

Authorized Users

Agent OS is the program Spectrum call center agents use while troubleshooting customer issues. One of the tasks an agent can assist a customer with is managing the authorized users on their account.

My role: UI design, content design

Collaboration: Accessibility, design systems, engineering, customer operations

Focus: Correct component and interaction for the action, understandable copy

Challenges: Two-factor authentication flow, avoiding scope creep

Collaboration

Collaborating with various teams allowed us to incorporate two-factor authentication into the user flow.

Accessibility: Sharing best practices for using disabled CTAs and hiding certain elements from the UI.

Design Systems: Selecting the right components for an intuitive flow.

Engineering: Explaining the backend limitations and capabilities.

Customer Operations: Defining the identification actions and pointing out the necessary improvements.

Challenges

Understanding two-factor authentication:

- How it works for this process
- How agents launch authentication dialog before or while helping a customer
- How it differs from verification

Focus on specific component within Settings:

- Intuitive location
- Understandable page, tab, and section titles

Spectrum Dashboard ETD Account Billing Repair Device Management Retention Ordering Troubleshooting Work Management Mobile Enterprise

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Manage Contact Info and Preferences

Notification Settings Contact Info **Access & Security**

Authorized Users

Complete security token authentication to manage authorized users.
[Complete Authentication](#)

Jane McClane	Edit Remove
Jim McClane	Edit Remove

[Add Another Authorized User](#)

Security Code

Enter a four-digit security code.

Security Code

Last Updated: 5/25/22, 11:20 CDT, Gateway P5097438

[Updated Security Code](#)

Account & Service Location Info

Internet, TV & Home Phone Mobile Location

John McClane
8246100016378106
Residential 10:47 AM MT

Customer Details

Service Address 2121 Nakatomi Plaza Los Angeles, CA 90067	Billing Address 2121 Nakatomi Plaza Los Angeles, CA 90067
Phone Number (914) 234-7890	Alt Phone Number (914) 432-1148
Email Address first.lastname@char...	Spectrum Username Created

Account Details

[Verify & Authenticate](#) [Update Contact Info](#)

Relevant Knowledge

Resolution, Notes & Interactions

Security Requirements

As a measure to limit fraudulent activity, two-factor authentication is required for a customer to manage their authorized users.

It was important to understand the difference between **verification** and **authentication** and what an agent is able to do for a customer at each stage of identification.

Since actions like managing authorized users are only accessible after a customer has been both verified *and* authenticated, it was important for the UX to reflect this.

Definitions

Verification: A way of identifying the customer based on their voice prompts during the call-in process.

Authentication: A second step taken to confirm the customer's identity (also known as two-factor authentication or 2FA).

Authorized User: A trusted person the customer adds to their account who can access information and make decisions.

The screenshot shows a web interface for 'Verify and Authenticate Account'. It is divided into three main sections: Account Info, Verification, and Authentication. The Account Info section displays fields for Account Number, Account Holder, Phone Number, and Service Address. The Verification section includes a dropdown for 'Account Holder or Other Person *' and two buttons: 'Mark as Verified' and 'Mark as Not Verified'. The Authentication section contains three sub-sections: 'Security Code' with a text input and an 'Authentication' button; 'Security Question' with a text input and an 'Authentication' button; and 'Security Token' with a dropdown menu and a 'Send Token' button. At the bottom of the Authentication section are 'Mark as Not Authenticated' and 'Cancel' buttons. On the right side, there is a sidebar with tabs for 'Resolution & Notetaking', 'Historic Notes', and 'Interactions'. The 'Resolution & Notetaking' tab is active, showing 'Add Resolution' and 'Add Notes' buttons. Below these are radio buttons for 'Select note type:' (Internet, TV and Home Phone, Mobile) and a text area for 'Account Notes' with a character count of 325 Characters Remaining. A 'Permanent' checkbox and a 'Submit' button are also present.

Verify and Authenticate Account

Account Info

Account Number 8352306990579797
Account Holder NATALIE RILEY
Phone Number (***-***-9061
Service Address 2609 Park Ridge Blvd. Rock Hill, SC 29732-9807

Verification

Account Holder or Other Person *
NATALIE RILEY

Mark as Verified Mark as Not Verified

Authentication

Security Code
[Text Input] Authentication

Security Question
What was the name of your first pet?
[Text Input] Authentication

Security Token
[Dropdown Menu] Send Token

Mark as Not Authenticated Cancel

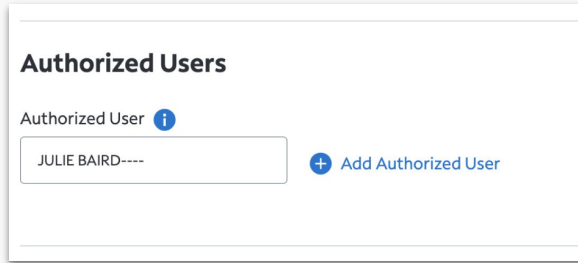
Resolution & Notetaking Historic Notes Interactions

Add Resolution Add Notes

Select note type:
☒ Internet, TV and Home Phone
☐ Mobile

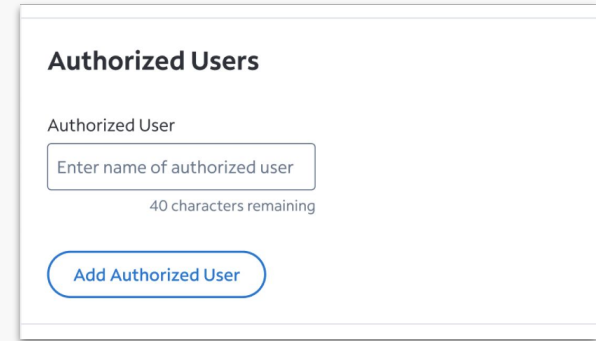
Account Notes
Enter an additional note
325 Characters Remaining
☐ Permanent
Submit

Component Selection – Match Design System



A UI mockup titled "Authorized Users". It features a label "Authorized User" with a blue information icon to its right. Below the label is a text input field containing the text "JULIE BAIRD-----". To the right of the input field is a blue button with a plus icon and the text "Add Authorized User".

Current state



A UI mockup titled "Authorized Users" following a design system. It features a label "Authorized User". Below the label is a text input field with the placeholder text "Enter name of authorized user" and a character count "40 characters remaining" below it. At the bottom is a blue button with the text "Add Authorized User".

Match design system

In the current state, the info icon hides the character limit information and the CTA is next to the field, rather than under it.

We could update this section to our current design system specifications, but that doesn't clarify the actions available to the agent – do they click the CTA to save the information they added to the input field? What if the account already has an authorized user, how can it be edited or removed?

Component Selection – Include All Actions

By changing the input field to a table, we're able to show existing authorized users and related actions.

Authorized Users

 Security token authentication must be completed to add or update an authorized user.
[Complete Authentication](#)

Authorized Users	
Jane McClane	Edit Remove
Jim McClane	Edit Remove

[+ Add Another Authorized User](#)

Including the alert message and disabling the actions in this section by default follows the two-factor authentication process.

Evolution of an Alert Message

Common Word Choices

⚠ Security token authentication must be completed to add or update an authorized user.

Complete Authentication

⚠ Security token authentication required to add or update an authorized user.

Complete Authentication

Other Common Word Choices

- Use **let** in place of **allow** (condescending, paternalistic; "This option lets you save...").
- Use **affect** in place of **impact** ("The storm may have affected your services...").
- Use **issue** in place of **problem** ("We'll resolve the issue soon").
- **Avoid the words must, need and required when possible** (can sound heavy-handed), and instead rephrase to indicate the required action ("To get started, review and accept these terms and conditions" instead of "You must accept...").

Accuracy, Clarity, Brevity

Remember Your ACBs

We apply many well-established UX writing principles when drafting content for our products. Some of these include being clear and concise, using plain language, adhering to established guidelines for consistency, avoiding ambiguity and others (ask a content designer to tell you more!). But above all, we remember our ACBs:

Accuracy, Clarity, Brevity.

To help our users complete the tasks they need to do, the content we write needs to be—in this order—accurate, clear and brief. It's not useful, for example, to be as brief as possible if that means that accuracy and clarity suffer.

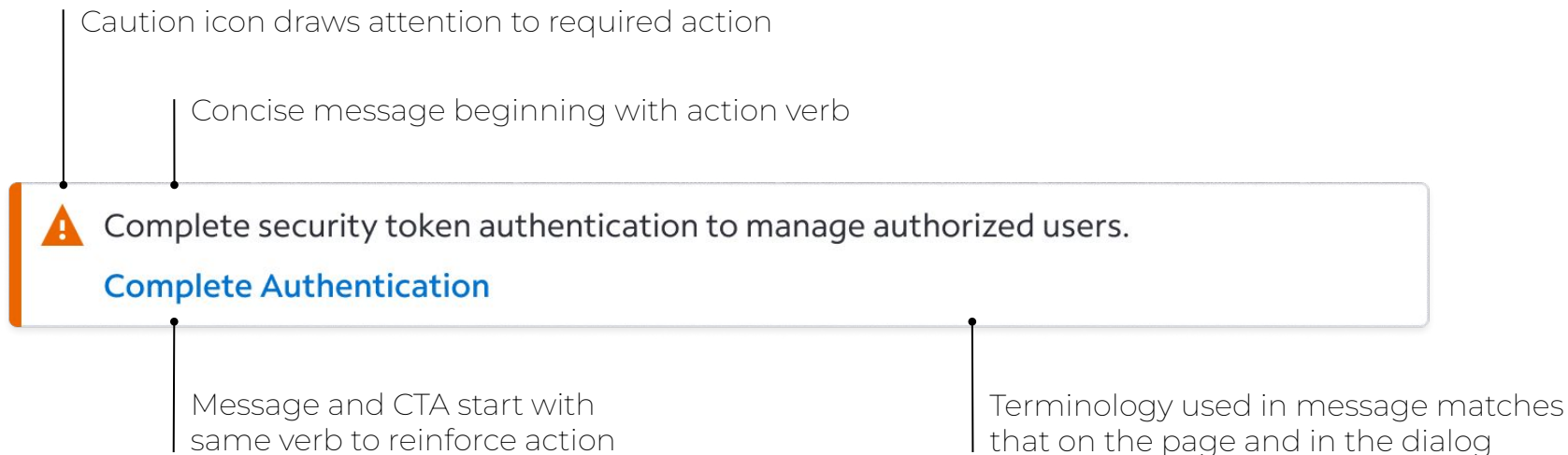
⚠ Complete security token authentication to add or update an authorized user.

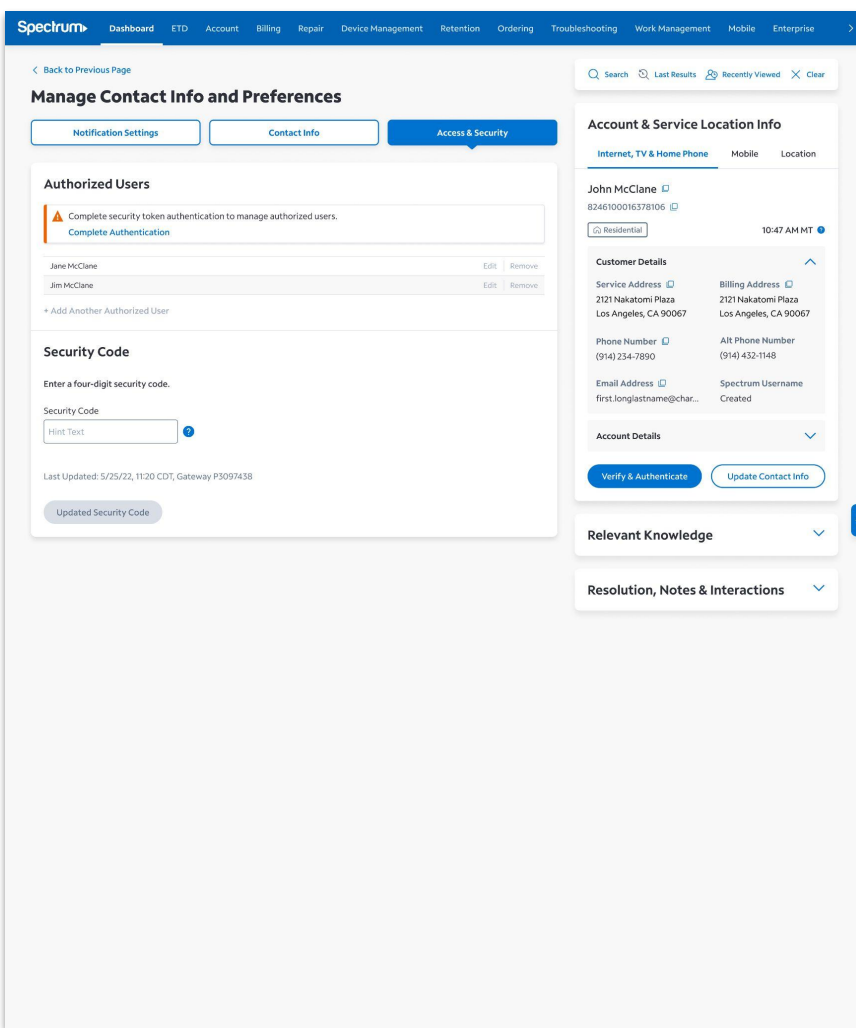
Complete Authentication

⚠ Complete security token authentication to manage authorized users.

Complete Authentication

Final Alert





Final Design and Prototype

After finalizing the content for this section, we were able to work with our Customer Operations partners to relocate it. Now, all of the items that require two-factor authentication are located on the same tab.

Authorized Users Figma Prototype

We'll partner with our UX research team in the future to determine the best agent experience for these settings. This will potentially affect the page title, tab order, and CTA used to navigate to this part of Agent OS.