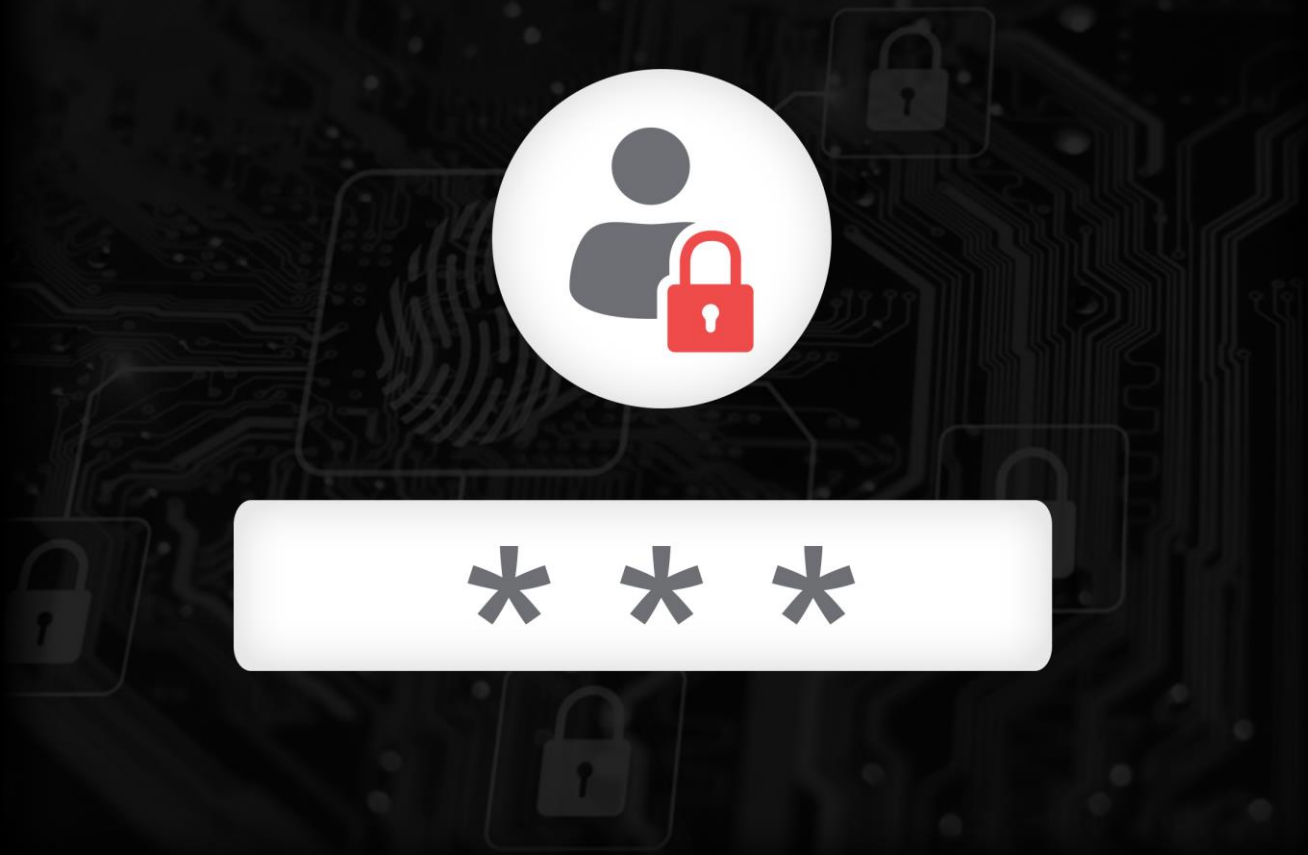# UX Case Study – Access Right (user access management module) in redIQ APP (New Feature)

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.
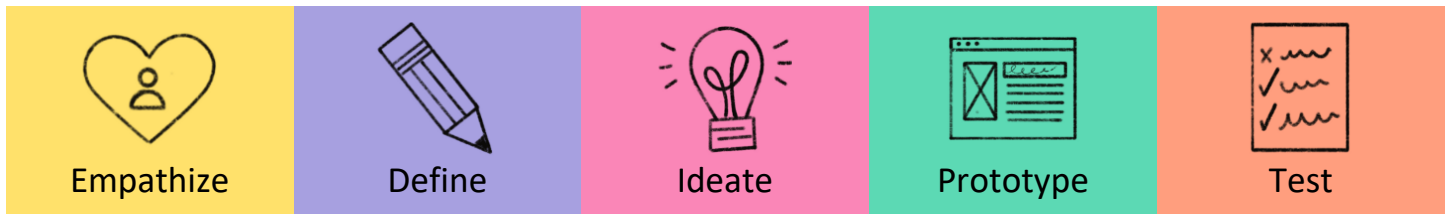
Business Goals

- 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.

Empathize	Define	Ideate	Prototype	Test

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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.

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

<u>Sign In flow for Corporate Admin</u>:

[Sign In - Default]
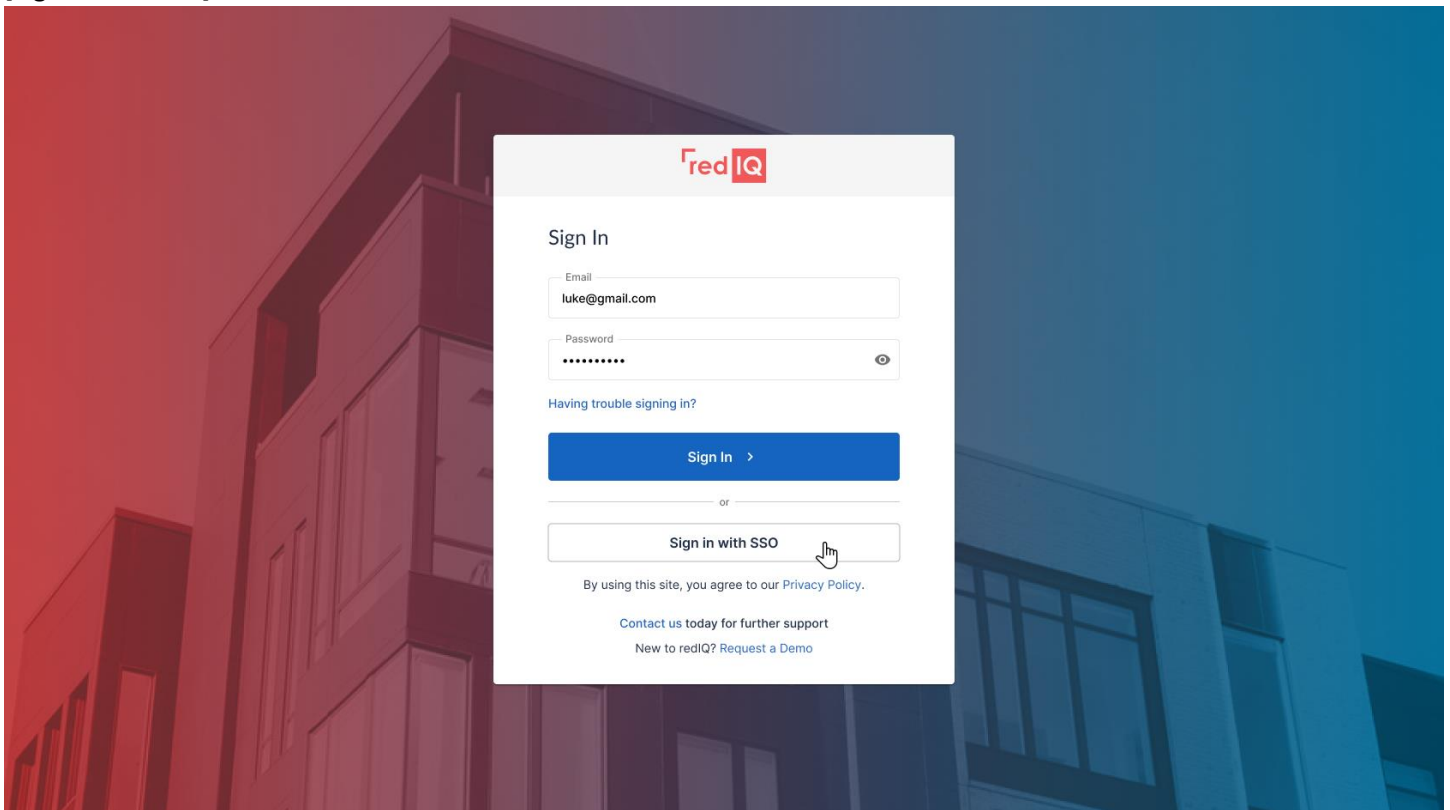
[Sign In - SSO]
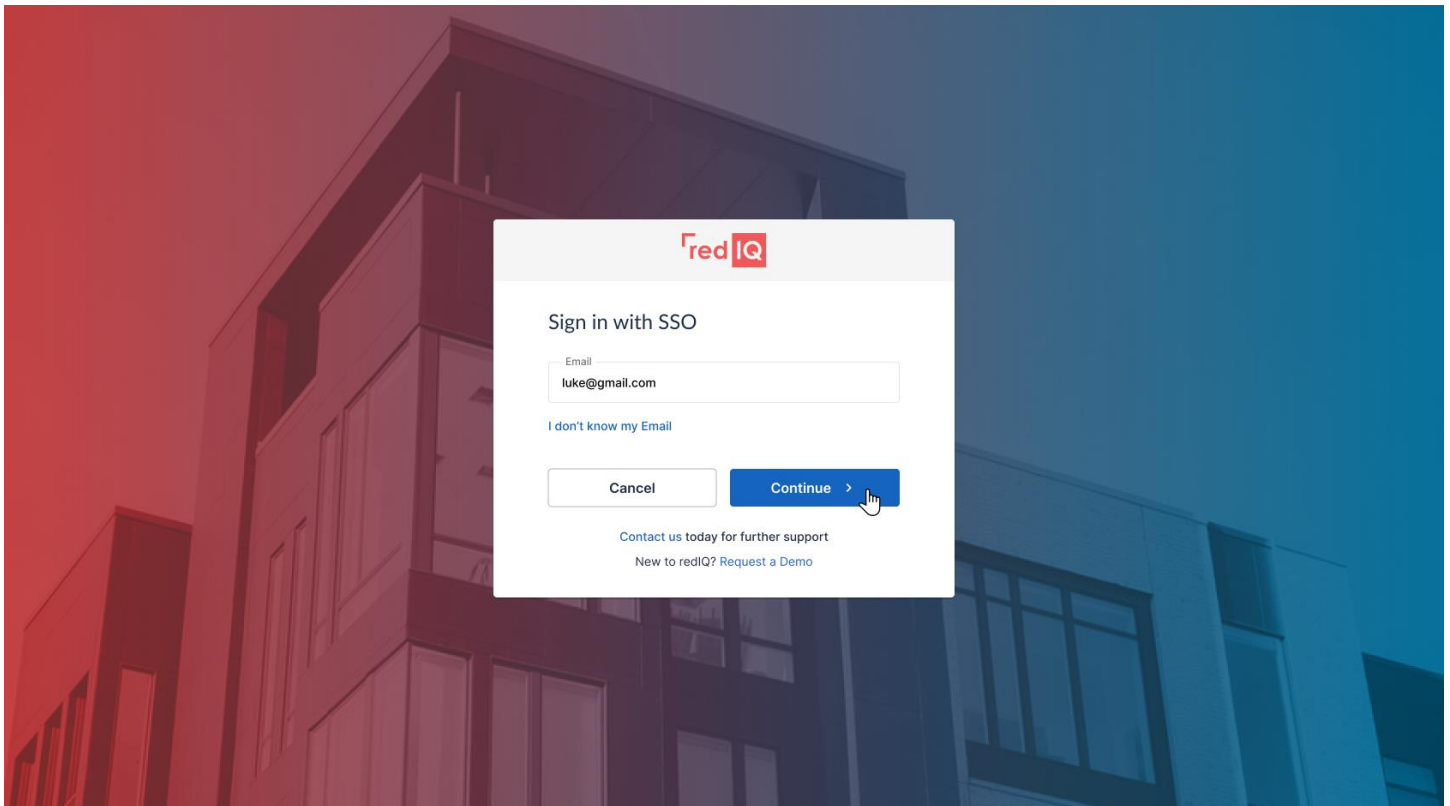
[Select an account – in case of multiple accounts]

[Option to switch account after log in]

Access Management flow for Corporate Admin:

[Menu to access accounts]

[Settings page]

[Settings page]

[Manage users page]

[Add User]

[Manage users page]

[Edit existing user account]

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.