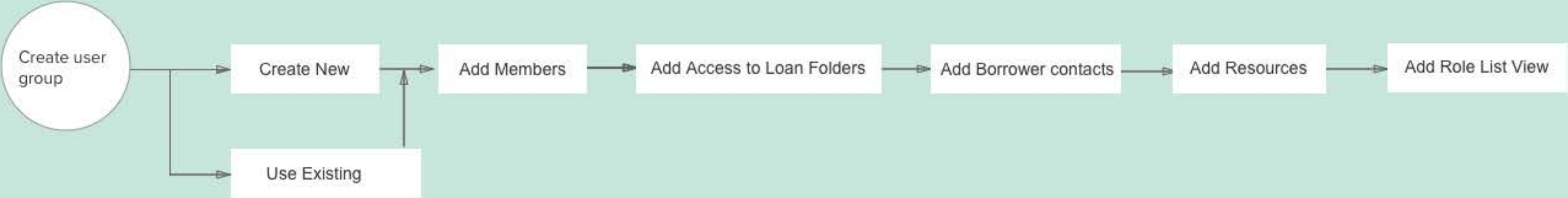


Admin User Experience Map 1 : Add user to a user group

User Flow	<pre>graph LR; Start((Add user to a user group)) --> Org[Organization / Users]; Start --> Groups[User Groups]; Org --> NoAdd[No ability to add to user group from here]; NoAdd --> Nav[Navigate to Organization]; Groups --> NoSearch[No ability to search by user name and add to user group]; NoSearch --> Nav; Groups --> AllInfo[All User Info]; AllInfo --> Sort[Sort / Scroll to user]; Sort --> Find[Find in Heirarchy]; Find -- "Back to User Group" --> Groups; Nav --> End((Added user to user group))</pre>	
User Goals	<p>Understand what access & features user need and add them to the appropriate group</p> <p>Quick search user and add to the user group</p>	
User Pain Points	<p>Takes complex steps to find what group the user is in</p> <p>Lack of consolidation and having to go back and forth between All User Info / User Group</p> <p>Lack of ability to add user to a User Group from the Organization/Users</p> <p>Lack of ability to add user from User Group (organization of the user not available easily)</p> <p>No ability to search for users in the heirarchy, which forces admin to go All User Info</p>	<p>Lack of summary of user groups access & features causes admin to rely on manual documentation</p> <p>No means to verify settings doesn't overlap or conflict a user in multiple groups.</p> <p>No ability to hide/remove deactivated users</p> <p>Lack of ability to bulk delete users</p>
Opportunities	<p>Provide a summary of user group access and who is in the group</p> <p>Make it easy to add an user to a user group where appropriate (Org/ Users & User Groups)</p> <p>Provide much needed search ability to search by username in the user groups</p>	<p>Make it easy to identify the organization which the user is part iof</p> <p>Provide related information and actions in the same section(Org/ Users, All User Info, User Groups)</p> <p>Prevent overlapping/ conflicting access by prompting users when it happens</p>

Admin User Experience Map 2 : Create user group

User Flow	 <pre>graph LR; Start((Create user group)) --> CreateNew[Create New]; Start --> UseExisting[Use Existing]; UseExisting --> CreateNew; CreateNew --> AddMembers[Add Members]; AddMembers --> AddAccess[Add Access to Loan Folders]; AddAccess --> AddBorrower[Add Borrower contacts]; AddBorrower --> AddResources[Add Resources]; AddResources --> AddRoleView[Add Role List View];</pre>		
User Goals	<p>Add new users to the correct user group, add forms and access to the folders they need access to</p> <p>Create templates for user groups to avoid rework and having to check manually every time</p> <p>Not duplicate user groups similar to an existing one to avoid conflicts</p>		
User Pain Points	<p>Difficult to locate user and User Groups</p> <p>Blank new template has access to some Loan Folders causing issues</p> <p>Lack of help to show the impact of setting checked/unchecked</p>	<p>Too many configuration options in multiple tabs</p> <p>Too many places to review and check</p> <p>Multiple steps to understand what is "turned on" in these groups</p> <p>Mostly need access to loans, loan templates, or resources.</p> <p>Loan folders and especially role visibility need to be separated</p>	<p>Maintaining the role list views is tedious</p> <p>Default set to view all personas and need to be changed</p> <p>Drop down to assign and view assigned is complicated</p>
Opportunities	<p>Make sure blank template provides a clean start without any defaults</p> <p>Archive old forms / deactivated users to avoid confusion</p> <p>Provide auto check for near similar user group settings</p>	<p>Fix usability issues with role list view view & edit</p> <p>Consider separating Role list view from user groups</p> <p>Clear summary of the access in a User Group</p>	<p>Duplicating from an existing user group should be made easy</p> <p>Quick Search for User and User groups</p>

Admin User Experience Map 2 : Create Business Rules

User Flow	<pre>graph LR; Start((Create Business Rules)) --> RuleName[Rule Name]; RuleName --> Channels[Channels]; Channels --> Conditions[Conditions]; Conditions --> OtherRules[Other rules]; OtherRules --> Test[Test]; Test --> Deploy[Deploy]; Conditions --> ACodeEditor[Advanced Code Editor];</pre>	
User Goals	Setup business rules to define and manage your business requirements	Make sure the business rules works as expected
User Pain Points	<div>No way to identify which fields can be used as conditions Vs. triggers</div> <div>Lack of help documentation to understand which fields cannot be used in business rules</div> <div>Lack of help resources for the Advance condition editor & best practices</div> <div>Lack of organization/grouping/folders when there are lot of business rules</div> <div>No ability to search in business rules</div> <div>Cannot identify which business rule does what with just the title</div> <div>Need to manual document business rules description and fields</div> <div>Lack of ability to automate MI and notify changes instead of clicking Get MI</div>	<div>Duplicating Personas doesn't sync business rules and extremely time consuming to recreate 200 fields</div> <div>Conflicting business rules are hard to identify and debug</div> <div>No ability to archive and separate out deactivated business rules</div> <div>Need to remember to activate business rules</div> <div>Hard to identify what changed and who changed it</div> <div>Business rules- Advanced condition editor has small space and is very limiting</div> <div>Testing the business rules and identifying conflicts is cumbersome and manual</div> <div>Business rule export functionality is broken, but needed for audits</div>
Opportunities	<div>Provide a summary of user group access and who is in the group</div> <div>Make it easy to add an user to a user group where appropriate (Org/ Users & User Groups)</div> <div>Provide much needed search ability to search by username in the user groups</div>	<div>Make it easy to identify the organization which the user is part iof</div> <div>Provide related information and actions in the same section(Org/ Users, All User Info, User Groups)</div> <div>Prevent creating overlapping/ conflicting access and propmpt users when it happens</div>