

Content strategy: User management for administrators

CLIENT

Wells Fargo

PROJECT SUMMARY

- Redesigned the Manage Users page to reduce cognitive load on administrators
- Updated copy to new content and WCAG accessibility standards

TIMELINE & TEAM

- 2 weeks
- Me, product designer, accessibility specialist

RESULTS

More intuitive user management center that surfaced common tasks and streamlined workflows.

The screenshot displays the 'Manage Users' interface in the Wells Fargo system. At the top, there's a navigation bar with 'WELLS FARGO' and various menu items like 'Home', 'Payments & Transfers', 'Deposits', 'Lending', 'Markets', 'Reports & Insights', 'Manage Organization', and 'Services'. Below the navigation, there's a search bar with the text 'Find by last name' and a 'Go' button. To the right of the search bar, there's a pagination control showing '1 to 25 of 30' and navigation arrows. The main content area is a table with the following columns: 'Name', 'User ID', 'Status', 'Last Sign-on', and 'Actions'. The table lists several users, including 'Agrawal, William', 'Alvarez, Juan', 'Doe, John', 'Green, Charles', 'Green, Martha', 'Gupta, George', 'Johnson, Henry', 'Johnson, David', 'Jones, Vladimir', 'Lee, James', 'Miller, Henry', 'Miller, Rashida', 'Nair, Kumar', 'Nandimandalam, David', 'Patel, James', and 'Patel, Jose'. The 'Status' column shows 'Enabled' for most users and 'Disabled' for 'Miller, Rashida' and 'Patel, James'. The 'Actions' column has a 'Select' dropdown for each user. A dropdown menu is open for the first user, 'Agrawal, William', showing options: 'Reset password', 'Add or edit services', 'Replace token', 'Remove access', 'View profile', 'Disable user', and 'Delete user'.

Name	User ID	Status	Last Sign-on	Actions
Agrawal, William	Upsilon78	Enabled	Apr 11, 20XX X:XX pm PST	Select ▾ Reset password Add or edit services Replace token Remove access View profile Disable user Delete user
Alvarez, Juan	Alpha808	Enabled	Apr 11, 20XX X:XX pm PST	Select ▾
Doe, John	Eta108	Enabled	Apr 11, 20XX X:XX pm PST	Select ▾
Green, Charles	Tau328	Enabled	Apr 11, 20XX X:XX pm PST	Select ▾
Green, Martha	Phi019	Enabled	Apr 11, 20XX X:XX pm PST	Select ▾
Gupta, George	Kappa082	Enabled	Apr 11, 20XX X:XX pm PST	Select ▾
Johnson, Henry	Lambda875	Enabled	Apr 11, 20XX X:XX pm PST	Select ▾
Johnson, David	Ksi037	Enabled	Apr 11, 20XX X:XX pm PST	Select ▾
Jones, Vladimir	Kappa132	Enabled	Apr 11, 20XX X:XX pm PST	Select ▾
Lee, James	Beta129	Enabled	Apr 11, 20XX X:XX pm PST	Select ▾
Miller, Henry	Omega4523	Enabled	Apr 11, 20XX X:XX pm PST	Select ▾
Miller, Rashida	Mu0099	Disabled	Apr 11, 20XX X:XX pm PST	Select ▾
Nair, Kumar	Chi5342	Enabled	Apr 11, 20XX X:XX pm PST	Select ▾
Nandimandalam, David	Rho36543	Enabled	Apr 11, 20XX X:XX pm PST	Select ▾
Patel, James	Nu89645	Disabled	Apr 11, 20XX X:XX pm PST	Select ▾
Patel, Jose	Gamma24334	Enabled	Apr 11, 20XX X:XX pm PST	Select ▾

Problem

Wells Fargo was refreshing their commercial banking experience, which included updating the user management area of Administration.

A major pain point for administrators was not being able to find or remember where to complete common tasks, such as resetting passwords and editing service entitlements.



TL; DR

PROBLEM

Administrators could not remember where to find common tasks

SOLUTION

Added more at a glance info and reorganized administrative actions

IMPACT

Fewer calls to support, increased confidence in the company

The old experience didn't provide much information at a glance.

Can only see user names and IDs. Is there helpful information we can add?

One function was highlighted in its own CTA while all other actions were hidden within a menu

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Administration [Return to CEO Home](#)

Manage Users

Filters Applied Search 1 to 10 of 10 items

<input type="checkbox"/>	Name	User ID
<input type="checkbox"/>	Jones, Martha	Alpha808
<input type="checkbox"/>	Wong, Susan	Eta108
<input type="checkbox"/>	Wilson, Michael	Zeta178
<input type="checkbox"/>	Alvarez, George	Omega665
<input type="checkbox"/>	Doe, Ann	Chi996
<input type="checkbox"/>	Johnson, David	Lambda329
<input type="checkbox"/>	Lee, James	Kappa082
<input type="checkbox"/>	Miller, Henry	Ksi037
<input type="checkbox"/>	Brown, Jane	Delta955
<input type="checkbox"/>	Wells, John	Sigma725

Add or Edit Services Other Actions

- Edit Profile
- Reset Password
- Copy to Users
- Disable Users
- Enable Users
- Remove Access

Is there a more logical order for the menu options?

Discussions with product managers showed that **resetting passwords** and **adding/editing services** were the most common admin tasks

- Support call data showed that administrators often called the bank because they couldn't remember where to go to reset a user's password
- The most common tasks an administrator does are resetting passwords and adding or editing service entitlements, though there wasn't any formal research done on this
- The development team noted that we wouldn't be able to deliver filtering or bulk actions for our first product release

We **added information** to the Manage Users list so administrators could see more things at a glance and **reorganized** administrative tasks so the most commonly used ones were at the top.

I also **updated** content to reflect new writing standards and accessibility requirements.

The MVP experience provided much more context for administrators.

- 1 More information at a glance
- 2 Added an entry point for user profile
- 3 Moved all actions into the menu, them with most common tasks at the top
- 4 Actions are dynamic depending on user status

WELLS FARGO

Home Payments & Transfers Deposits Lending Markets Reports & Insights **Manage Organization** Services

< Go to Manage Organization

Manage Users

+ Add new user

Find by last name Go 1 to 25 of 30 < >

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Additional explorations - informational ribbon

The design team looked at adding a “ribbon” to provide additional information, like how many users are enabled or disabled.

We put this on hold due to tech constraints. We plan on doing user testing to see what information would be most helpful here.

The screenshot displays the 'Manage Users' page in the Wells Fargo system. At the top, the Wells Fargo logo is on the left, and notification and user profile icons are on the right. A navigation bar includes links for Home, Payments & Transfers, Deposits, Lending, Markets, Reports & Insights, **Manage Organization** (the active page), and Services. Below the navigation, there is a breadcrumb link 'Go to Manage Organization' and a yellow '+ Add new user' button. A summary ribbon shows: All users: 30, Enabled users: 26, and Disabled users: 4. Below this is a search bar with the placeholder 'Find by last name' and a 'Go' button. To the right of the search bar are pagination controls showing '1 to 25 of 30' and left/right arrow buttons. The main content is a table with columns: Name, User ID, Status, Last Sign-on, and Actions. Two users are listed: William Agrawal (User ID: Upsilon78, Status: Enabled, Last Sign-on: Apr 11, 20XX X:XX pm PST) and Juan Alvarez (User ID: Alpha808, Status: Enabled, Last Sign-on: Apr 11, 20XX X:XX pm PST). Each user has a 'Select' dropdown in the Actions column.

Name	User ID	Status	Last Sign-on	Actions
Agrawal, William	Upsilon78	Enabled	Apr 11, 20XX X:XX pm PST	Select ▾
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Additional explorations - Administration dashboard



Our product managers wanted administrators to be able to reset passwords from the Administration dashboard, in addition to Manage Users.

We put this on hold due to tech constraints and a new direction for navigation.

Results

The team delivered an MVP experience with common administrative tasks surfaced as best possible.

This foundation explored how to make the design scalable for future improvements.

Next steps

We have been creating additional flows for the items in the Actions menu, which will likely affect how we present them in Manage Users.

The larger design team is looking at navigation changes, which should make administrative tasks even easier to find.

Bulk editing and filtering capabilities will be added as well.
