

Gabriela Viana

Selected projects

Hello. Welcome to my portfolio.

On the next pages, I will walk you through some of the projects I'm most proud of.

I hope you enjoy the journey!

Table of contents

About me	01
My approach	02
Management	03
Projects	
Workforce Management	04
Cybersecurity	11
HealthCare	19
Infrastructure DevOps	35

About me

- Over 20 years of experience leading teams and acting as an individual contributor
- Current position: Senior Manager, Product Designer at HashiCorp
- Previous position: Director of Product Designer at Pomelo Health
- 3 Publications
- 2 Awards
- Master's Degree in Industrial Engineering at Polytechnique Montreal (Software Ergonomics)
- Bachelor in Social Communication (Marketing and Advertising) at Salvador University
- Partial Diploma in Management (E-business) at McGill University
- Certificate in Design of Visual Communication at Salvador University
- Certificate in Web Accessibility (WCAG) at Montreal University

My approach

I believe building the best user experience is not the responsibility of one team, but of **all teams** involved in the process.

From the moment the user knows a service or a product exists, buys and/or uses - all teams need to be part of the discussion of “what is the experience we want to deliver?”,

It's important to understand the motivations, challenges users can face during their journey.

Understand users (and customers)

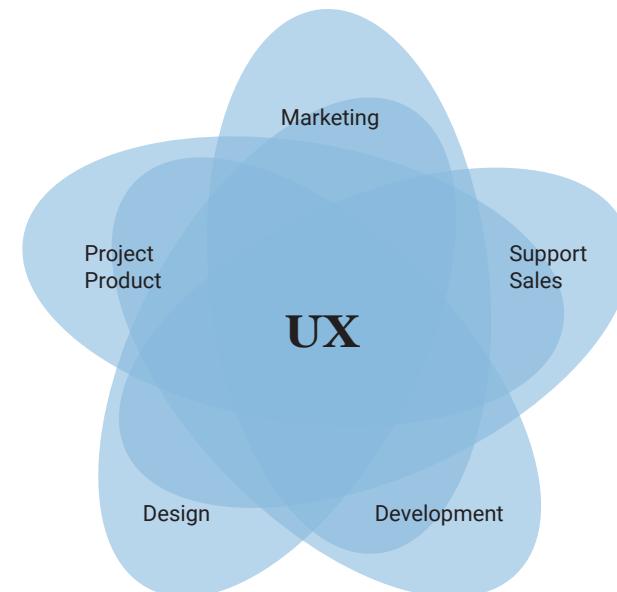
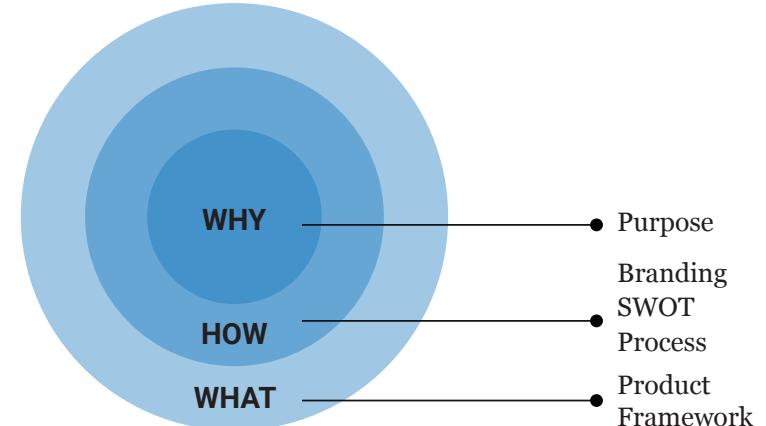
Who are they? (Verticals, Personas)

Why are they interested? (Motivations)

What do they want to achieve? (Goals)

Where/When do they use? (Context)

What are their pain points? (Challenges)



Management

It has been 7+ years, that I've been responsible for not only working as an Individual Contributor, but also:

Establish cadence for regular check-ins and empower the team to manage the day to day tasks, checking in often enough to ensure they are on track to deliver value against the business objectives without micro-managing

Provide career, leadership development, coaching and guidance through recurring team and one-on-one check-ins.

Manage, mentor, motivate, lead and inspire the team to constantly deliver excellence in performance.

Build the capability of designers across the design team by providing open and candid feedback, direction, and coaching

Aid in the sourcing, recruiting, hiring and retaining of high performing talent

The UX Team page in Confluence displays the following content:

- Welcome!**: Hello! Welcome to the UX Team Page. Here, you will find information about UX Team, Design System, Projects and much more. Do you have questions, requests or comments for the UX Team? Please, write to: ux-global@onespan.com, and we will come back to you. Also check: [UX ≠ UI - Know the difference](#)
- The team**: A grid of four team members:

Global UX Lead @Gabriela Viana	Senior UX Designer Security @Morgane Neto	Global UX Researcher @Maira Santos	Senior UX Designer OSS and Agreement Automation @Isabel Quintela Rodriguez
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- Process**: How does UX relate to your department? Check our UX Process.
- UX Calendar**: A monthly calendar view.
- Resources** sidebar:
 - Design System
 - UX Personas
 - Users Database

Project
—
Workforce Management



About



1000 fortune companies

35+M of users

100+ countries

UKG is a workforce management company, powered by AI and the world's largest collection of people, workforce, and culture data for 80,000+ organizations across all sizes, industries, and geographies.

Who

Nurse manager

Why

When meeting with customers, the team learned that the Schedule needed to be updated specially to cover cases of managers who needed to schedule for more than 4 weeks at a time - which is a common scenario in Hospitals. The look and feel was also deprecated and we needed to address Accessibility requirements.

How

In partnership with the Product Owner, Developers, Accessibility Expert, we went through many iterations on how the new Schedule could look like.

I started by creating a brief and making sure to gather as much information as possible, then did competitive analysis.

I drove brainstorm sessions and paired design with the Accessibility Expert to make sure we were leading toward the right direction. And made several presentations to many stakeholders, making sure to address their concerns.

With the support of the Product Owner, we identified key customers and we did 40 interviews to make sure we addressed the main users' pain points.

Team

Product Onwer

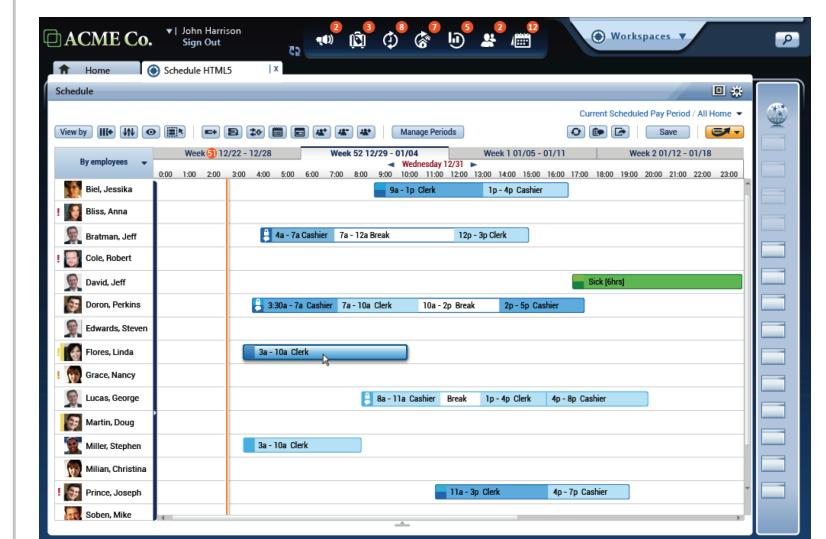
Lead Interaction Designer (me)

Archtect

Accessibility Expert

Front-End Developers

Back-End Developers



Original Schedule

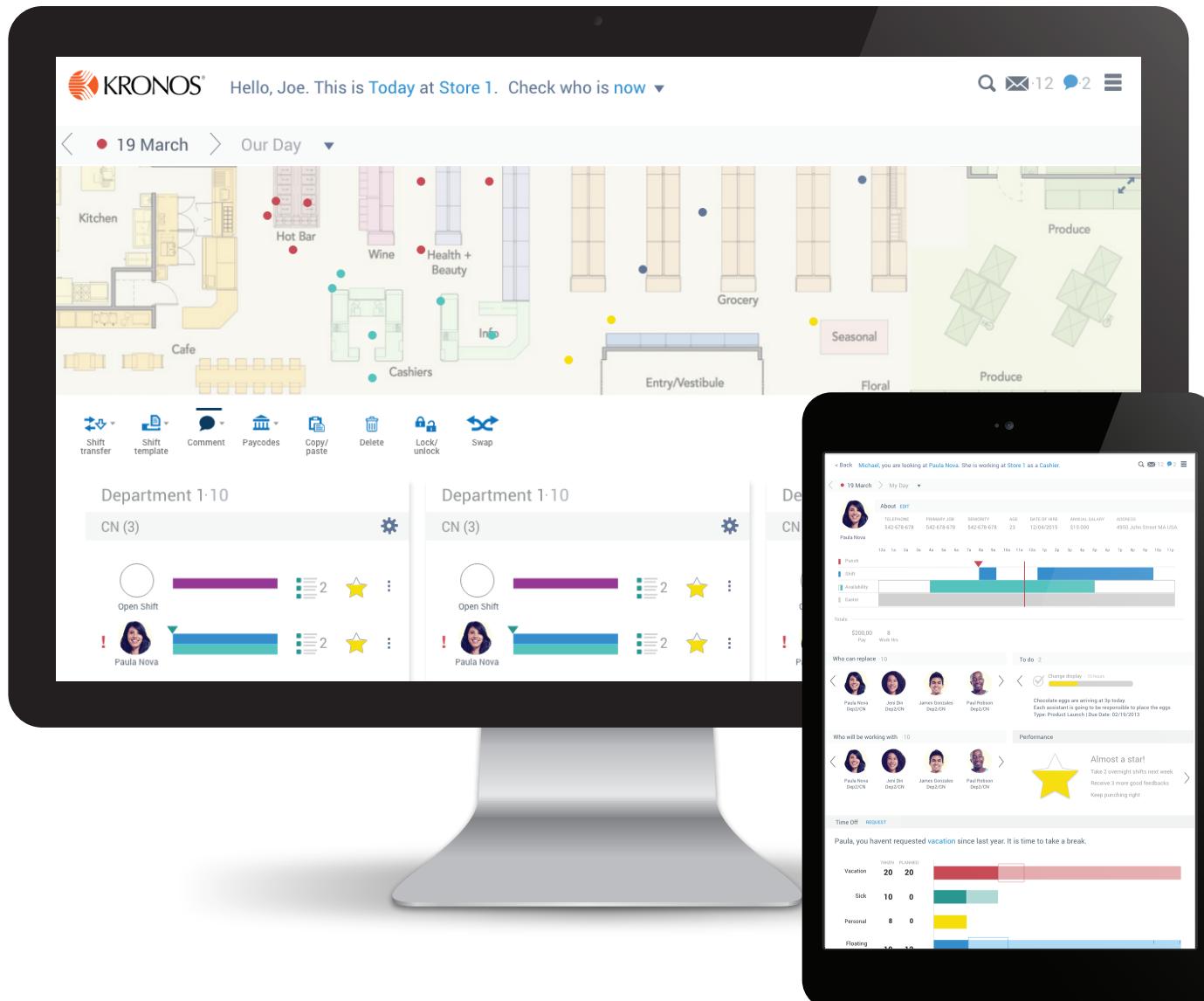
Solution and results

The KRONOS Schedule software interface is displayed on a computer monitor. The main area shows a weekly schedule grid from April 6 to April 26, 2012. The grid includes columns for days of the week (M, T, W, Th, F, S, Su) and rows for specific shifts like '9a-5'. Shifts are color-coded (e.g., red for 04/06 - 04/12). A sidebar on the left lists 'Open Shifts [25]' and 'Group 1 [5]' with employee names (Doron, Perkins; Flores, Linda; Grace, Nancy). The top of the screen has various navigation and status icons.

We needed to make sure a complex system is intuitive, respects accessibility rules and follows responsive design guidelines.

For the new Schedule, more than 40 customers worldwide were interviewed during sessions of 1 hour each. 98% of the customers really appreciated the new design and they were glad to see it was easier to create schedules for 4-6 weeks period.

Other projects: Staffing exploration



On this page, an example of a design exploration for the Schedule with the focus on the Staffing workflow - Retail, in which managers can visualize the employees in real-time and better allocate them in a store.

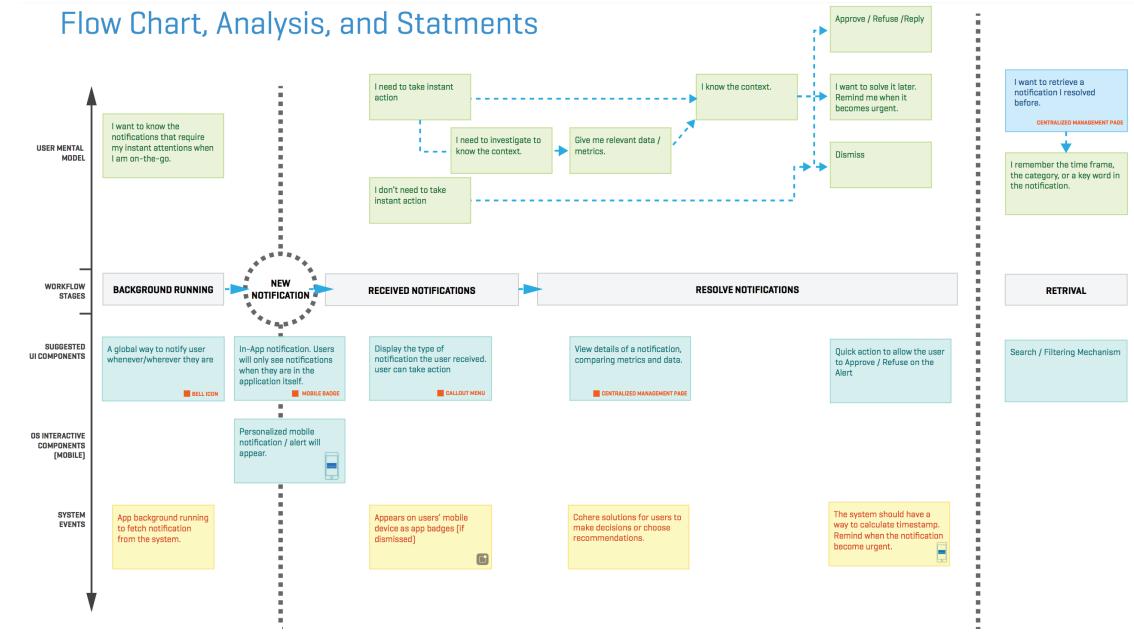
And an exploration for the employee experience, in which they can see their week schedule, timecard, accruals, colleagues, performance, and activities to be performed in a day.

Other projects: Control Center

Here, an example of the design of the Control Center.

The Control Center is a place where employees and managers receive notifications, and decide what to do next - if action is required.

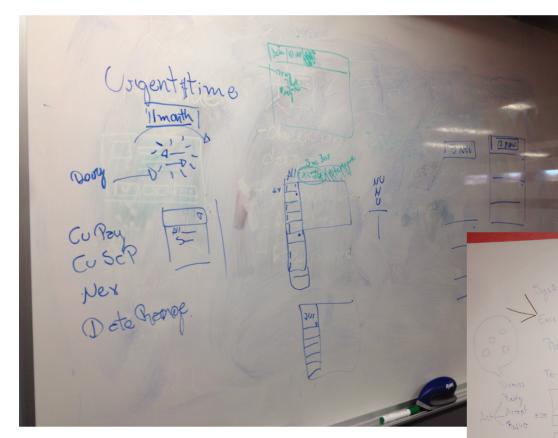
We identified six areas that we should be aware when working on the concepts: Real time, Metrics, Related Data, Educate the System (Machine learning), Personalization and Archive



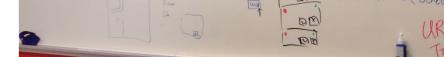
Meeting with Product Owners: Outcome

The 6 Statements		
Real-time Solution	Dismiss - Potential to Remind	Flexibility - Remind me a
Metrics for Investigation	Reply - Communication	Ease of communication -
Related Data Catenation	Resolve - Accept / Refuse	Context
Educate System Behavior	Urgent / important Actionable items	IMPLICIT - System Memorizes System recommends, but user can ignore Explicit - System Learns Rules System decides, but there's a rule
Personalize	Categorization of Notifications	System vs. User-defined
Archive	Search / filtering mechanism	Audit Trail

Brainstorming



Disection of different information and making

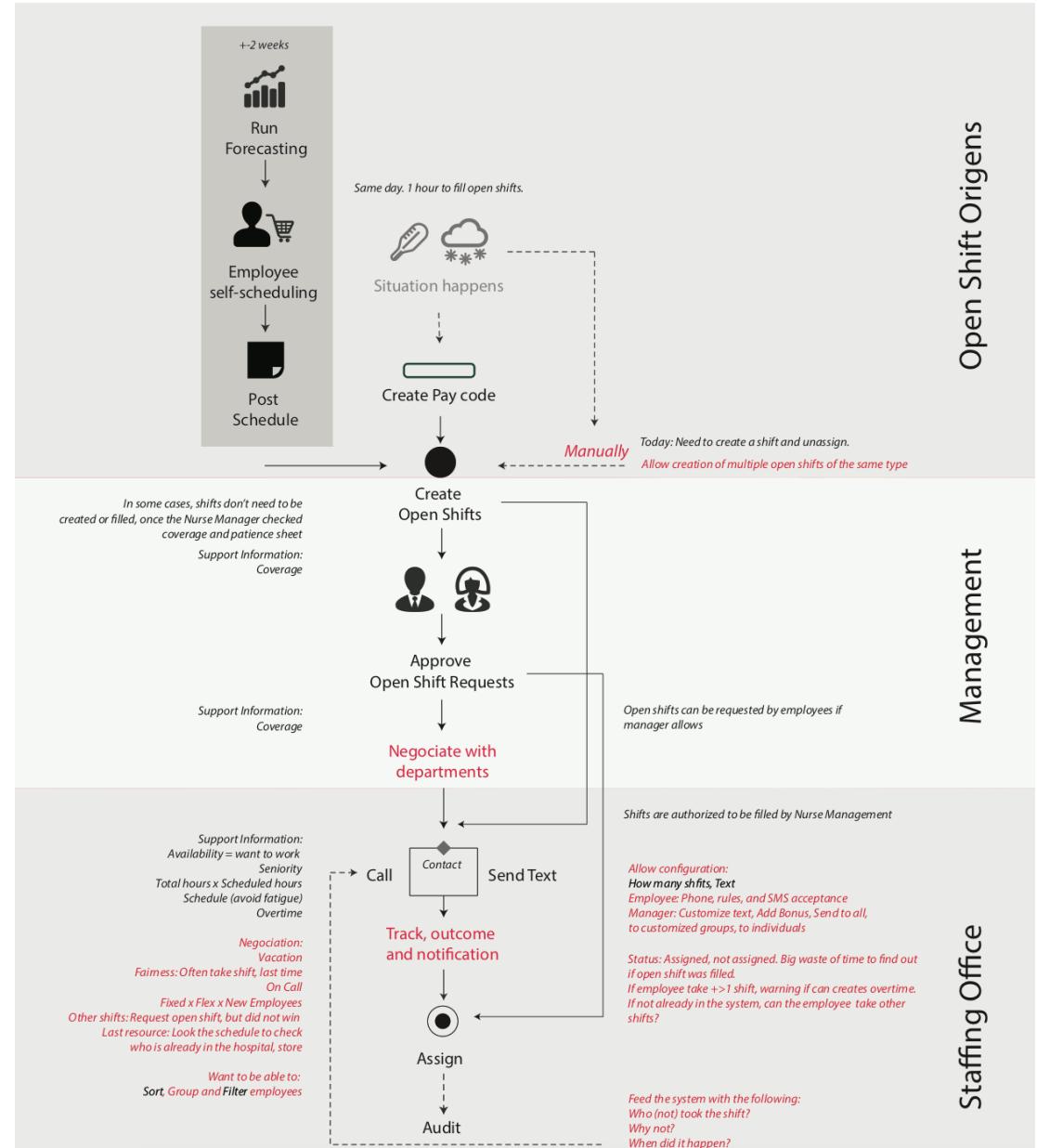


Other projects: Open Shift Cycle

On this page, an example of the “Open Shift Life Cycle”. This cycle happens when an employee misses a day of work. This situation can be critical for an organization, especially for hospitals.

The advantage of drawing a process like this are:

- Give the designer and other stakeholders an overall view of the process and help to scope the project
- Highlight the areas of improvement - innovation
- Focus in the process not in the design (it can contribute to many designs and help to see dependencies)
- Help new stakeholders to get up to speed in understanding the process



Other projects: Open shift

Below, the flow of the Open Shift and how it is connected to other areas in the System.

OTHER HEADLINES

ESS

- Action Bar (New Request)
- ESS Events list (Request Shift)
- My Schedule Home Page Tile (request Open shift)



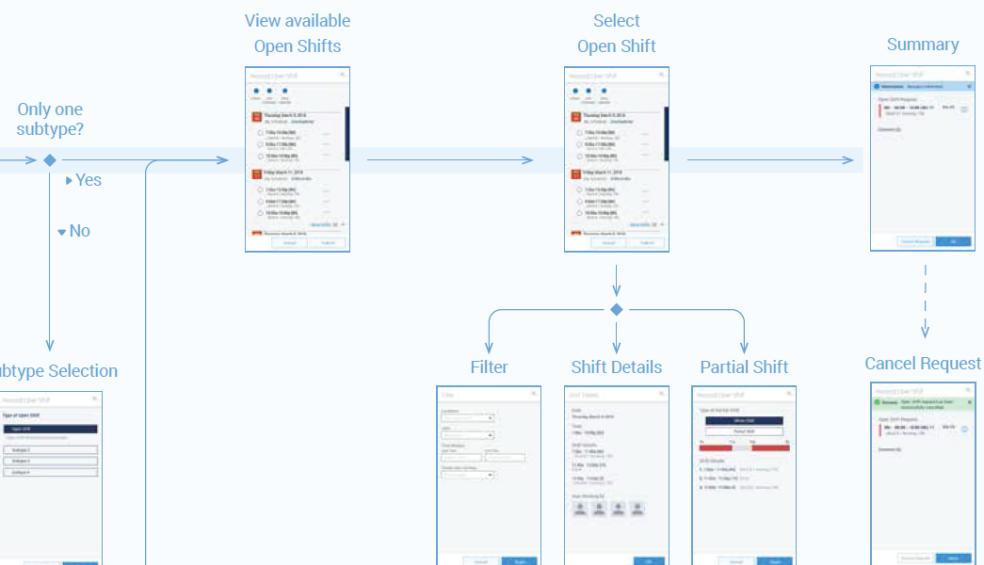
Manager Control Center

Open Shift request notification
(if not configured for auto-approval)



Employee Control Center

Refusal or Approval notification



REQUEST OPEN SHIFT (RIGHT PANEL)

REQUEST LIFECYCLE

Project

Cybersecurity



About



60% World's largest 100 banks **100+countries**

A digital agreements security company with a heritage in cybersecurity and business workflows. OneSpan processes millions of digital agreements and billions of transactions annually.

Who

Abram Fields (Fraud Analyst)

Why

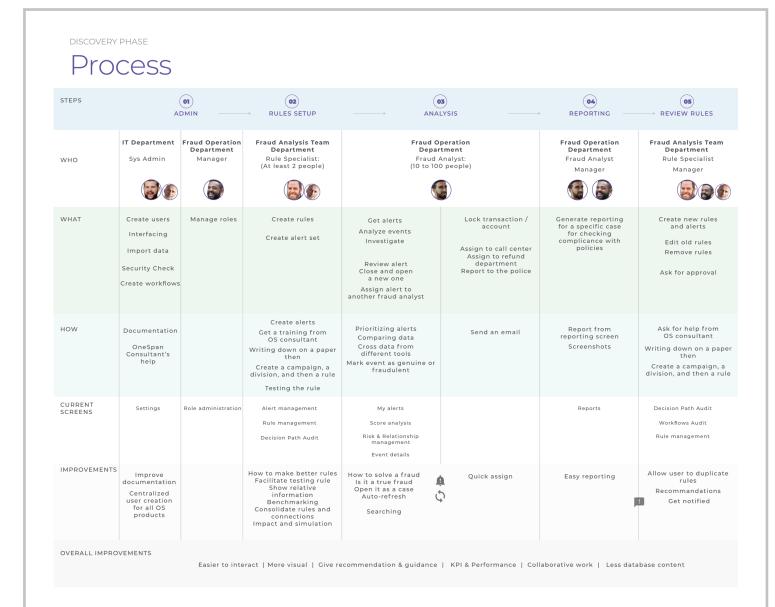
Every day, Abram needs to investigate thousands of suspicious transactions at the bank he works for. Abram would appreciate having a way to quickly identify the most critical cases and connect with other colleagues who may be working on the same case.

How

The Fraud Analysis domain was a new area for some of the team working on this project, including myself. The first step for this project was to interview domain experts in the company who could give us a better idea on how a department of Fraud Analysis works. After meeting with them, I and the Product Designer created a diagram on how the Fraud Analysis department looked like. We understood that one of the pain points of the Fraud Analysts was how the current Forensic Analysis solution was displaying data and the lack of a dashboard for them to have an idea of cases that were severe and/or treated by their colleagues.

Team

Product Owner
 Scrum Master
 Head of Design (me)
 Product Designer
 Accessibility Expert
 Developers



Fraud Analysis Department

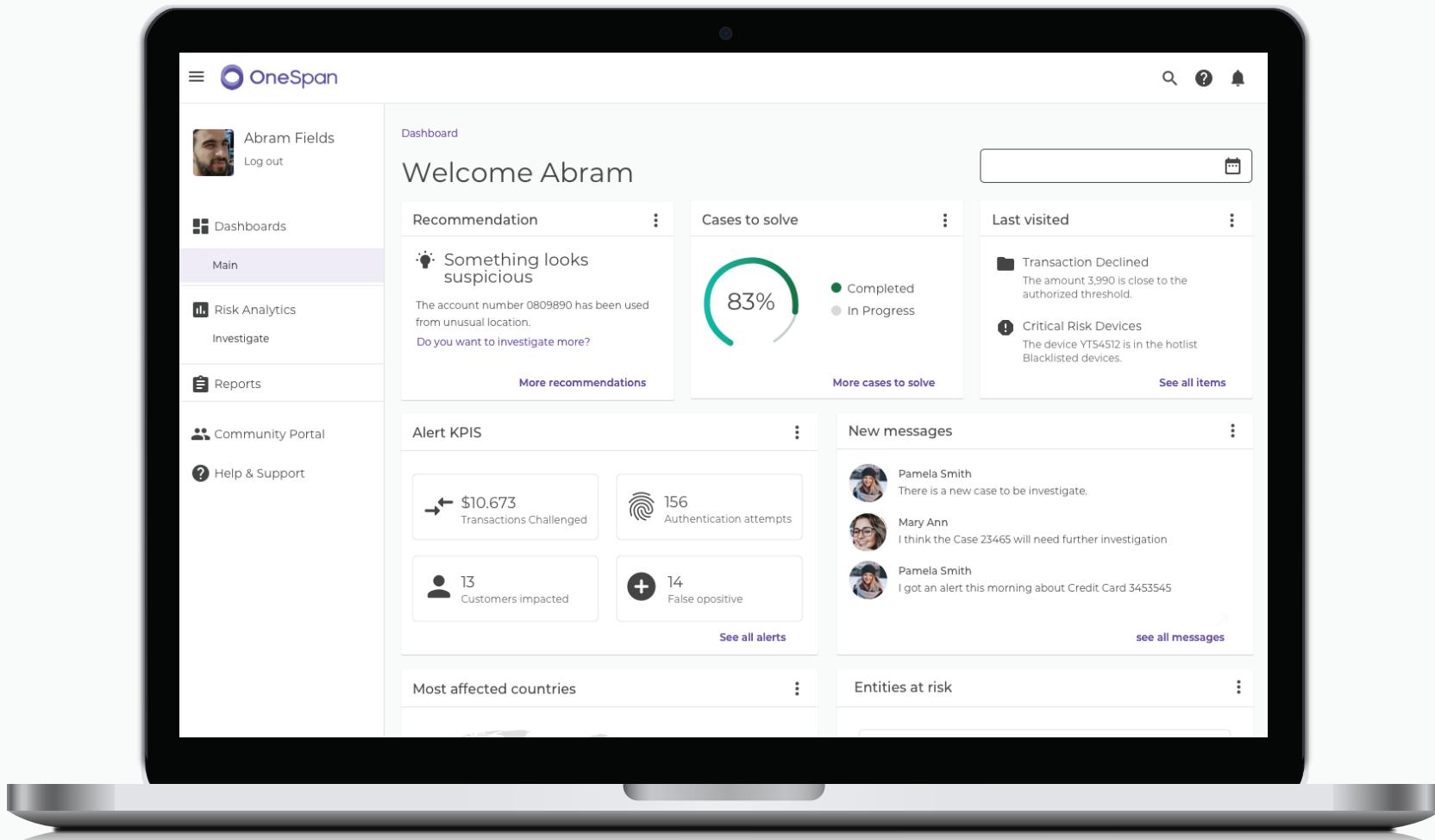
Solution

Based on what we learned, we created a new example of Forensic Analysis. With the new version, users could have a better visualization of the problem, save different scenarios by creating snapshots, leverage a powerful filter and share their findings with other colleagues.

The image shows a tablet displaying the OneSpan Forensic Analysis interface. The top half of the screen shows a "Transactions Map" with various nodes representing events, locations, and devices. Nodes include "Activity" (Login, Transactions, Account Modif...), "Location" (Chicago, USA; Milwaukee, USA; Panama City, PA), and "Device" (Samsung S9, Lenovo Laptop). Red lines connect nodes between categories. The bottom half shows a "Forensic Analysis" panel with a "Polar Chart" and a "TRANSACTIONS MAP" tab. The chart has four quadrants: "Beneficiaries" (top-left), "Locations" (top-right), "IP Addressess" (bottom-left), and "Devices" (bottom-right). A central circular node is connected to several green and orange peripheral nodes. The "TRANSACTIONS MAP" tab shows a similar network structure with nodes for "Event", "PIVOT FACTOR", "DIMENSIONS", "UNTIL DATE", and "TIME LINE". The top navigation bar includes "Supervise & Investigate / Score Analysis / Forensic Analysis", "View by: Columns / Map", "Columns", "Snapshots", "History", and "Download". The overall interface is modern and user-friendly, designed for efficient forensic analysis.

Solution

We also created what the Dashboard experience could like. Key information was displayed on it, such as Last visited cases, for easy access to work in progress, new messages of colleagues about the cases they were working on, and most important, recommendations of the most severe cases Abram should be looking for.



Other projects: E-signature

Who

Rose Smith (the signer)

Why

Rose is an ER nurse in a large hospital. She is very busy and complex technology is not her strength. She recently bought a house and needs to sign several documents. E-signature really helps her make the process easier, as much as the interface is intuitive and guides her through the process.

How

When I joined OneSpan as Head of Design, this was one of the first projects the team was working on. The current solution was quite outdated and the actions the user needed to perform on the screen were quite spreaded out. We received a Usability Study from one of the banks that adopted this solution, and we learned that re-think the experience was critical. Together with the Development Team, we discussed a couple of solutions to rethink the experience. Considering the pain points, the first approach was to identify all the actions the user could do in the system and organize them. Another consideration was to make the interface with as few colors as possible, because this is a solution that will be used by several banks, so it needed to be white-label. With a couple interactions and brainstorm sessions, we came with a solution that after scoring really high when validating the designs.

Team

Product Owner

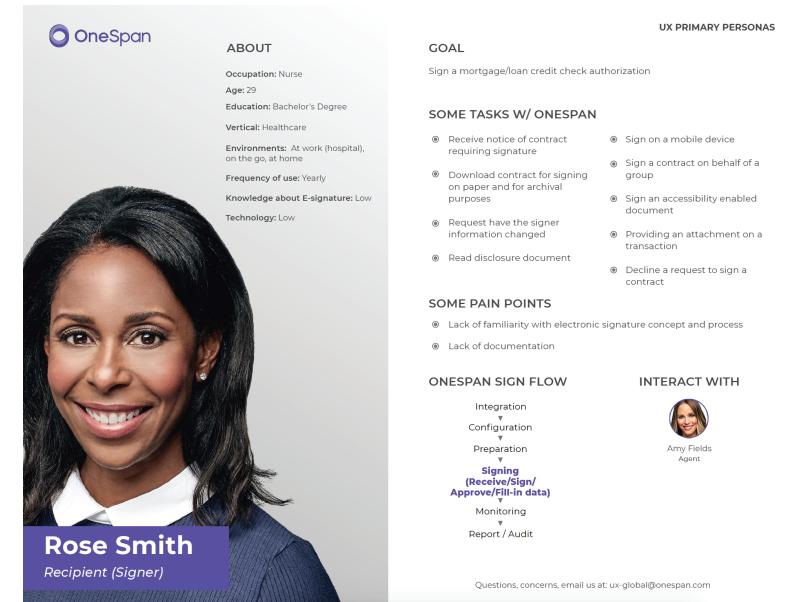
Scrum Master

Head of Design (me)

Product Designer

Accessibility Expert

Developers



The image shows a detailed UX Primary Persona for Rose Smith, a Recipient (Signer). The persona includes a portrait of a woman with dark hair, a name tag 'Rose Smith' with the subtitle 'Recipient (Signer)', and various demographic and usage details. It also lists tasks, pain points, and a sign flow diagram.

UX PRIMARY PERSONAS

ROSE SMITH

ABOUT

- Occupation: Nurse
- Age: 29
- Education: Bachelor's Degree
- Vertical: Healthcare
- Environments: At work (hospital), on the go, at home
- Frequency of use: Yearly
- Knowledge about E-signature: Low
- Technology: Low

GOAL

Sign a mortgage/loan credit check authorization

SOME TASKS W/ ONESPAN

- Receive notice of contract requiring signature
- Download contract for signing on paper and for archival purposes
- Request have the signer information changed
- Read disclosure document
- Sign on a mobile device
- Sign a contract on behalf of a group
- Sign an accessibility enabled document
- Providing an attachment on a transaction
- Decline a request to sign a contract

SOME PAIN POINTS

- Lack of familiarity with electronic signature concept and process
- Lack of documentation

ONESPAN SIGN FLOW

```

graph TD
    Integration --> Configuration
    Configuration --> Preparation
    Preparation --> Signing
    Signing --> ReviewSignApprove
    ReviewSignApprove --> Monitoring
    Monitoring --> ReportAudit
    ReportAudit --> Integration
    
```

INTERACT WITH

 Amy Fields
Agent

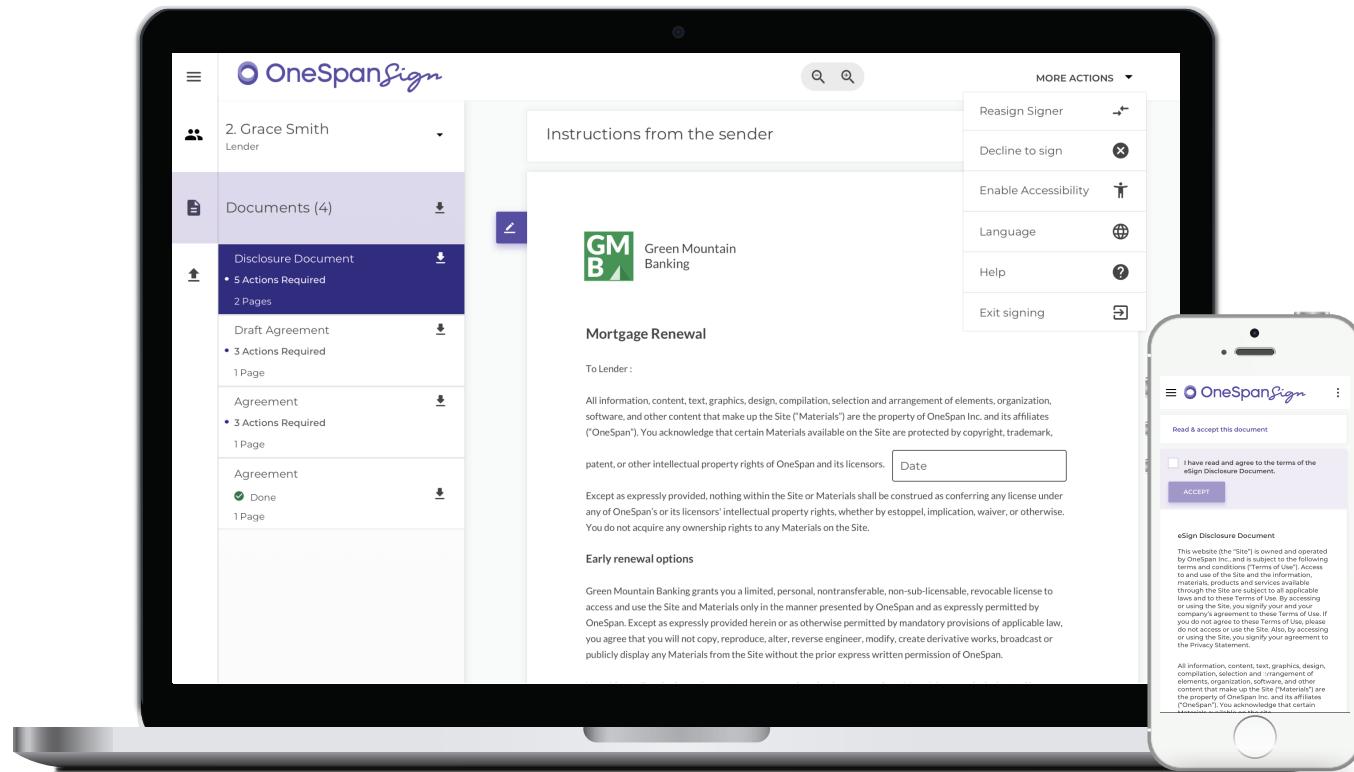
Questions, concerns, email us at: ux-global@onespan.com

Original Schedule

Solution

The new interface was responsive, accessible and clean.

The simplified version really helped to facilitate the signature process to banks, but most important, to millions of users.



P7: I think it is way better than the currently implementation.

P8: Going in the right direction and I like the look and feel.

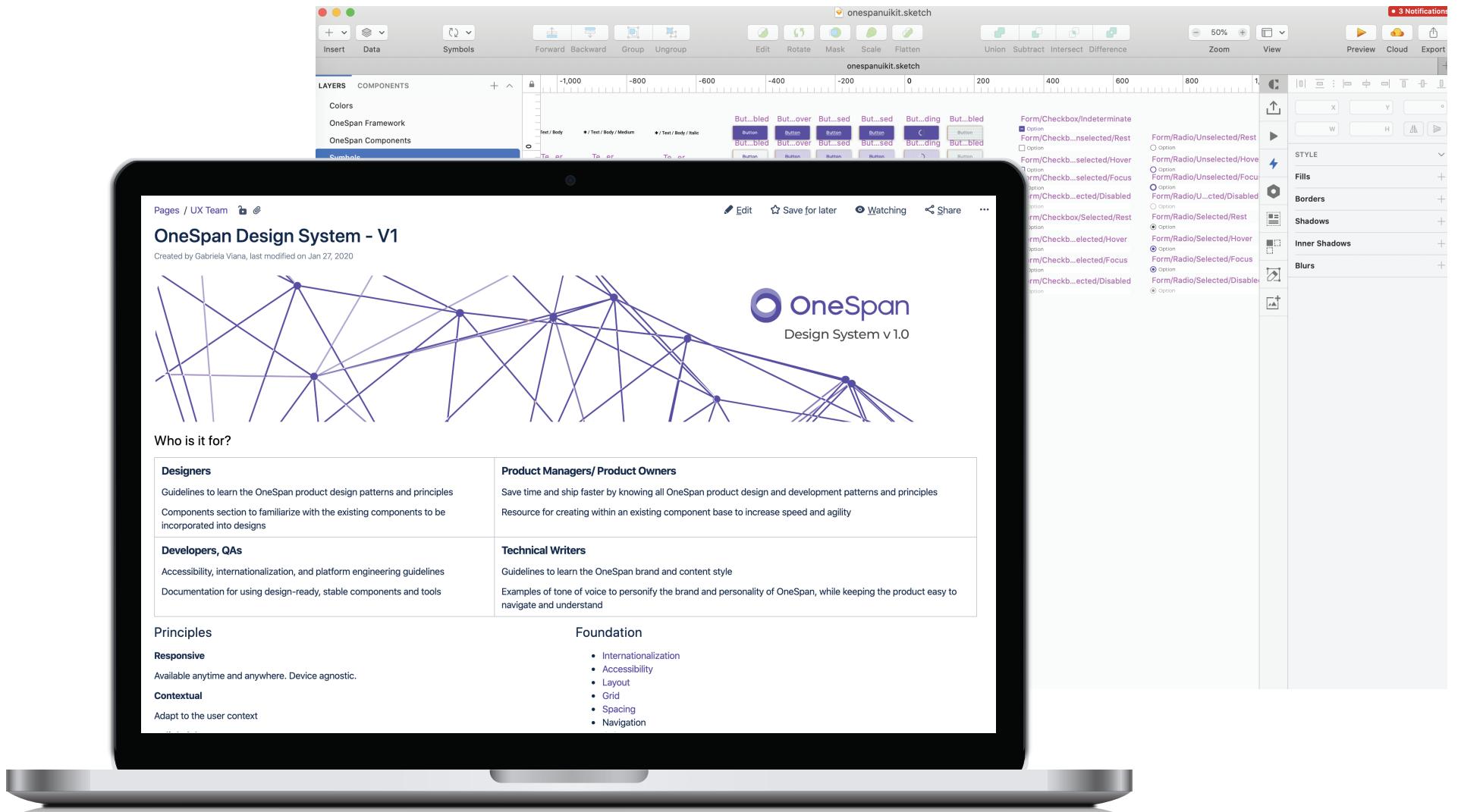
P8: It is condensed, cleaned document in the middle, it is much better.

P11: Cleaner interface, less confusion, more consistent experience between mobile and desktop

P12: There are improvements, there are struggles today to find where to sign, so I like the jumper and the document panel.

Other projects: Design System

At OneSpan, I was also responsible for developing the Design System. The goal was to make sure all the products have not only the same look and feel, but also the same structure, navigation, patterns and components.



Other projects: Personas

I also ran workshops to create OneSpan Personas.

And speaking of personas...Personas are the subject of my Master's Thesis: **Practitioners' Points of View on the Creation and Use of Personas for User Interface Design.**





ABOUT

Occupation: Manager, Strategic Procurement – Info Technology
Age: 35
Education: Bachelor's Degree
Vertical: Finance
Environments: Office
Frequency of use: Daily
Knowledge about E-signature: High
Technology: Medium

Anderson Fields
 Account Admin

UX PRIMARY PERSONAS

GOAL

Manage the team in order to integrate in line with business requirements. He is the main contact with OneSpan. Manage accounts, create e-mail templates, give support for their clients/users.

SOME TASKS W/ ONESPAN

- ① Manage and Configure accounts
- ② Create and define templates
- ③ Troubleshoot support issue for their customers
- ④ Provide OSS Training
- ⑤ See architectural diagram of the information flow
- ⑥ Know when the system is down with detailed report of root cause

SOME PAIN POINTS

- ⑦ Have to call OSS support for actions
- ⑧ Lack of online documentation

ONESPAN SIGN FLOW

```

graph TD
    Integration --> Configuration
    Configuration --> Preparation
    Preparation --> Signing["Signing<br>(Receive/Sign/Approve/Fill-in data)"]
    Signing --> Monitoring
    Monitoring --> ReportAudit["Report / Audit"]
  
```

INTERACT WITH

 Amy Fields Agent	 Steve Fields Sys Admin	 Tina Fields Transaction Preparation
 Igor Fields Integrator	 Sean Span OSS Support	 Patrick Span Professional Services

Questions, concerns, email us at: ux-global@onespan.com

Project

HealthCare

PomeloHealth

About

PomeloHealth

6.000 clinics

1.2 M of users

25 most innovative company

PomeloHealth was a Quebec based start-up and developer of a leading end-to-end online healthcare productivity solution in Canada to provide to patients with the ability to book and manage appointments online.

Who

Patient

Why

Patricia is a busy employee and mother of two. When she is sick or someone in her family, she needs to quickly find a solution. She would really appreciate having a solution where she can book an online appointment for an online or in person consultation.

How

As a Director, I was tasked to rethink the ecosystem of products at PomeloHealth and make sure they were aligned to our user's expectations.

In partnership with the VP and Directors of Product Management, Director of Development, VP of Marketing, I created a plan to come up with a vision of integrating the current products of the company while providing an end-to-end experience for both patients and practitioners. On the next pages, let's see some of the steps of this process.

Team

Product Owner

Scrum Master

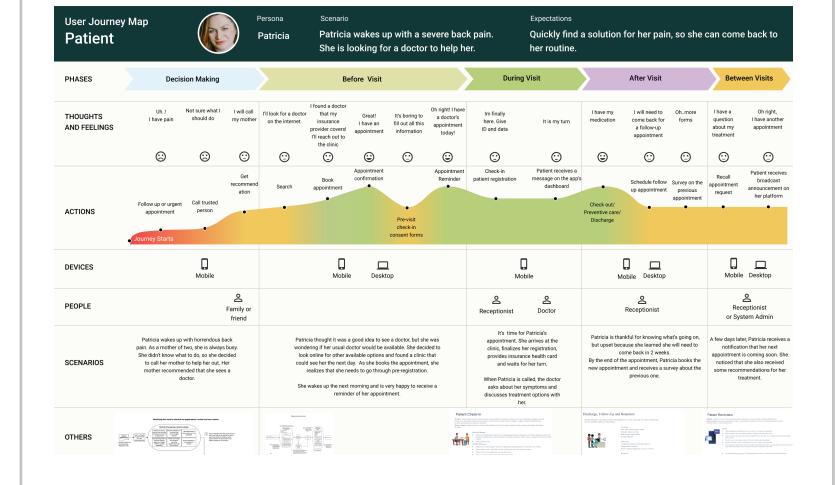
Head of Design (me)

Product Designer

Accessibility Expert

Developers

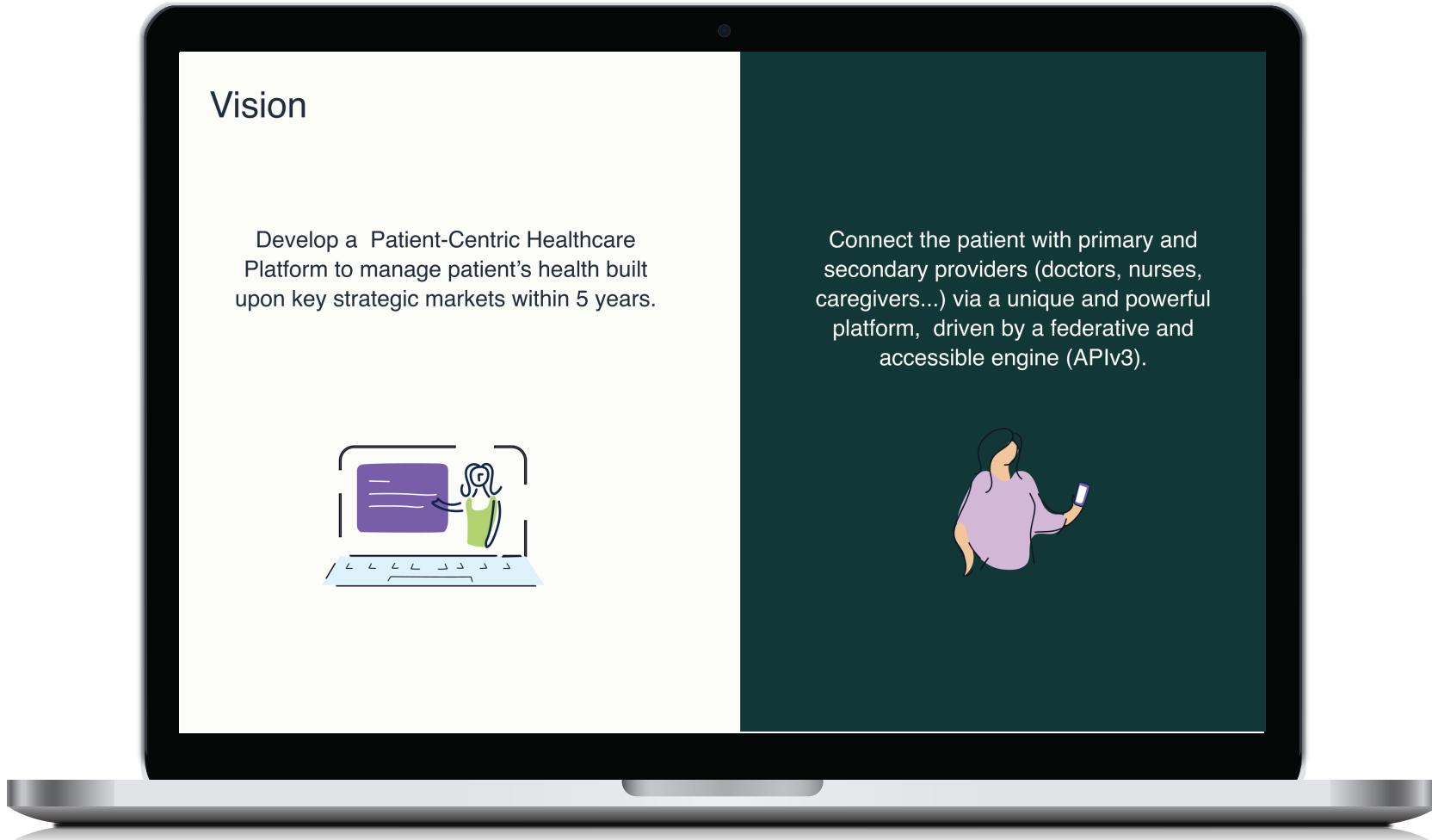
Persona Journey



Patient Journey

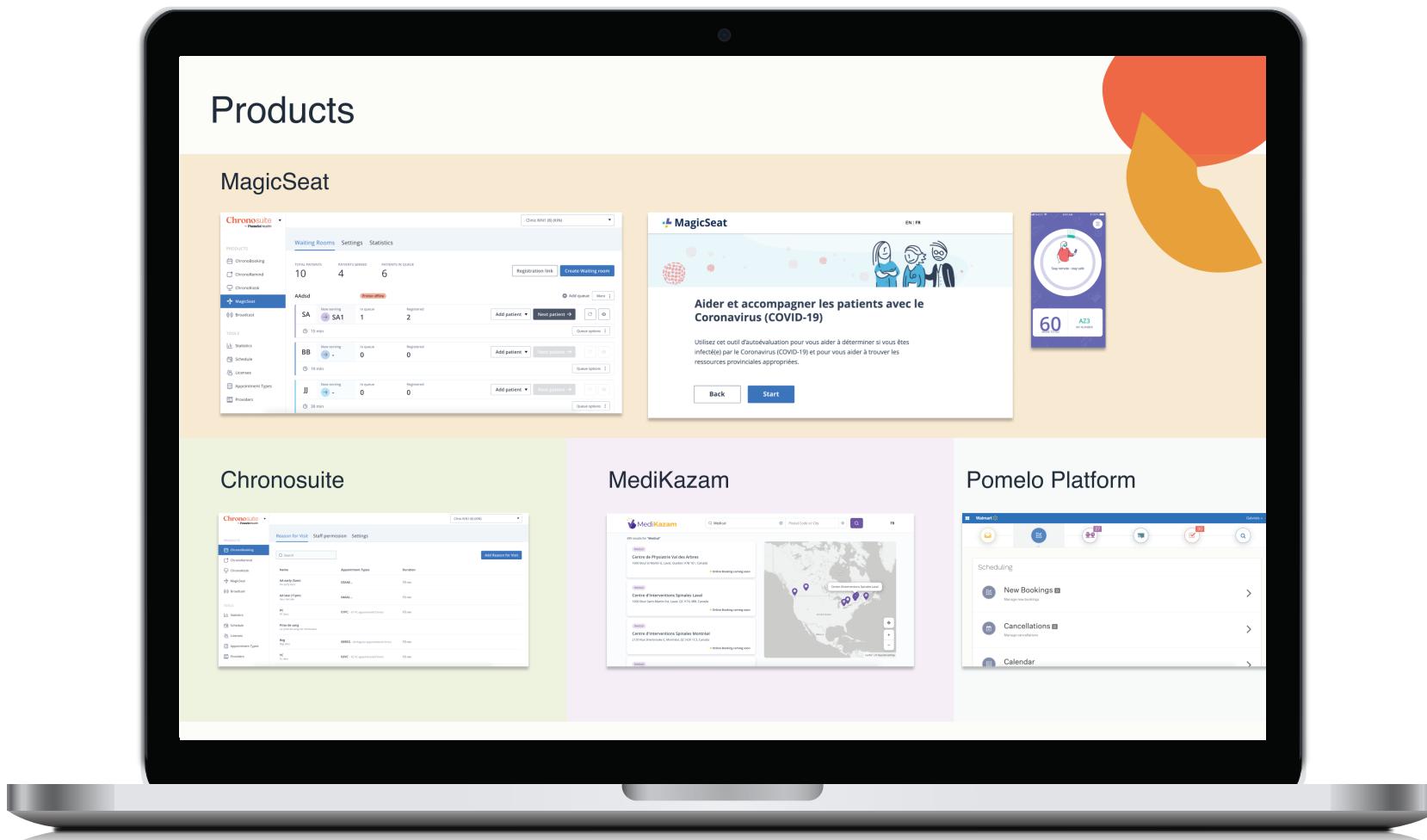
How

One of the first steps was to understand the vision of the business.



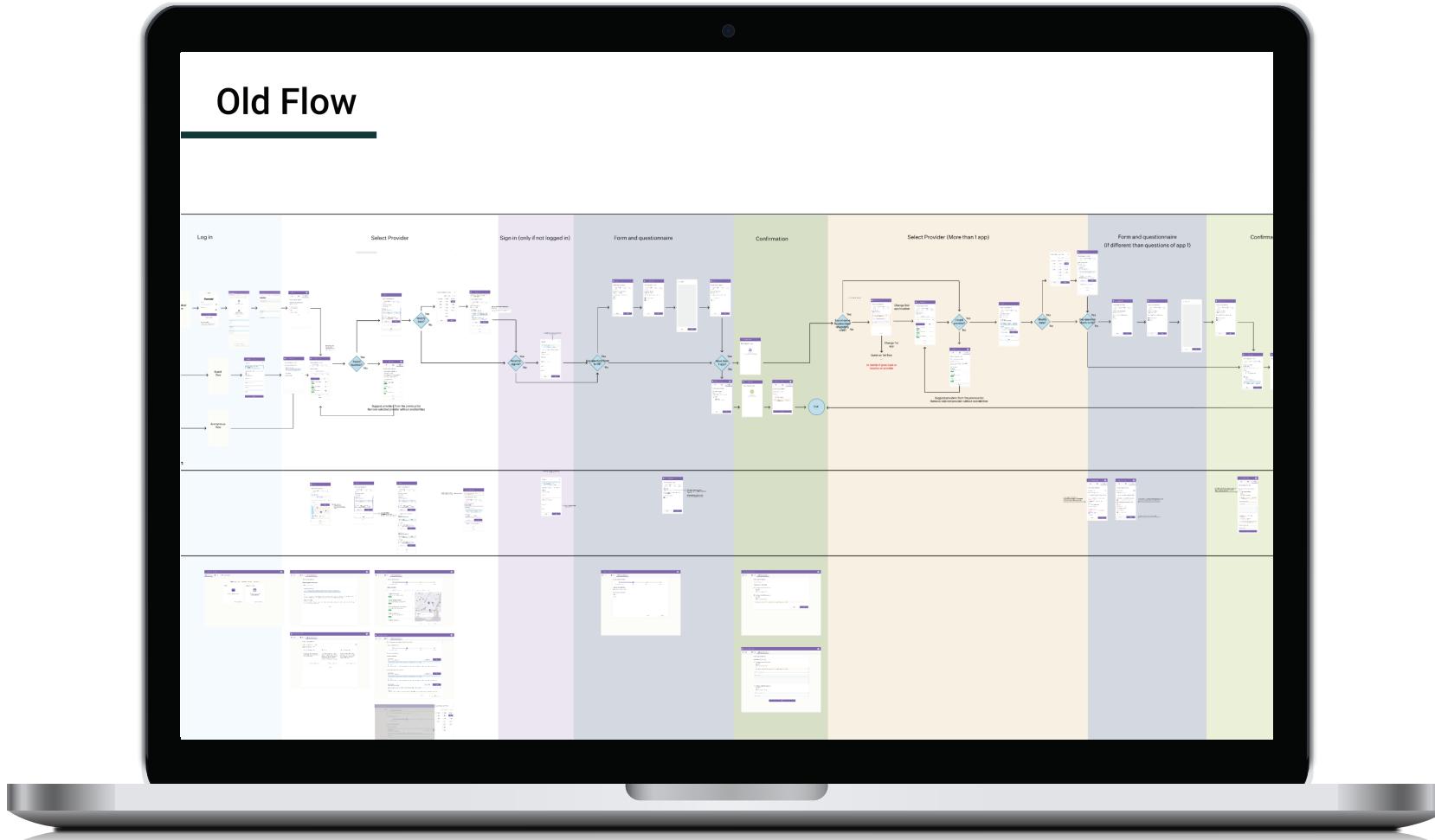
How

Then, understand how the experience of the products looks like today. The company had different products with different experiences, even though they shared the same users and customers.



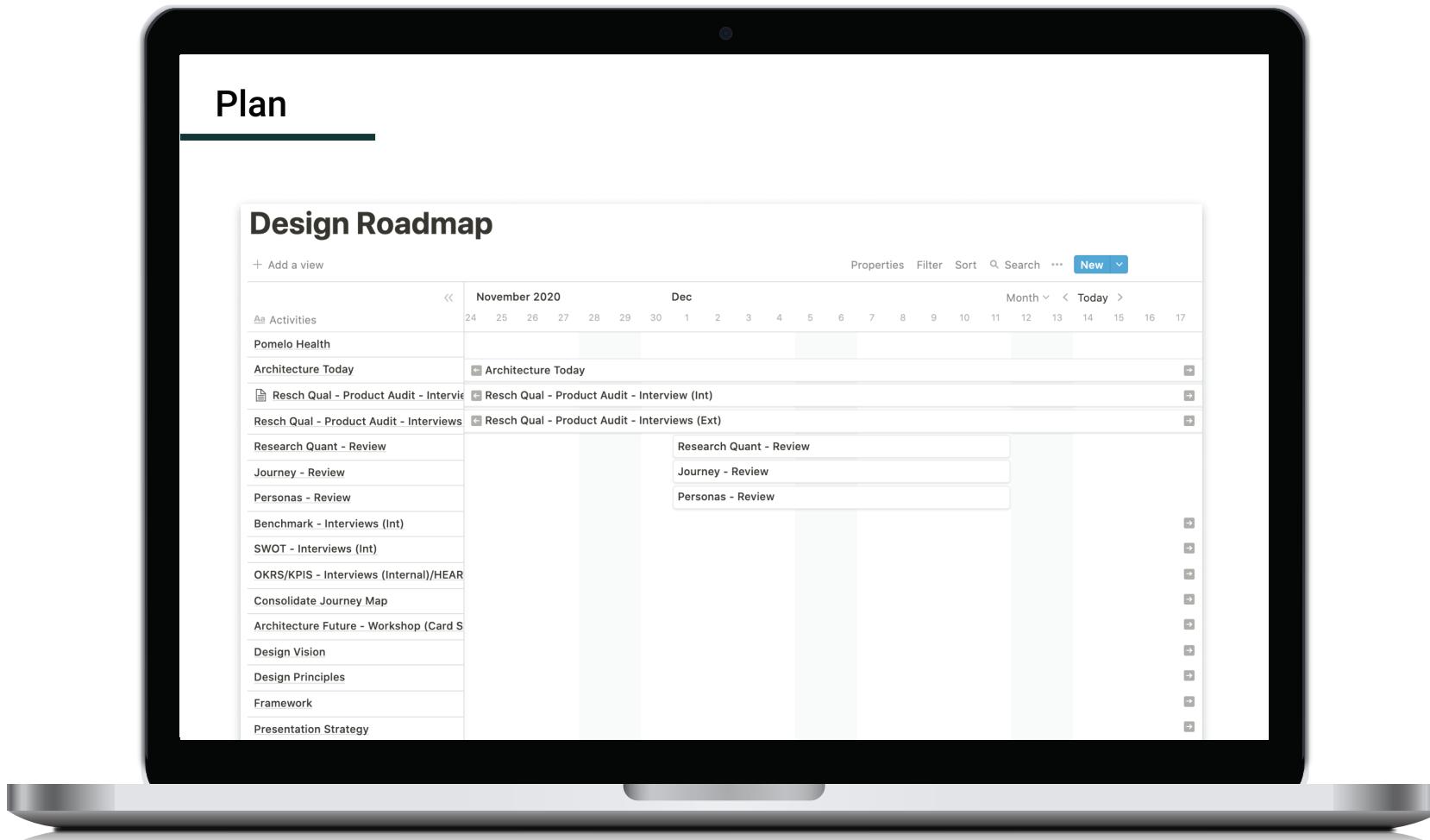
How

It was important to understand how the process looked like of each product, identify duplicates, understand technical limitations.



How

Once the audit of the experience was done inside the company, I came with a roadmap on how we should move forward to create a vision for PomeloHealth.



How

After the plan was created, I booked some time with practitioners to understand their pain points and from their patients. I learned that the current experience was very complicated, and some steps like creating an account were quite difficult.

Research Result

If it's designed for the average patient, it's way too complicated.

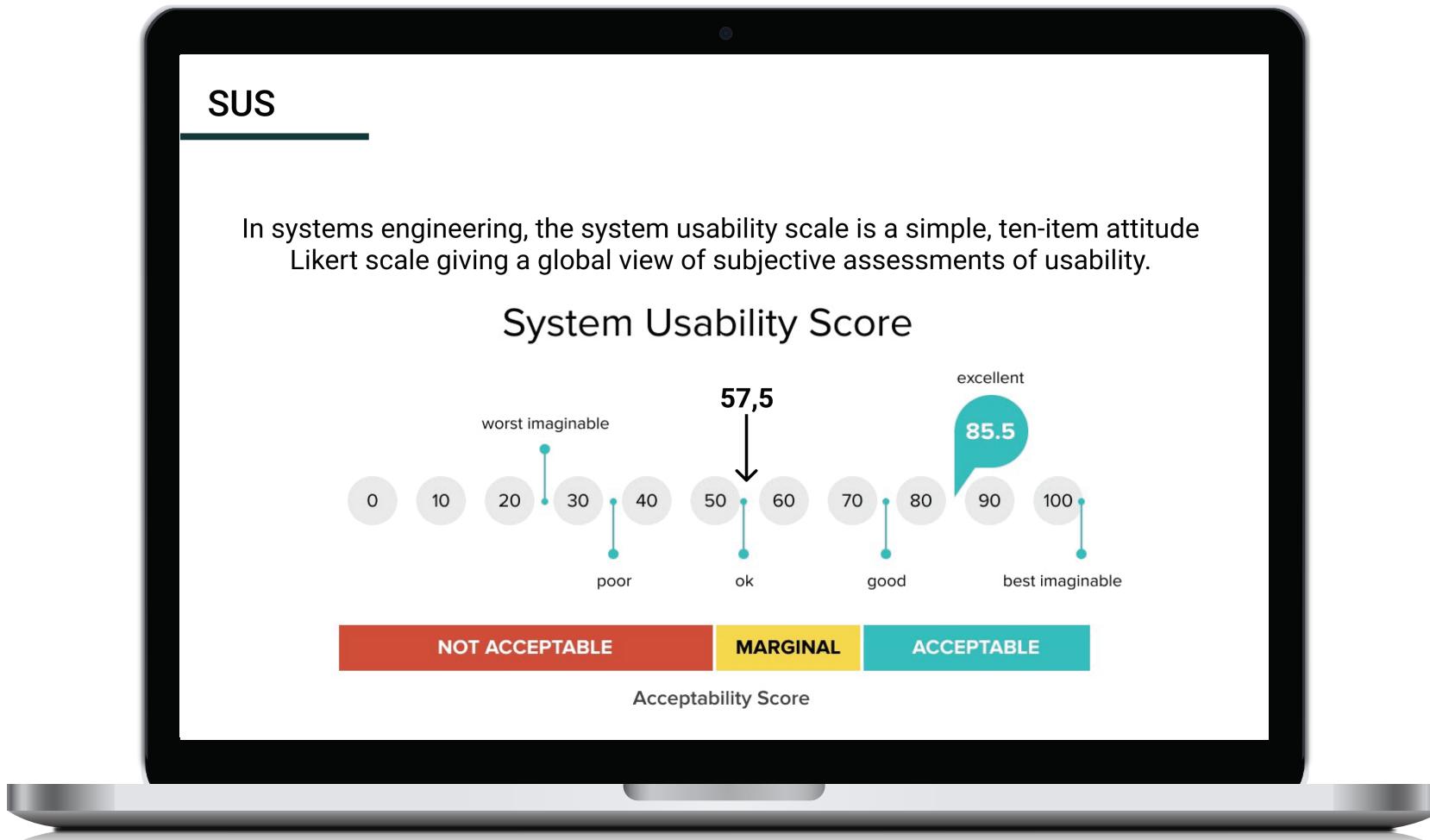
3 out of 10 patients cannot make it right.

A lot of going back and retracing steps. A lot of clicks and boxes and things to duplicate in some areas.

Summary	Severity	Suggestion
Registration	• High	Improve the way patients register. Several issues with create an account (same email, etc) and remembering password.
Appointments and reminders	• High	Revisit the flow configuration of appointments type and reminders
Forms	• High	Offer more options of forms in the database

How

During the interviews, I also asked the practitioners to fill out the SUS questionnaire. It was not a surprise that the experience was considered as “marginal”.



How

During this time, I could hire a UX Researcher, and then, he was responsible for running a survey. We surveyed 100 participants considering a population of 70.3 million people, with a confidence level of 95% and margin error of 10%, which gave us the confidence that the results would be quite representative.

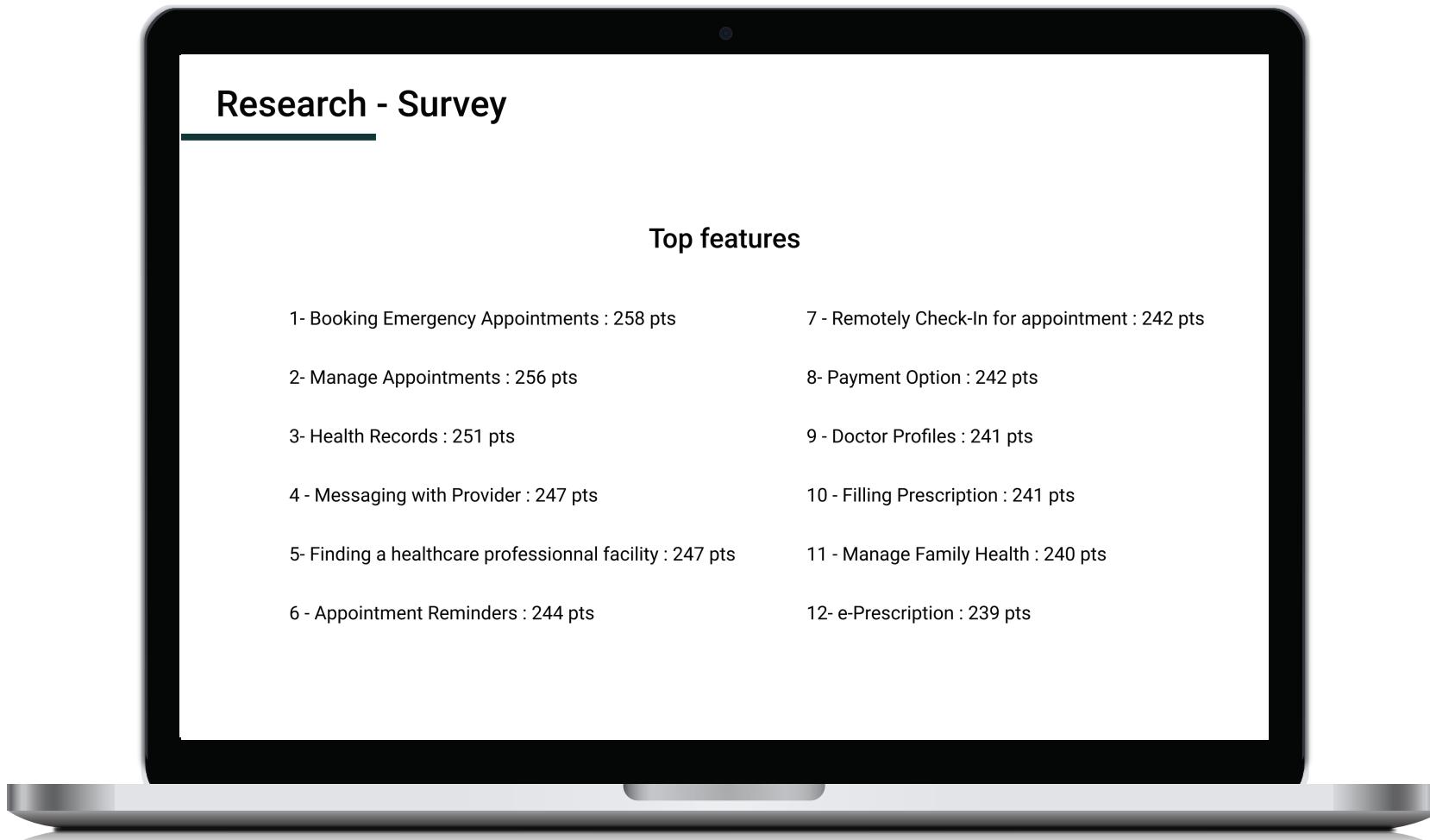
The image shows a laptop screen with a white background. At the top, there is a dark header bar with a small blue circular icon in the center. Below the header, the word "Research - Survey" is displayed in bold black font, followed by a horizontal dark green line. The main content area starts with the heading "100 participants" in bold black font. Below this, the text "The method used for this research was **survey**." is written. Further down, it states "Since those are the two segments of the population that we are interested in, that would mean that the target population is **70.3 million people**." At the bottom of the content area, the text "To achieve a **Confidence level of 95%** with a **margin of error to 10%**, the needed sample size for this research was **97 people**." is displayed. Below this text is a table with three rows and three columns. The first row has a black header with the column titles "Confidence level", "Margin of error", and "Sample". The second row has a light purple background and contains the values "95%", "5 %", and "385 people". The third row also has a light purple background and contains the values "95%", "10%", and "97 people". The last row has a white background and contains the values "90 %", "10 %", and "68 people". At the very bottom of the screen, the text "Qualtrics's sample size calculator" is visible in a small, italicized font.

Confidence level	Margin of error	Sample
95%	5 %	385 people
95%	10%	97 people
90 %	10 %	68 people

Qualtrics's sample size calculator

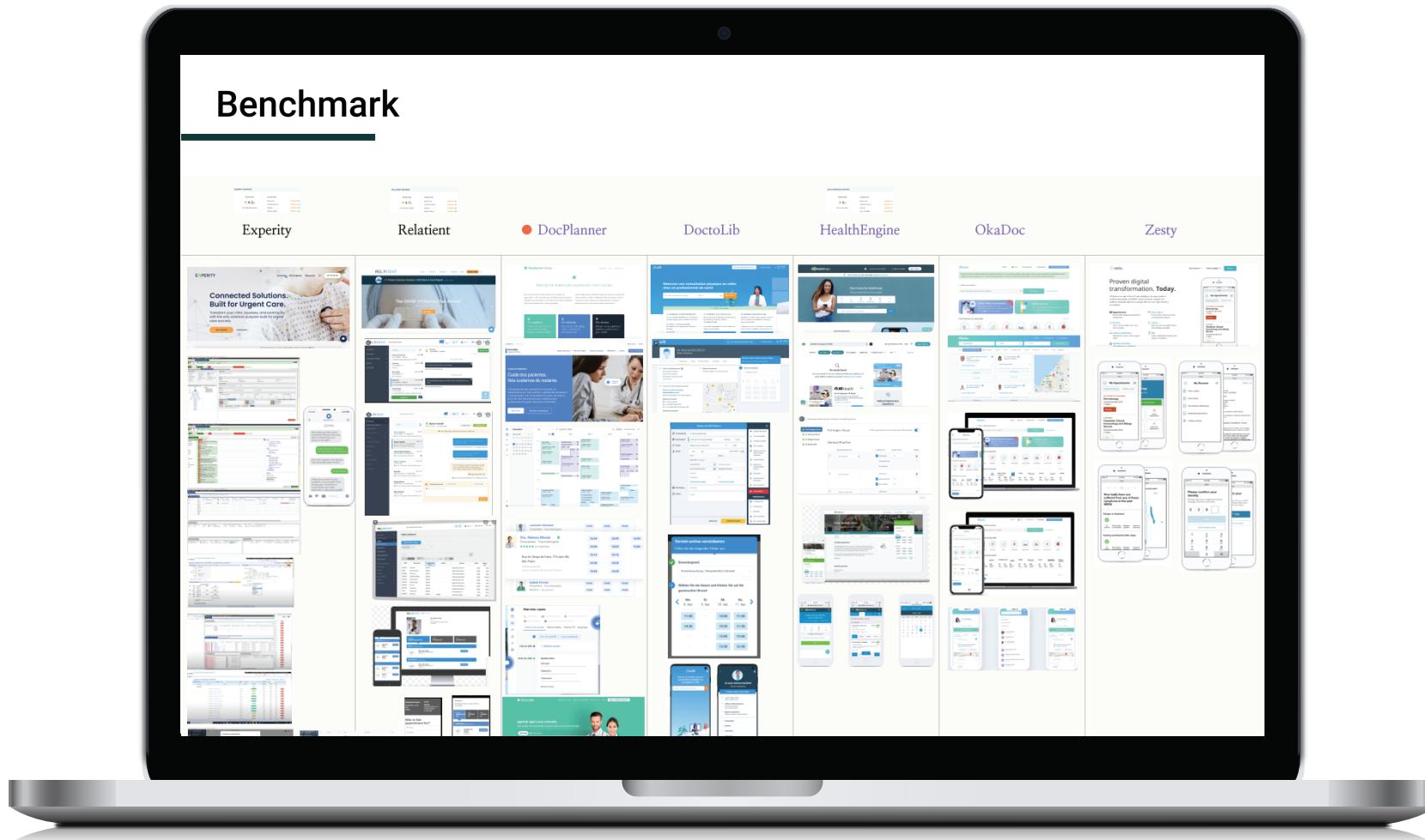
How

Through this study, we learned that users were expecting to have some features already available, but we discovered several opportunities, such as: Filling prescriptions and access to health records.



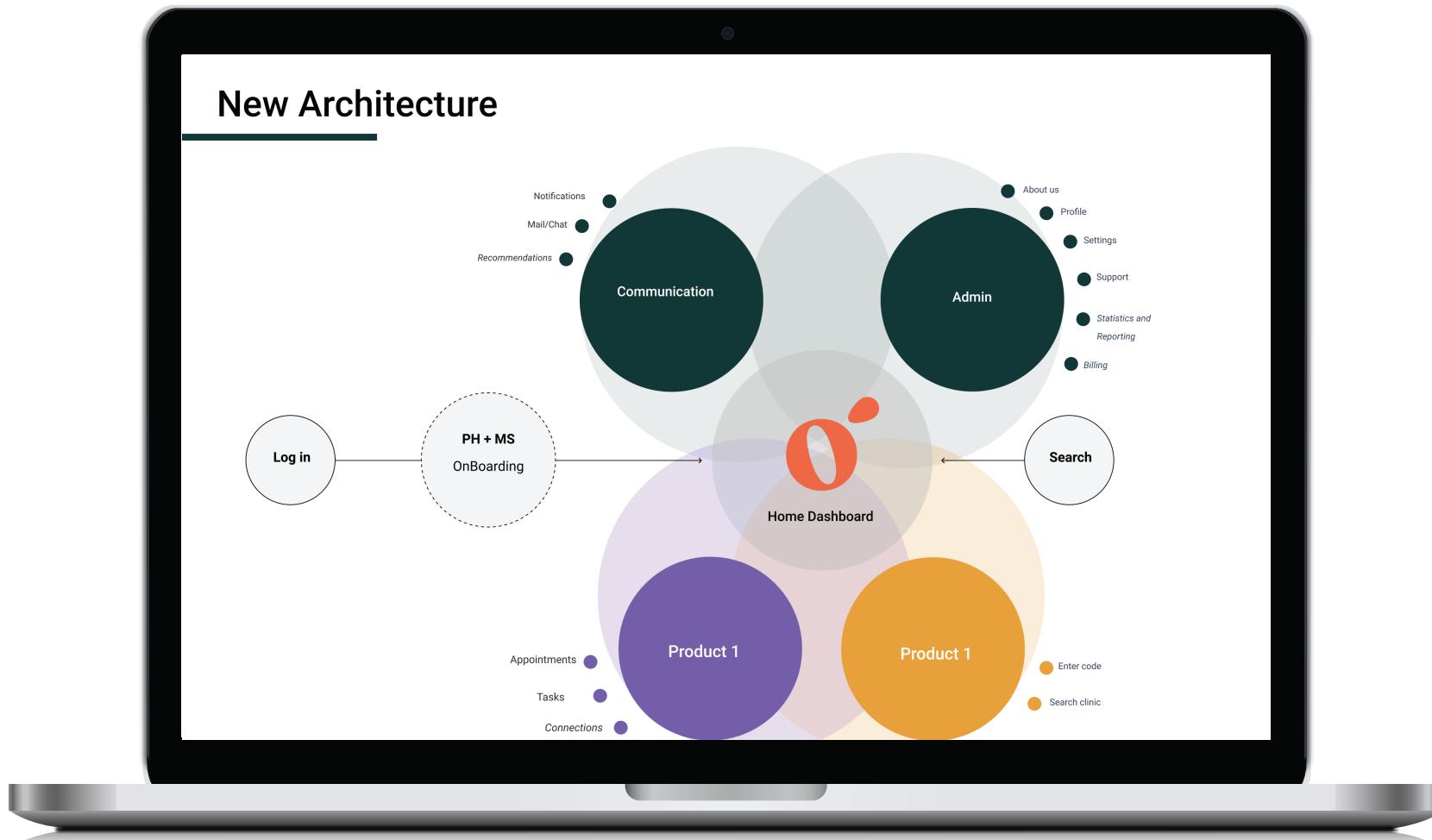
How

I also did a benchmark to understand who the key competitor's or close applications that were on the same domain and had a great experience.



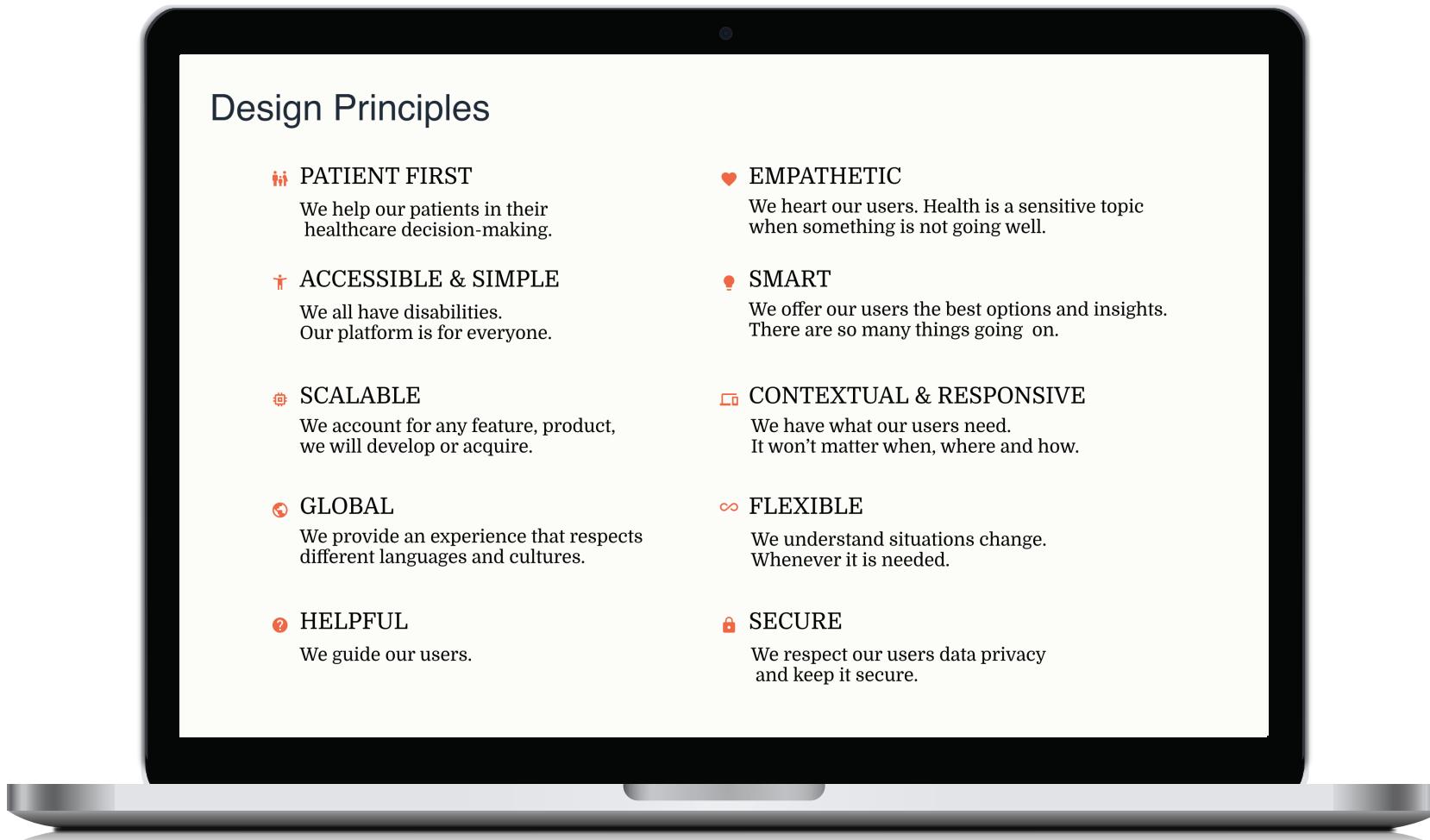
How

Based on all the learning, I put together a new structure on how the PomeloHealth Platform should look like.



How

And in order to start thinking about the experience, it was important to define the key design principles that should be part of provider and patient experiences.



The image shows a black tablet device with a white screen. On the screen, the title "Design Principles" is displayed in a large, dark font. Below the title, there are ten design principles, each represented by a small orange icon followed by the principle name and a brief description. The principles are arranged in two columns: the left column contains five principles (Patient First, Accessible & Simple, Scalable, Global, Helpful) and the right column contains five principles (Empathetic, Smart, Contextual & Responsive, Flexible, Secure). The tablet is shown from a slightly elevated angle, with its bottom edge resting on a dark surface.

Design Principles	
 PATIENT FIRST	 EMPATHETIC
We help our patients in their healthcare decision-making.	We heart our users. Health is a sensitive topic when something is not going well.
 ACCESSIBLE & SIMPLE	 SMART
We all have disabilities. Our platform is for everyone.	We offer our users the best options and insights. There are so many things going on.
 SCALABLE	 CONTEXTUAL & RESPONSIVE
We account for any feature, product, we will develop or acquire.	We have what our users need. It won't matter when, where and how.
 GLOBAL	 FLEXIBLE
We provide an experience that respects different languages and cultures.	We understand situations change. Whenever it is needed.
 HELPFUL	 SECURE
We guide our users.	We respect our users data privacy and keep it secure.

How

Together with the Leadership team, we defined some key metrics we should take in account once the first iteration would be available online.

The tablet screen shows a slide with the title "KPIs & Measurements". Below the title is a table with five rows, each representing a different metric category:

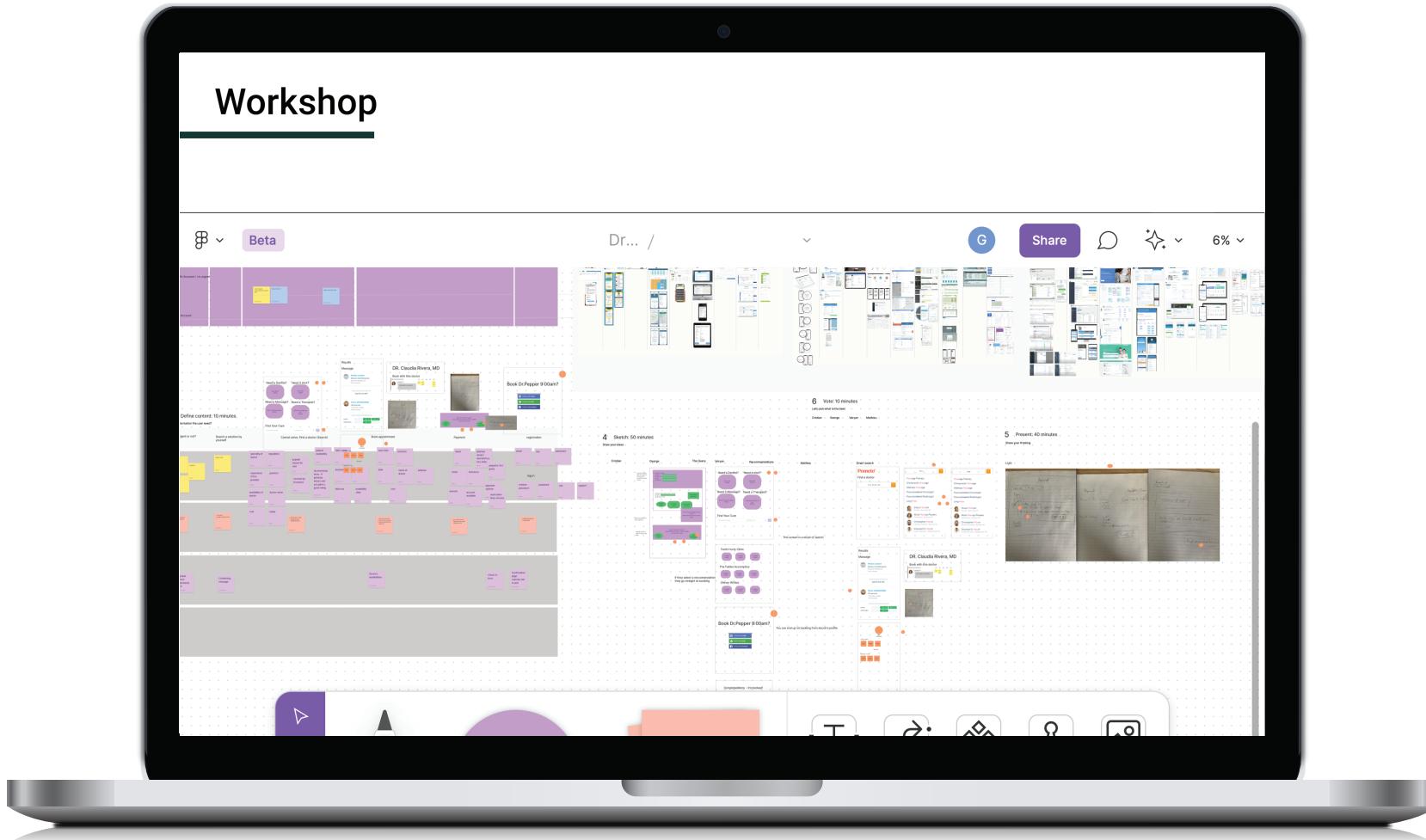
HAPPINESS	Satisfaction, likelihood of recommendation	User surveys
ENGAGEMENT	How much a user is using your product	Analytics
ADOPTION	The % of users that adopt your product after signing up/onboarding	Analytics
RETENTION	How many users stick around	Analytics
TASK SUCCESS	Time to task completion, error rates	User tests

Below this table is a larger table titled "Metrics" with columns for "Metrics", "What", "Why", "KPI", and "Notes". The data is organized by category:

Metrics	What	Why	KPI	Notes
Acquisition	Button promotion	We want to understand how many people are engaging with the button	More than 50 clicks a day	
Acquisition	Download App	Understand how the user discovers the Pomelo App Via Pomelo Link (Direct) Via other sources: Search: (what keywords) Other websites	At least 30 downloads per day on Phase 1	
Acquisition	Clinic Selection	Understand which clinics are getting selected	High traffic clinics should have at least 10 selections per day	(People that click on a dot/ People visiting the homepage) - people using the search bar

How

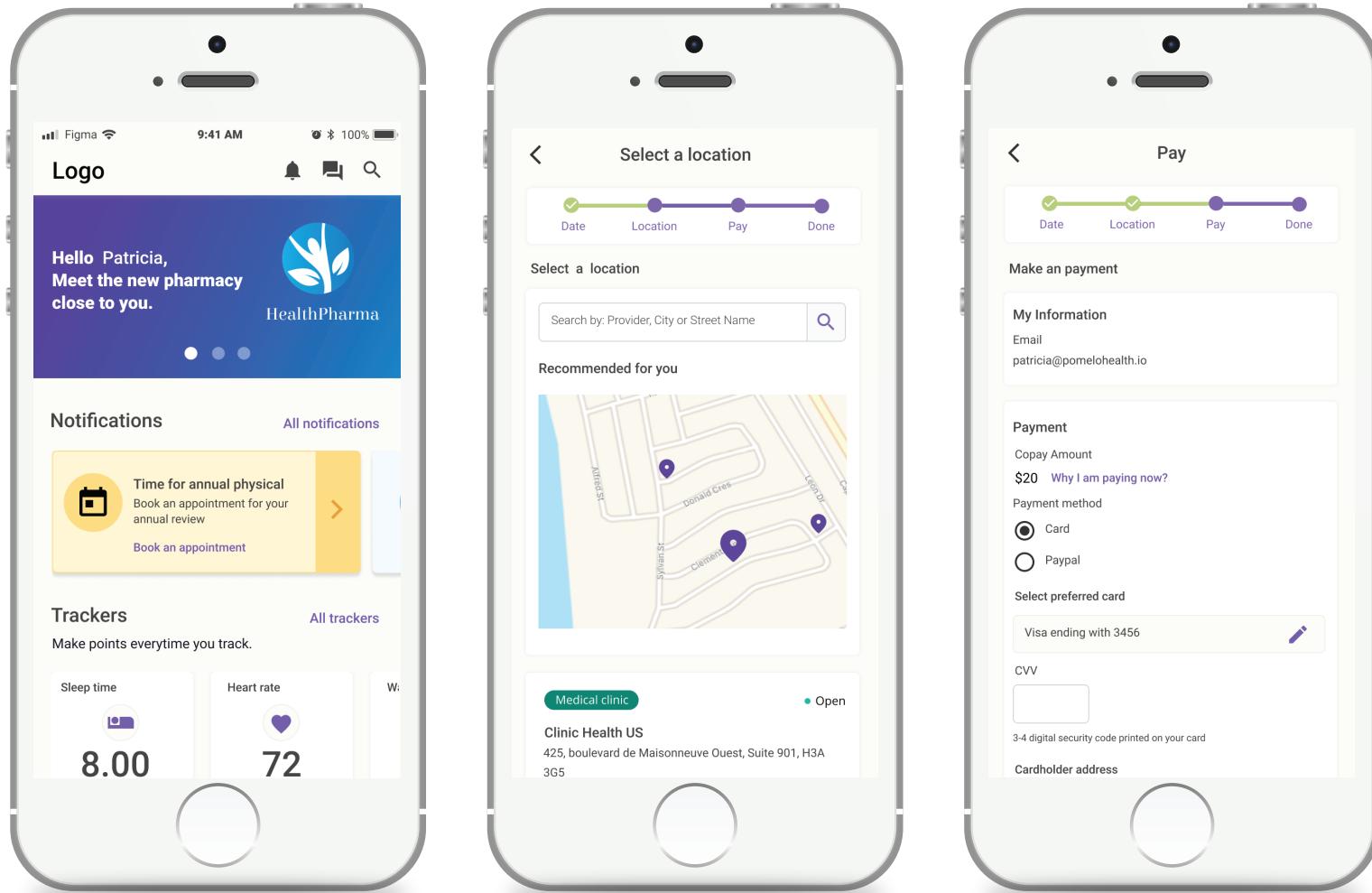
With the leadership team, we had some brainstorm sessions to understand what we expected as the first version.



Solution

I created the first prototype of how the experience could look like. This solution was part of the pitch deck for investors. The company was acquired by TelusHealth shortly after, so we didn't finish implementing this proposal.

You can visit the prototype on this link: <https://tinyurl.com/pomelohealth>



Project

Infrastructure Provider



About



200 fortune 500

4,300+ Customers

Worldwide

HashiCorp helps organizations automate multi-cloud and hybrid environments with Infrastructure Lifecycle Management and Security Lifecycle Management.

Who

Platform Admin

Why

Pearson works with clients as a consultant to architect, implement, and run multi-cloud/region solutions for their clients. Pearson constantly examines the entire software development lifecycle from source to production. From this introspective process, he builds a workflow that enables application developers to rapidly code and ship software.

How

Once the personas were ready, we wanted to think what the experience of HCP (HashiCorp Cloud Platform) would look like. For that, we did a couple of meetings and workshops with the goal to understand where we were coming from, the company strategy and align on an ideal experience for HCP users.

Once the ideation was done, we shared with the Leadership team, who provided us with very insightful feedback. Based on that feedback, we updated the flow and created a deck with the key ideas to share with the different departments in the company and make sure we were all aligned.

During these meetings, we appreciated how the audience was engaged and excited. We received positive feedback and ideas on how we could continue iterating.

Team

Product Manager

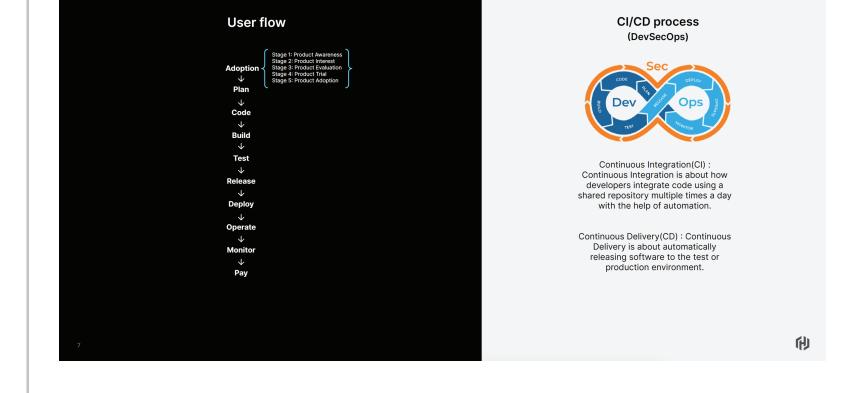
Senior Product Design Manager (me)

Product Designers

Service Designers

Developers

HCP User's flow, process



CI/CD Process

How

For this project, we leverage the information we had about the personas using the HashiCorp stack.

Pearson Platform Engineer (Contractor)

Infra Engineer / DevOps Engineer

About

Pearson works with clients as a consultant or contractor to architect, implement, and run multi-cloud/region solutions for their clients. Pearson will work with the client to architect their approach, build a POC and then partner with their Developers, DevOps, Security and Network teams to enact it. They will need to teach those teams about microservices. And, they'll need particular help managing security key values and secrets storage. They constantly examine the entire software development lifecycle from source to production. From this introspective process, they build a workflow that enables application developers to rapidly code and ship software. Key focus:

- Visibility and governance
- Delivering services quickly and reliably
- Operating consistently across clouds

Pearson needs a way to help the Networking and Security teams understand what a service mesh and design a service mesh solution that will help them put workloads anywhere, across regions, cloud providers and with the private cloud used by their client. All their work and infrastructure usage needs to be coordinated, but some of the resources - like the secrets with customer financial information - should be stored separately in an Onprem environment. Pearson needs to map out a solution for Key Values and Secrets storage for her clients. Pearson will start with managing them and will then hand that over before they leave the client. Their client will not have a lot of SREs to support their infrastructure once she leaves.

Pain points

For Pearson, monitoring phase is really important for them, because they need to make sure the systems are operating properly. If they customers aren't having like latencies that are affecting their workflow. Having an outage of one of major components would be a terrible day, because those components are what hosts the application. If one or two components such as get out of memory or high CPU usage, then that would affect the entire platform and they have to have it fixed as soon as possible. Being able to monitor, so the components don't get into that state where they have to be like firefighting and solving these issues when the worst case scenario is happening. Other challenges:

- Building trust w/ internal teams
- Explaining workflow changes as improvements
- Building expertise
- Creating an approach that doesn't require a lot of client roles
- Lacks permanent access to client tools
- Needs to balance needs of client teams and/or clients

Accessibility

As a user who oversees lots of data, Pearson wants media presented in small chunks of understandable content, so that they can understand the main points and not lose focus.

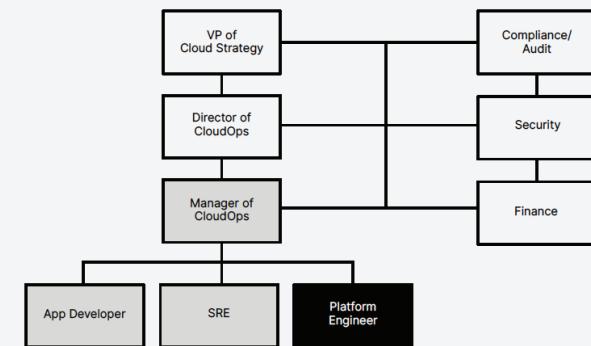
HashiCorp tools



Other tools

Google Drive	Ansible
Jira	Test Kitchen
Confluence	Jenkins
Packer	Concourse
Git	AWS
Chef	DataDog

Interact with



How

For this project, we leverage the information we had about the personas using the HashiCorp stack.

Pearson Platform Engineer

Main Tasks and HashiCorp

Plan

Pearson will start by writing down what they plan to actually do for our work and kind of hypothesize what is going to be the challenges they have, etc. They have a lot of input from other people on the team to make sure that plan actually seems feasible. It will work within the guidelines of what they need to do.

Build

Tool: Packer

Test

After compilation, Automated Unit and UI testing are performed. Once testing is performed and after approval, the software is sent to production.

Release

Pearson release the images into their environments. And then there's that deploy phase where they are actually releasing the application into the environments, so those images would go into a cloud provider.

Deploy

The software is deployed and monitored for further enhancements. The step to deploy has been written by the depth productivity team, and it builds on top of the work the infrastructure team has done to bring up.

Tool: Terraform

Operate

That's where Pearson gets service discovery, and they are able to do a lot of Nomad also would be at the operation level. So that's where, the application code is running.

Tool: Consul, Vault, Nomad

Monitor

Once Pearson releases the images, then from there they use Datadog to monitor.

Pay

Based of the platform, databases cost a lot of money, infrastructure costs a lot of money, so Pearson team does work with finance, a lot to solve a lot of the issues that we have with overrun costs.

CI/CD Flow

Adoption



Plan



Code



Build



Test



Release



Deploy



Operate



Monitor



Pay

How

We also interviewed participants to understand their pain points and identify opportunities.

Methodology

Interviews

The interviews happened between December 2021 and February 2022. The interviews were recorded via Zoom during 1 hour session.

The participants were recruited based on their experience with HCP. The participants also replied to a short questionnaire and the consent form.

Questions:

- Where are you located?
- Which products from HashiCorp do you use?
- For how long have you been using the HashiCorp Platform?



9 Participants

In total, 9 participants joined the interview. The roles of respondents were as follow:

- Senior Developer
- Sr DevOps and Cloud Infra Lead
- DevOps Engineer
- Cloud Architect
- Sr Platforms Engineer
- Software Engineer and Infra Architect
- Cloud Solution Architect
- Executive Director / Lead DevOps engineer
- Solution Architect

How

Based on research and business goals, we identified that enabling the platform to support “better together experiences” was key in this process.

FY25 Company Annual Plan

We will shift our products into an integrated platform that provides a seamless experience across products, focused on the user workflows and the outcomes that users are trying to achieve.

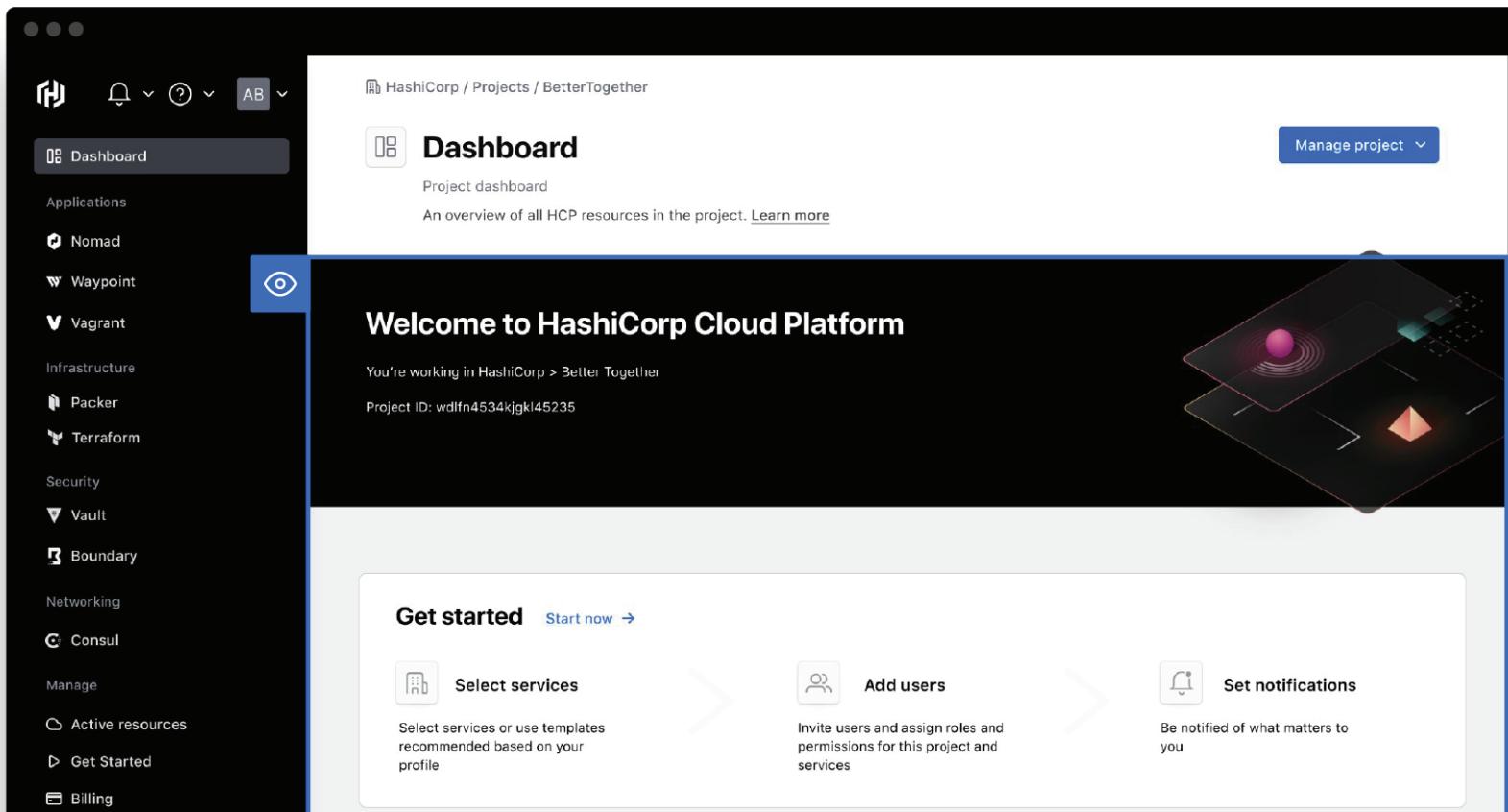
We want to deliver a multi-product experience that feels tightly integrated, without burdening the user with the integration work.

Solution

One of the main changes should be to support the onboarding experience better, by understanding the user needs and guiding them through the “get started” guide.

Once onboard is finished

Pearson lands on the Dashboard. As a first time experience, Pearson can see how to get started



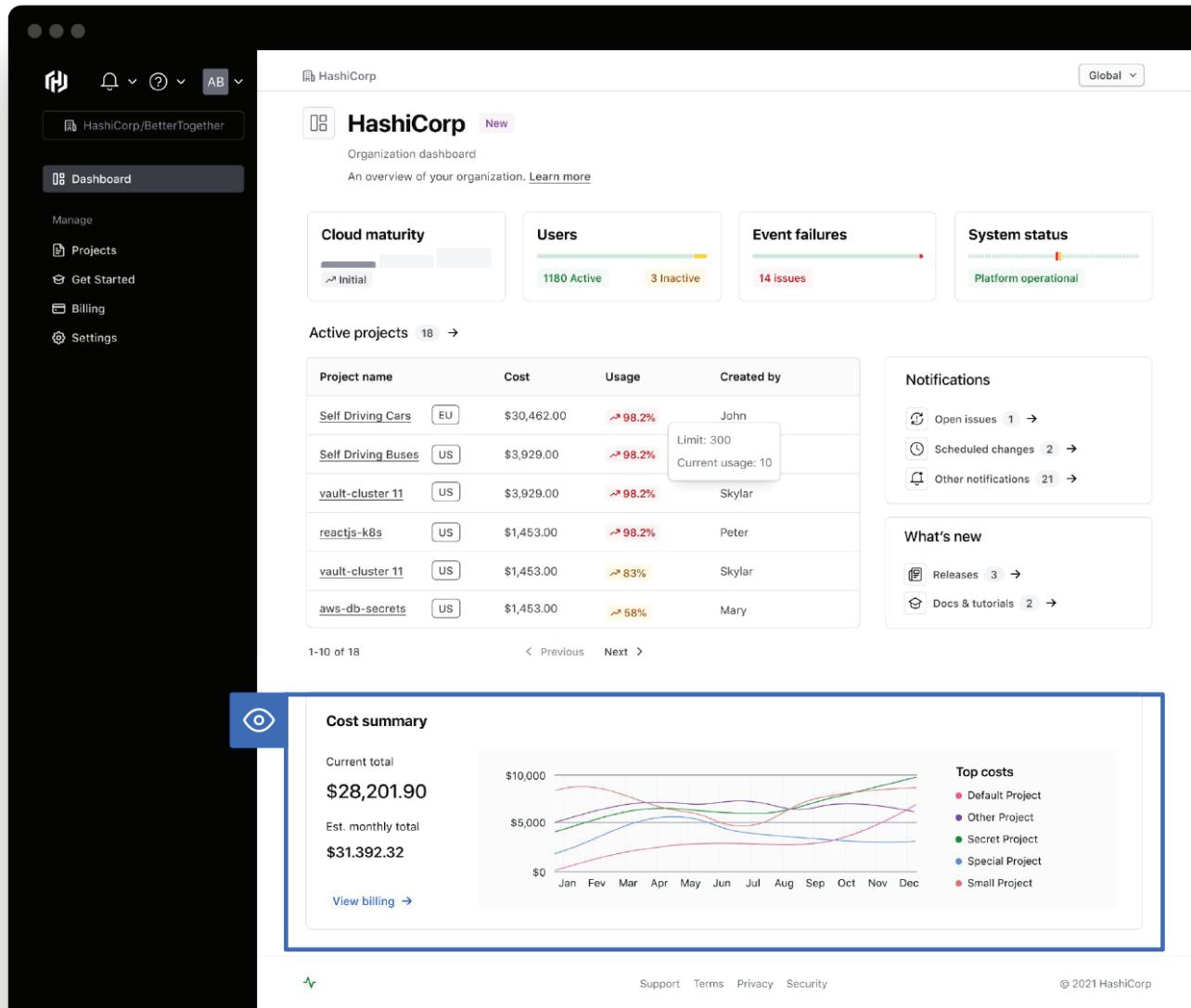
The screenshot shows the HashiCorp Cloud Platform dashboard for the project "BetterTogether". The left sidebar lists various services: Applications (Nomad, Waypoint, Vagrant), Infrastructure (Packer, Terraform), Security (Vault), Networking (Boundary), Consul, Manage, Active resources, Get Started, and Billing. The main dashboard area has a dark header with the HashiCorp logo and "Manage project" dropdown. Below the header, it says "Project dashboard" and "An overview of all HCP resources in the project. [Learn more](#)". A large central box is titled "Welcome to HashiCorp Cloud Platform" with sub-titles "You're working in HashiCorp > Better Together" and "Project ID: wd1fn4534kjgkl45235". To the right is a 3D rendering of a network node with glowing pink and blue lights. At the bottom, there's a "Get started" button with "Start now →" and three cards: "Select services" (with a brief description), "Add users" (with a brief description), and "Set notifications" (with a brief description).

Solution

Another area of improvement should be displaying key information to the user when looking at the Dashboard, specially related to Cost and Usage.

Organization level view

Person can also see the cost summary and understand the projects that are costing most



The screenshot displays the HashiCorp Organization dashboard. At the top, there's a header with the HashiCorp logo, a search bar, and a dropdown menu labeled "Global". Below the header, the dashboard is divided into several sections:

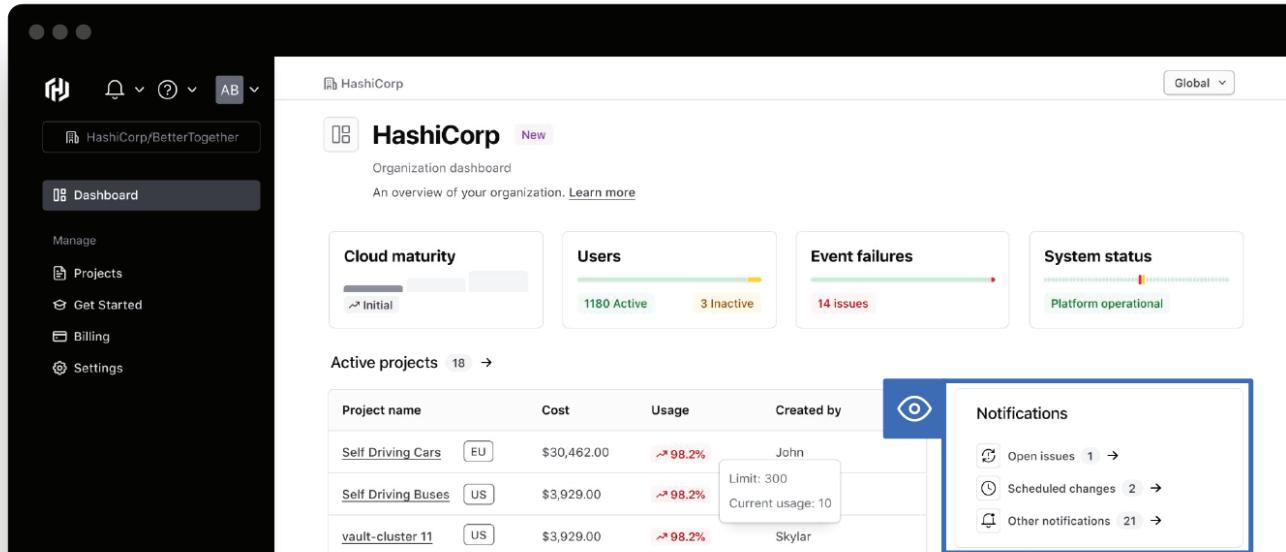
- Cloud maturity:** Shows a progress bar from "Initial" to "Advanced".
- Users:** Shows 1180 Active users and 3 Inactive users.
- Event failures:** Shows 14 issues.
- System status:** Shows "Platform operational".
- Active projects:** A table listing 18 projects with columns for Project name, Cost, Usage, and Created by. One row for "Self Driving Cars" is highlighted, showing usage at 98.2% against a limit of 300, with current usage at 10.
- Notifications:** A section listing Open issues (1), Scheduled changes (2), and Other notifications (21).
- What's new:** A section listing Releases (3) and Docs & tutorials (2).
- Cost summary:** A callout box showing the Current total (\$28,201.90) and Est. monthly total (\$31,392.32). It includes a line chart showing monthly costs for various projects over the last year, with a legend for "Default Project", "Other Project", "Secret Project", "Special Project", and "Small Project".

Solution

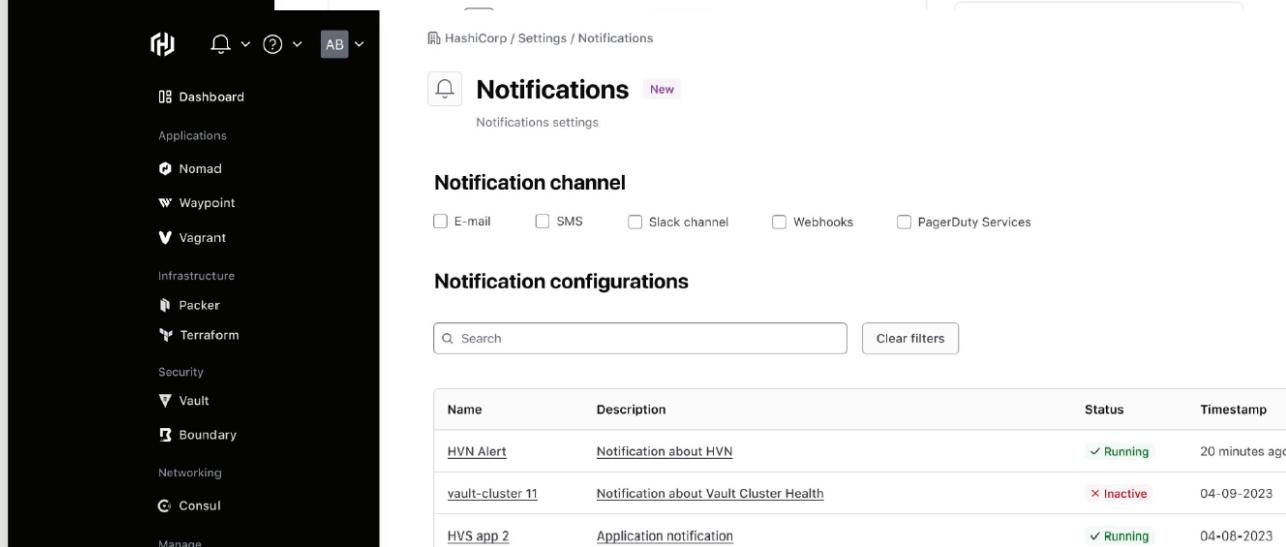
A critical area as well is to support Notifications. Users would like to be notified specially when something goes wrong. For them being able to configure their notification preferences is also key, so they can be very specific about what would trigger a notification to be sent.

Notifications

In the Notifications area and its settings, Pearson can manage their notification preferences



The screenshot shows the HashiCorp Better Together interface. On the left, there's a dark sidebar with navigation links: Dashboard, Manage (Projects, Get Started, Billing, Settings), Applications (Nomad, Waypoint, Vagrant), Infrastructure (Packer, Terraform), Security (Vault, Boundary), Networking (Consul), and Manage. The main area is the HashiCorp Organization dashboard, which includes sections for Cloud maturity, Users (1180 Active, 3 Inactive), Event failures (14 issues), and System status (Platform operational). A blue box highlights the Notifications section, which contains links for Open issues (1), Scheduled changes (2), and Other notifications (21).



The screenshot shows the HashiCorp / Settings / Notifications page. It has two main sections: 'Notification channel' (with checkboxes for E-mail, SMS, Slack channel, Webhooks, and PagerDuty Services) and 'Notification configurations'. The 'Notification configurations' section includes a search bar, a 'Clear filters' button, and a table with columns for Name, Description, Status, and Timestamp. The table contains three rows: HVN Alert (Notification about HVN, Running, 20 minutes ago), vault-cluster 11 (Notification about Vault Cluster Health, Inactive, 04-09-2023), and HVS app 2 (Application notification, Running, 04-08-2023).

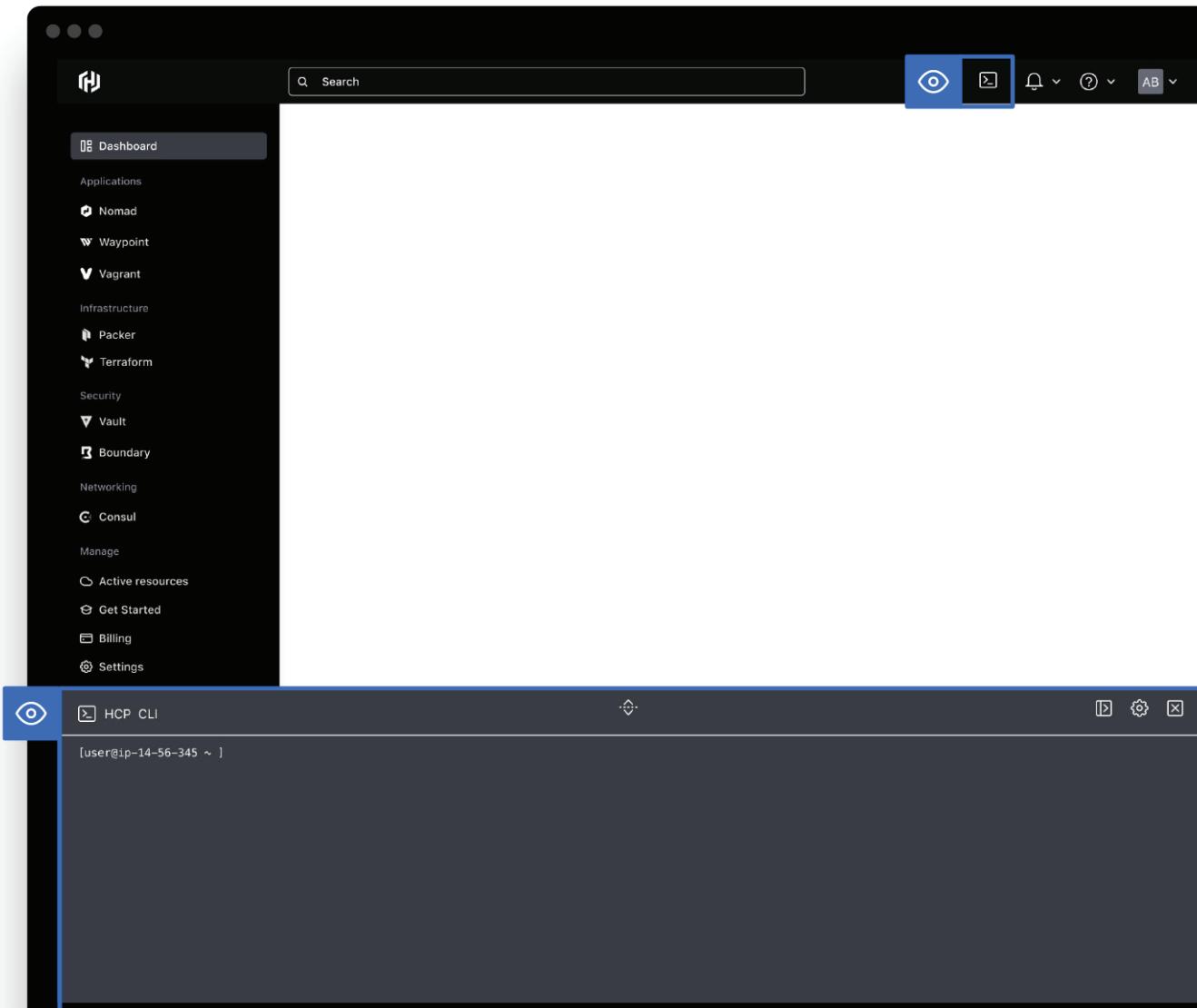
Solution

During research, we learned that even though users appreciate having an UI, many of them still prefer to leverage CLI, so the Platform should take into account those use cases.

HCP CLI

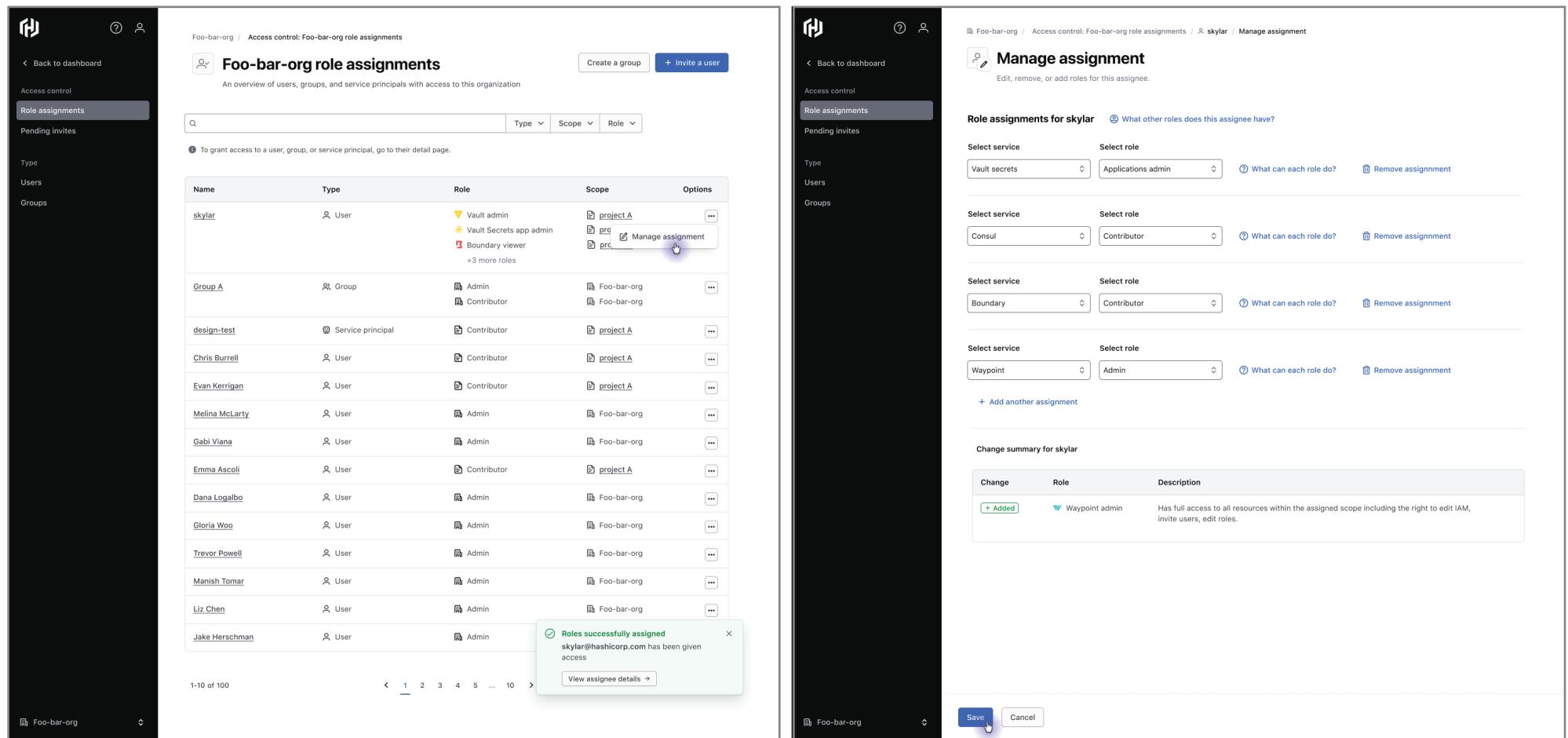
The HCP Command Line Interface (HCP CLI) is a unified tool to manage HCP services.

With just one tool to download and configure, Pearson can control multiple HCP Resources from the command line and automate them through scripts.



Other projects: RBAC (Fine Grained Roles)

HCP has the following roles: Owner/Admin, Contributor, and Viewer that exist at project and org levels. Viewers are allowed to view but not modify, Contributors can take all actions except user management such as inviting users and assigning them roles and modifying billing. This final capability is granted solely to Admins. The permissions granted by each of these roles is quite broad and is not service specific. This proposal allows platform and product line service teams to define their own roles outside of the platform's coarse-grained roles based on their own particular user personas. This helps limit a given user's permissions to least privilege.



The image displays two screenshots of the HashiCorp Cloud Platform (HCP) interface, illustrating the RBAC (Role-Based Access Control) feature.

Left Screenshot: Foo-bar-org role assignments

- Header:** Foo-bar-org / Access control: Foo-bar-org role assignments
- Left sidebar:** Back to dashboard, Access control, Role assignments (selected), Pending invites, Type, Users, Groups.
- Content:** A table titled "Foo-bar-org role assignments" showing users, groups, and service principals with access to the organization. Columns include Name, Type, Role, Scope, and Options. A tooltip indicates "To grant access to a user, group, or service principal, go to their detail page."
- Details for skylar:** Shows skylar as a User with roles: Vault admin, Vault Secrets app admin, Boundary viewer, and project A. The "Manage assignment" button is highlighted with a cursor.
- Bottom:** A success message: "Roles successfully assigned" and "skylar@hashicorp.com has been given access".
- Footer:** 1-10 of 100, navigation icons.

Right Screenshot: Manage assignment for skylar

- Header:** Foo-bar-org / Access control: Foo-bar-org role assignments / skylar / Manage assignment
- Left sidebar:** Back to dashboard, Access control, Role assignments (selected), Pending invites, Type, Users, Groups.
- Content:** "Manage assignment" interface for skylar. It shows role assignments across different services:
 - Vault secrets:** Applications admin (Contributor role)
 - Consul:** Contributor
 - Boundary:** Contributor
 - Waypoint:** Admin
- Buttons:** "Save" and "Cancel".
- Bottom:** "Change summary for skylar" table showing the added Waypoint admin role with the description: "Has full access to all resources within the assigned scope including the right to edit IAM, invite users, edit roles."

Thank you. I'm looking forward to hearing from you.

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