

Sanjay the Manager Reviewer



52 yrs old

Career

15 yrs

Current

2 yrs

A Day in the Life: Sanjay's day consists of managing his full-time employees and contractors and ensuring his group's products and services are successful and delivered on time, which in turn leads to his company's success. He is also tasked with reviewing access permissions for his employees on an infrequent, but regular basis.

Consistency in context

Leverage archetypes

User-centered design

“ I think I have some access reviews assigned to me that are not complete. I have taken all the steps I know to complete the reviews assigned to me, but I see two reviews still marked ACTIVE. ”

Top of Mind Concerns

- ▶ Confusing system actions and options that slow progress
- ▶ Overwhelming information leading to escalation and error
- ▶ Improper role entitlements
- ▶ Poor signaling for completed, remaining, and finished
- ▶ Incorrect employee to manager assignment
- ▶ User-friendly access request interface and process
- ▶ User-friendly review interface and process
- ▶ Amount of support calls/tickets required to complete a process
- ▶ Not remembering steps I followed since last use of the system

Motivational Goals

Success: An understanding and confidence that his team is successful moving products and services forward.

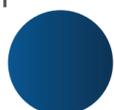
Knowledge: If Sanjay and his team have the right tools and knowledge they need to complete their tasks, it makes his life easier and ties to his feeling of success.

Growth: Adapting to new technologies that help his company become more efficient and grow in their space provides a sense of confidence; he feels that he is with a winning, stable company.

Establishing Confidence for Himself and Others: Sanjay wants to be able to understand and relate that his work and the work of others is important to the life and prosperity of his company.

I want ...

Clear messaging presented that details state, actions to perform, and a directed progression



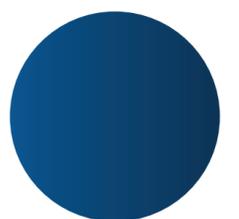
Better queues and calls to action in the form of buttons and layout.



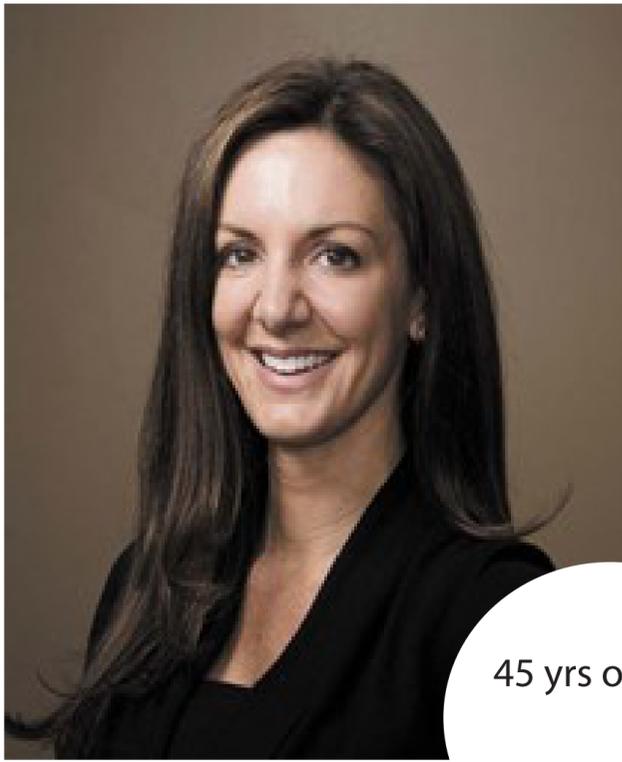
The ability to view individual responses for the same item, revealing conflicts and indicating further need for discussion.



To be able to trust the system, have more system analysis presented, and feel a sense of confident accomplishment in tasks.



Kim the Information Security Admin



45 yrs old

Career  12 yrs

Current  3 yrs

A Day in the Life: Kim answers questions from Reviewers and Requestors on a daily basis, helping to ensure that tasks are progressing or completed and that conflicts are properly resolved. She also initiates their monthly, quarterly, and annual reviews. She sees a mix of problems that need to be escalated to the Security Engineering Admins, problems she can solve, and simply pointing out cases of user error.

Recognition over recall

Traceable steps

Fewer clicks to get meaningful information

“ When users call, I would like to be able to see what actions they’ve taken [historic points]. ”
This also allows easier handoff in our organization.

Top of Mind Concerns

- ▶ Are audit tasks her team sends out to managers getting done?
- ▶ At-a glance information related to users questions and problems.
- ▶ Ability to retrace steps from the current state of user actions.
- ▶ Easy collaboration and handoff of her teams distributed issues.
- ▶ Unengaging UI that hides or covers meaningful information.
- ▶ Confusing signals about which user has an outstanding task(s).
- ▶ Having to dig deeply for relevant information.

Motivational Goals

Information Clarity and Ability to Investigate: At-a-glance information offering meaningful, concise, actionable information that allows me to do my job.

Transparency: A complete security implementation progress picture day-to-day and during the auditing process. Users shouldn’t have to dig to begin formulating an hypothesis.

Helping Business Users Succeed: Users should understand what they need to do, the results of their actions, and the progression of their tasks.

Contributing to Company Success: An understanding of the complete user story when problems arise and during day-to-day operations creates a confident knowledge of security.

I want ...

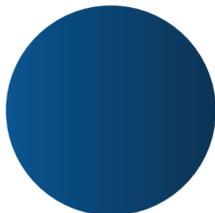
 Meaningful dashboards with rich, succinct information that focuses on user roles.

 Historical information that is easily traceable and contextual.



At-a-glance assessment to understand the scope of tasks and problematic areas.



 A smart sense of the source systems that avoids puzzled and annoyed questions.

Dan the Security Engineering Admin



37 yrs old

Career  7 yrs

Current  1.5 yrs

A Day in the Life: Dan's day consists of creating, maintaining, and scaling his company's security architecture. He fields questions and concerns from Information Security Admins and executive-level stakeholders, and he sees a balance between problems that need to be escalated to company Support and problems he can solve. Dan also analyzes system interaction and creates scalable, innovative ideas to improve the system for his company.

Remove to improve

Goal-based thinking

iterative design

“ When people log in, what are they supposed to do? We don't want to send them to another spot. ”
That was a big driver for leveraging dashboards.

Top of Mind Concerns

- ▶ Ability to watch various pieces of the system simultaneously.
- ▶ Similar, meaningful views in a repeatable, role-based environment.
- ▶ Proper role entitlements.
- ▶ Amount of time it takes for process to complete.
- ▶ Ability to retrace steps from the current state of user actions.
- ▶ User-friendly access management process.
- ▶ Unknown anomalies (never resolve/resolve without clear reason).
- ▶ Scalability of the system.

Motivational Goals

Information Validity and Communication: Is the information collected from the source system(s) correct, and if not, is there an indication to correct it in the source system?

Transparency: A complete security implementation progress picture day-to-day and during the auditing process. Users shouldn't have to dive down too deep to begin formulating an hypothesis.

Empowering Business Users: Are users able to understand what they need to do as well as the results of their actions and the progression of their tasks?

Establishing Confidence for Himself and Others: Systems that deliver meaningful information in context based on user role and objective.

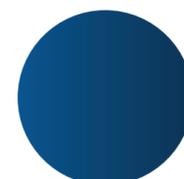
I want ...

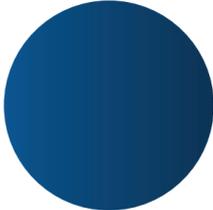
 Dashboards available to surface meaningful information at a glance

 Status signals and messaging that creates confidence and trust in the system.



An intuitive flow through the system without digging too deep or working in a siloed environment.



 Action-oriented buttons/selections and UI themes that help me achieve my goals.

Kate the Auditor



30 yrs old

Career  5 yrs

Current  2 yrs

A Day in the Life: Kate's day consists of auditing processes for compliance across multiple systems. She needs to ensure that all systems have complete and proper certifications that are up-to-date. She spends time meeting to discuss plans and procedures with Dan and Sanjay, and then follows up by running reports or having someone run them in a system intermittently to validate findings.

Compliance

Repeatable detailed processes

Range of proof

“ Your process says remove access from all SoX systems 24 hours after a user leaves the business. Show me the access lists for these systems. ”

Top of Mind Concerns

- ▶ Am I missing anything by not logging in to systems?
- ▶ Do I have a full range of proof to show processes in compliance? Am
- ▶ I receiving the most pertinent and comprehensive reports?
- ▶ Are all certifications up-to-date and correct?
- ▶ What rules are in place?
- ▶ What violations and exceptions to the rules exist?
- ▶ What reviews were run and what do they cover?
- ▶ Meeting federal compliance and regulatory requirements.
- ▶ Do I have a focus balance between technology and business process?

Motivational Goals

Success: Confidence that her organizational, analytical, and investigative skills ensure the process is in compliance.

Knowledge: Kate is passionate about learning and problem-solving. She is at her best when multi-tasking and supplementing and growing her existing knowledge.

Empowering Business and Technical Users: Are users able to understand what they need to do to fulfill process and compliance requirements as well as the results of their actions and the progression of their tasks?

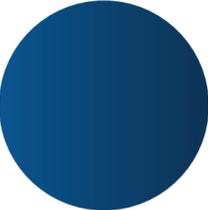
Establishing Confidence for Herself and Others: With internal and external factors driving the auditing process, Kate initiates audit plans that mitigate and remediate risk and compliance issues for continued engagement and success.

I want ...

 Information available when I ask for it with verifiable proof.

The organizational structure and ability to devise a yearly plan for audit findings and to solve problems.

 Tools and procedures to present a transparent range of proof for analysis.

 To be able to trust the process, have more system analysis presented, and feel a sense of confident accomplishment that the audit plan is working.