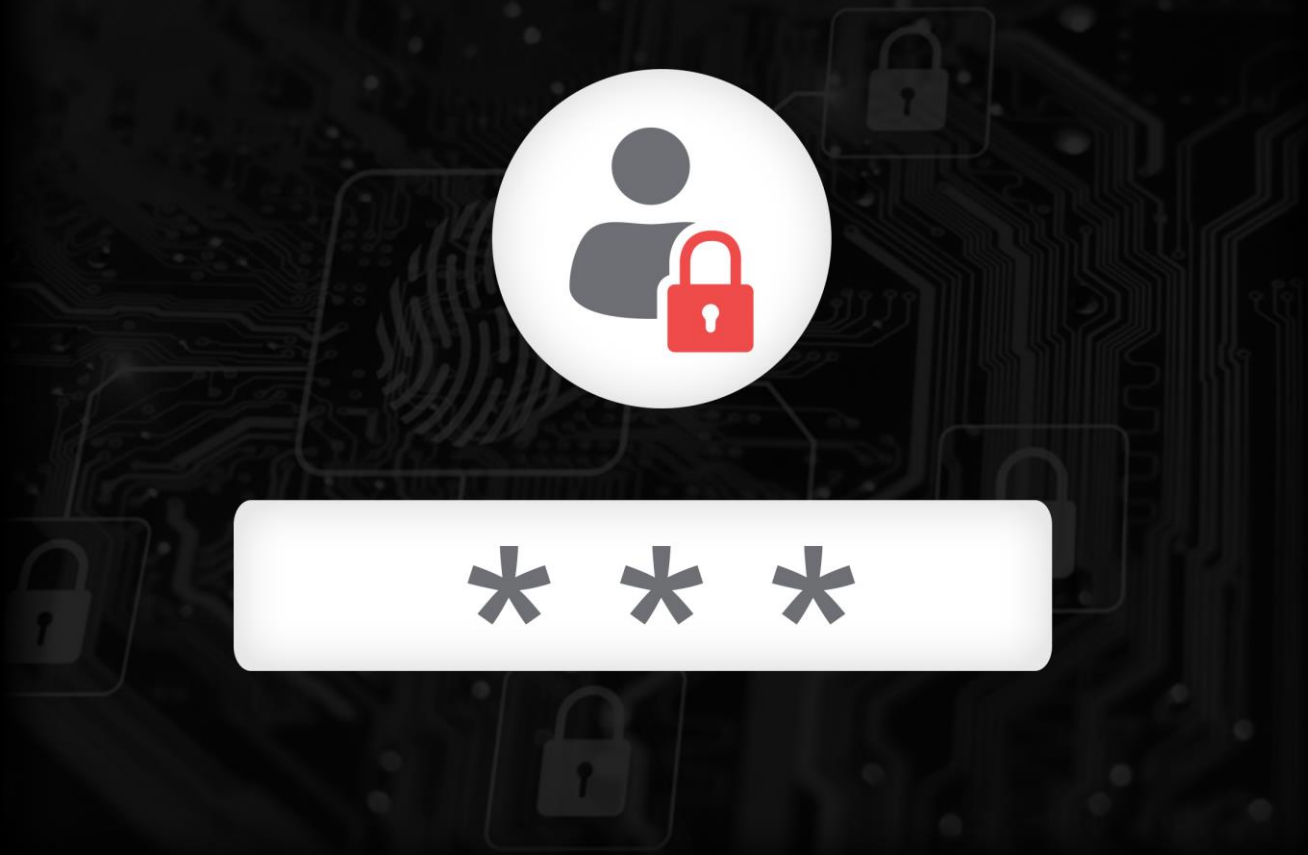


# UX Case Study – Access Right (user access management module) in redIQ APP (New Feature)

Status – Design handoff to developers



*redIQ is the leading multifamily underwriting and analytics platform. Trusted source by clients for better insights, faster underwriting, and smarter investing.*

# 01 - Project Overview

## Role

Senior Product Designer

## Duration

Sep 2021– Dec 2021

## Tools



Figma



Lucid  
Chart



Creative  
Cloud



Excel



Word

## Team

We used Agile Scrum Methodologies for development of product.

- Product Owner
- Scrum Master
- Senior Product Designer (Me)
- Developers (3)

## Background

redIQ is the most trusted deal analysis and underwriting platform on the market for multifamily owners, brokers, and lenders. It allows CRE professionals to extract data automatically from rent rolls and operating statements and generate comps from highly reliable underwriting data sets.

During project handoff, a Super Admin from Berkadia assigns a Corporate Admin for its clients, who plays a user manager role for that company. Hence, he/she adds/edit user accounts for various roles (User, Support and other roles).

## Problem Statement

The existing Keycloak (an open source access management solution) do not have a front end, so external and internal users are dependent on support users to add/update user account management records.

So, Access right (access management module built by Berkadia) was implemented, which provides a front end services for both internal and external users to access the records of user and account management with ease and less dependence.

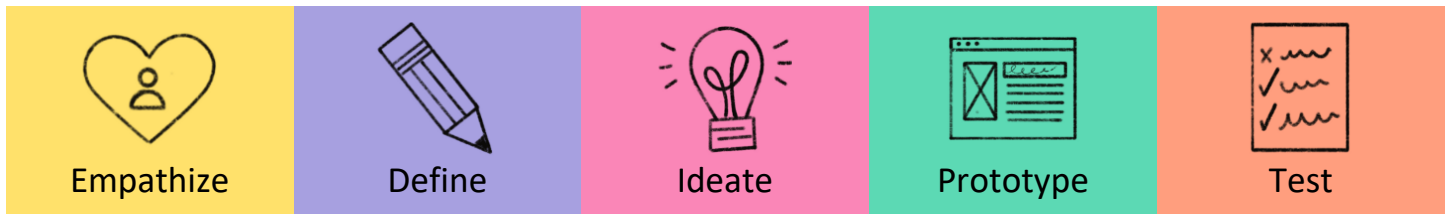
## Business Goals

- Provide a front end services for both internal and external users to access the records of user and account management using Access right.
- New design to improve the experience of the user and focus more on Accessibility.

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## 02 - Design Thinking Process

There are many ways to describe a design process and here's one that covers strategy through production.



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## 03 - Empathize

### Research

**Quantitative** research method was used to understand business goals and gain insight into the journey of the user and their pain points.

### Stakeholder interviews:

- Interviews were conducted with multiple stakeholders such as VP, product management and various teams.
- This gave us a better understanding of the Berkadia internal processes and organizational structure.
- We arranged the interview notes into an Affinity Diagram and found some key insights.

### User contextual inquiry:

- We took sample users (10 size) and conducted one-to-one meeting, using online video call with a small sample of users in their normal work environment.
- We observed how they are working using this application and found some key insights.

### Usability Evaluation / Literature Reviews

- We have studied the documents related to redIQ, style guides and corporate colors.

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## 04 – Define

- We put together all findings into one place, to create a collage of experiences, thoughts, insights, and stories.
  - Empathy Mapping of what the users: Said, Did, Thought, and Felt.
  - Define Problem Statement in a human-centered manner using Point of view (POV)
- 

## 05 – Ideate

- With the help of Brainstorm session with the team, we came up with 15 concepts to solve the problem for the initial phase.
  - We tested our idea with Stakeholders to know the sustainability and viability of the notions.
  - We requested team to vote for the best idea.
- 

## 06 – Prototype

- We created user stories and user flows before working on wireframes.
- Prototypes was created for each user roles (Corp admin, Corp user, Support user and other roles)

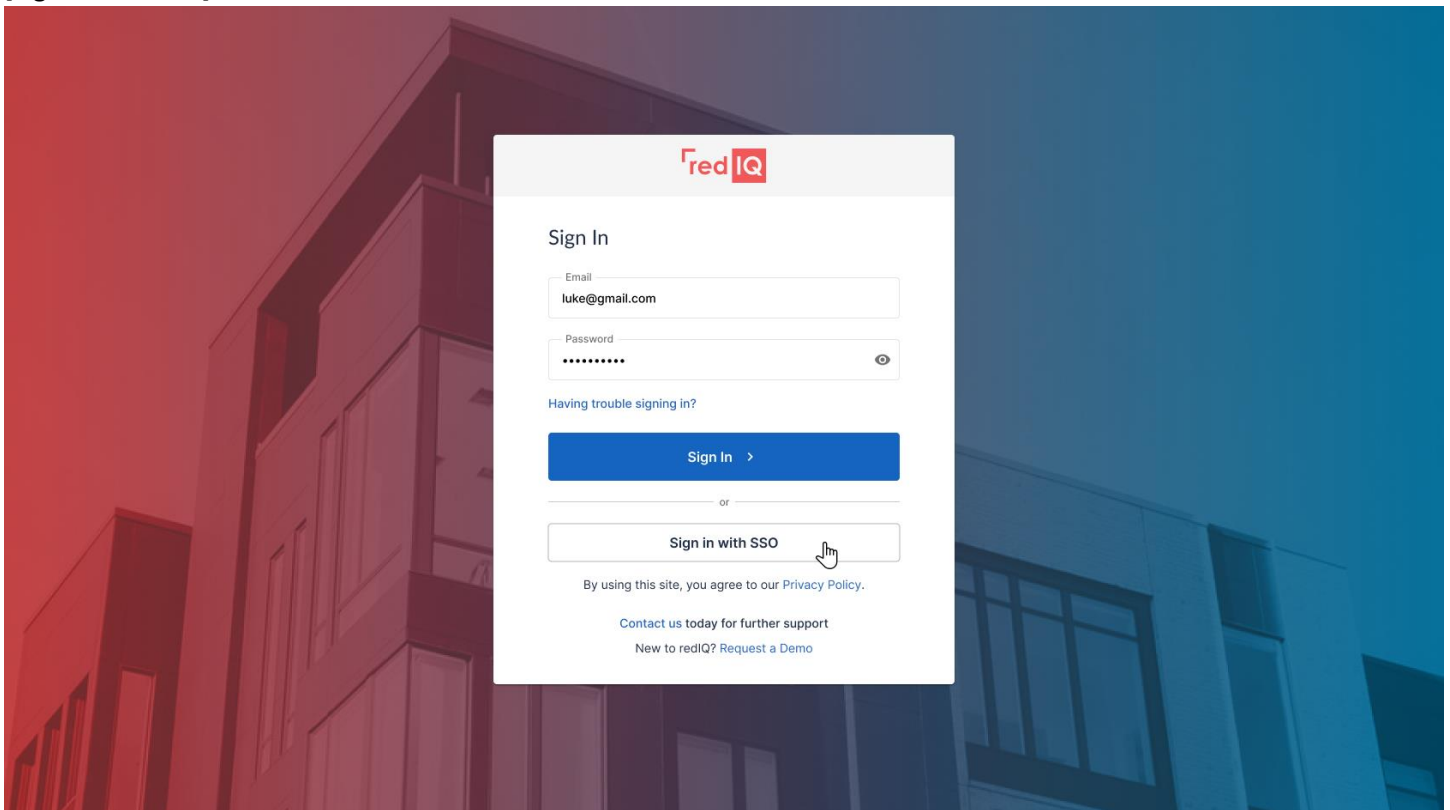
### Low Fidelity Designs

- To begin with we created wireframe on paper first and discussed with the team.
- A low fidelity wireframe was tested with users using Figma.
- Updated the designs based on the testing.

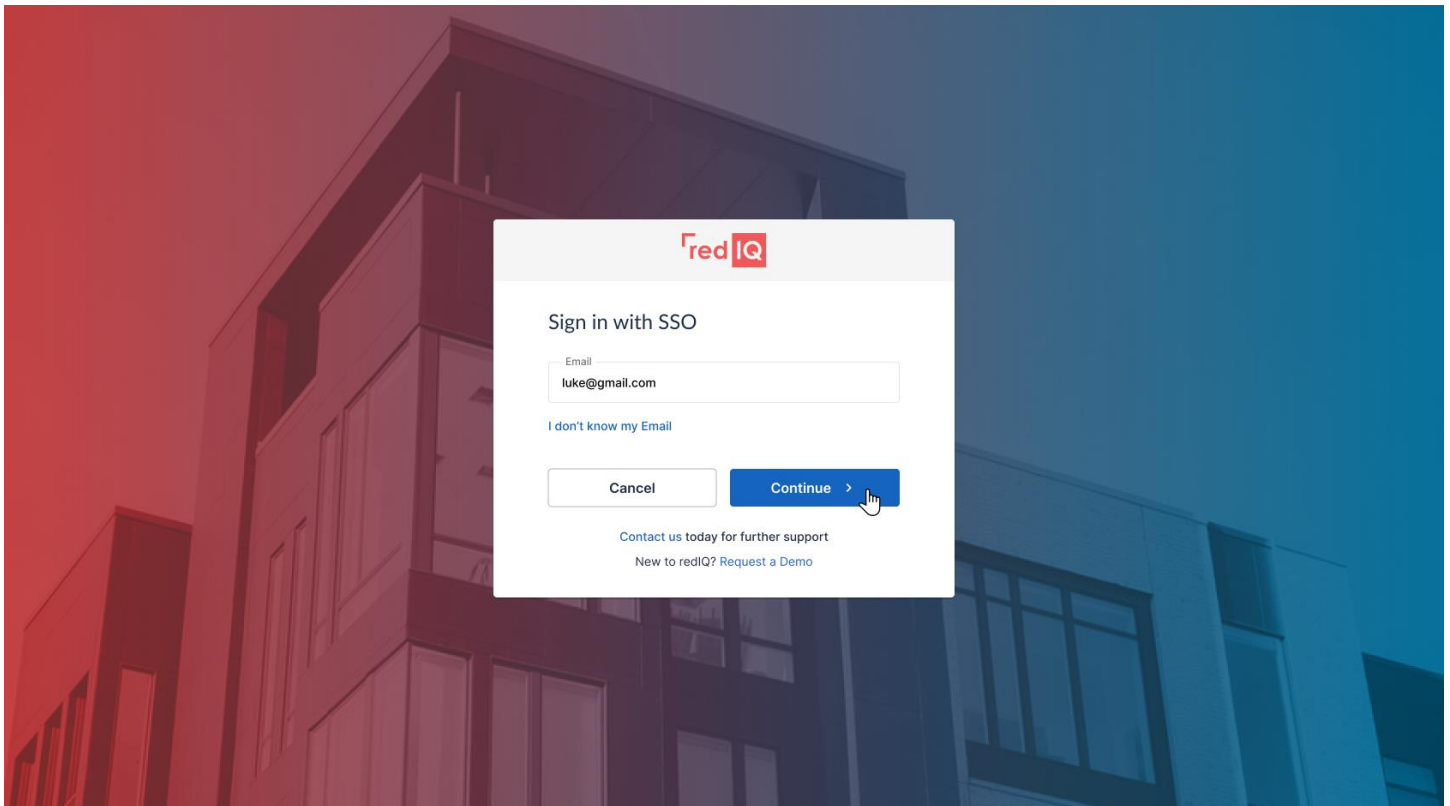
### High Fidelity Designs

#### Sign In flow for Corporate Admin:

## [Sign In - Default]



## [Sign In - SSO]




[Select an account – in case of multiple accounts]


← Sign in with another account


red IQ


### Select Company Account


**Recommended**

**JLL**  
JLL - West  
Yesterday


**iret**  
IRET Properties  
2 days ago


**JLL**  
JLL - Corporate  
5 days ago


**iStar**  
iStar Financial  
23 Oct 2021


**Blackstone**  
Black Stone  
11 Sep 2021


**All Accounts**


**ARBOR**  
Arbor Realty Trust, Inc.  
28 Aug 2021


**AVALON**  
Avalon  
28 Aug 2021


**Blackstone**  
Black Stone  
11 Sep 2021


**CBRE**  
CBRE  
28 Aug 2021

**CONTINENTAL REALTY CORPORATION**  
Continental Realty Corporation  
28 Aug 2021

**GREYSTAR**  
Greystar  
28 Aug 2021

**iret**  
IRET Properties  
2 days ago

**iStar**  
iStar Financial  
23 Oct 2021

**JLL**  
JLL - Corporate  
28 Aug 2021

[Option to switch account after log in]

red IQ

JLL - West

Deals

Comps

Pipeline report

### All deals

Search by Deal Name

Deal Name	Status	Market	No. Properties	No. Units	Assigned to
Alice Deal - 2021	New	Fort Worth, TX	13	512	K. Farnsworth
Ochre Shadow Estates	New	Fort Worth, TX	-	13	L. Berhmann
Santa Fe Deal - 2021	New	Dallas, TX	8	512	S. Goodwill
Hunter Hills Deal - 2021	New	Austin, TX	5	72	S. Goodwill
Creeside Village Deal	New	Dallas, TX	13	1024	K. Farnsworth
Forest Cove Apartments	New	Fort Worth, TX	-	21	L. Berhmann
Willow Peak Apartments	New	Austin, TX	-	8	L. Berhmann
Grand Rosso Deal - 2021	New	Fort Worth, TX	13	640	L. Berhmann
Mountain Shadows Deal	New	Fort Worth, TX	8	256	S. Goodwill
Family Villas Deal - 2021	New	Fort Worth, TX	56	1440	K. Farnsworth
Green Gardens Deal	New	San Antonio, TX	3	13	K. Farnsworth
Vinewood Village Deal	New	Austin, TX	512	1680	L. Berhmann
Vinewood Apartments	New	Austin, TX	-	8	K. Farnsworth

iret IRET Properties

JLL - Corporate

iStar Financial

Black Stone

JLL - West

See all accounts

# Access Management flow for Corporate Admin:

[Menu to access accounts]

The screenshot shows the 'All deals' page in the RedIQ application. The left sidebar contains navigation links for 'Deals', 'Comps', and 'Pipeline report'. The main content area displays a table of deals with columns: Deal Name, Status, Market, No. Properties, No. Units, Assigned to, and Last opened. A search bar is located above the table. On the right side, a user profile dropdown menu is open, showing options: Edit Account, Manage Users, Manage Assumptions, Chart of Accounts, Automated Mappings, Bulk Upload, Settings, Change Password, and Logout. The 'Edit Account' option is highlighted with a mouse cursor.

Deal Name	Status	Market	No. Properties	No. Units	Assigned to	Last opened
Alice Deal - 2021	New	Fort Worth, TX	13	512	K. Farnsworth	10/26/2021
Ochre Shadow Estates	New	Fort Worth, TX	-	13	L. Berhmann	10/25/2021
Santa Fe Deal - 2021	New	Dallas, TX	8	512	S. Goodwill	10/25/2021
Hunter Hills Deal - 2021	New	Austin, TX	5	72	S. Goodwill	10/24/2021
Creeside Village Deal	New	Dallas, TX	13	1024	K. Farnsworth	10/21/2021
Forest Cove Apartments	New	Fort Worth, TX	-	21	L. Berhmann	10/21/2021
Willow Peak Apartments	New	Austin, TX	-	8	L. Berhmann	10/21/2021
Grand Rosso Deal - 2021	New	Fort Worth, TX	13	640	L. Berhmann	10/21/2021
Mountain Shadows Deal	New	Fort Worth, TX	8	256	S. Goodwill	10/21/2021
Family Villas Deal - 2021	New	Fort Worth, TX	56	1440	K. Farnsworth	10/21/2021
Green Gardens Deal	New	San Antonio, TX	3	13	K. Farnsworth	10/21/2021
Vinewood Village Deal	New	Austin, TX	512	1680	L. Berhmann	10/21/2021
Vinewood Apartments	New	Austin, TX	-	8	K. Farnsworth	10/20/2021

[Settings page]

The screenshot shows the 'Settings' page in the RedIQ application. The left sidebar contains navigation links for 'Deals', 'Comps', and 'Pipeline report'. The main content area is titled 'Settings' and has two tabs: 'Preferences' and 'Customize Colors'. The 'Preferences' tab is active and contains three sections: 'Privacy Preferences', 'Report Display', and 'Historicals Mappings'. The 'Privacy Preferences' section has two sub-sections: 'Data Aggregation' and 'Physical Property Data', each with 'Opt-In' and 'Opt-Out' radio buttons. The 'Report Display' section has two sub-sections: 'Display Expenses As' and 'Display Reimbursements As', each with 'Negative' and 'Positive' radio buttons. The 'Historicals Mappings' section has a 'Default Mapping Method' with 'Auto Mappings' and 'Legacy Mapping' radio buttons. On the right side, there is a 'Budget Type' section with a list of budget types: 'Budget Type A' and '2022 - 2023'. Below the list is an 'Add' button. At the bottom of the page, there are 'Cancel' and 'Update' buttons.

**Settings**

**Preferences** | Customize Colors

**Privacy Preferences**

Data Aggregation

☒ Opt-In \* ☐ Opt-Out \*

Physical Property Data

☒ Opt-In \* ☐ Opt-Out \*

**Report Display**

Display Expenses As

☐ Negative ☒ Positive

Display Reimbursements As

☒ Revenue ☐ Expense

**Historicals Mappings**

Default Mapping Method

☐ Auto Mappings ☒ Legacy Mapping

**Budget Type**

Budget Type A

2022 - 2023

+ Add

Cancel Update

## [Settings page]

redIQ

Deals

Comps

Pipeline report

JLL - West

99

### Settings

PreferencesCustomize Colors

Valuation Model

Header Font Color

Header Background Color

Title Font Color

Subheader Font Color

Sensitivity Table Highlight Color

Sensitivity Table Secondary Highlight Color

Apply rediQ Defaults

Preview Colors

Cancel

Update >

## [Manage users page]

redIQ

Deals

Comps

Pipeline report

JLL - West

99

### Manage Users

ExportAdd User

Filter Search Results

	First name	Last name	Job title	Email	Phone	Role	Last login	
	Aaron	Eastburn		aeastburn@rediq.com		Corporate User	Nov 11, 2021 16:56	
	Allison	Hossack	UX Strategist	allison.hossack@berkadia.com		Corporate User	Nov 10, 2021 16:33	
	Amarender	Devarapally		Amarender.Devarapally@berkadia.com		Corporate User	Nov 01, 2021 13:41	
	Luke	Behrmann	Insurance Peddler	lBehrmann@rediq.io		Corporate Adminis...	Nov 01, 2021 12:09	
	Roly	Aurora	Product Manager	roly.aurora@berkadia.com		Corporate User	Oct 27, 2021 10:51	
	Ravi	Papireddy		ravi@company.com		Corporate User	Oct 22, 2021 06:29	
	Joaquin	Soto		jsoto@rediq.com		Corporate User	Oct 22, 2021 06:29	
	Ketan	Vanjara		ketan.vanjar@berkadia.com		Corporate User	Oct 08, 2021 18:12	
	Suresh	Alagar		sureshbabu.alagar@berkadia.com		Corporate Adminis...	Sep 29, 2021 07:03	
	David	Jaynes	INTERN (h)	david.jaynes@berkadia.com		Corporate User	Sep 22, 2021 07:03	
	Amarender	Devarapally		Amarender.Devarapally@berkadia.com		Corporate User	Sep 17, 2021 21:04	
	Amarender	Devarapally	INTERN (h)	Amarender.Devarapally@berkadia.com		Corporate User	Feb 28, 2020 14:25	
	Amarender	Devarapally		Amarender.Devarapally@berkadia.com		Corporate User	Sep 16, 2021 22:46	



## [Add User]

redIQ

Deals

Comps

Pipeline report

JLL - West

99

Cancel

Add >

Add User

Email

indrani@gmail.com

First Name

Indrani

Last Name

Maity

Company

JLL West

Role Name

Corporate User

☐ Disabled

☒ Send Password

## [Manage users page]

redIQ

Deals

Comps

Pipeline report

JLL - West

99

Export

+ Add User

Filter Search Results

	First name	Last name	Job title	Email	Phone	Role	Last login	
	Aaron	Eastburn		aeastburn@rediq.com		Corporate User	Nov 11, 2021 16:56	
	Allison	Hossack	UX Strategist	allison.hossack@berkadia.com		Corporate User	Nov 10, 2021 16:33	
	Amarender	Devarapally		Amarender.Devarapally@berkadia.com		Corporate User	Nov 01, 2021 13:41	
	Luke	Behrmann	Insurance Peddler	lBehrmann@rediq.io		Corporate Adminis...	Nov 01, 2021 12:09	
	Roly	Aurora	Product Manager	roly.aurora@berkadia.com		Corporate User	Oct 27, 2021 10:51	
	Ravi	Papireddy		ravi@company.com		Corporate User	Oct 22, 2021 06:29	
	Joaquin	Soto		jsoto@rediq.com		Corporate User	Oct 22, 2021 06:29	
	Ketan	Vanjara		ketan.vanjar@berkadia.com		Corporate User	Oct 08, 2021 07:03	
	Suresh	Alagar		sureshbabu.alagar@berkadia.com		Corporate Adminis...	Sep 29, 2021 07:03	
	David	Jaynes	INTERN (h)	david.jaynes@berkadia.com		Corporate User	Sep 22, 2021 07:03	
	Amarender	Devarapally		Amarender.Devarapally@berkadia.com		Corporate User	Sep 17, 2021 21:04	
	Amarender	Devarapally	INTERN (h)	Amarender.Devarapally@berkadia.com		Corporate User	Feb 28, 2020 14:25	
	Amarender	Devarapally		Amarender.Devarapally@berkadia.com		Corporate User	Sep 16, 2021 22:46	

Edit User

Reset Password

Delete User

## [Edit existing user account]

**Edit User**

Email  
ravi@company.com

First Name  
Ravindra

Last Name  
Papireddy

Job Title  
Engineer

Phone

Role Name  
Corporate User

Company  
JLL - West

☐ Disabled

☐ Locked Out

Cancel Add >

## 07 - Test

- We used **remote moderated method** for usability testing.
- We assigned tasks to each user and observed them to understand their pain points.
- This helped to improve the designs further.

## 08 - Design handoff to developers

- We shared Figma wireframes with developers. This includes clickable prototype, page with individual screens where they can get assets, codes and color values.
- In addition to this, an instruction file was shared using which developers can understand in details about the flow in written format.