

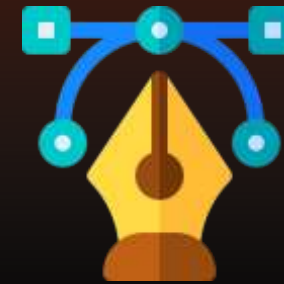
Endpoint Insight Engine

April 2025

POD: UXDs and PM Partners



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Overview

- **IT admins and support teams** have limited visibility into endpoints, making it challenging to predict when these issues might arise and difficult to troubleshoot efficiently once they do. Many of these problems have been encountered and resolved before, yet the lack of visibility leads to a significant impact on customer productivity and satisfaction, often resulting in escalations that demand considerable time and resources from the support team.
- To address this, our team is developing the **Endpoint Insights Engine**—a solution designed to equip IT admins and TAC teams with deep endpoint visibility and an AI-driven investigation tool. This engine empowers teams to analyze and resolve previously unknown agent issues efficiently, often without needing direct end-user involvement. By enabling smarter, faster issue resolution, we aim to reduce escalations, boost customer satisfaction, and improve overall operational efficiency.

Research Objectives

To deeply understand user interactions with our endpoint insight new feature.

To identify usability issues and friction points experienced by our diverse users.

To gather detailed feedback on the clarity, accessibility, and workflow efficiency of the root cause analysis workflow.

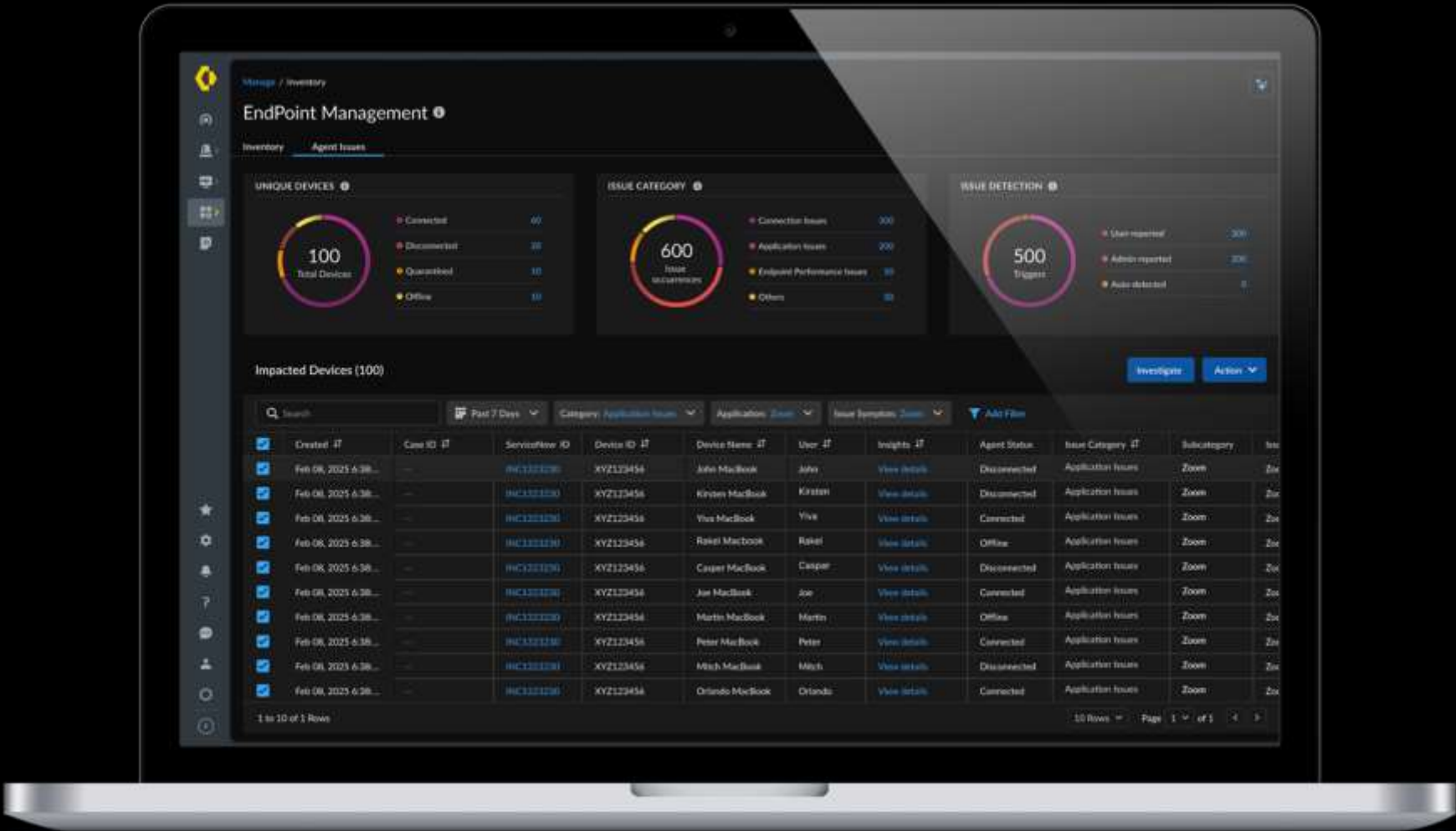
To validate improvements in navigation, Widget, Visualization, user confidence, and satisfaction.

Executive Summary

This research involved a thorough usability evaluation of the new Endpoint Insight feature through remote, moderated sessions with experienced users. Participants completed structured, real-world tasks to assess the usability and effectiveness of key functions—Root Cause Analysis, Coaching the End User, and Ticket Creation.

The study revealed how users efficiently investigated the root cause of unknown issues and explored the various actions they could take during the investigation process. While users found the interface generally easy to navigate, there were areas of confusion. Participants indicated a need for additional context—such as tooltips, clearer visualizations, and more detailed information—to deepen their understanding of the root cause.

These insights provide a clear roadmap for targeted enhancements focused on simplifying the interface, enriching the available information, and ultimately increasing user satisfaction and efficiency.



Methodology

- Conducted remote, moderated usability sessions.
- Task-oriented scenarios reflecting realistic workflows and common use cases.
- Captured qualitative insights through task observations, participant ratings, and detailed post-task interviews.
- Included diverse user profiles for comprehensive perspectives.

Participant Details

- Total Participants: 5 (Internal from Palo Alto Networks)
- Roles: SASE Domain Consultants, Solution Architects, PAA users
- Experience Level: 5-8 years actively using Prisma Access solutions

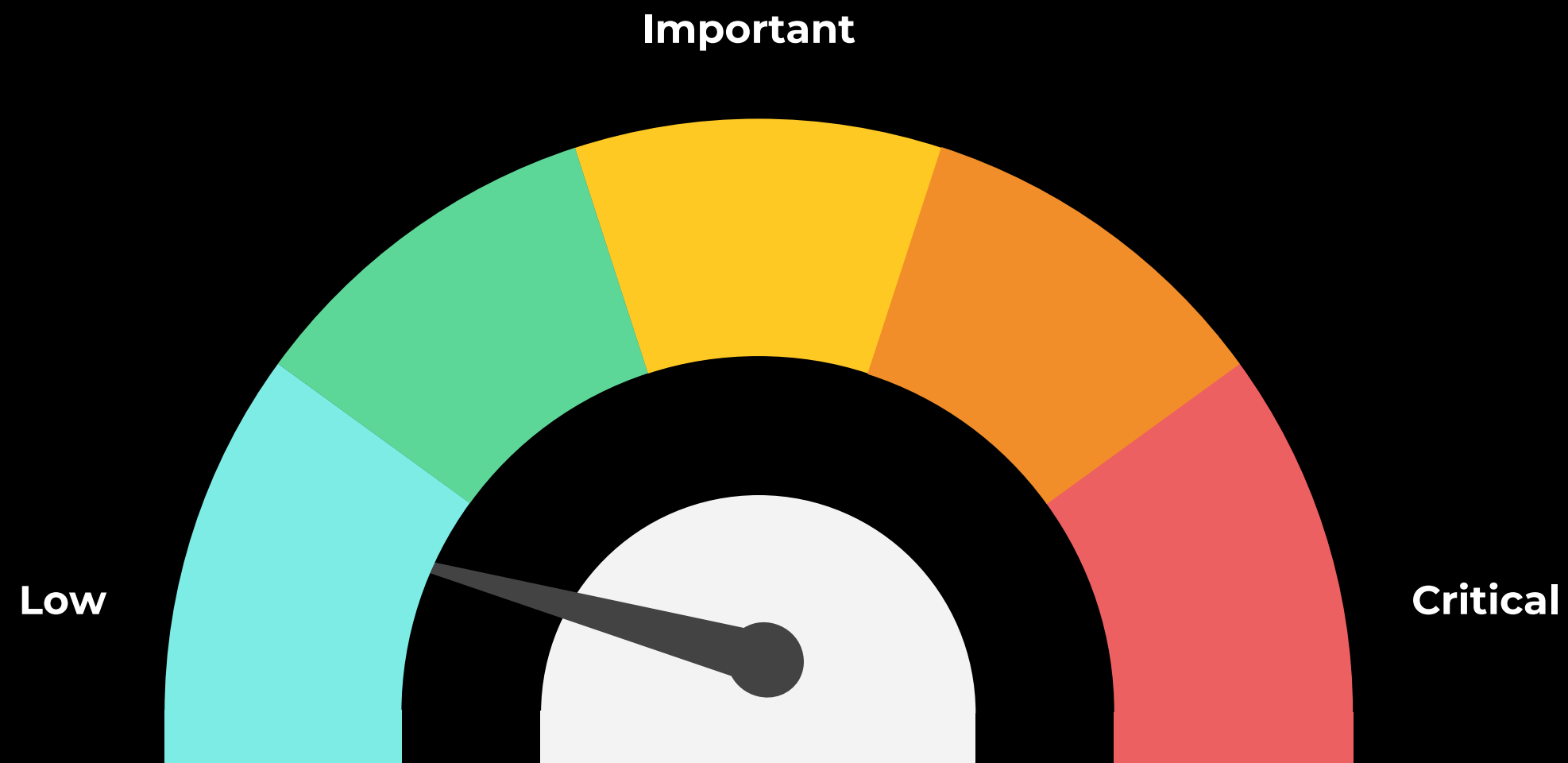
Tasks

- [Exploratory feedback] - Explore the Endpoint Insight landing page.
- [Task completion] - Investigate the root cause analysis.
- [Task completion] - Coach the end user, Contribute to the resolution and Create ticket

Severity Scale

Severity is based on a number of factors including

- Number of users affected
- Risk of not understanding key concepts in the product
- Risk of not being able to complete key tasks, etc.



Task - 1

Endpoint insight landing page

Agent Issue Page

Positive Findings

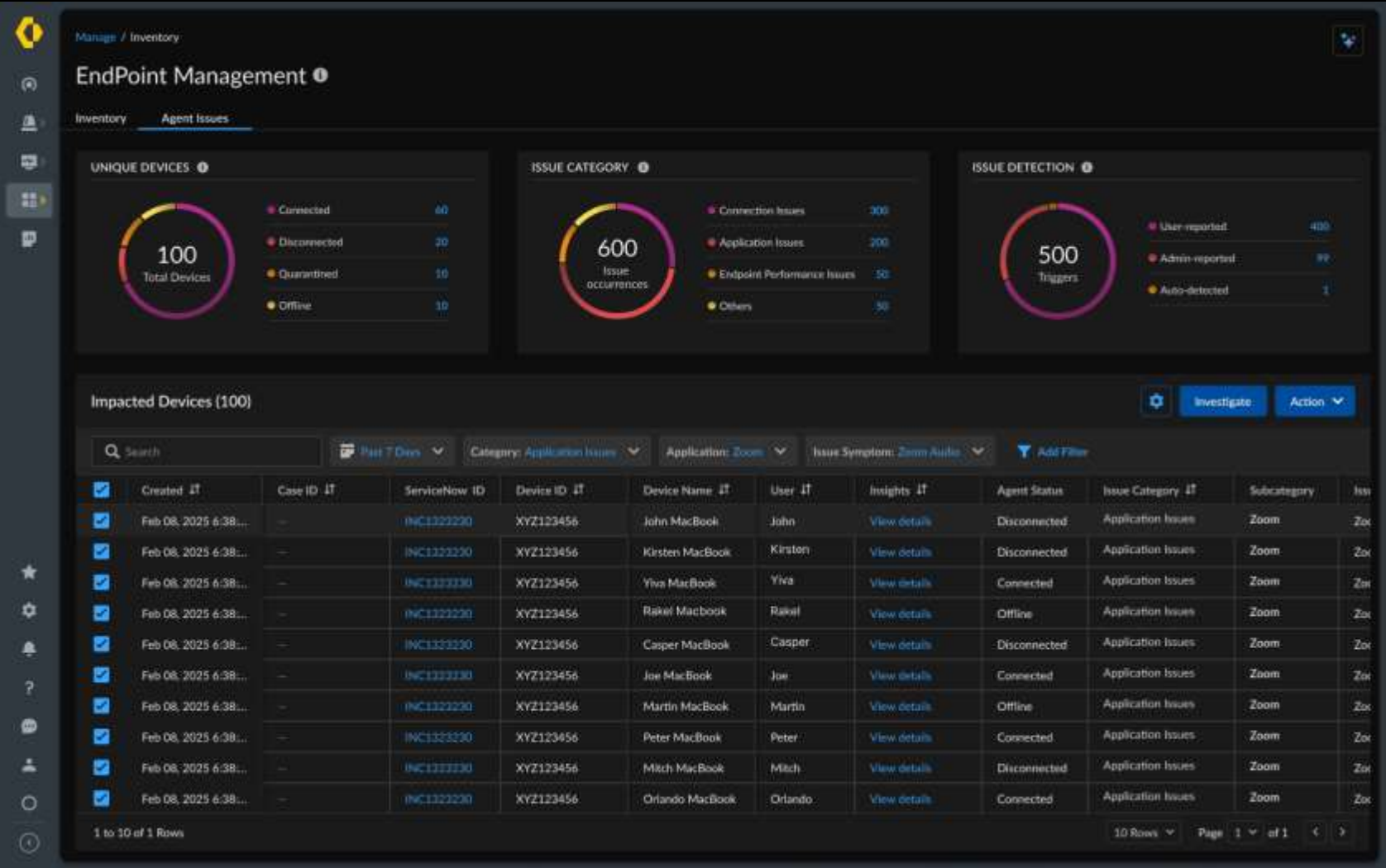
- 5/5 Participants found the top widgets with data points easy to understand and appreciated the clear visibility they provided into the endpoints.
- Participants also responded positively to the devices table, it offered a clear and detailed view of individual endpoint information.

Issues

- Participants find it difficult to differentiate between Case ID and ServiceNow ID.

Recommendation

- Make a clear differentiation of case ID and ServiceNow ID.
- Adding some tooltips for the columns in the table.



"I like that we can see endpoint-level details at a glance. It gives a quick idea of the device environment."



Insight Page

Positive Findings

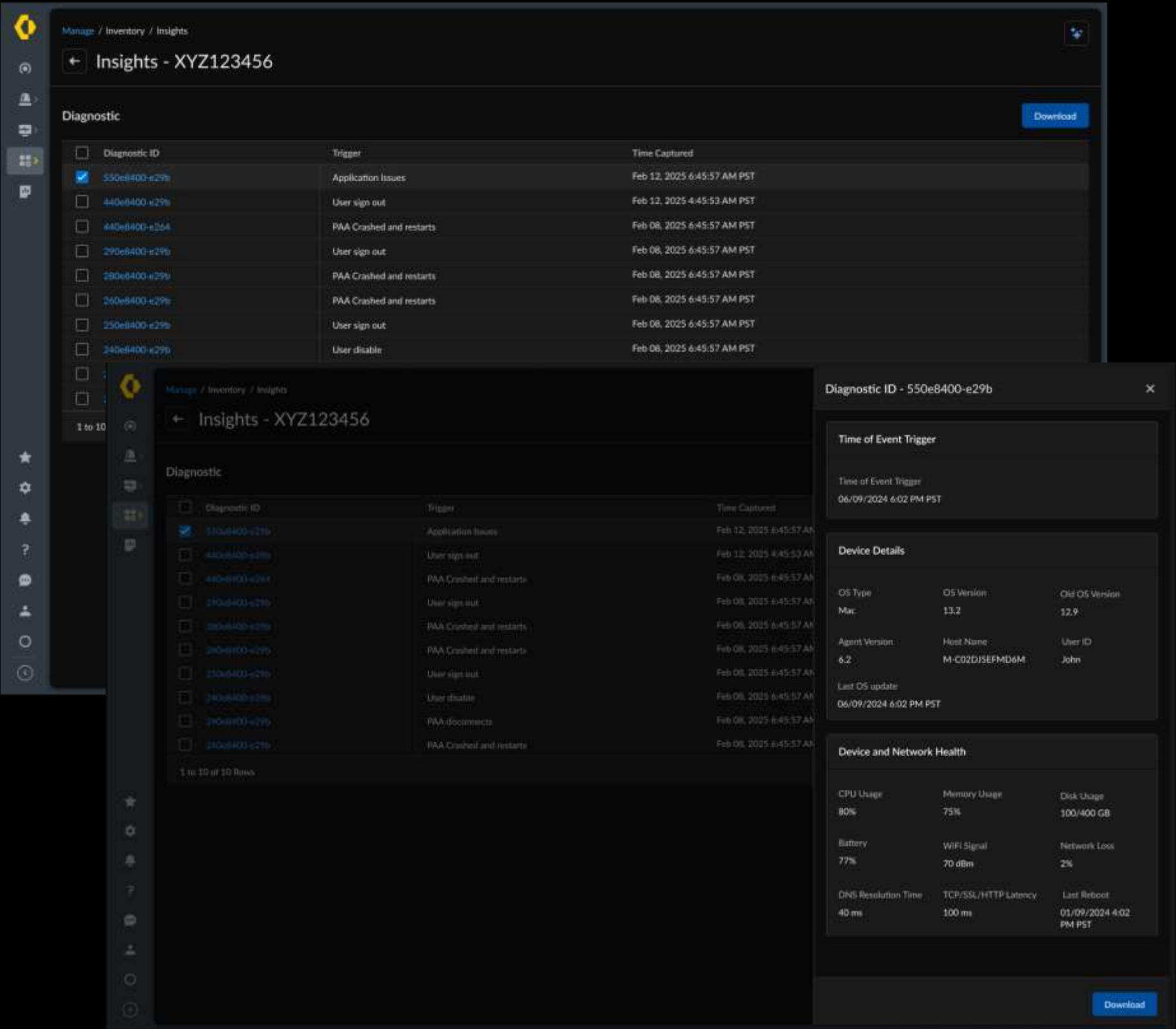
- 5/5 Participants found the insight page useful.
- 4/5 Participants appreciated the Diagnostic side panel, mentioning that it provides detailed and valuable information about the endpoint.

Issues

- 3/5 Participants raised concerns about the limited information available in the insight table.

Recommendation

- Some of the terminology needs to be improved for better user understanding.
- Additional information should be added to the table to provide users with more insights.



"Including logs and environment context right on the screen was a huge plus. No need to jump between pages."



Task - 2

Investigate (AI Root cause Analysis)

Investigate Landing Page

Positive Findings

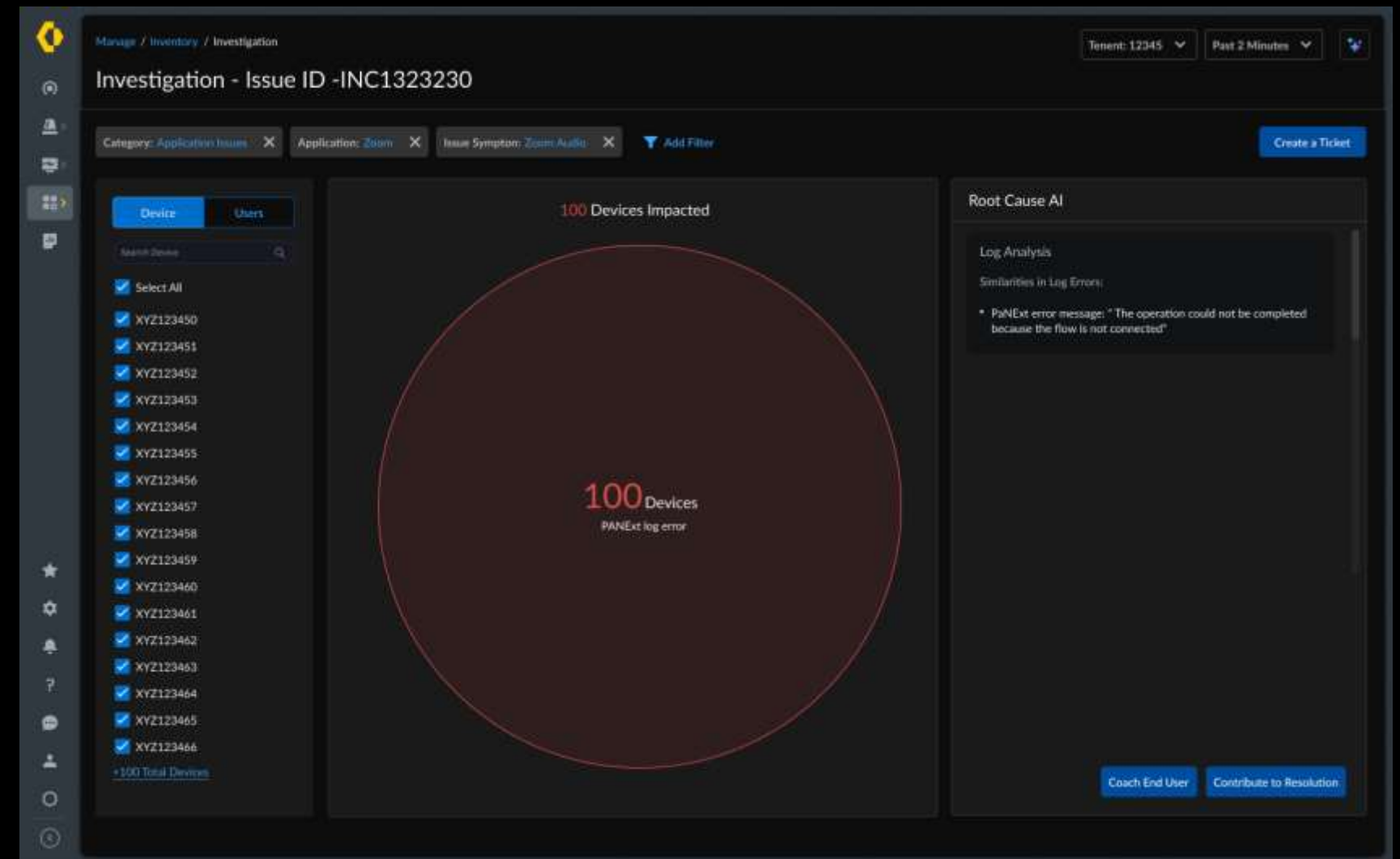
- 5/5 Participants found it easy to investigate and appreciated the information displayed in the right panel.
- 4/5 Participants emphasized the importance of an efficient investigation process and the role of filters in narrowing down issues.

Issues

- 3/5 participants questioned the purpose of displaying the Device/Users section again, noting that the devices had already been selected earlier. They were unclear about its added value or functionality.

Recommendation

- Participants emphasised the importance of AI auto filling more root cause details of all the endpoints.
- Add more information on the root cause AI panel to give more insights to the users.



"Including logs and environment context right on the screen was a huge plus. No need to jump between pages."



Filters

Positive Findings

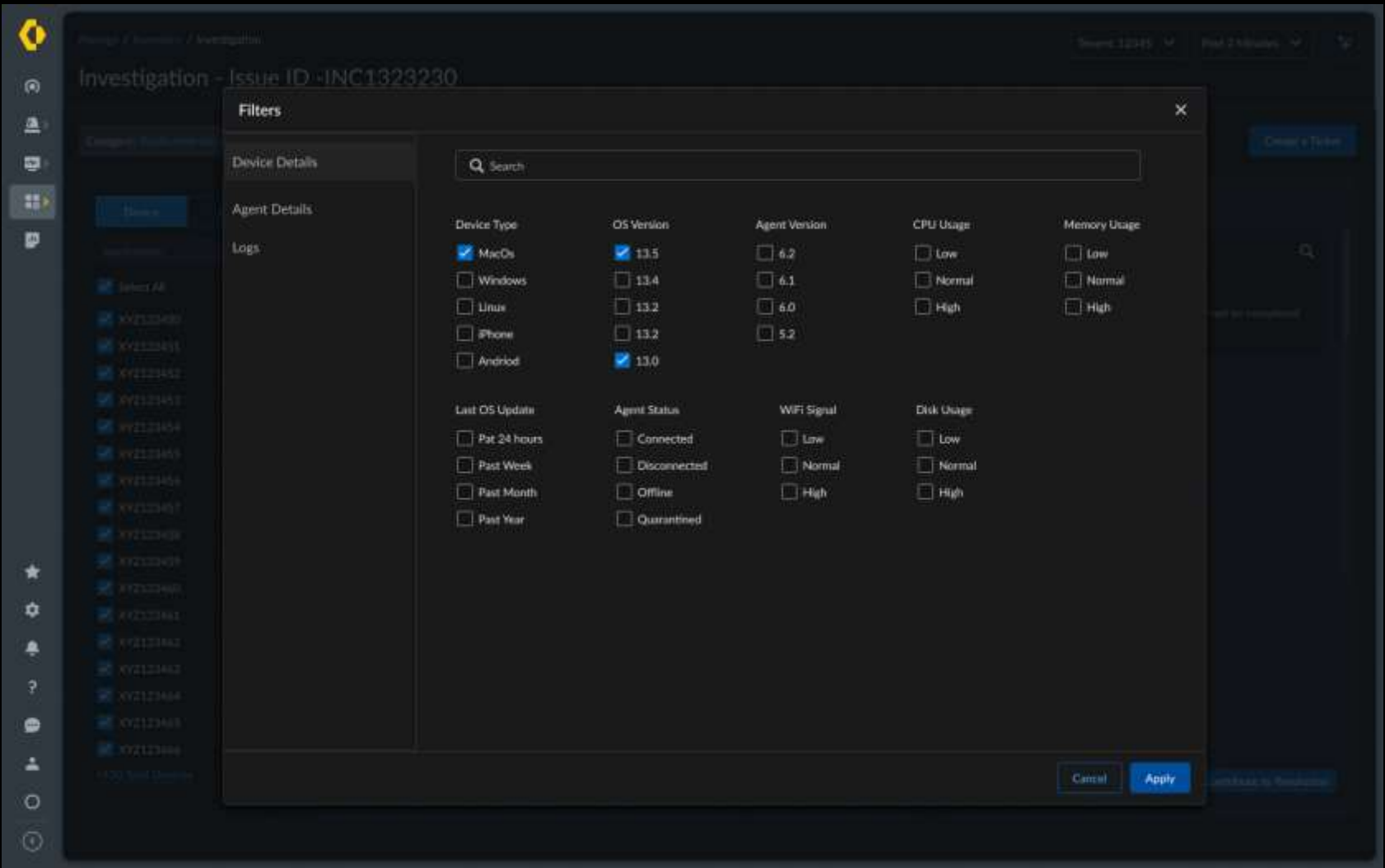
- 4/5 Participants found the filter feature very useful, especially being able to view all available filter options.

Issues

- They were also curious about how many filters can be applied during an investigation and how the applied filters would be visually represented.
- Participants raised questions about the content within the "Agent Details" and "Log" tabs under the filters.

Recommendation

- Too many clicks to filter and investigate
- Reduce the filter options / Restricted the filter option to investigate the root cause analysis.



"The filters and sorting options are intuitive. It's easy to narrow down on devices with issues."



Investigate the root cause AI

Positive Findings

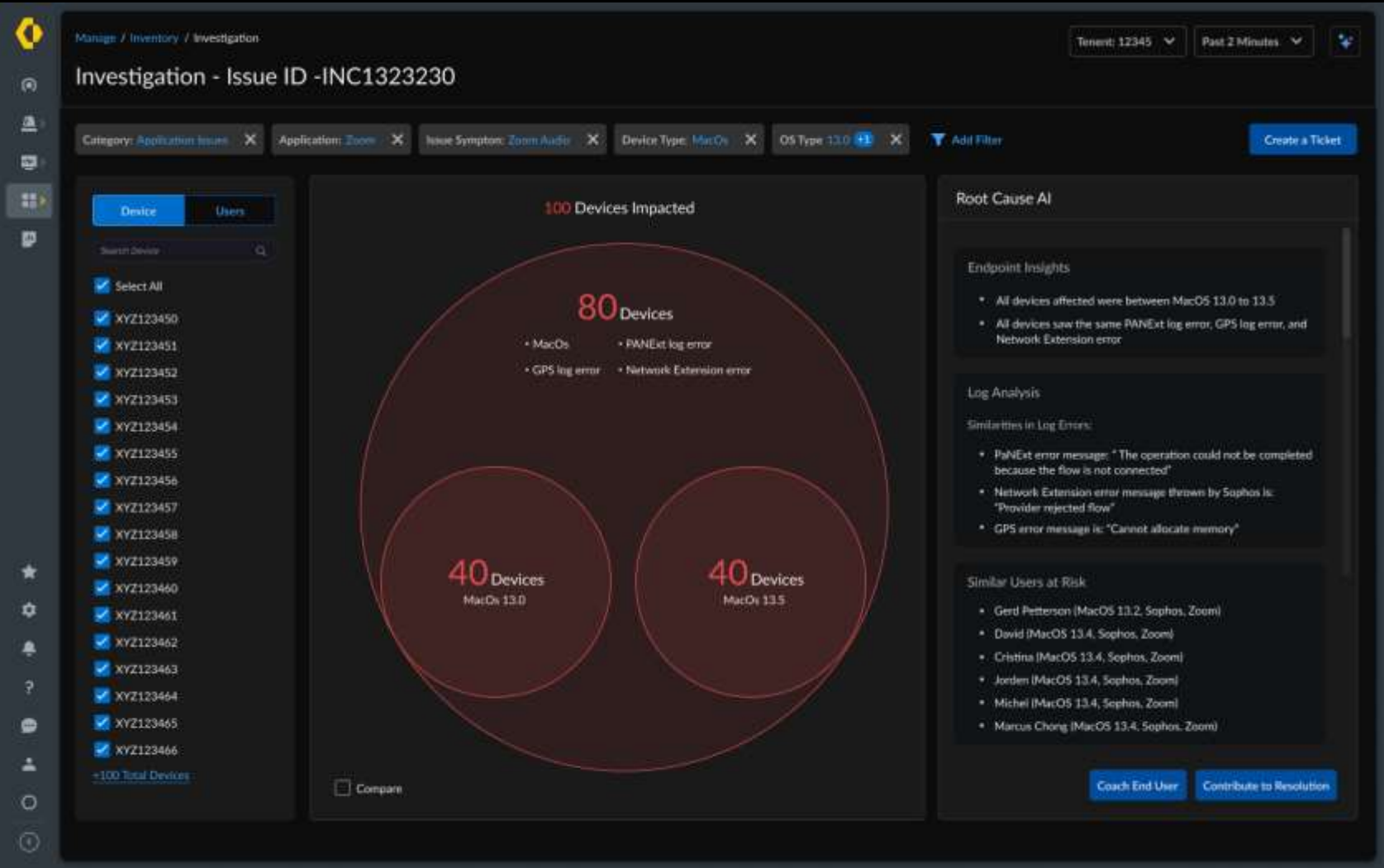
- 5/5 participants found it easy to investigate the root cause through each drill-down.
- 5/5 Participants appreciated the clear separation of devices based on filters and the detailed information displayed in the right panel.

Issues

- Participants requested more clarity around the “Similar Users at Risk” section, specifically what actions they are expected to take with this information.

Recommendation

- 2/5 Participants suggested to show the interaction and the connection between visuals and information on right panel in better way to get more clarity.
- Show more information about the endpoints and remove some of the elements like Similar user at risk.



"It was clear which devices were affected, and the ability to drill down for more details was extremely helpful."



Compare capability

Positive Findings

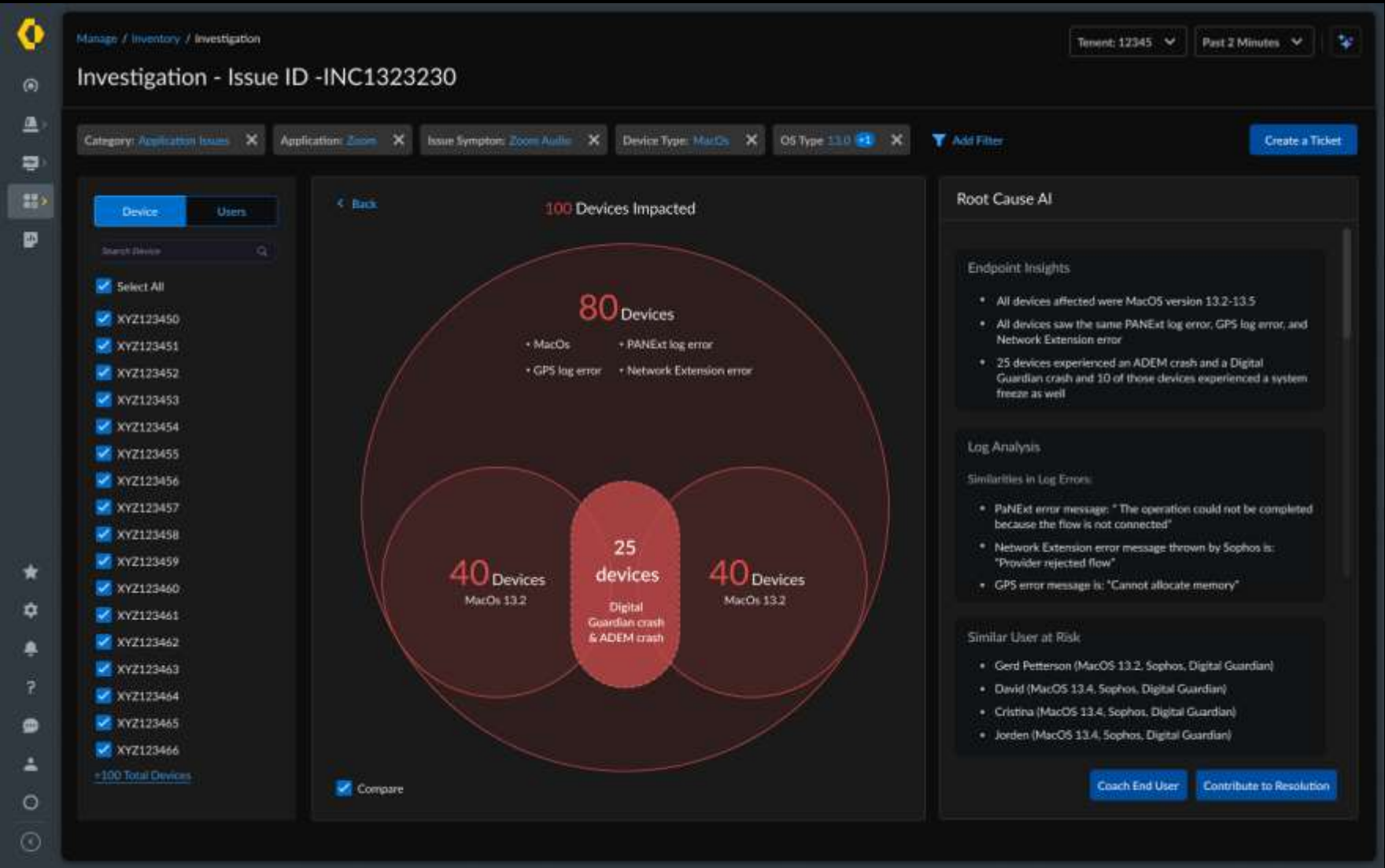
- 5/5 participants appreciated the comparison feature and the ability to identify commonalities across devices.
- 5/5 All participants also liked the visual design of the comparison view, though they found the information in the right panel unclear.

Issues

- Participants were curious if it's possible to further drill down into the 25 devices listed.
- What happens when more MacOS filters selected?

Recommendation

- Clarify the information presented in the right-hand panel to improve user understanding.
- Enhance the visualizations to make them more intuitive and user-friendly.



"The comparison feature is really useful, especially when trying to identify configuration mismatches between endpoints."



Task - 3

Coach End Users, Contribute to Resolution & Create Ticket

Coach End User

Positive Findings

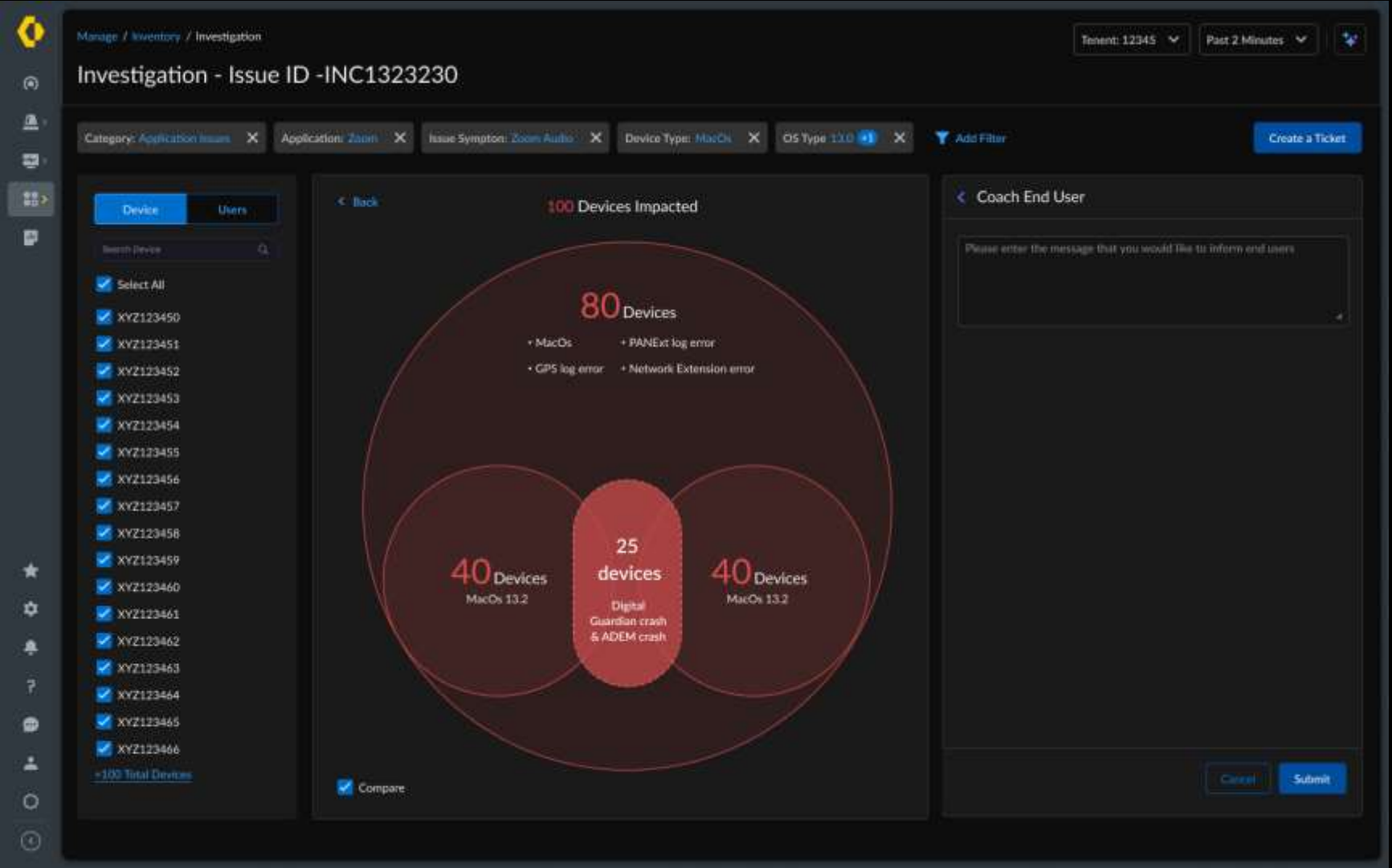
- 4/5 participants liked the "Coach End User" option.

Issues

- There was confusion about whether the "Coach End User" action applies to a single device or multiple devices.
- Participants wanted more clarity on what happens after submitting the information.

Recommendation

- Provide clarity on the "Coach the End User" flow—specifically, what happens after the user clicks submit.
- Add a clear label or description outlining the purpose and outcome of coaching the end user, including its potential impact.
- Include additional information specifying which devices are eligible for user coaching.



Contribute to Resolution

Positive Findings

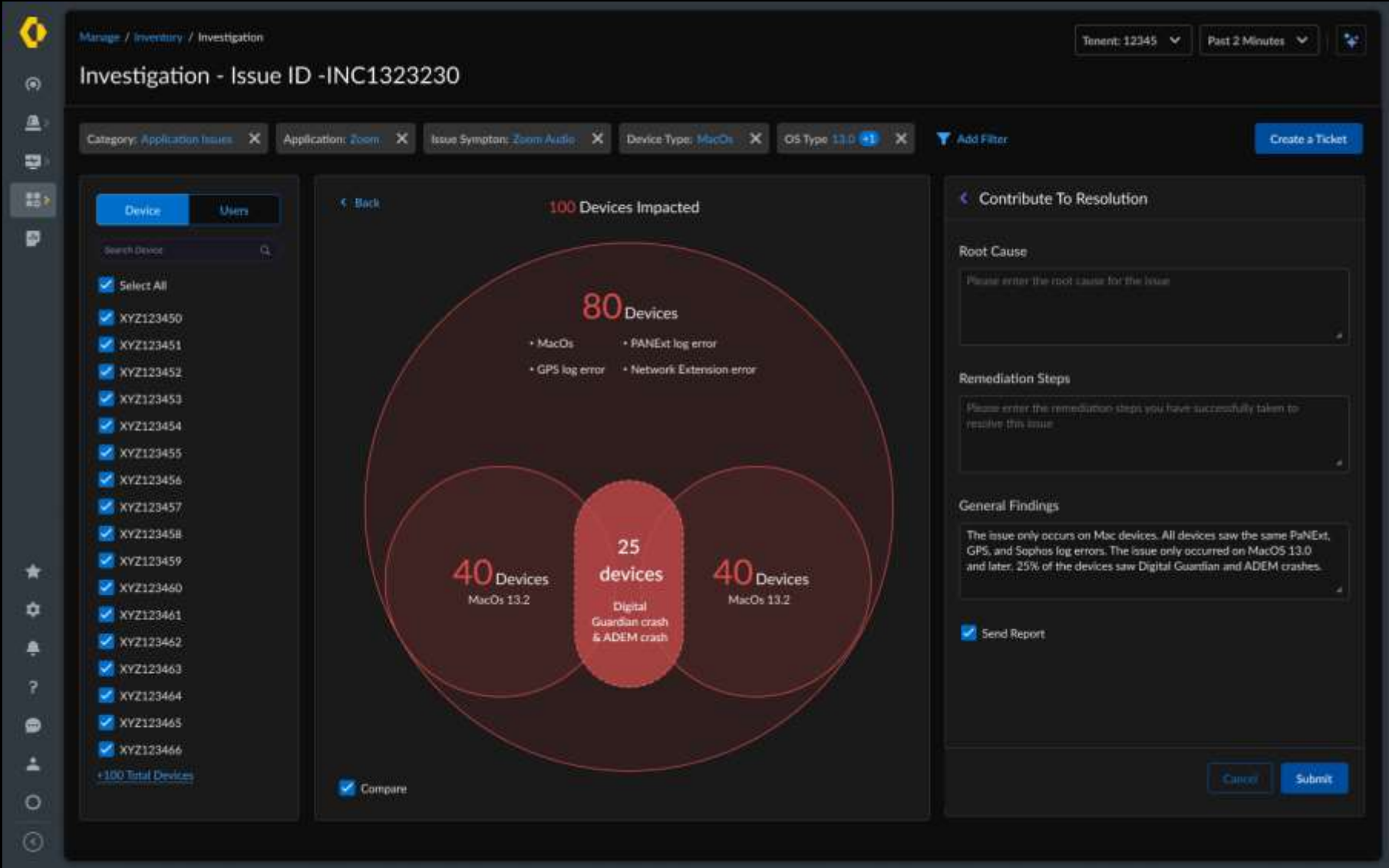
- 4/5 participants liked the "Contribute to Resolution" option.

Issues

- Some participants were confused about the difference between general findings and identifying the root cause.
- Participants expressed the need for clearer guidance on what happens next and what actions they are expected to take.
- There were also questions around where the reports would be stored and whether they could be shared with others.

Recommendation

- Place the general findings section at the top and provide clear guidance on the actions the user needs to take.
- Include a brief explanation of why contributing to the resolution is important and how it can benefit other IT admins by aiding future troubleshooting efforts.



Create Ticket

Positive Findings

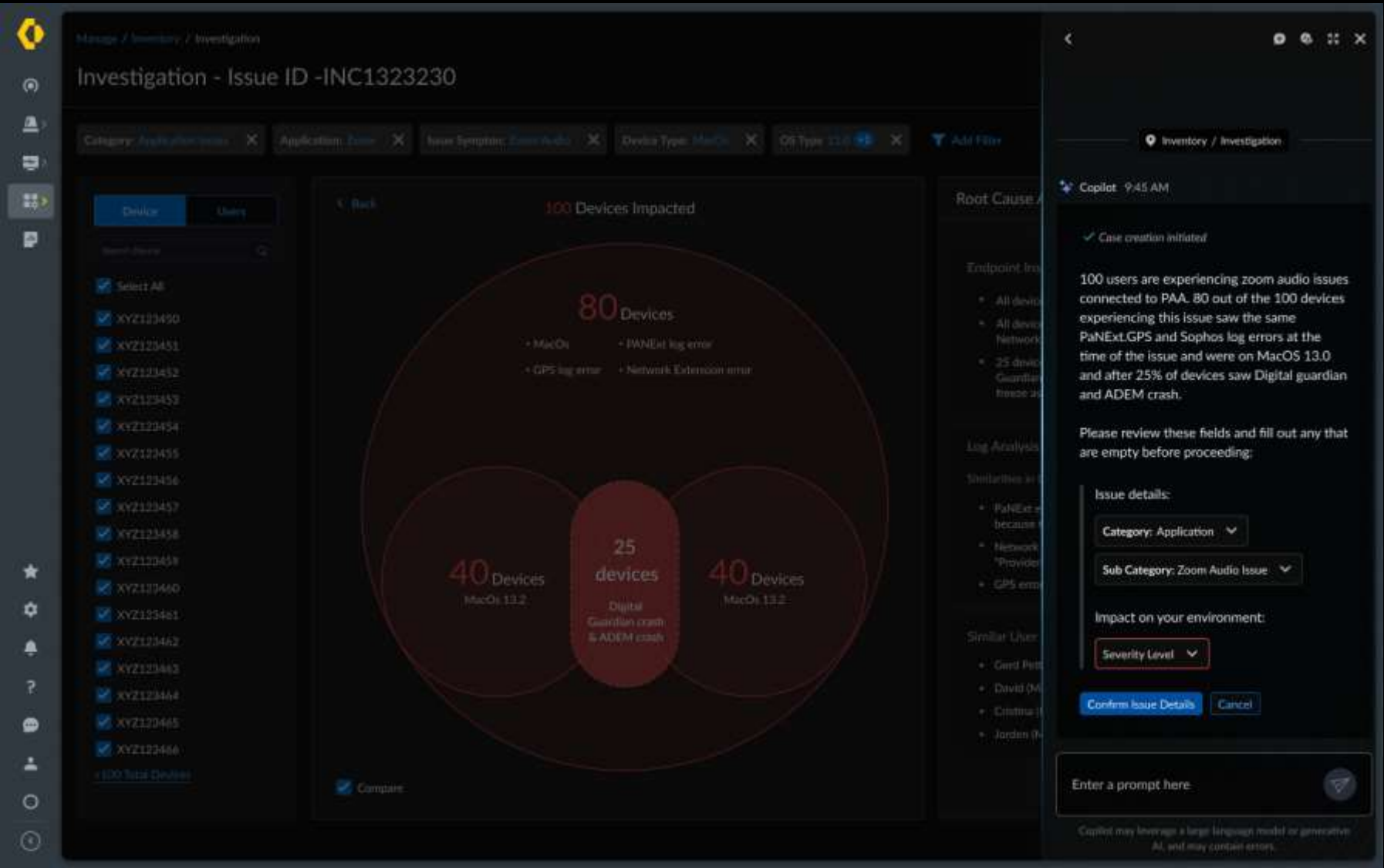
- 5/5 Participants appreciated this capability.
- Participants also appreciated the copilot's ability to summarize the investigation and automatically provide relevant categories and subcategories.

Issues

- Several participants were curious if ticket creation could be initiated directly from the landing page of the investigation view.
- Participants also recommended auto-populating case fields—such as impacted application and severity—based on insights gathered during the investigation.

Recommendation

- Add a brief summary on the investigation landing page to help users minimize the number of steps.
- Participants also suggested enhancing the copilot case creation by including a more detailed summary of the investigation.



"It's great that the system could pre-fill information into the ticket—it saves effort for the admin."



Actionable Insights

From user feedback, actionable insights include:

- Include explanatory text or tooltips on tables to enhance clarity.
- Enrich the Insight page with additional information and details.
- Simplify the interface by minimizing unnecessary visual clutter.
- Improve visual elements to better support root cause analysis. Offer clearer guidance within the "Coach End User" and "Contribute to Resolution" features by providing more detailed and actionable information.

Research References

Discussion Guide

[Link](#)

Figma Prototype

[Link](#)

Thank You

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