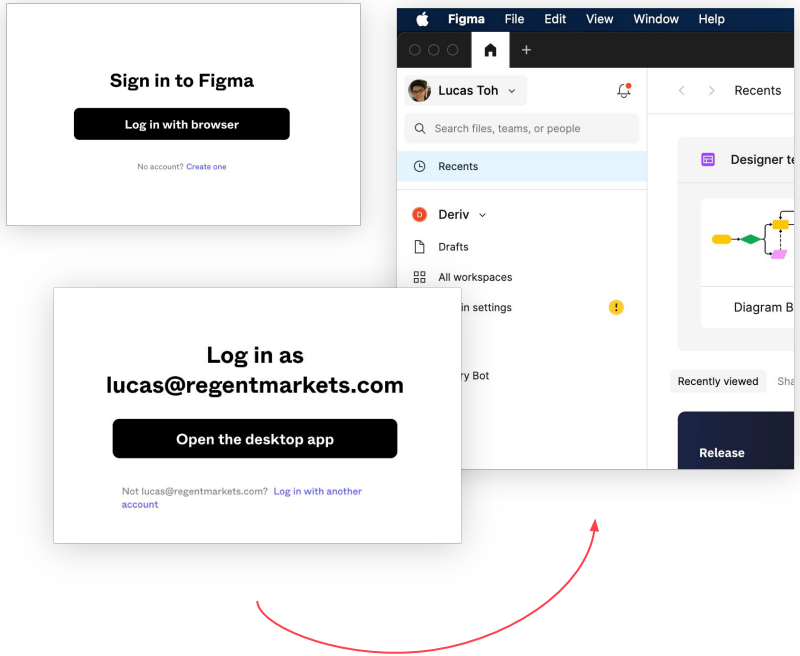
1. Access to your Okta account.
2. Look for Figma and click on it to log in via your web browser.
3. You have now login to Figma via a browser.





Login via Figma app

1. Ensure you have logged in via a browser before proceeding to the next step.
2. Locate and open your Figma in your machine.
3. Click on “Login with browser”.
4. On the browser, click the “Open the desktop app”. Make sure your email is the one ending with “@regentmakets.com”.
5. You are now logged in to your account.

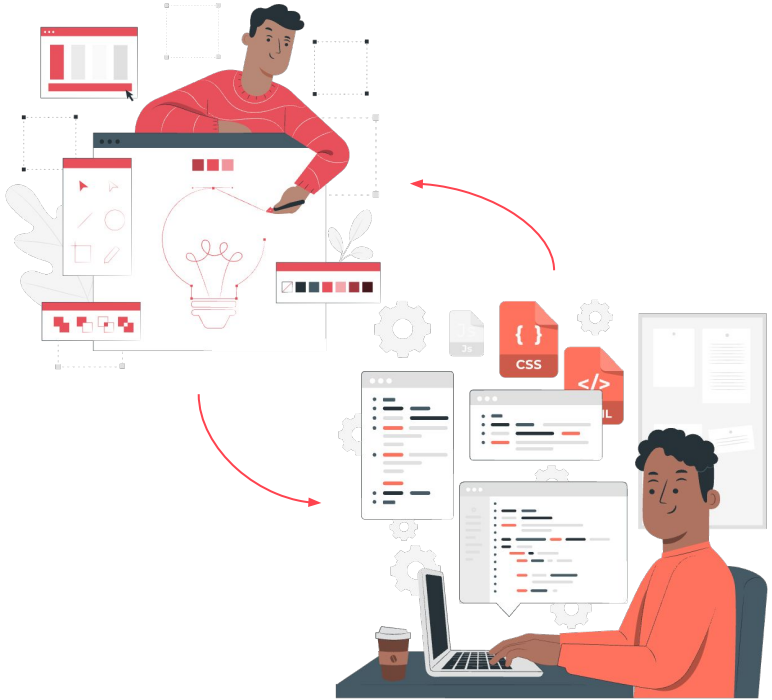


Figma Focus and Purpose

Figma Focus and Purpose

We use Figma:

1. As a tool for designers and developers to collaborate, design and build digital products.
2. To document designs to set up engineers to succeed in building products.
3. For designers to sketch, discover, and do concept design.
4. As a time machine that allows us to look back into history and search for specific design versions.
5. To separate work-in-progress designs in branches and the approved designs in the main file.



Navigation

Navigation: Figma's structure consists of four layers

- **Teams**
  These are the various groups within the organisation. You can select a team to see the specific projects they are currently working on.

- **Products or Platforms**
  Within a selected team, you can choose a product or platform they manage.

- **Folders**
  Under each product or platform, you have multiple folders serving different purposes. These may include design folders, a folder for UX and research, and another for ideation.

- **Design files**
  Within the designated design folders, you'll find the actual design files.

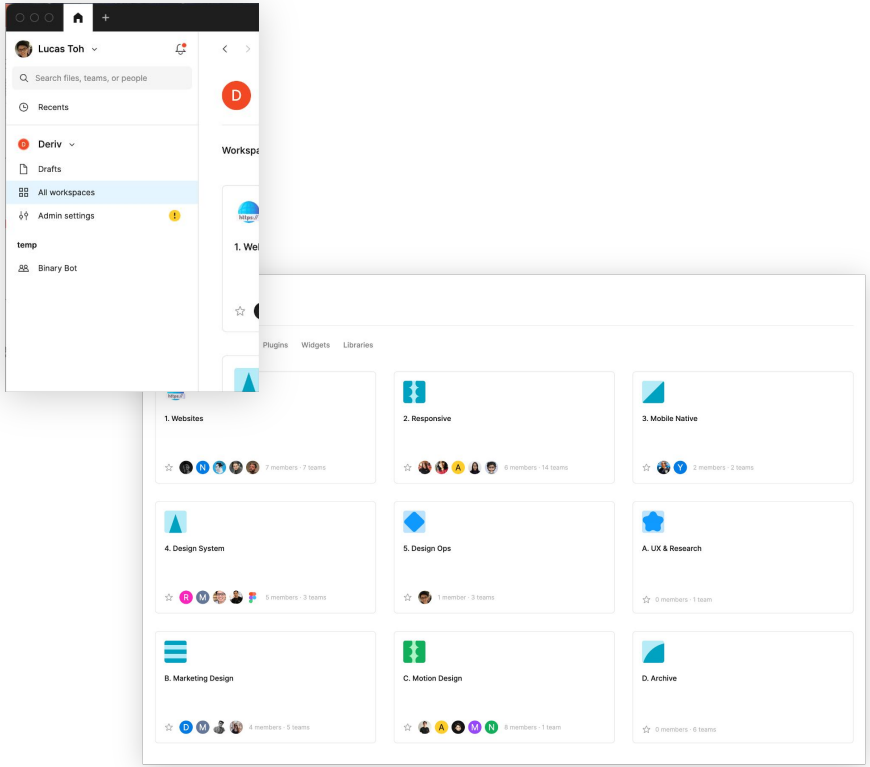
Teams

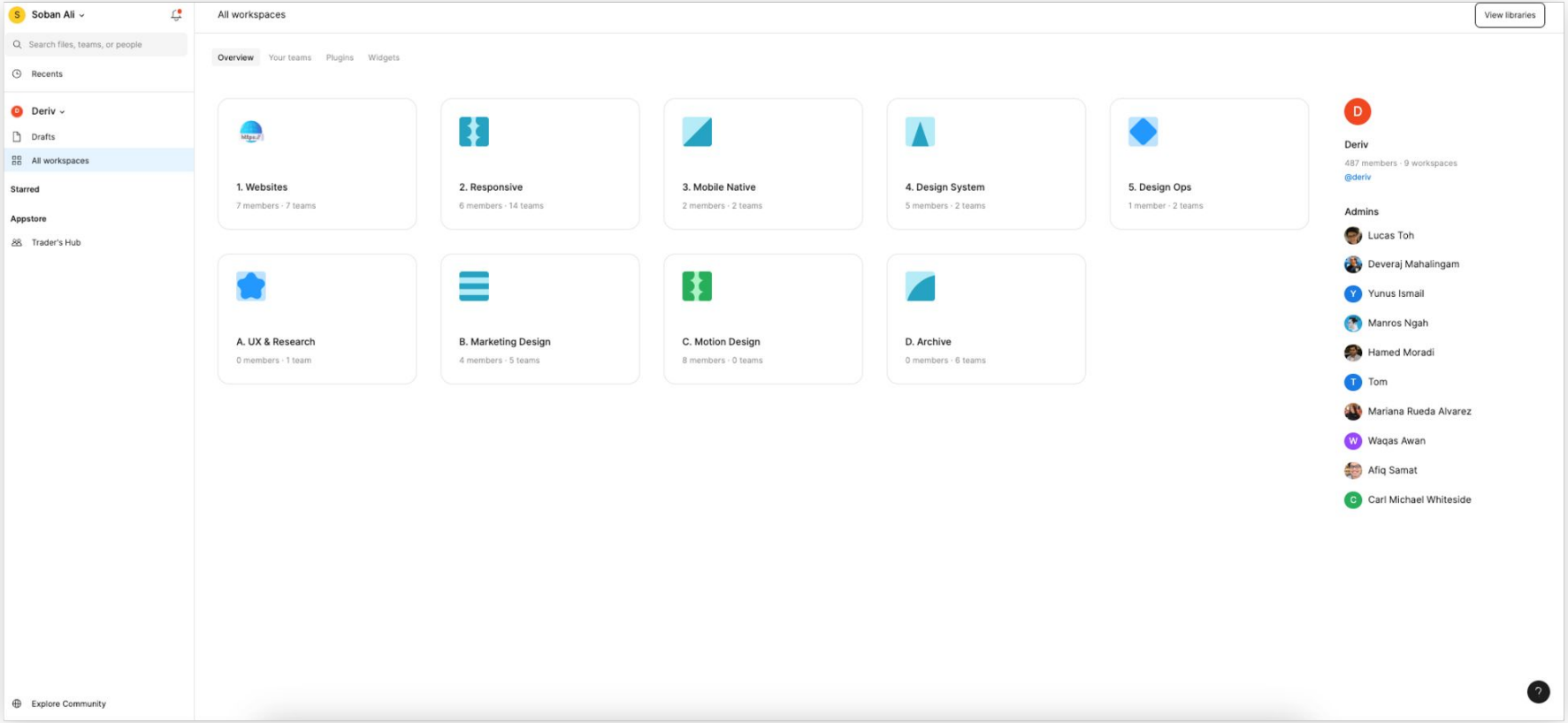
Click “**All workspaces**” On the left menu to see all the teams:

- Sub-teams under the Design team:
  1. Websites
  2. Responsive
  3. Mobile Native
  4. Design System
  5. Design Ops

- Other teams that are using Figma:
  A. UX & Research
  B. Marketing Design
  C. Motion Design

  The “D. Archive” is the folder where we keep the obsolete design.




Soban Ali
Search files, teams, or people
Recents
Deriv
Drafts
All workspaces
Starred
Appstore
Trader's Hub
Explore Community
All workspaces
View libraries
Overview
Your teams
Plugins
Widgets
1. Websites
7 members · 7 teams
2. Responsive
6 members · 14 teams
3. Mobile Native
2 members · 2 teams
4. Design System
5 members · 2 teams
5. Design Ops
1 member · 2 teams
A. UX & Research
0 members · 1 team
B. Marketing Design
4 members · 5 teams
C. Motion Design
8 members · 0 teams
D. Archive
0 members · 6 teams
Deriv
487 members · 9 workspaces
@deriv
Admins
Lucas Toh
Deveraj Mahalingam
Yunus Ismail
Manros Ngah
Hamed Moradi
Tom
Mariana Rueda Alvarez
Waqas Awan
Afiq Samat
Carl Michael Whiteside

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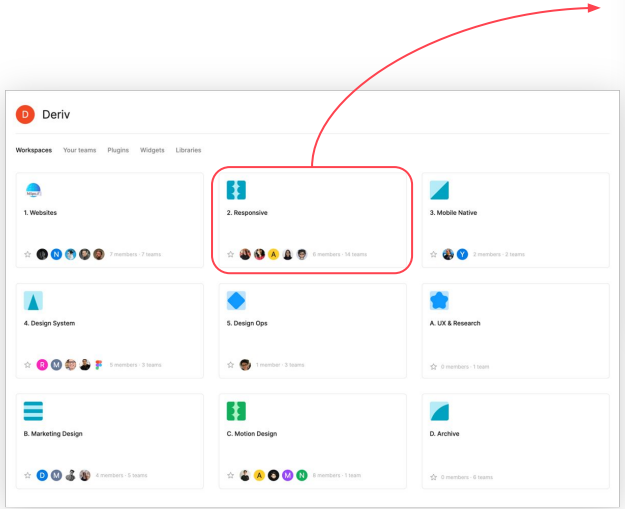
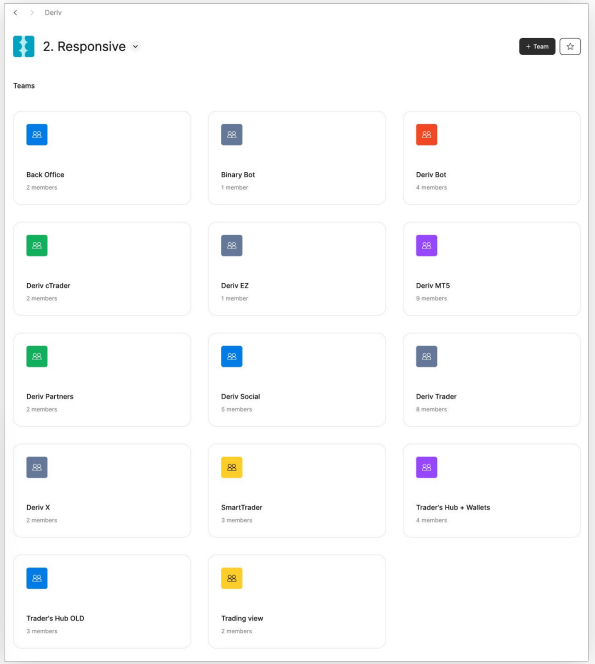
Products/Platforms

- Click on one of the teams to see platforms managed by them.
- For example, the images on the right are the platforms responsible for the Responsive team.





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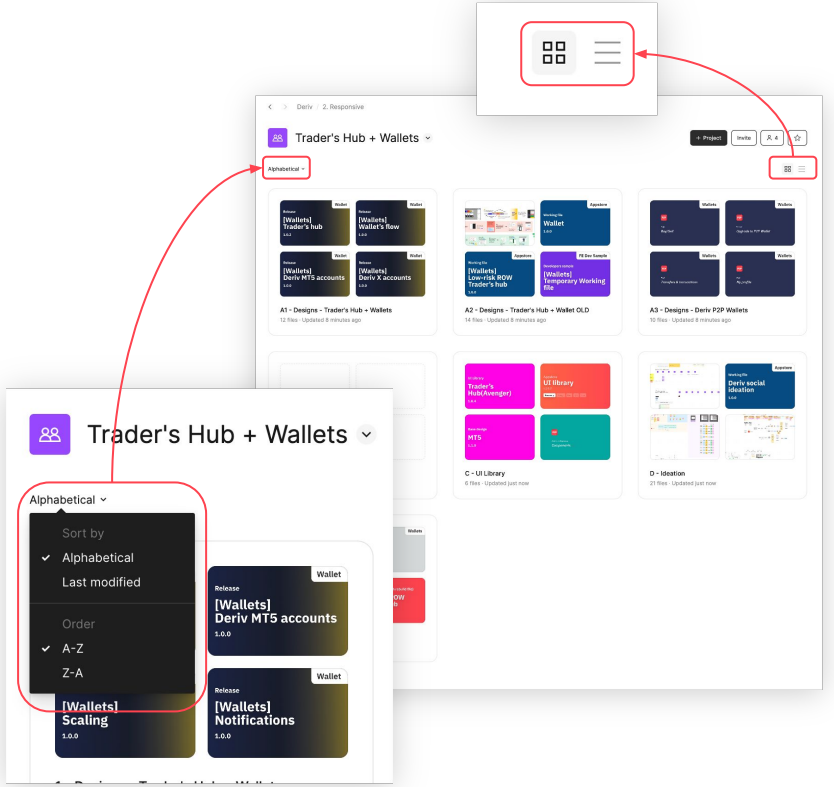
Folders

- Click on one of the products or platforms to see related folders.
- Each of them contains a minimum of five folders and no maximum limit.
- Each folder starts with an alphabet to help view them more easily. Before viewing, change the view order to “Alphabetical” if it is not.
- Toggle between the view between the list and the grid view.
- To access a folder, double-click the whitespace or the folder name area. Clicking on the files preview thumbnail will open the design file directly.



Type of folders

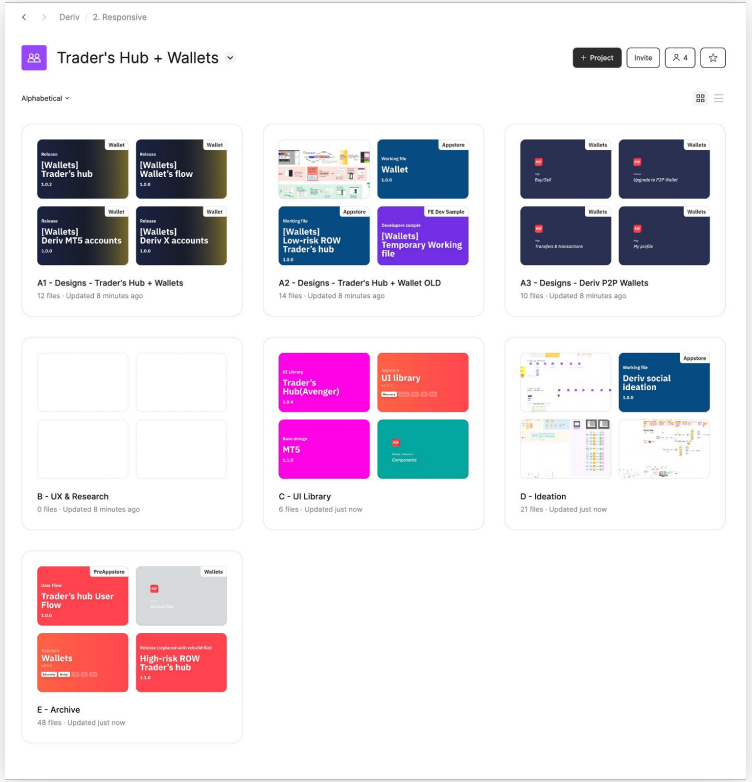
A. Designs – [product/platform/feature name]
   - Files related to the product/platform/feature.
   - Folder names always start with the alphabet “A”, e.g., A1, A2, A3, etc.

B. UX & Research
   - Files related to UX and research.
   - Folder name always with the alphabet “B”.

C. UI Library
   - Files with components explicitly used within.
   - Folder name always with the alphabet “C”.

D. Ideation
   - Files used for brainstorming.
   - Folder name always with the alphabet “D”.

E. Archive
   - Outdated design files.
   - Folder name always with the alphabet “E”.

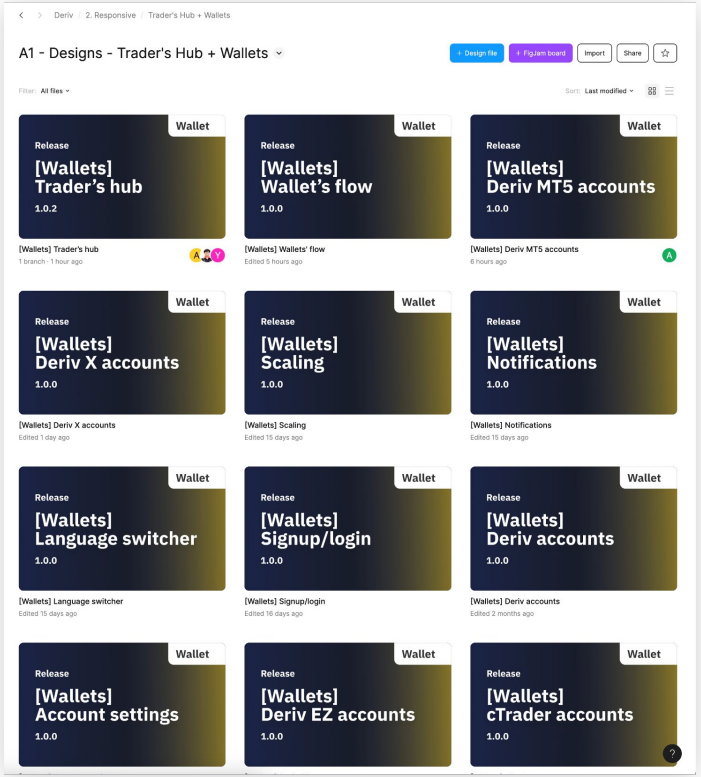


A. Design folders

The design folder contains the latest design files specifically for the selected platform.

It does not reflect what we have on production but how it will be.

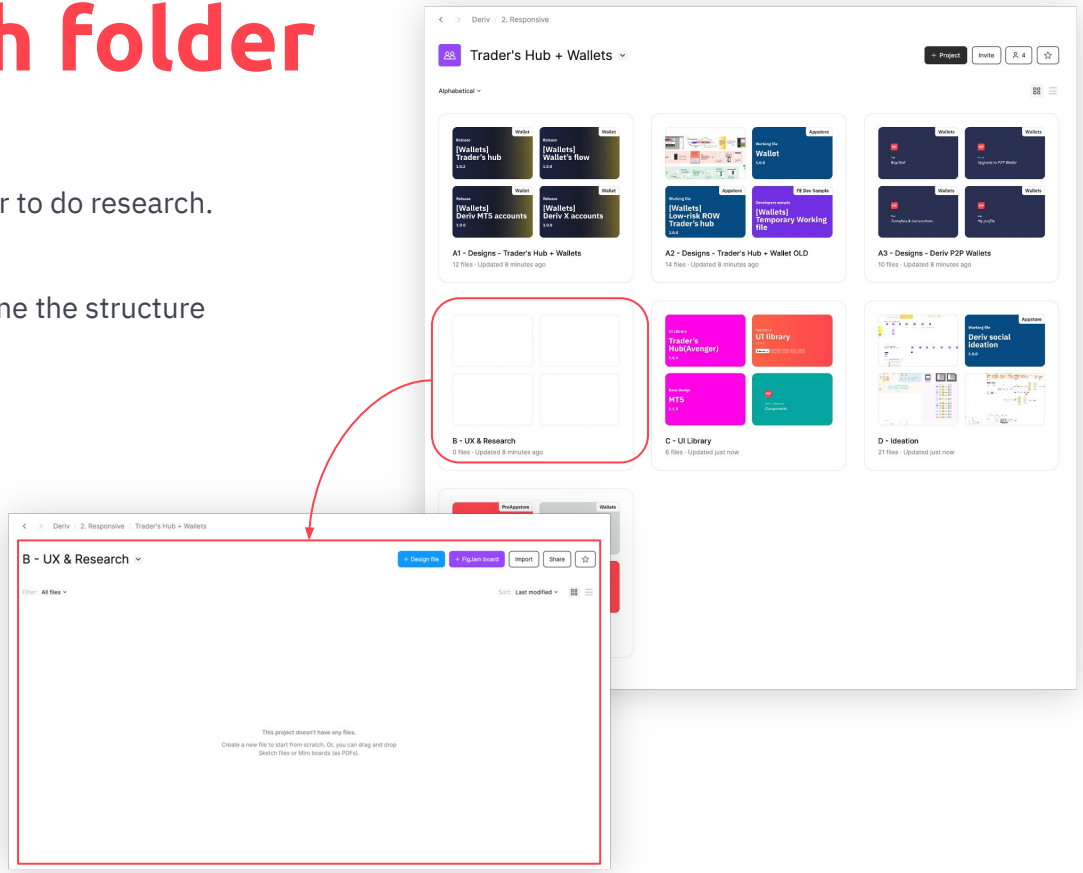
Reviewing each file lets you understand how the product will evolve compared to what the client sees now.



B. UX & Research folder

The UX & Research team exclusively uses this folder to do research.

It is still under discussion, and they will further define the structure soon.



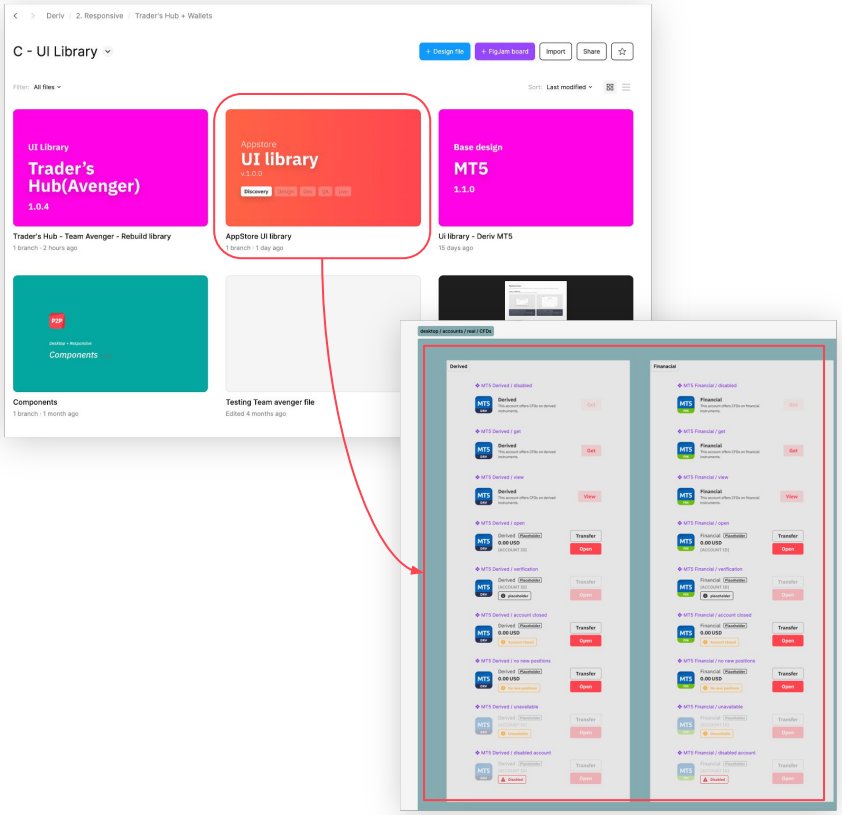
C. UI library folder

This folder is exclusively used to create and store unique components* for a specific product.

When starting a new project, you can create components by extracting them from Quill Design system files and combining them. These combined components can be used as instances** to build design flows in the design file.

* A main component defines the properties of the component.

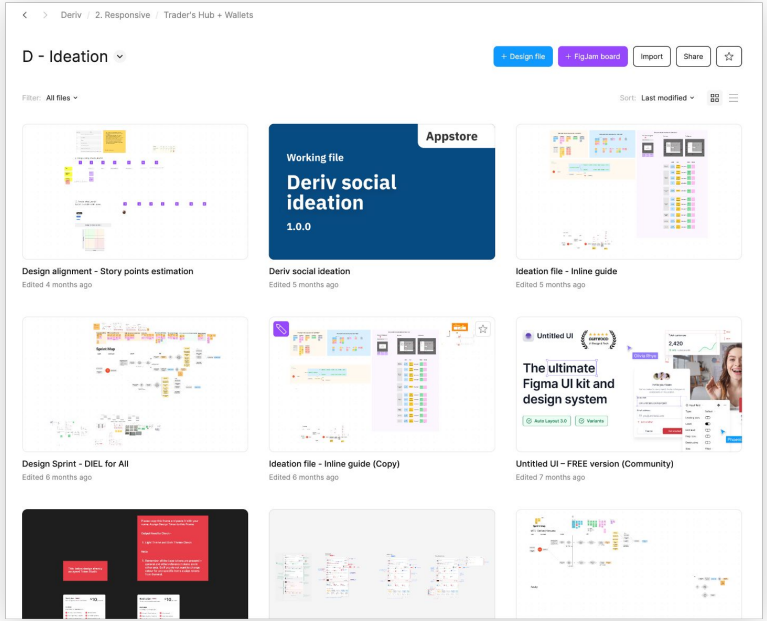
** An instance is a copy of the component you can reuse in your designs. Instances are linked to the main component and receive any updates made to the component.



D. Ideation folder

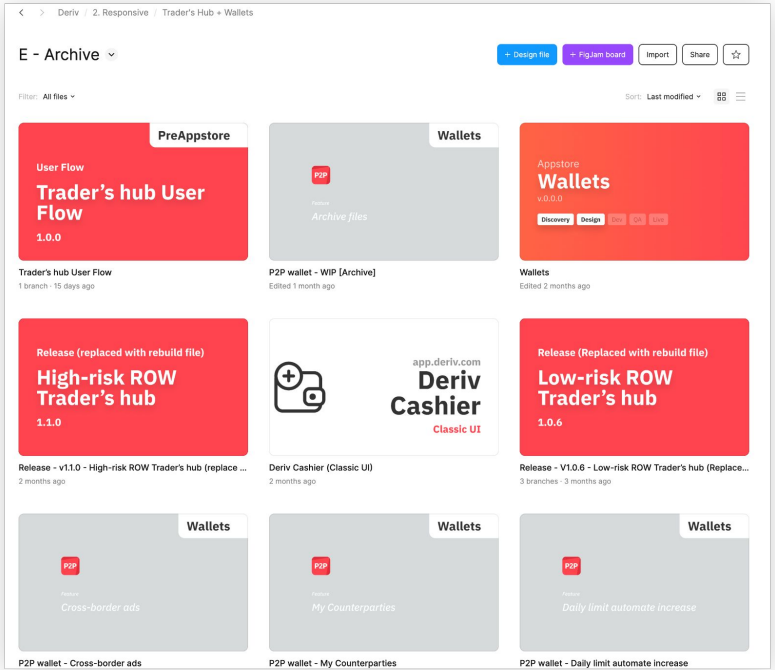
This is the folder where the FigJam files for conducting Design Sprints are located. Here, you can brainstorm and doodle around.

A Design Sprint is a unique process for validating ideas and solving big challenges through brainstorming, prototyping, and testing ideas with designers, developers, QA members, compliance teams, and anyone else involved in the project.



E. Archive folder

This is the folder where we keep all the obsolete files.



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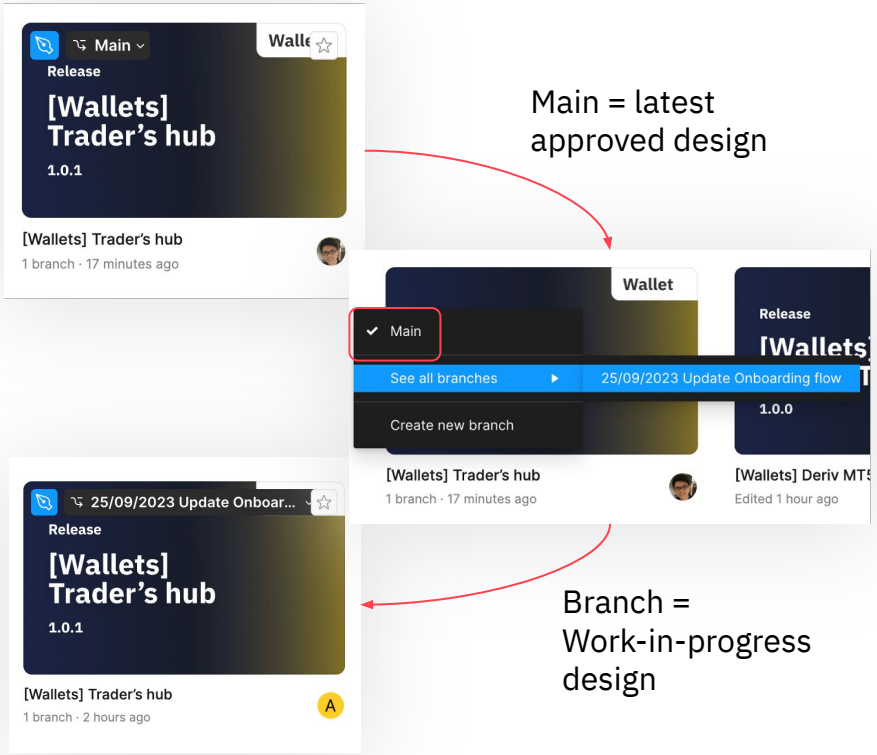
Approved VS WIP design

1. Click on one of the Design folders to see the design files.
2. While hovering over a design file, you might see a badge that said 

or has no badge. In this case, this is the latest design.
3. Click on 

will allow you to switch to branches. They contain work-in-progress designs.
4. To switch back to the main design file, click “Main”.
5. To view it, double-click on the file.



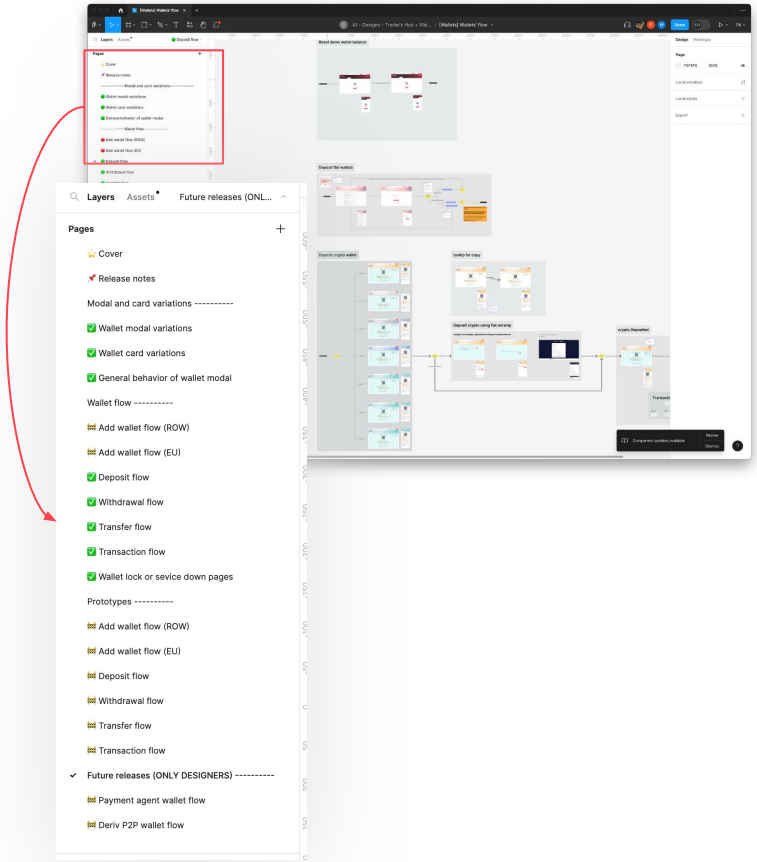
File navigation

With a design file opened, you will see the content of pages in this design file as per the image on the right:

1. ⭐ Cover: The cover design you see in the folder.
2. 📌 Release notes: The release notes that inform the changes over time.
3. Name ----------: The divider that tells what the category of the following pages belongs to.
4. Prototypes ----------: pages below this divider are where we kept the prototypes.
5. Future releases (ONLY DESIGNERS) ----------: pages below this divider are where we kept designs for future releases and not to be shared with any developers.

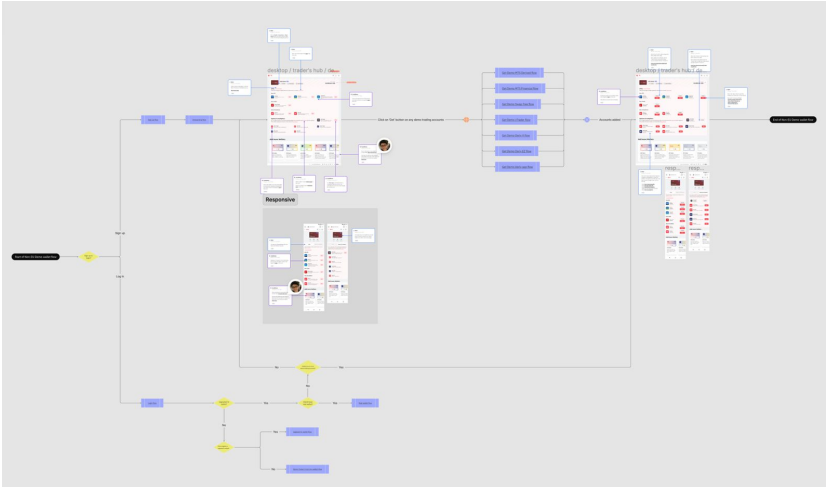
The ✅(Design ready icon) and 🚧(construction icon) are only useful for designers.

- ✅(Design ready icon): Everything on this page is done, including the design of each screen, the flow, and the instruction guides, for which no further changes are required.
- 🚧(construction icon): some things are not done.



Flow navigation

- Each page contains a specific flow of a platform.
- We use the ISO flowchart standard to build a flow.
- Below are the standard symbols we use:



Start of Non-EU Demo wallet flow

“Terminator” symbol: Indicates the beginning and ending of a process.

Sign up or login?

“Decision” symbol: Shows a conditional operation that determines which one of the two paths the process will take. The operation is commonly a yes/no question.

Sign up flow

“Predefine process” symbol: Shows named process which is defined elsewhere. It is represented as a rectangle with double-struck vertical edges. Click to further explore the process on another page or design file.

“Or” symbol: Indicates that the process flow continues in three or more branches.

“Summoning junction” symbol: Used to converge multiple branches back into a single process.

After delay (300ms)

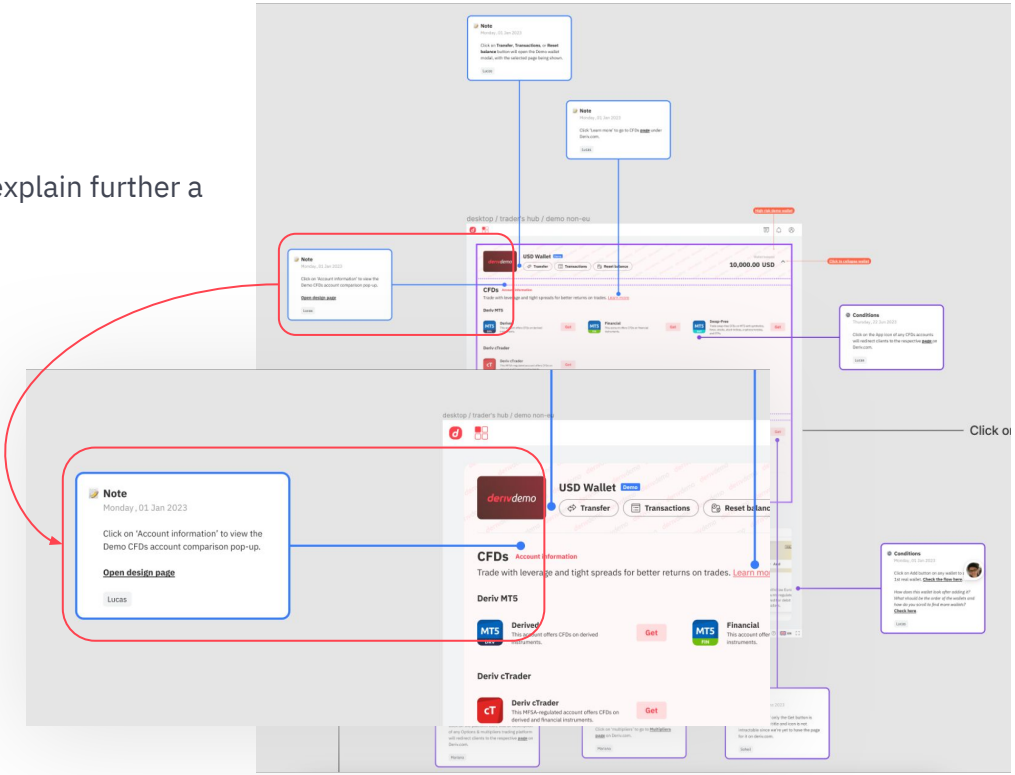
“Delay” symbol: Represent any delay periods that will be part of the process.

Navigate back to Deriv GO

“Outside control” symbol: Represent any process outside of Deriv environment that require users to operate.

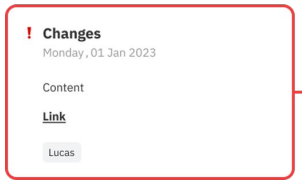
Instruction guide

- There are instruction guides on some designs which explain further a particular element, such as a button.
- There are 4 types of notes:
  1. New
  2. Changes
  3. Conditions
  4. Note

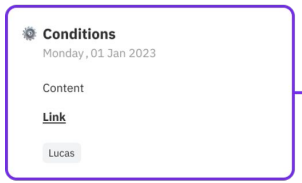


Instruction guide (Cont.)

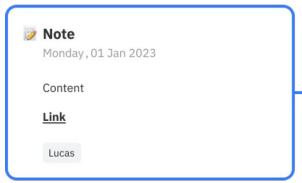
Indicate new elements or flow.



Indicate elements or flow that have changed since the last version.



Indicate elements or flow that will change depending on user actions.

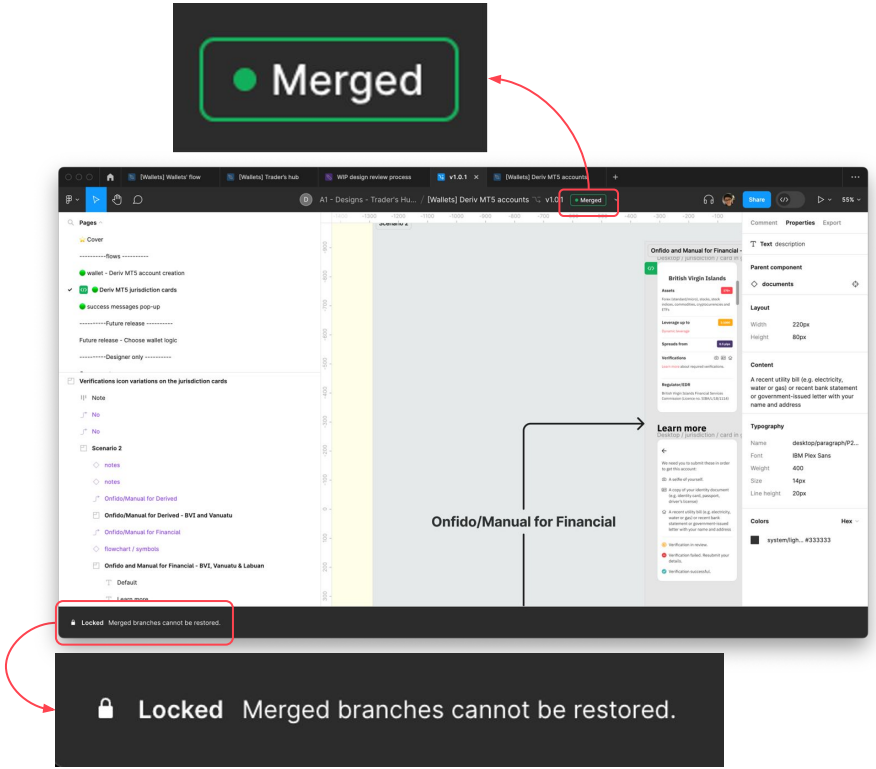


To further explain an element or flow for a better context.

Developer mode with Figma

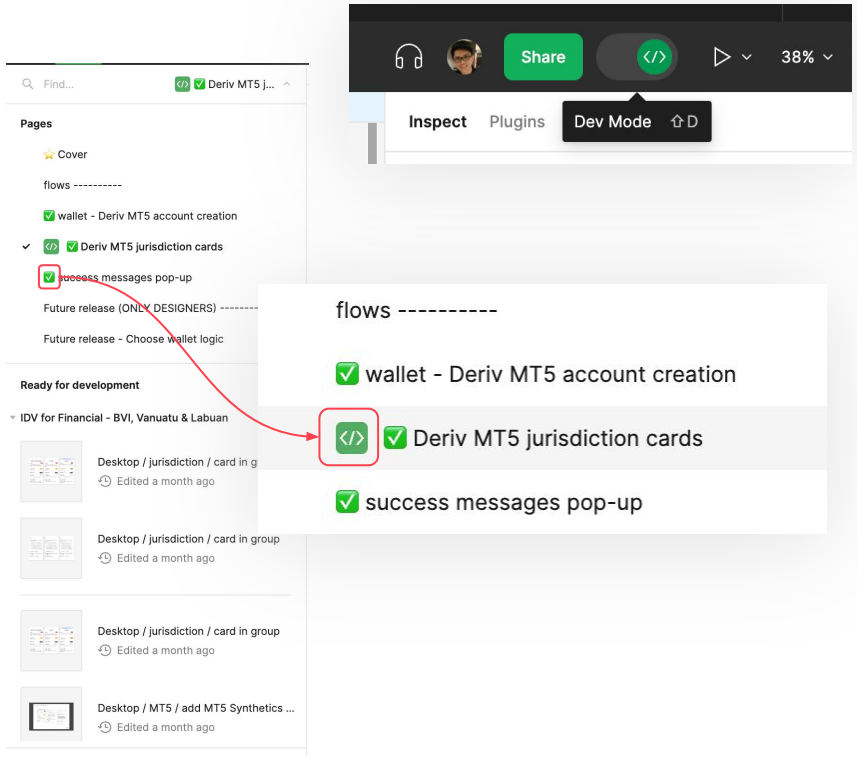
Merge branch with view only access

1. When a design is ready, the branch will be merged into the main file. This way, the main file will always contain the latest approved design changes.
2. For development purposes, the merged branch is what we pass to the developer during the handshake.
3. A **merge branch is locked** and has **view access only** to prevent unauthorised changes that are not part of the scope.
4. Links to the design in the merged branch will be attached to the CU cards. Click the link to view the design.



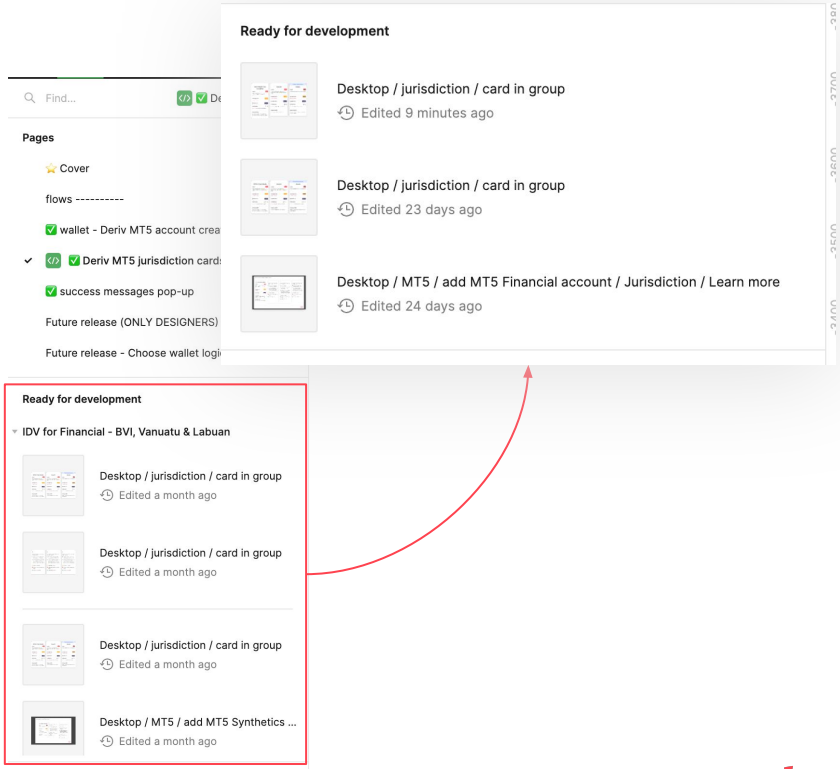
Page with “</>” icon in green

1. Once the design is opened, from the top-right, you will notice you are in “Developer mode”.
2. On your left, you can see the “Pages” panel. You will notice pages marked with a “</>” icon in green. It means “Ready for development” and indicates some designs require the developer’s attention within this page.
3. For example, the screens on the right show that the “Deriv MT5 jurisdiction cards” page has designs marked as “Ready for Dev’.



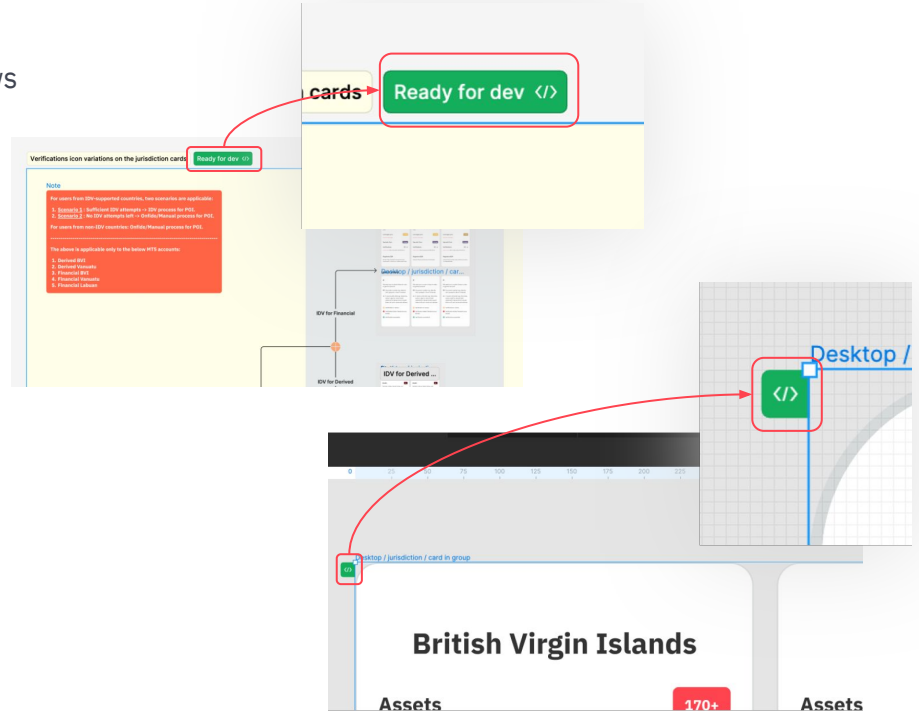
Ready for development panel

1. You can also see the “Ready for development” panel on your left. It includes all the designs on the selected page that require your attention and omits those unrelated to the task you are working on.
2. For example, the screens on the right show that the “Deriv MT5 jurisdiction cards” page has designs marked as “Ready for Dev’.



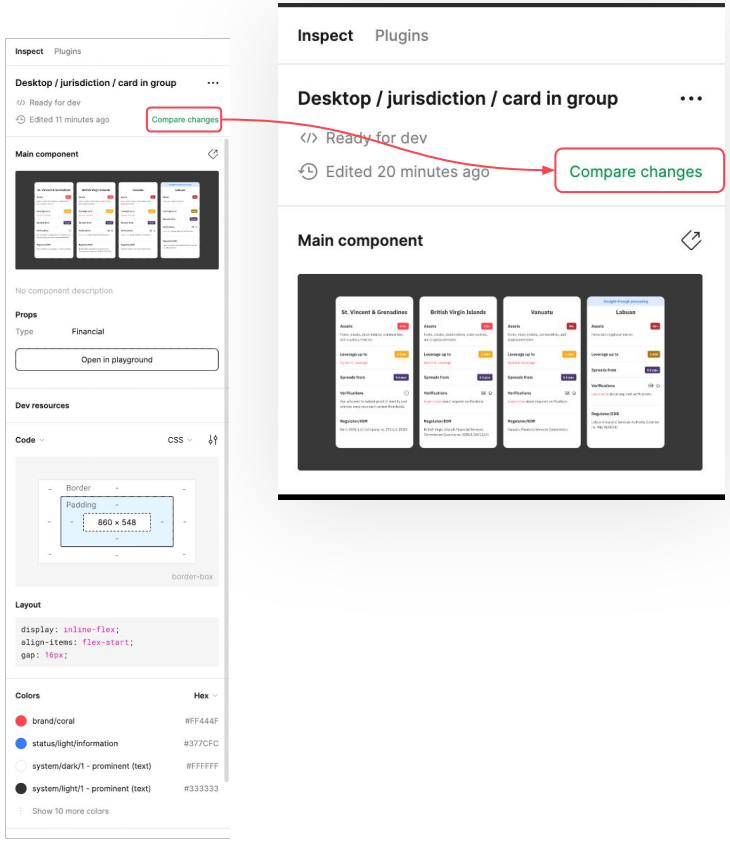
Design with Ready for dev marking

1. Looking through the designs, you will see designs or flows marked with a ”Ready for dev” badge.
2. Click on them to start the design inspection.



Design inspection

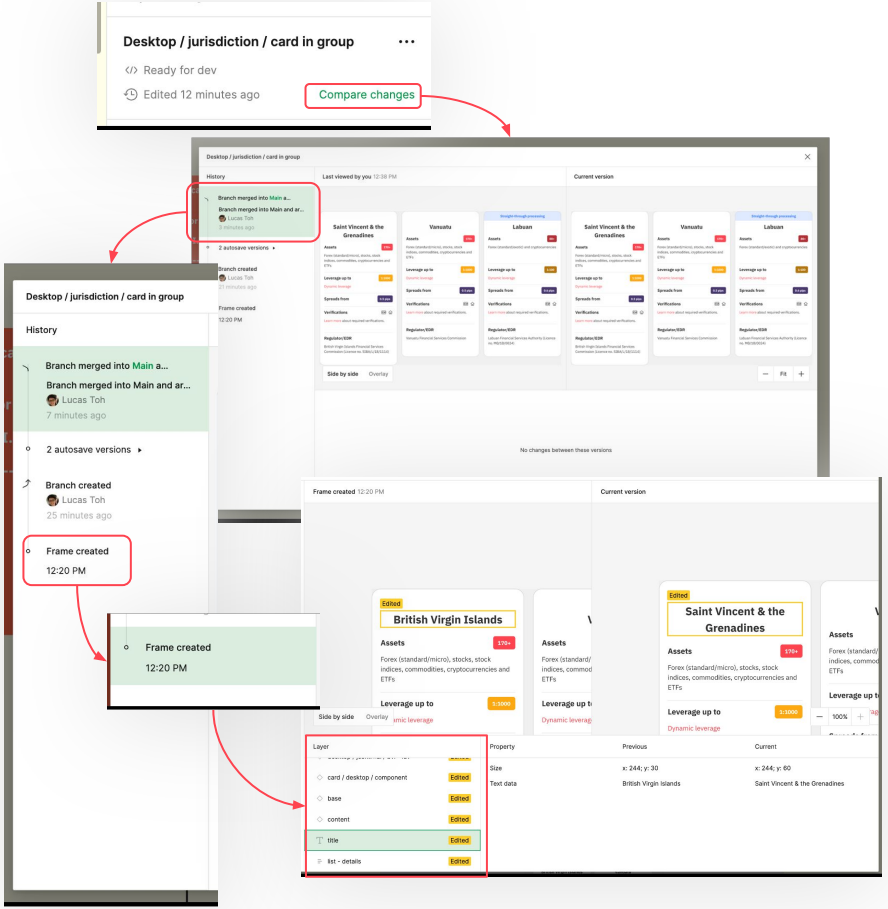
1. With a design marked with “Ready for dev” selected, you will see some helpful information on the right panel, as shown in the screenshot.
2. One thing to highlight is the “Compare changes” feature. It allows you to compare the changes of the selected design over time, starting from when this branch is created to after it is approved.



Compare changes

1. Click on the “Compare changes” to start the comparison.
2. On the left of the ”Compare changes” modal is the history of the changes in this design. It will always default to the latest edition. To see the old one, click on the “Frame created”.
3. With “Frame created” being selected, you can now compare the old design with the current version, layer by layer.

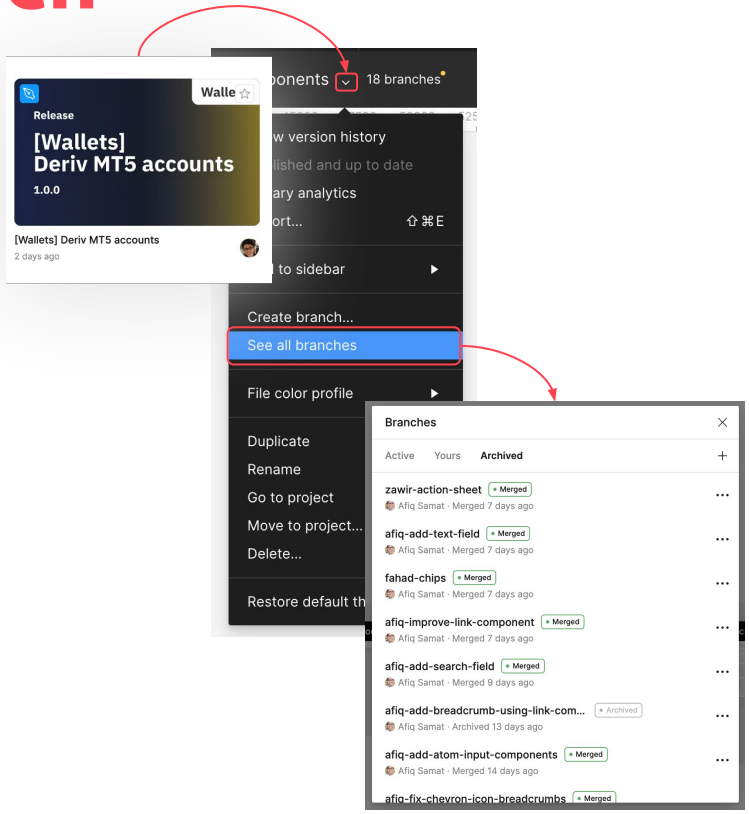
Here is a video that summarised the developer mode with Figma.



Access to the history of a design file

Access to merged branch

1. A merged branch is part of the master design file.
2. To access, open the design file you wish to explore its history.
3. Once the file is open, click the chevron right after the file name on the toolbar.
4. In the dropdown, click on “See all branches”.
5. A “Branches” pop-up window will appear.
6. Browse through branches under the “Archived” category to see all merged branches.



When can we start with these approaches?

Where are we now?

- We are 60% away from deploying this new approach by 1st January 2024.
- Between now and then, these are what we need to prepare the designers. They are the “How-to” for :
    - Managing and using UI Library
    - Create and update the cover with a plugin/widget
    - Prepare pages with the proper structure
    - Use dots with colour on pages to communicate with other designers
    - Build a user flow
    - Prepare instruction guide to communicate with developers
    - Create prototype
    - Request branch review
    - Merge approved branch
    - Prepare the requirement for developers to use the “Developer mode”

Handshake with developers

Figma Guide

Handshake instead of hand-over

- Developers are designers' partners. The collaboration between us is ongoing, so, instead of saying “hand-over”, we prefer “handshake” to express that we constantly working together.
- To further enhance our collaboration, The Design Ops team are working on a design process guide which designers and engineers will own. It defines:
    - Design process from start to finish.
    - Design statuses and what they mean on cards.
    - A central location containing design links with version numbers that are Dev-ready.
    - Card prioritisation with developers, designers and product owners.
    - Design change protocol and Backlog gap management with developers, designers and product owners.

We will share more about the design process guide soon.

Thank you!