

Gabriela Viana

Hello.Welcome to my portfolio.

On the following pages, I'll guide you through some of the projects that I'm particularly proud of

I hope you enjoy the journey!

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About me

- Over 20 years of experience leading teams and acting as an individual contributor
- Current position: Senior Manager, Product Design 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's Degree 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)

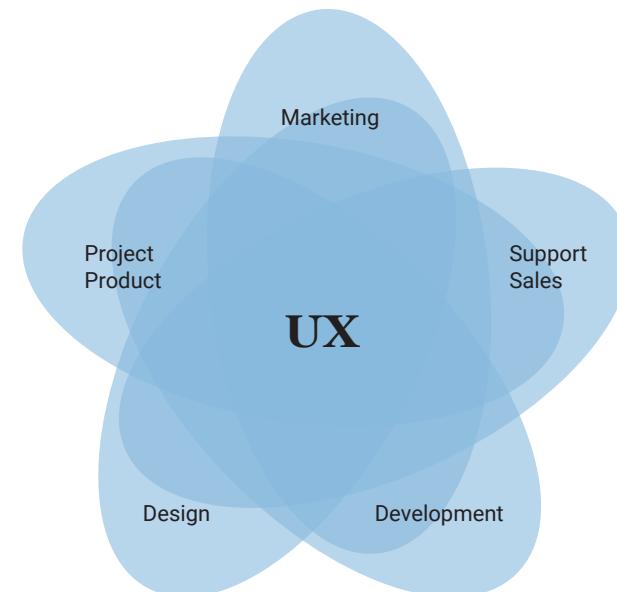
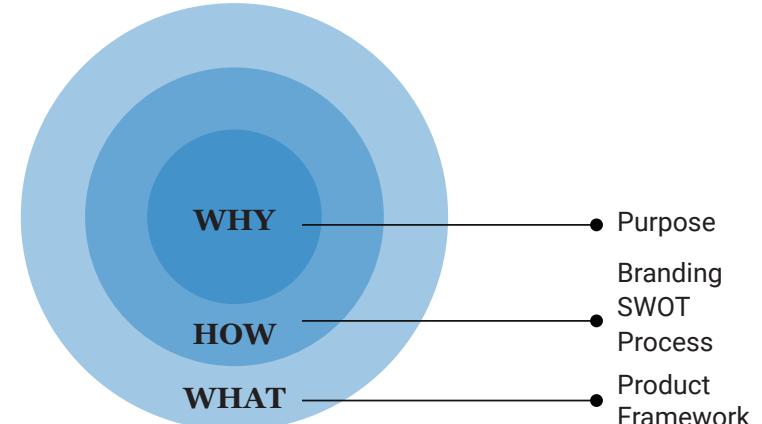
Who are they? (Verticals, Personas)

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:

- Establishing 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;
- Providing career, leadership development, coaching and guidance through recurring team and one-on-one check-ins;
- Managing, mentoring, motivating, leading and inspiring the team to constantly deliver excellence in performance;
- Building the capability of designers across the design team by providing open and candid feedback, direction, and coaching;
- Aiding in the sourcing, recruiting, hiring and retaining of high performing talent

The image shows a tablet displaying a Confluence page for the 'UX Team' space. The page has a sidebar on the left with links for 'Pages', 'Blog', 'Space Shortcuts', and 'Page Tree'. The main content area includes a 'Welcome!' section with a message from Gabriela Viana, a 'The team' section showing four team members (Global UX Lead, Senior UX Designer Security, Global UX Researcher, Senior UX Designer OSS and Agreement Automation) with their profile pictures and names, a 'Process' section with a note about UX relating to the department, and a 'UX Calendar' section showing a monthly calendar.

Project

DevSecOps



About



200 fortune 500

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

4,300+ Customers

Worldwide

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

Persona Development: I started by creating personas, which are fictional characters representing your ideal users.

Meetings and Workshops: I conducted meetings and workshops to gain insights into the company's strategy and to align on the desired experience for HCP users.

Ideation and Feedback: After brainstorming ideas, I shared them with the Leadership team and received valuable feedback. This feedback helped refine your ideas and update the user flow accordingly.

Creating a Presentation Deck: I synthesized the key ideas into a presentation deck. This deck was used to communicate the vision and gather alignment across different departments within the company.

Engagement and Iteration: During presentations to various departments, I noticed that the audience was engaged and excited. This engagement led to positive feedback and additional ideas for further iteration.

Team

Product Manager

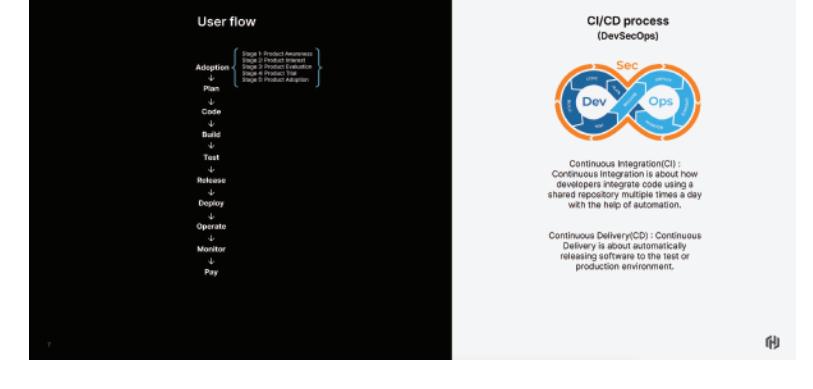
Senior Manager of Product Design (me)

Product Designers

Service Designers

Developers

HCP User's flow, process



CI/CD Process

How

For this project, I 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 their 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.

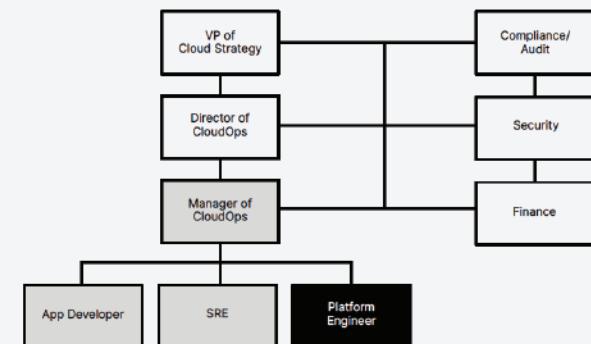
HashiCorp tools



Other tools

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

Interact with



How

For this project, I 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

I also interviewed HCP 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, I 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.

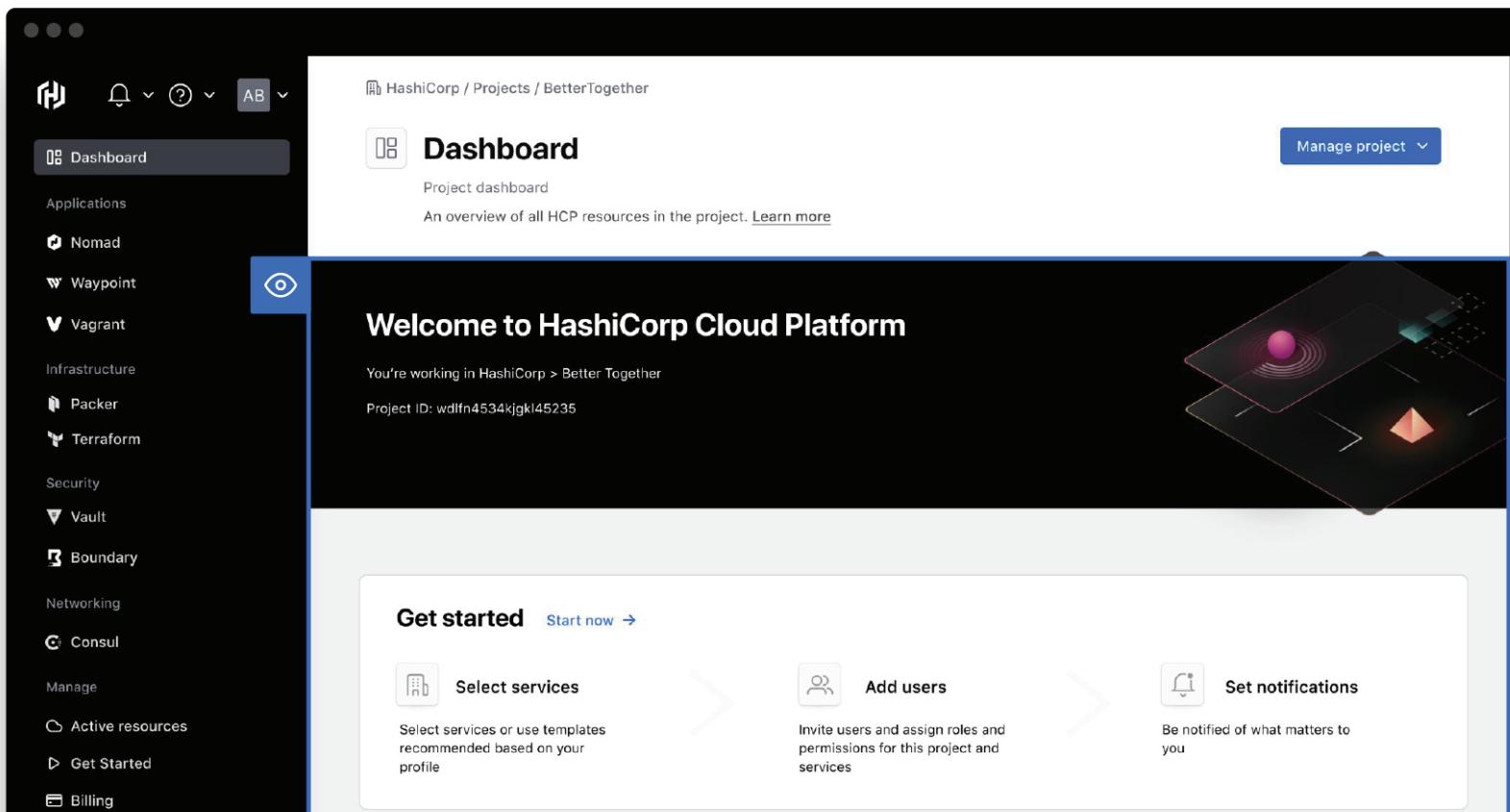
We want to deliver a multi-product experience that feels tightly integrated, without burdening the user with the integration work.

Solution

One significant improvement should focus on enhancing the onboarding experience. This entails gaining a deeper understanding of user needs and providing clear guidance 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

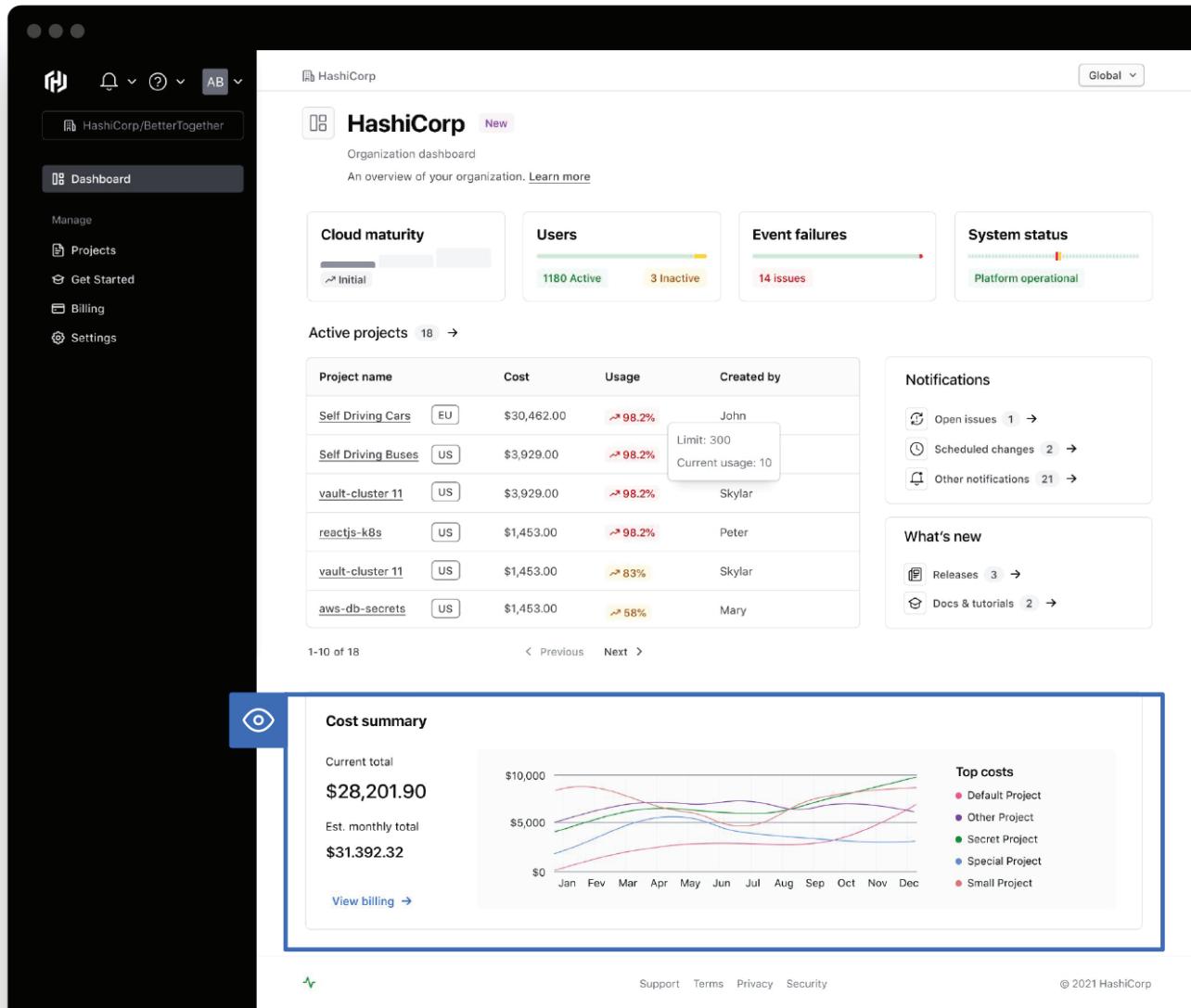


Solution

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



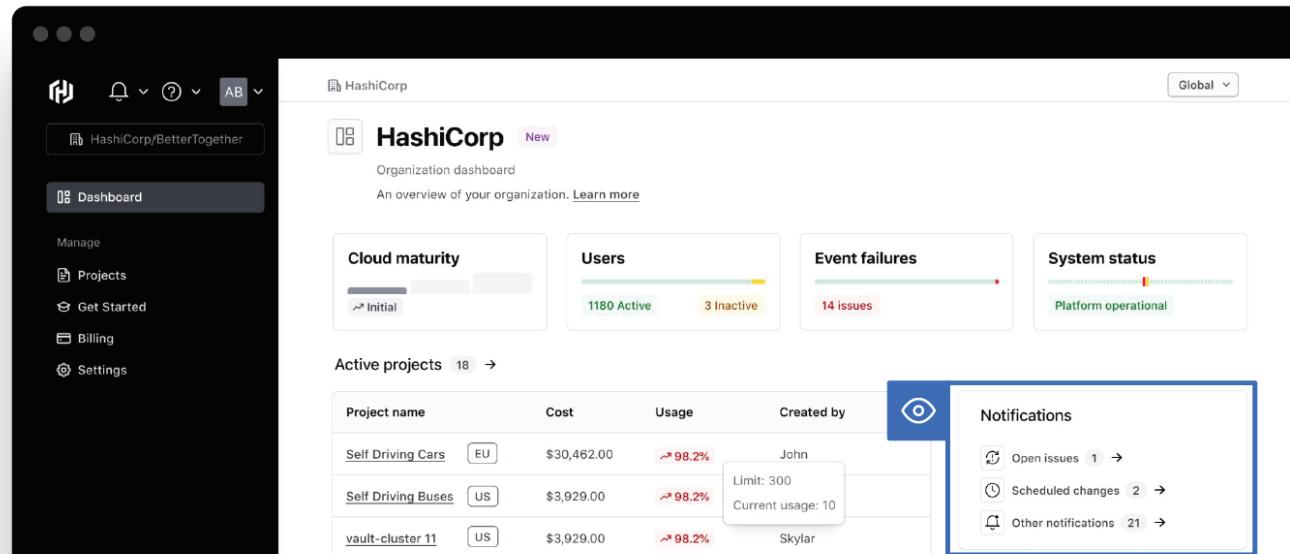
The screenshot displays the HashiCorp BetterTogether organization dashboard. At the top, there's a navigation bar with icons for notifications, help, and account settings. Below it is a secondary navigation bar with links for 'Dashboard', 'Projects', 'Get Started', 'Billing', and 'Settings'. The main content area is titled 'HashiCorp' and 'Organization dashboard', with a sub-section 'Cloud maturity' showing a progress bar from 'Initial' to 'Advanced'. It also shows 'Users' (1180 Active, 3 Inactive) and 'Event failures' (14 issues). A section for 'Active projects' lists 18 items, each with a project name, cost, usage percentage (e.g., 98.2%), and creator. A tooltip for a row about 'Self Driving Buses' indicates a usage limit of 300 and current usage of 10. The bottom section, highlighted with a blue border, is titled 'Cost summary' and shows a chart of monthly costs from January to December. It highlights the 'Default Project' (red line) as the top cost. Other projects shown include 'Other Project' (purple), 'Secret Project' (green), 'Special Project' (blue), and 'Small Project' (pink).

Solution

Another crucial area to address is Notifications. Users value timely alerts, especially when issues arise. It's essential to empower them to configure their notification preferences precisely, ensuring they receive notifications based on specific triggers.

Notifications

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



The screenshot shows two views of the HashiCorp BetterTogether application. The top view is the Organization dashboard, which includes sections for Cloud maturity, Users, Event failures, and System status. The bottom view is the Notifications settings page, which includes a Notification channel section (with options for E-mail, SMS, Slack channel, Webhooks, and PagerDuty Services) and a Notification configurations section (listing existing notifications like HVN Alert, vault-cluster 11, and HVS app 2). The Notifications section is highlighted with a blue border.

Name	Description	Status	Timestamp
HVN Alert	Notification about HVN	✓ Running	20 minutes ago
vault-cluster 11	Notification about Vault Cluster Health	✗ Inactive	04-09-2023
HVS app 2	Application notification	✓ Running	04-08-2023

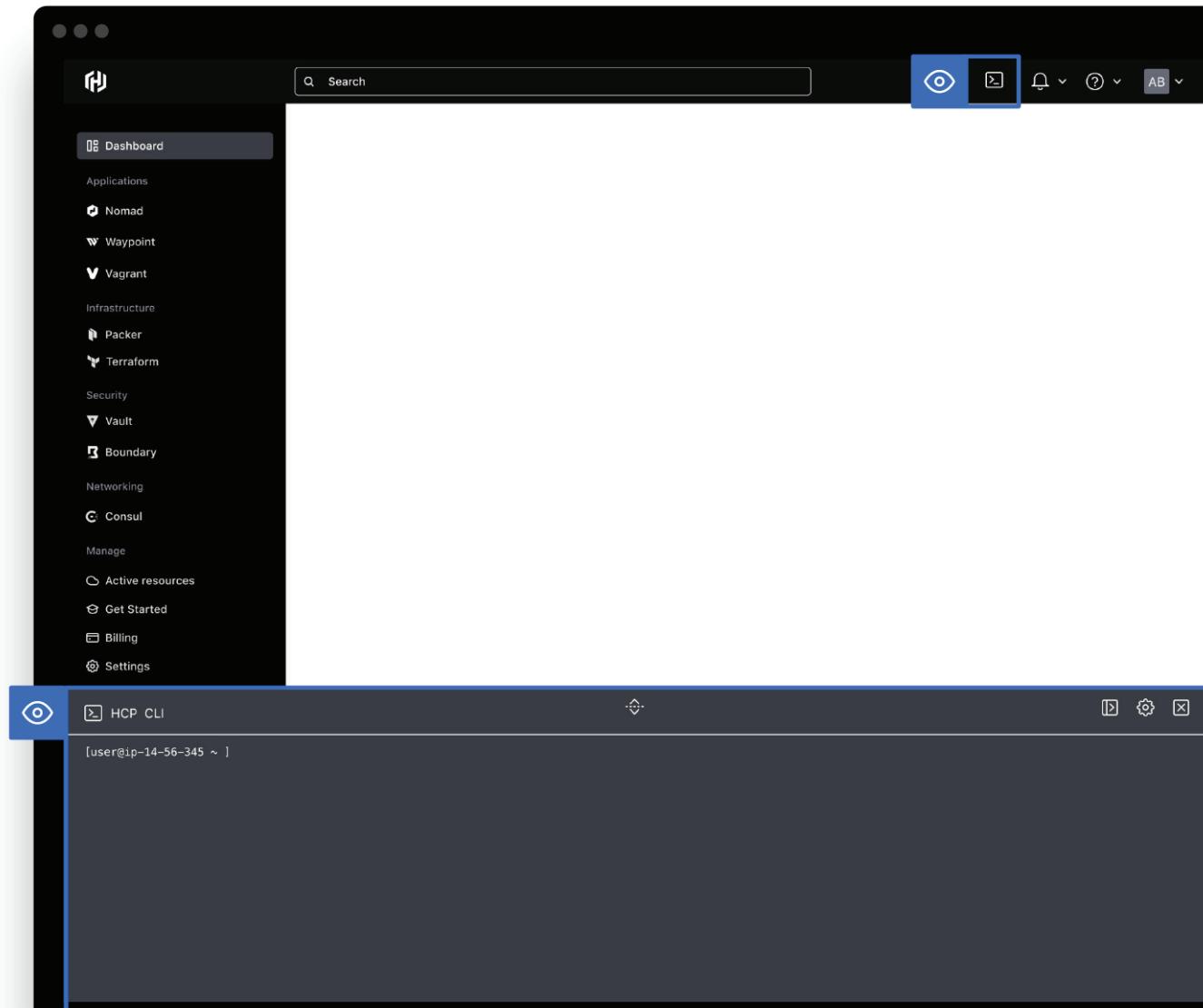
Solution

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

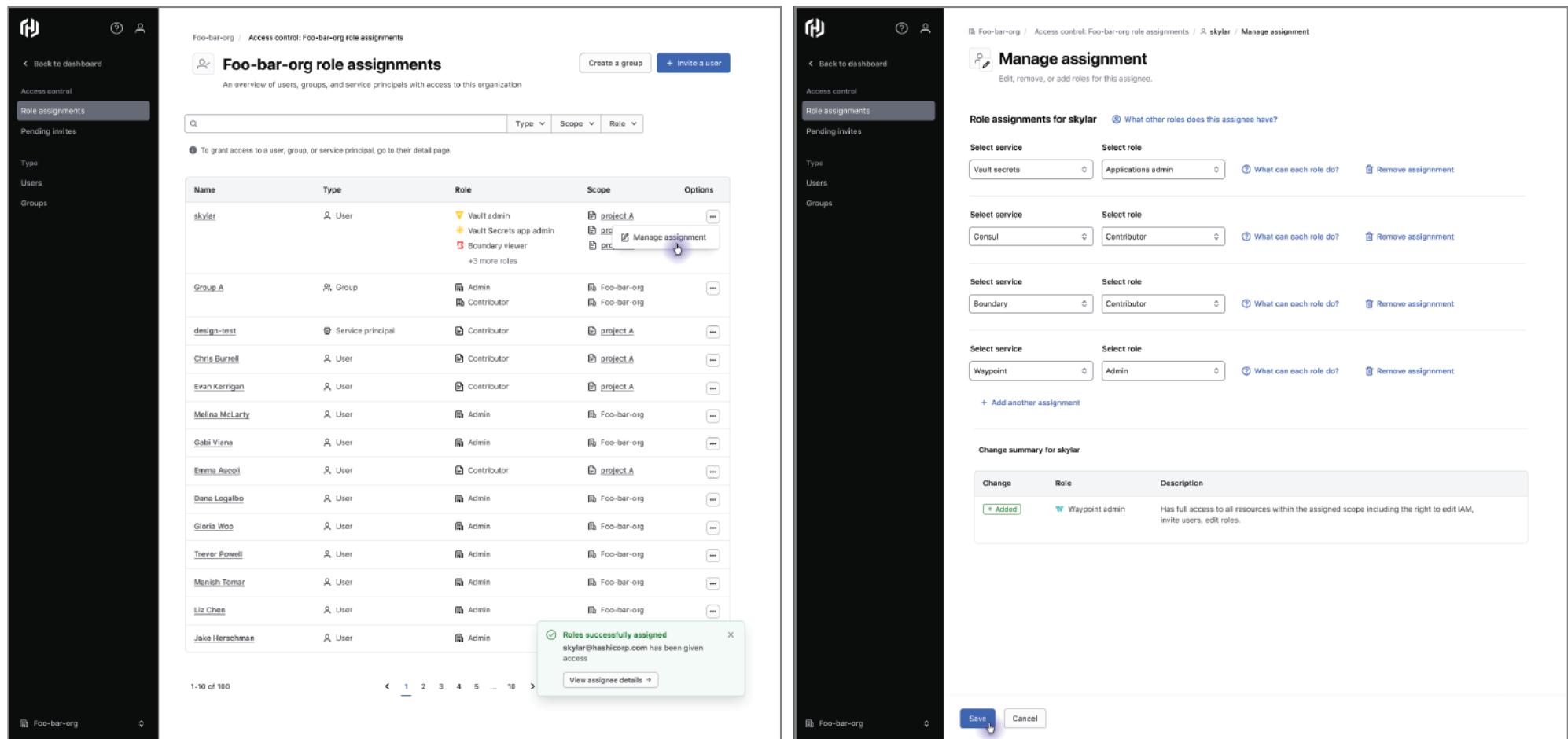
The HCP Command Line Interface (HCP CLI) is a unified tool to manage HCP services.

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, specifically focusing on Access Control and Role Assignments.

Screenshot 1: Foo-bar-org role assignments

This screenshot shows the list of role assignments for the organization "Foo-bar-org". The table includes columns for Name, Type, Role, Scope, and Options. A modal window is open for the user "skylar", showing assigned roles like "Vault admin" and "Boundary viewer", and options to "Manage assignment". A success message at the bottom right indicates "Roles successfully assigned".

Name	Type	Role	Scope	Options
skylar	User	Vault admin Vault Secrets app admin Boundary viewer +3 more roles	project_A prc prc	Manage assignment
Group_A	Group	Admin Contributor	Foo-bar-org Foo-bar-org	
design-test	Service principal	Contributor	project_A	
Chris Burrell	User	Contributor	project_A	
Evan Kerrigan	User	Contributor	project_A	
Melina McLarry	User	Admin	Foo-bar-org	
Gabi Viana	User	Admin	Foo-bar-org	
Emma Ascot	User	Contributor	project_A	
Dana Legalbo	User	Admin	Foo-bar-org	
Gloria Woe	User	Admin	Foo-bar-org	
Trevor Powell	User	Admin	Foo-bar-org	
Manish Tomar	User	Admin	Foo-bar-org	
Liz Chen	User	Admin	Foo-bar-org	
Jake Herschman	User	Admin		

Screenshot 2: Manage assignment for skylar

This screenshot shows the "Manage assignment" page for the user "skylar". It lists multiple role assignments across different services and scopes. For each assignment, it shows the service, role, and a "What can each role do?" link. A summary for "skylar" indicates they have "Waypoint admin" assigned, which "Has full access to all resources within the assigned scope including the right to edit IAM, invite users, edit roles." Buttons for "Save" and "Cancel" are at the bottom.

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

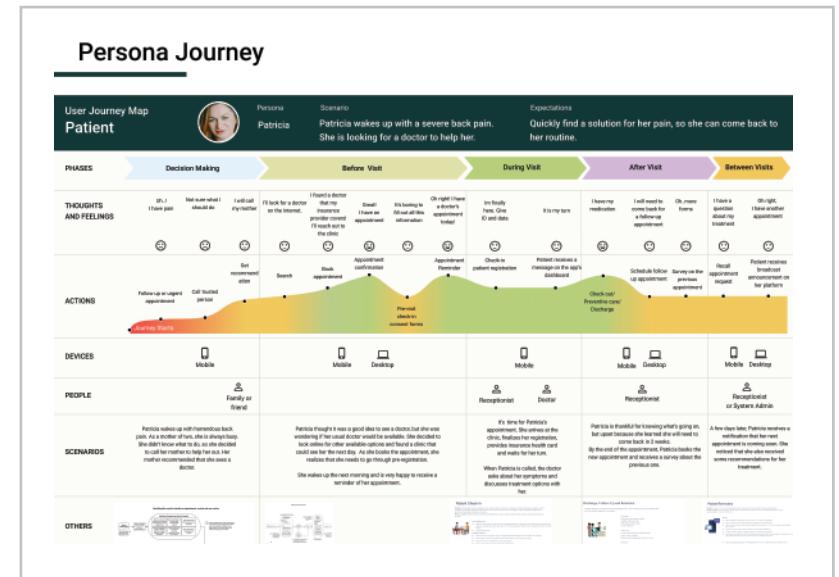
Scrum Master

Director of Product Design (me)

Product Designer

Accessibility Expert

Developers



Patient Journey

How

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

The image shows a tablet device. On its screen, there is a white slide titled "Vision". The slide contains the following text:

Develop a Patient-Centric Healthcare Platform to manage patient's health built upon key strategic markets within 5 years.

Below the text is a small illustration of a person interacting with a computer monitor, which displays a purple document or interface.

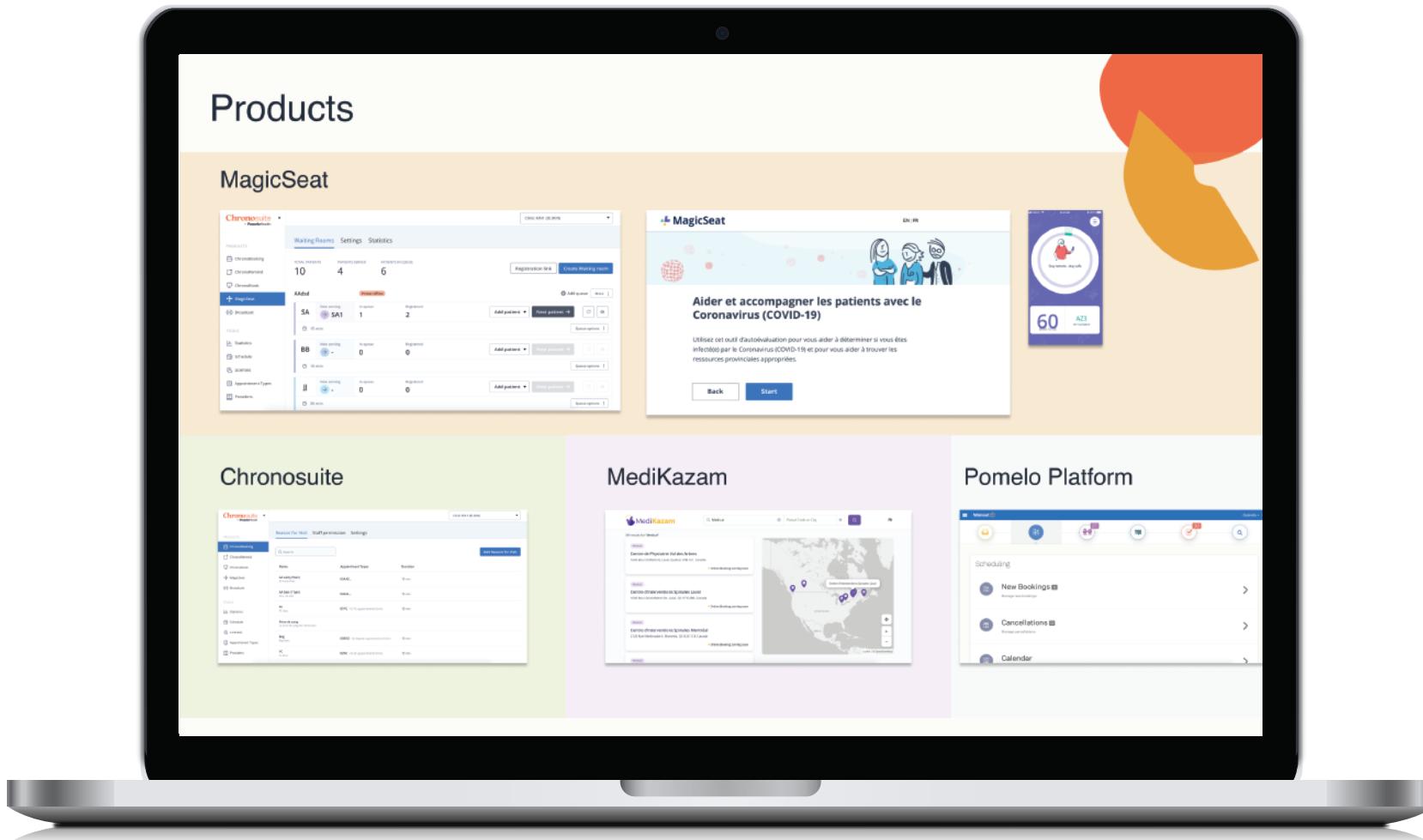
To the right of the slide, there is a dark green sidebar containing the following text:

Connect the patient with primary and secondary providers (doctors, nurses, caregivers...) via a unique and powerful platform, driven by a federative and accessible engine (APIv3).

At the bottom right of the tablet screen, there is a small illustration of a person holding a smartphone.

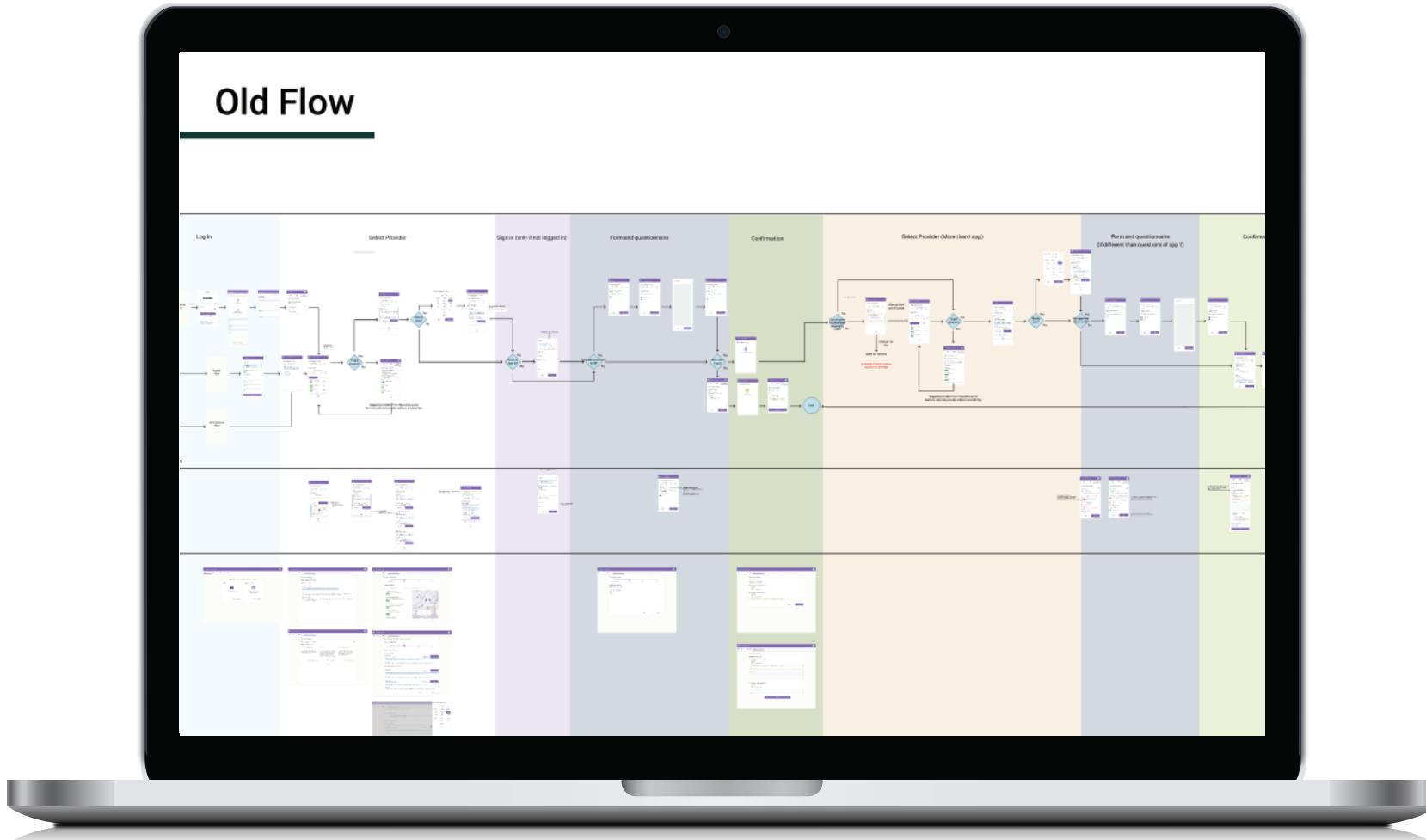
How

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.



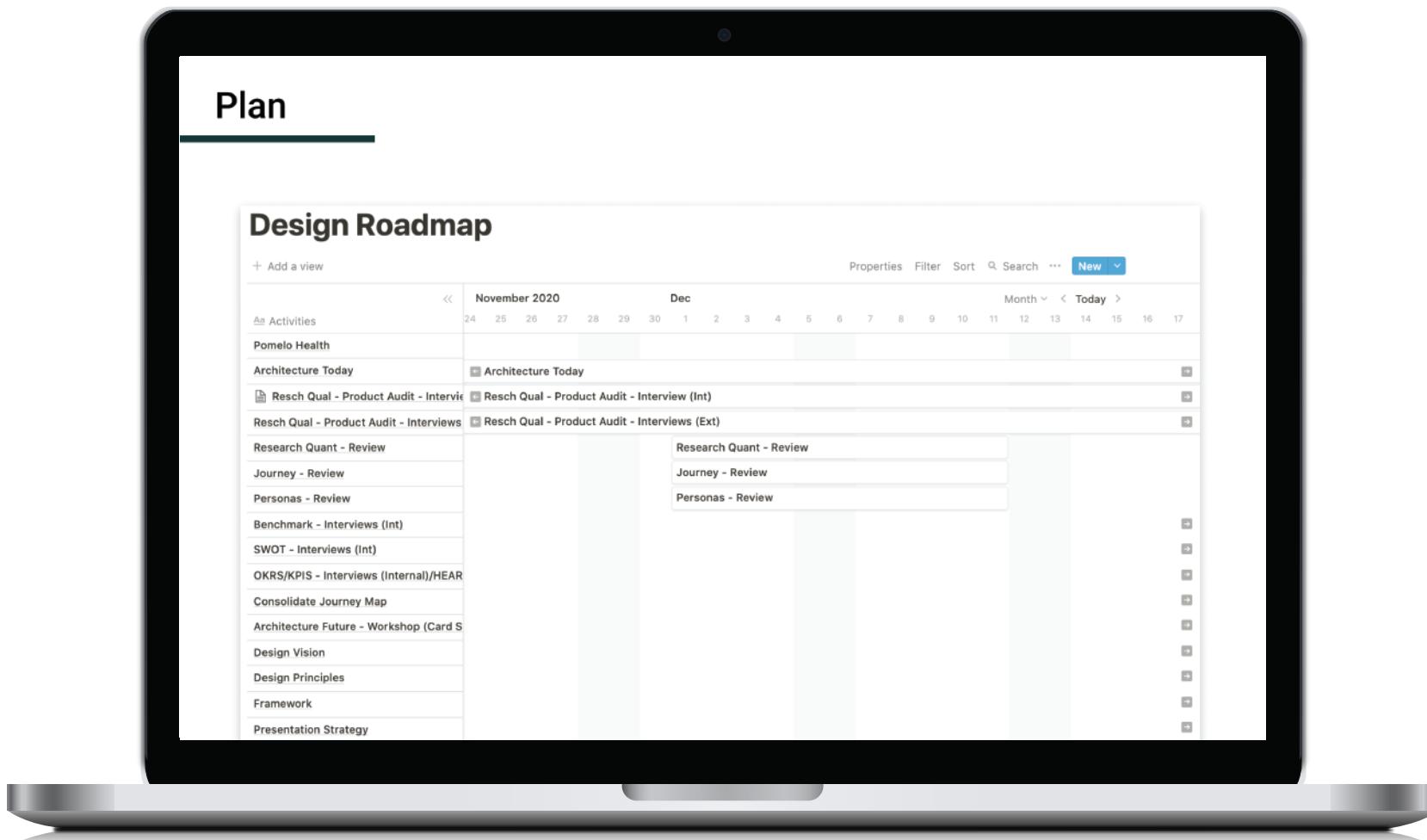
How

It was crucial to comprehend the workflow of each product, identify redundancies, and understand any technical constraints.



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

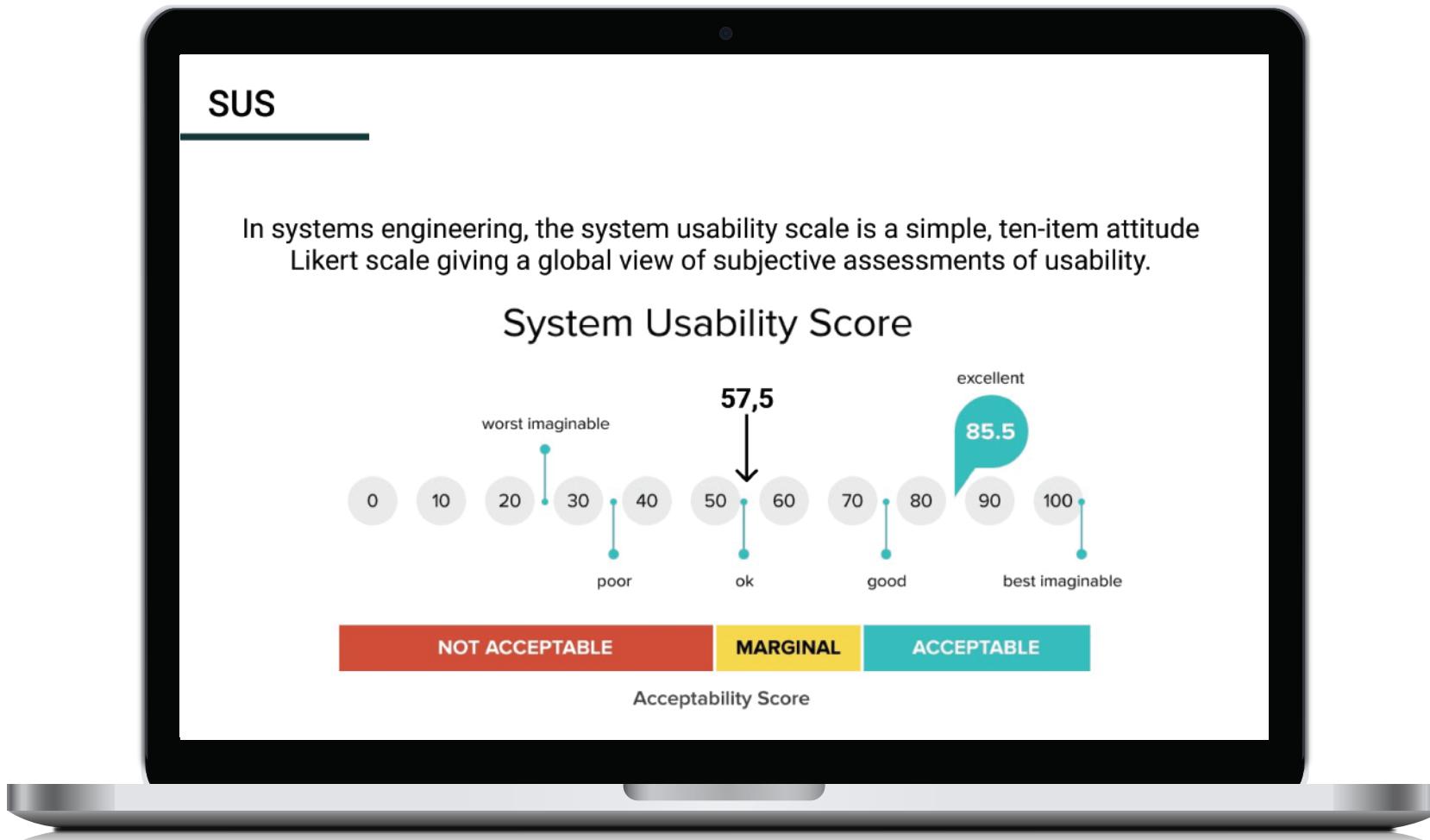
After finalizing the plan, I scheduled sessions with practitioners to uncover their challenges and those of their patients. Through these discussions, I discovered that the current experience was overly complex, with tasks such as account creation proving particularly difficult.

The image shows a tablet device with a white screen displaying research findings. The top section is titled "Research Result". Below this, there are two main quotes: one on the left and one on the right. The left quote reads, "If it's designed for the average patient, it's way too complicated." The right quote reads, "3 out of 10 patients cannot make it right." Below these quotes, there is a larger text block that says, "A lot of going back and retracing steps. A lot of clicks and boxes and things to duplicate in some areas." At the bottom of the screen, there is a table with three columns: "Summary", "Severity", and "Suggestion". The table has four rows, each corresponding to a different area of concern: "Registration", "Appointments and reminders", and "Forms". Each row includes a severity rating ("High") and a detailed suggestion. The tablet is shown from a slightly elevated angle, with its physical silver frame visible at the bottom.

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.

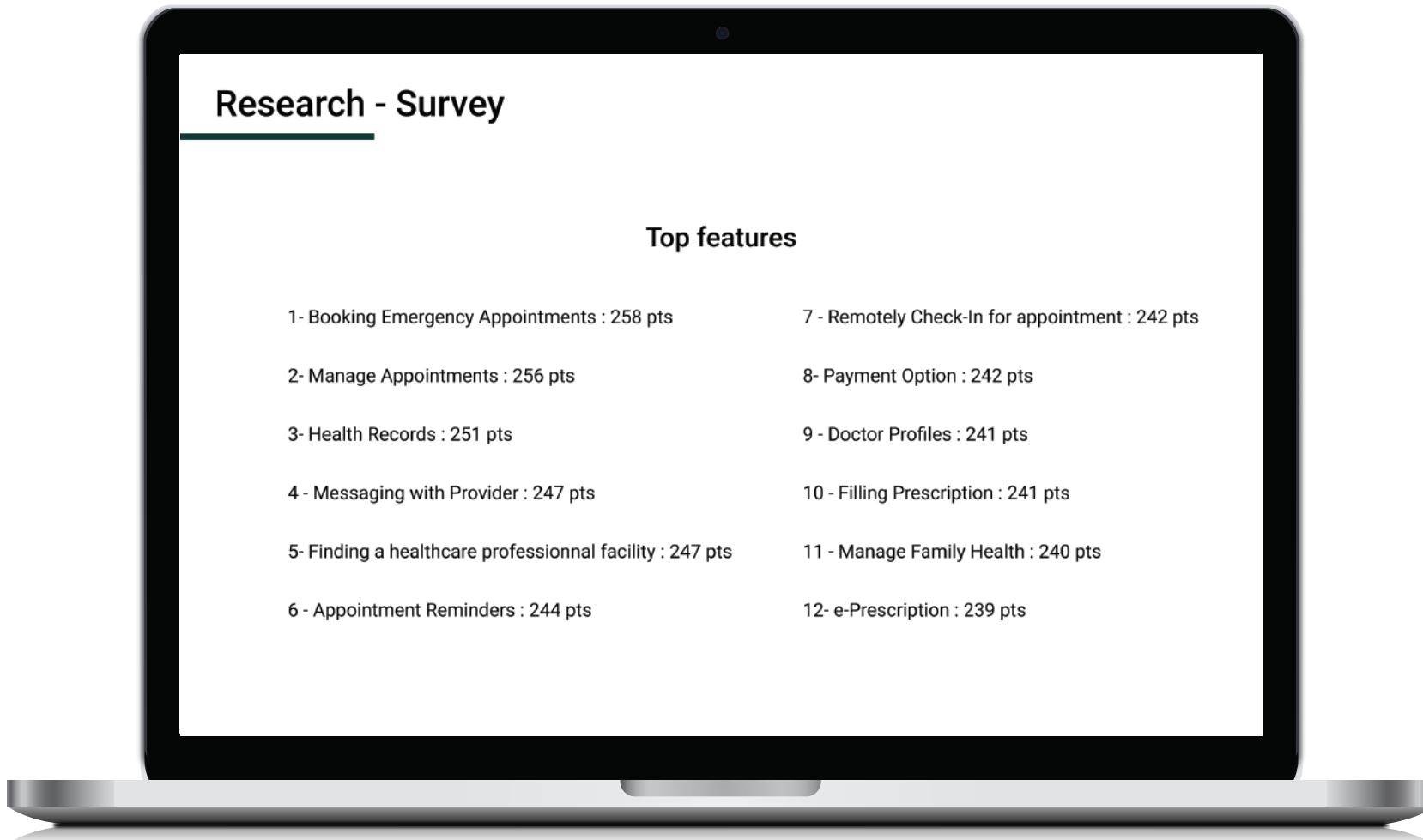
The image shows a laptop screen with a white background. At the top left, the text "Research - Survey" is displayed above a horizontal line. Below this, the heading "100 participants" is shown in bold. A paragraph follows, stating: "The method used for this research was **survey**. Since those are the two segments of the population that we are interested in, that would mean that the target population is **70.3 million people**. To achieve a **Confidence level of 95%** with a **margin of error to 10%**, the needed sample size for this research was **97 people**." At the bottom of the screen, the text "Qualtrics's sample size calculator" is visible. The laptop has a black frame and a silver base.

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

Qualtrics's sample size calculator

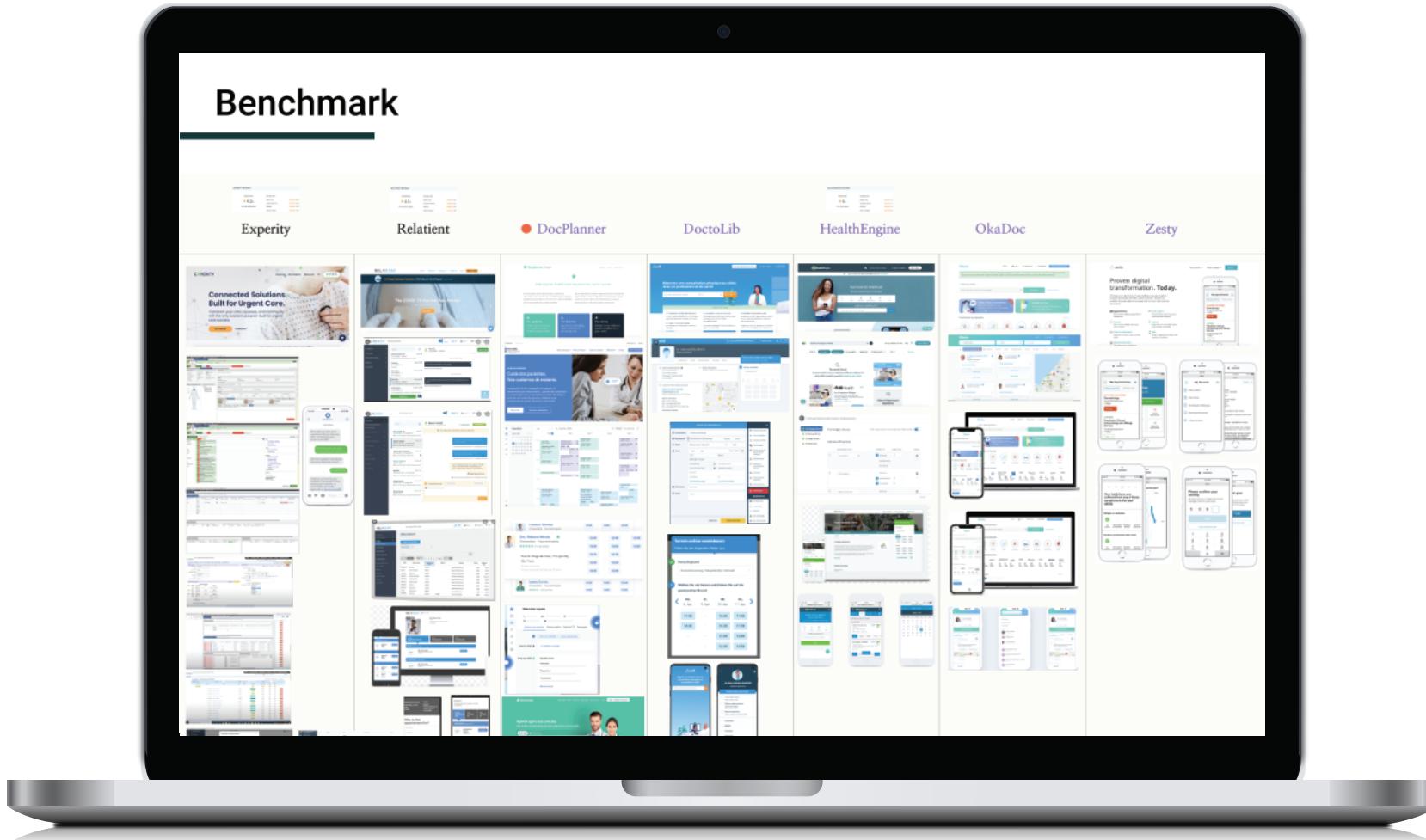
How

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.



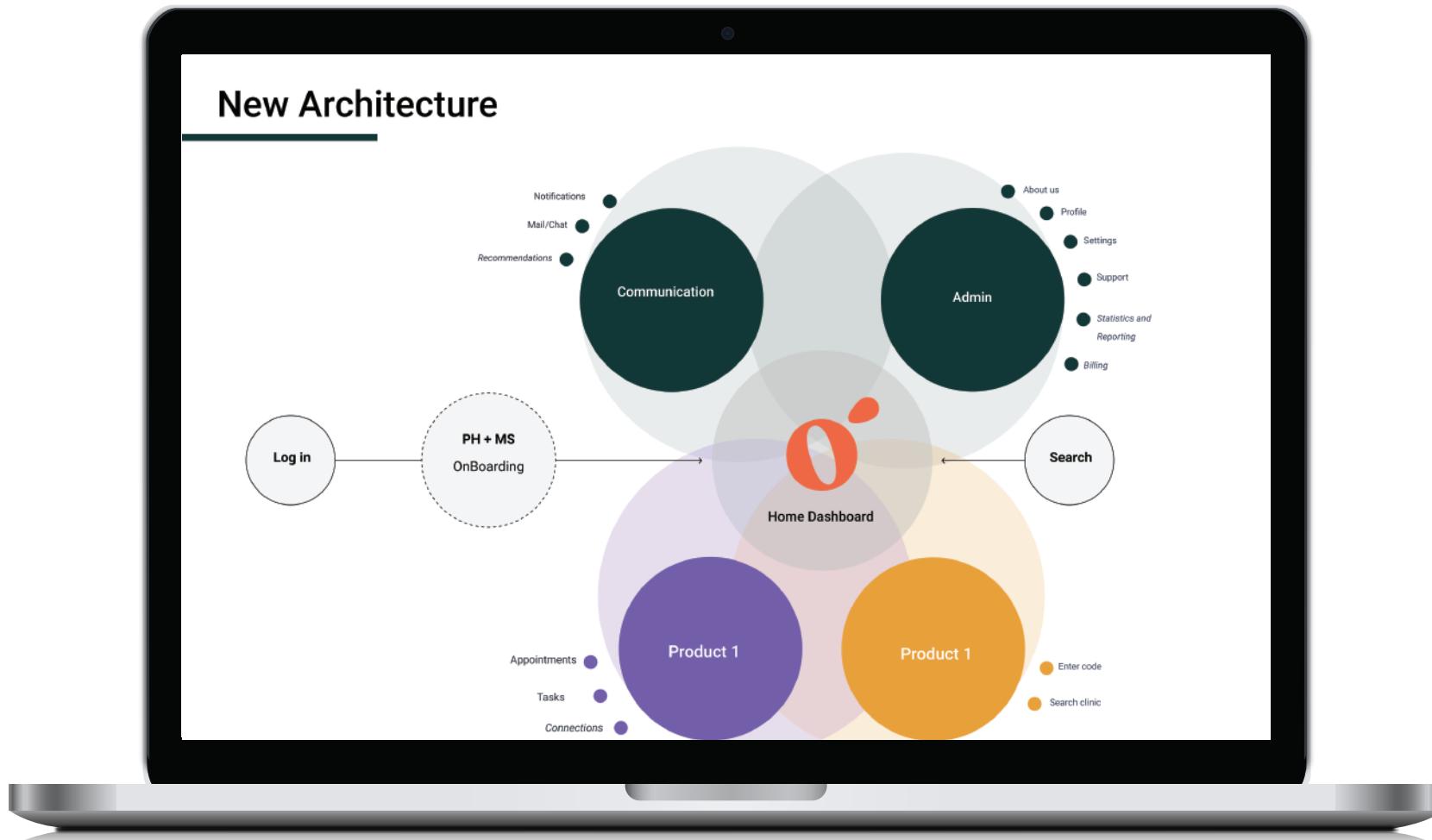
How

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.



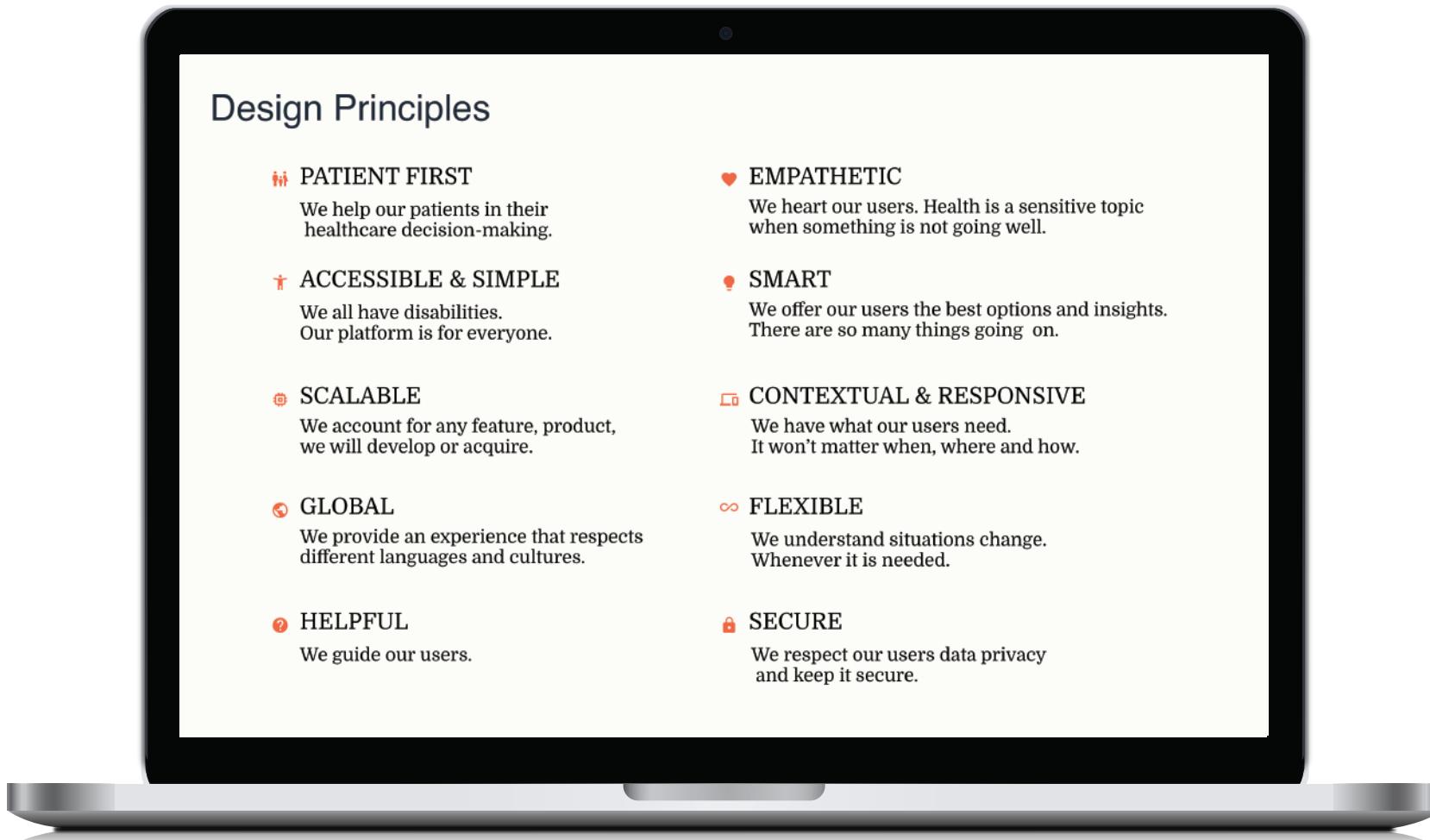
How

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 centered at the top. Below the title, there are ten design principles listed in pairs, each with an icon and a brief description. The principles are:

- PATIENT FIRST** (Icon: Person with stethoscope) We help our patients in their healthcare decision-making.
- EMPATHETIC** (Icon: Heart) We heart our users. Health is a sensitive topic when something is not going well.
- ACCESSIBLE & SIMPLE** (Icon: Hand with accessibility symbol) We all have disabilities. Our platform is for everyone.
- SMART** (Icon: Lightbulb) We offer our users the best options and insights. There are so many things going on.
- SCALABLE** (Icon: Scale) We account for any feature, product, we will develop or acquire.
- CONTEXTUAL & RESPONSIVE** (Icon: Document with arrows) We have what our users need. It won't matter when, where and how.
- GLOBAL** (Icon: Globe) We provide an experience that respects different languages and cultures.
- FLEXIBLE** (Icon: Double arrow) We understand situations change. Whenever it is needed.
- HELPFUL** (Icon: Question mark) We guide our users.
- SECURE** (Icon: Lock) 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.

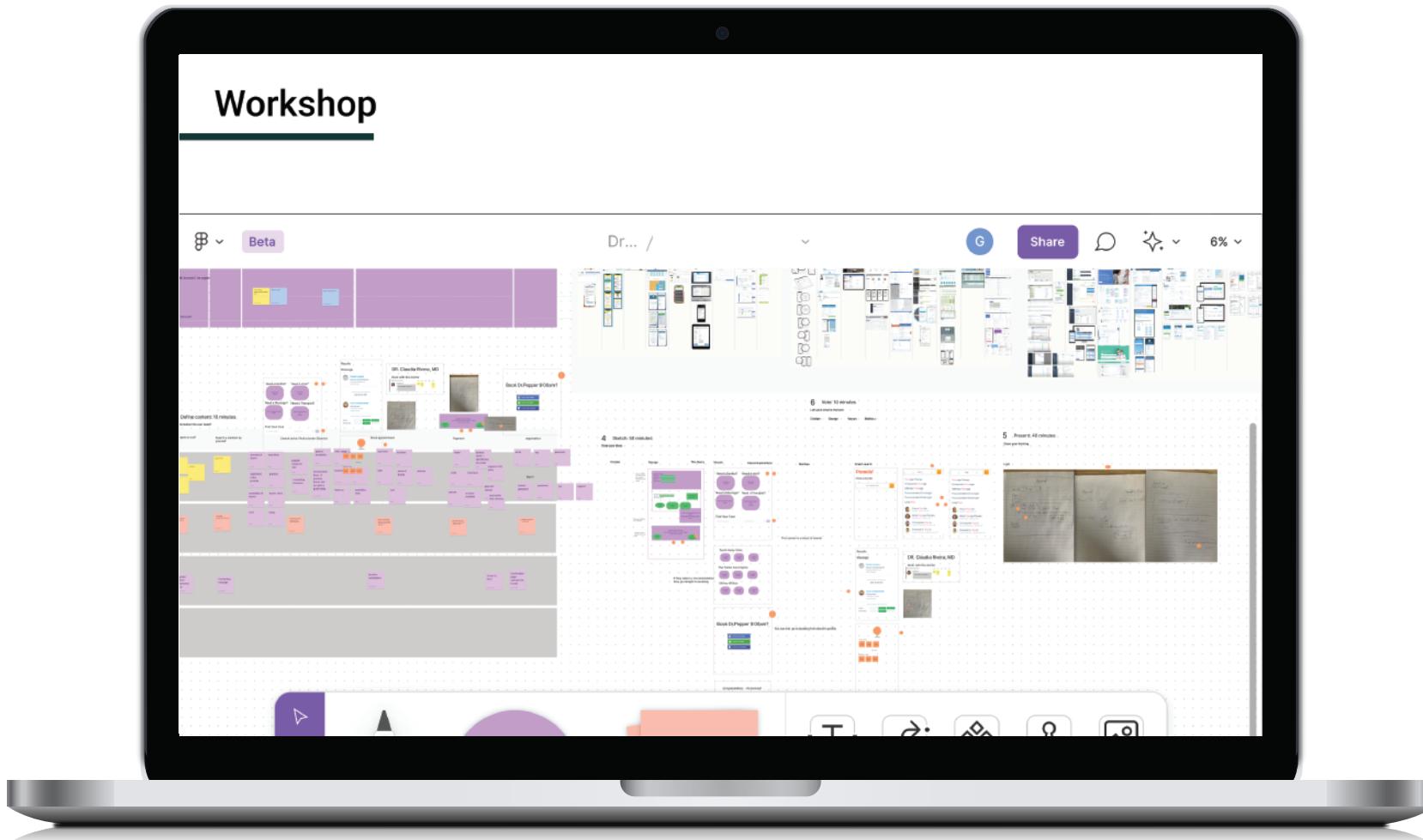
The image shows a tablet displaying two tables related to KPIs and measurements. The top table is titled "KPIs & Measurements" and lists various metrics under categories like Happiness, Engagement, Adoption, Retention, and Task Success. The bottom table is a more detailed breakdown of metrics, likely for the "Acquisition" category, showing specific actions like "Button promotion" and "Download App" along with their goals and notes.

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

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

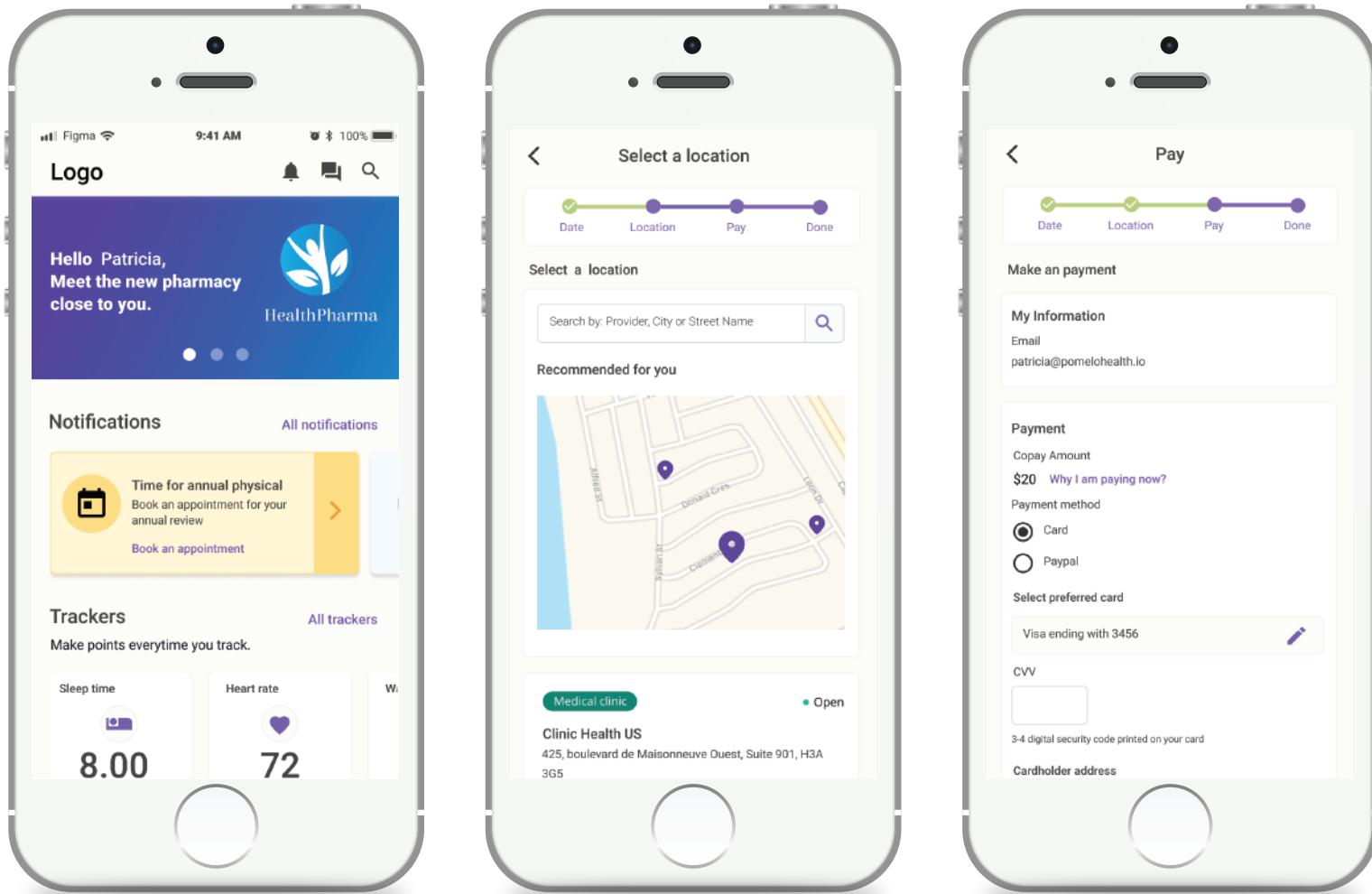
With the leadership team, we had some brainstorm sessions to understand what we expected as the first version.



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

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.

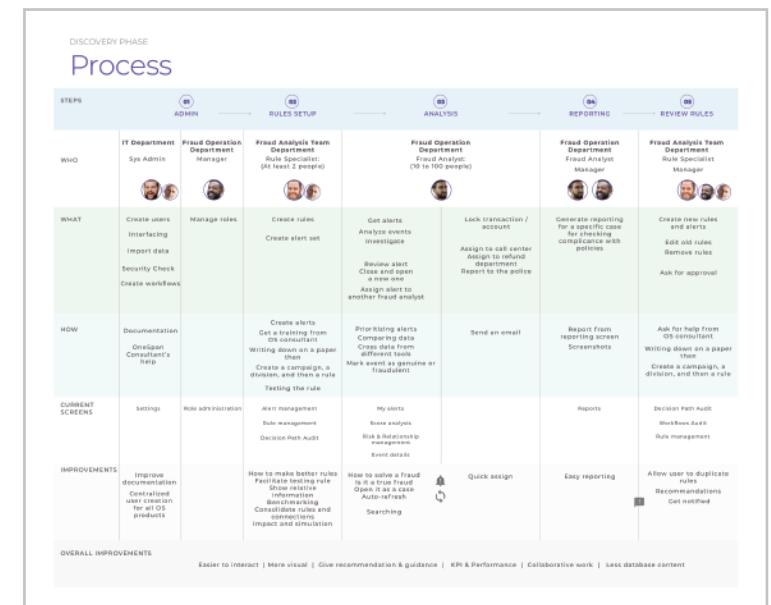
How

The Fraud Analysis domain was unfamiliar territory for some of us on the project team, myself included. Our initial step was to interview company experts in this field to gain insights into how the Fraud Analysis department operates. Following these discussions, the Product Designer and I collaborated on creating a diagram to visualize the structure of the Fraud Analysis department.

During our exploration, we identified a significant pain point for Fraud Analysts: the inefficiencies in the current Forensic Analysis solution's data display and the absence of a dashboard to track severe cases and their colleagues' interventions.

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 screenshot illustrates the OneSpan Forensic Analysis solution, showing a transition from an old experience to a new, more advanced version. The top portion of the interface displays a 'Transactions Map' where various events are interconnected. The bottom portion shows a 'Polar Chart' that provides a visual summary of the data across four dimensions: Beneficiaries, Locations, IP Addresses, and Devices. A detailed event view is also provided on the right side of the screen.

Events
Filtered by J. Mitzervan, 12/02/19 - 12/03/19

Mon 2 Dec, 2019

- Login Attempt #56789 * 9:15 am
- Login Success #67091 * 9:15 am
- Check Balance #01289 * 9:16 am

Activity

- Login (8)
- Transactions (5)
- Account Modif... (4)
- Other events (4)

Location

- Chicago, USA (15)
- Milwaukee, USA (1)
- Panama City, PA (5)

Device

- Samsung S9 ID PLS209 (16)
- Lenovo Laptop ID 0284872738 (5)

Forensic Analysis

POLAR CHART

TRANSACTIONS MAP

EVENT

- Reference: 1001
- Type: Transaction
- Sub Type: InterBankTransfer
- Date: 17/04/2019 10:53:18
- Amount: 450.00

PIVOT FACTOR

- Type: Relationship
- Value: user_YUTB_1

DIMENSIONS

- Locations
- Devices
- IP Addresses
- Beneficiaries

UNTIL DATE

- None
- 17/04/2019 11:53

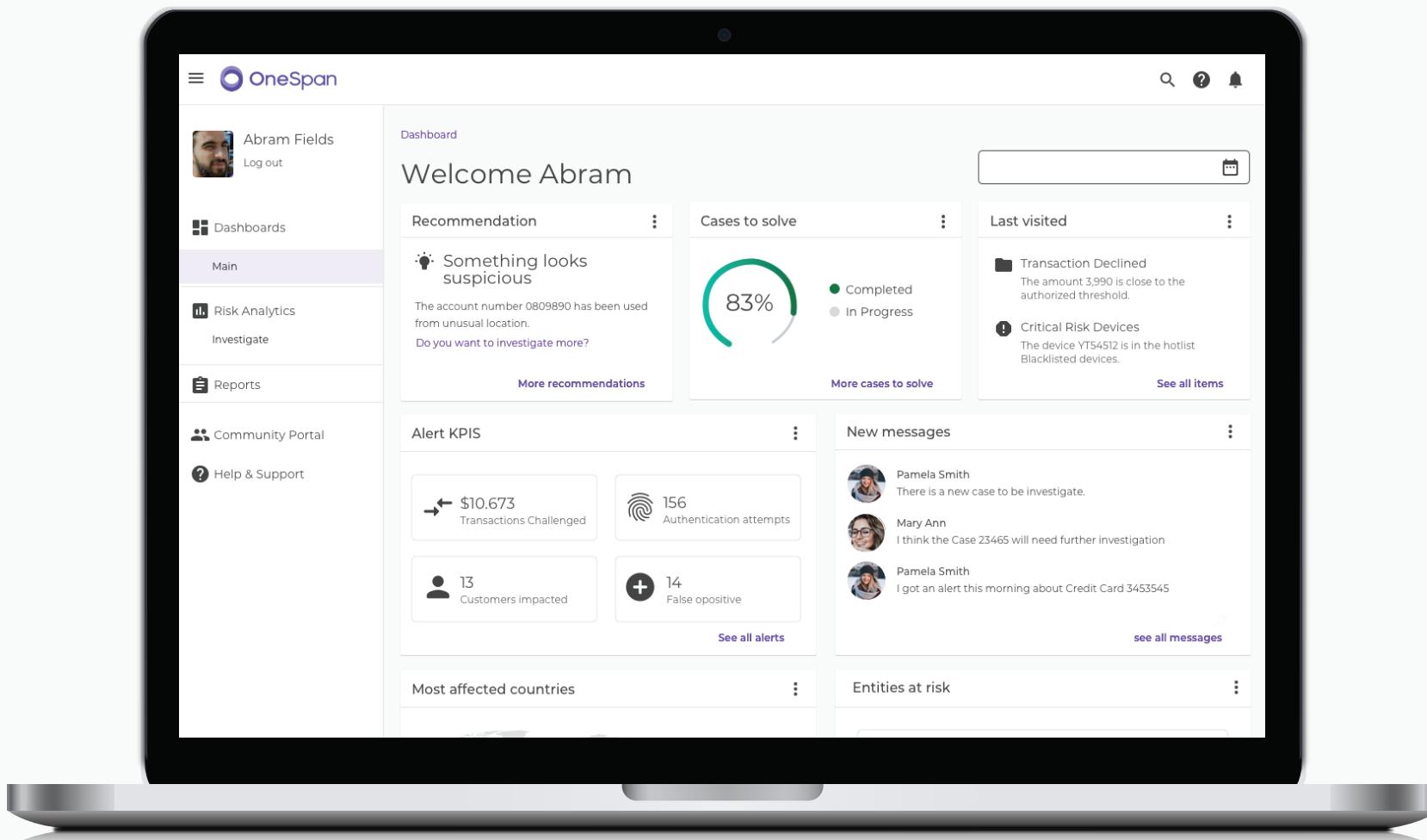
TIME LINE

- Presets
- Intraday

Old experience

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, one of our initial projects involved updating an outdated solution where user actions were scattered across the screen. A Usability Study from a bank using our solution highlighted the urgent need for a redesigned user experience.

Working closely with the Development Team, we explored various solutions. Our first step was to systematically identify and organize all user actions within the system. Another crucial consideration was minimizing the interface's color palette to ensure it could be easily white-labeled for multiple banks.

Through collaborative brainstorming and iterative design sessions, we developed a solution that performed exceptionally well during validation, scoring highly across all metrics.

Team

Product Owner

Scrum Master

Head of Design (me)

Product Designer

Accessibility Expert

Developers

UX PRIMARY PERSONAS

ROSE SMITH

ABOUT

- Occupation: Nurse
- Age: 29
- Education: Bachelor's Degree
- Vertical: Healthcare
- Environment: 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 --> RecipientSignOrApprove
    RecipientSignOrApprove --> Monitoring
    Monitoring --> ReportAudit
    
```

INTERACT WITH

Rose Smith
Recipient (Signer)

Amy Fields
Agent

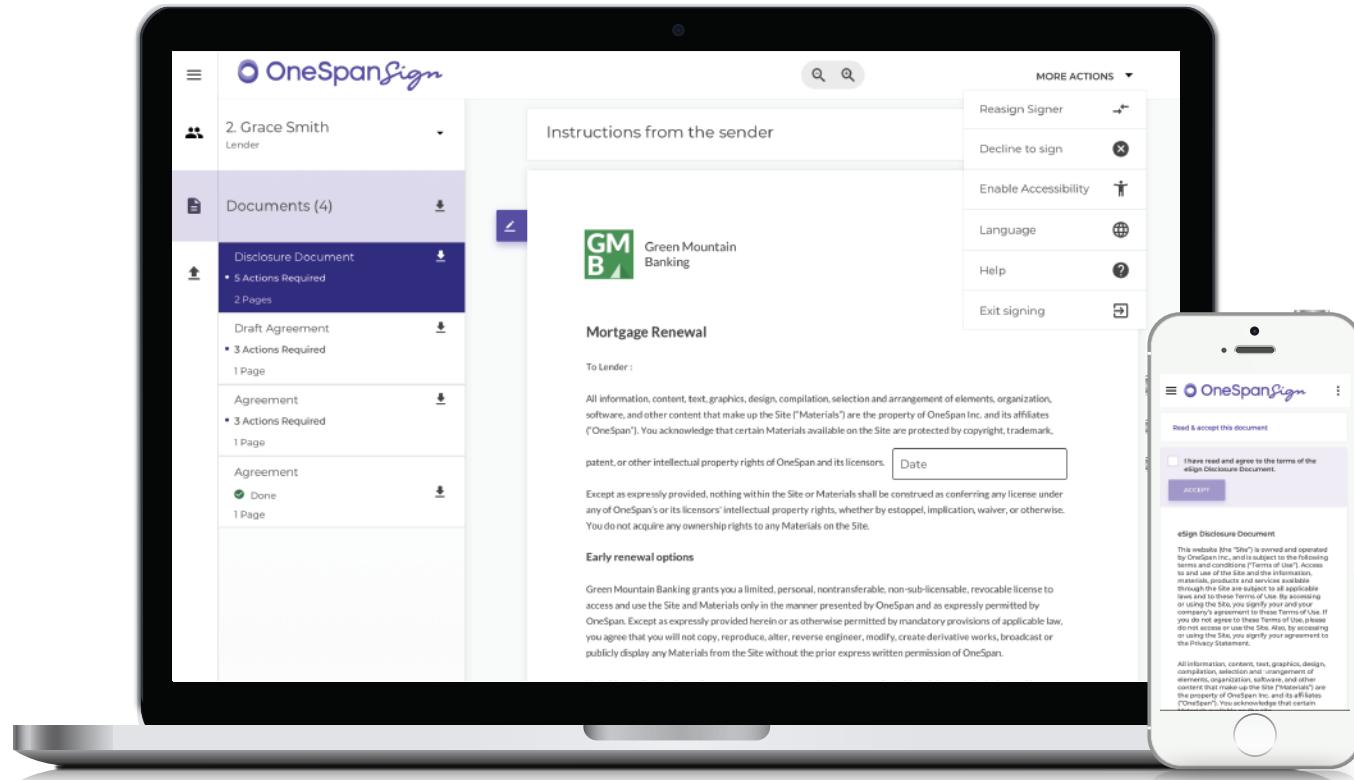
Questions, concerns, email us at: ux-global@onespan.com

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.

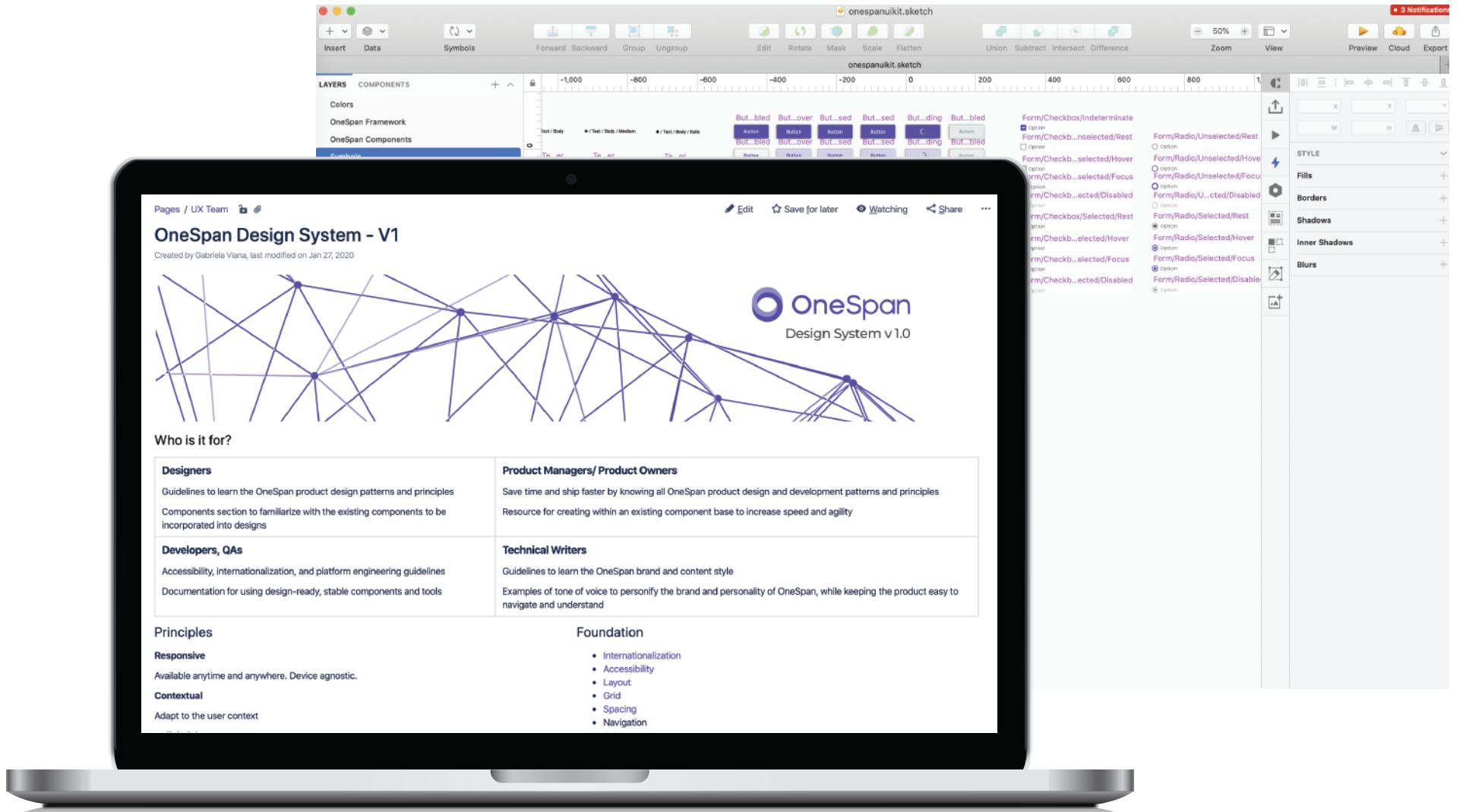
P8: It is condensed, cleaned document in the middle, it is much better.

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

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

SOME PAIN POINTS

- ⑥ Have to call OSS support for actions
- ⑥ 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
—
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

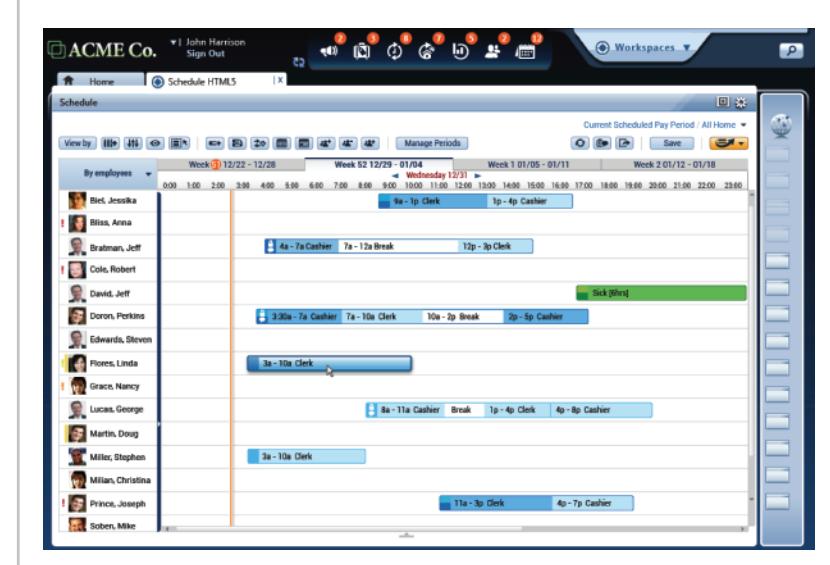
Lead Interaction Designer (me)

Archtect

Accessibility Expert

Front-End Developers

Back-End Developers



Original Schedule

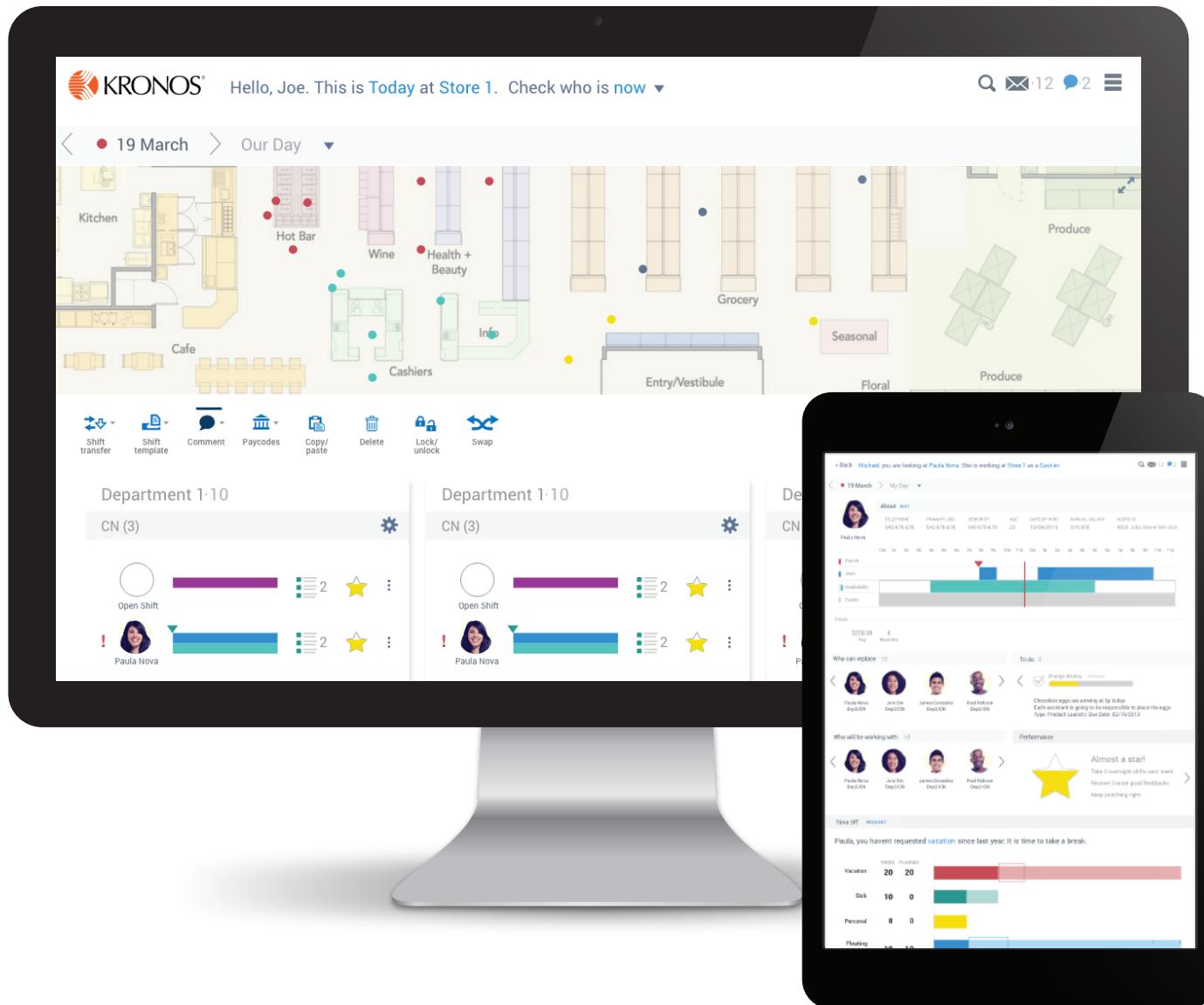
Solution and results

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.

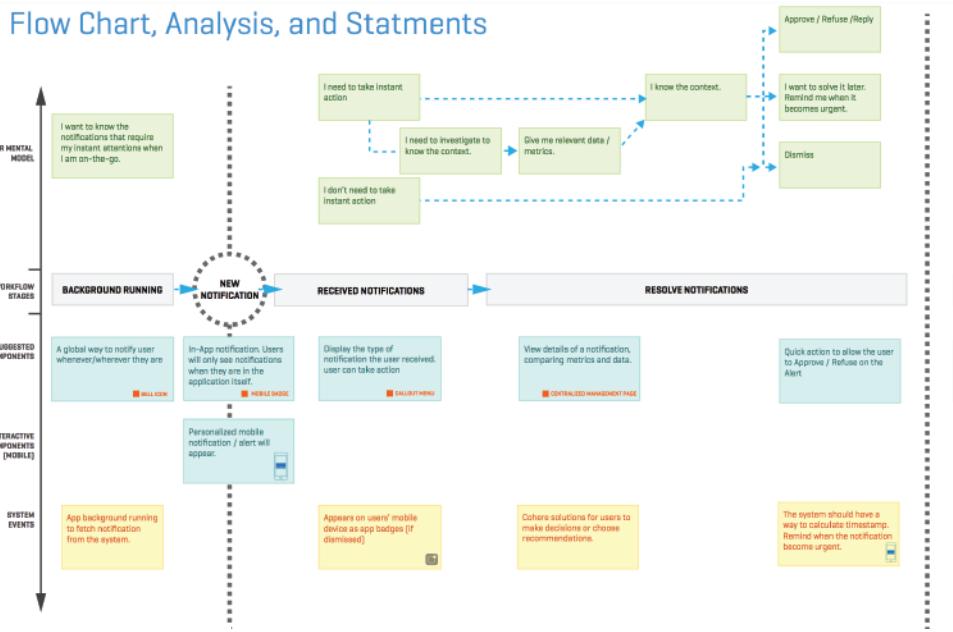
And an exploration for the employee experience, in which they can see their week schedule, timecard, accruals, colleagues, performance, and activities to be performed in a day.

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.

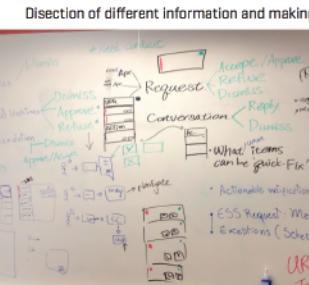
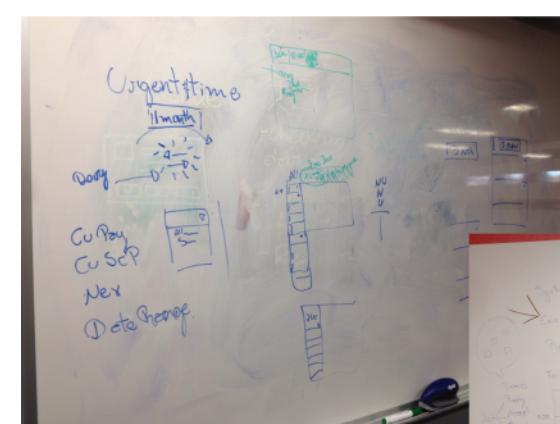
We identified six areas that we should be aware when working on the concepts: Real time, Metrics, Related Data, Educate the System (Machine learning), Personalization and Archive



Meeting with Product Owners: Outcome

The 6 Statements		
Real-time Solution	Dismiss - Potential to Remind	Flexibility - Remind me again.
Metrics for Investigation	Reply - Communication	Ease of communication - Through Interaction Design.
Related Data Catenation	Resolve - Accept / Refuse	Context
Educate System Behavior	Urgent / important Actionable items	IMPLICIT - System Memorization System recommends, but does not take over human decisions. EXPLICIT - System Learn Rules [could be configured with human effort] System decides, but there are ways to revert system efforts.
Personalize	Categorization of Notifications	System vs. User-defined reminding methods [Sms, email...etc.]
Archive	Search / filtering mechanism	Audit Trail

Brainstorming

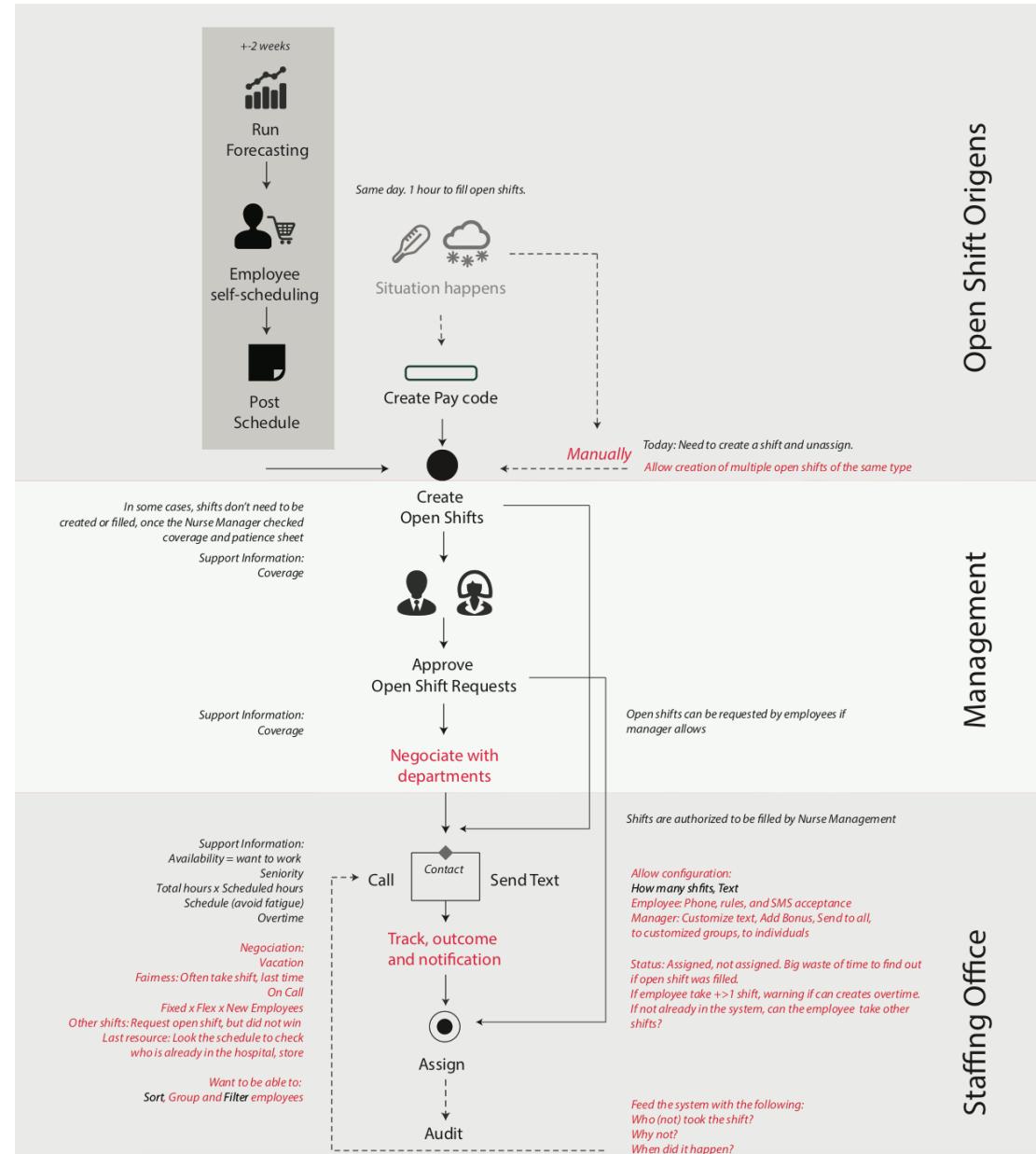


Other projects: Open Shift Cycle

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



Open Shift Origins

Management

Staffing Office

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)

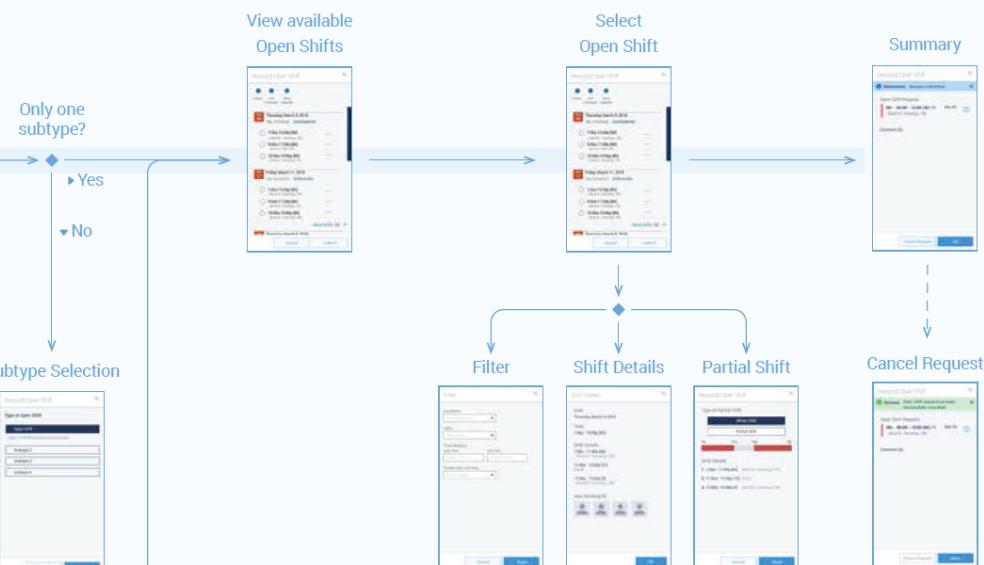


Manager Control Center

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

Employee Control Center

Refusal or Approval notification



REQUEST OPEN SHIFT (RIGHT PANEL)

REQUEST LIFECYCLE

Thank you.

I'm looking forward to hearing from you.

If you would like to know more about my work, contact me at:

gabiviana@gabiviana.com

+1 514 7542422

<https://www.gabiviana.com/>

<https://ca.linkedin.com/in/gabiviana>