IT General Controls eLearning

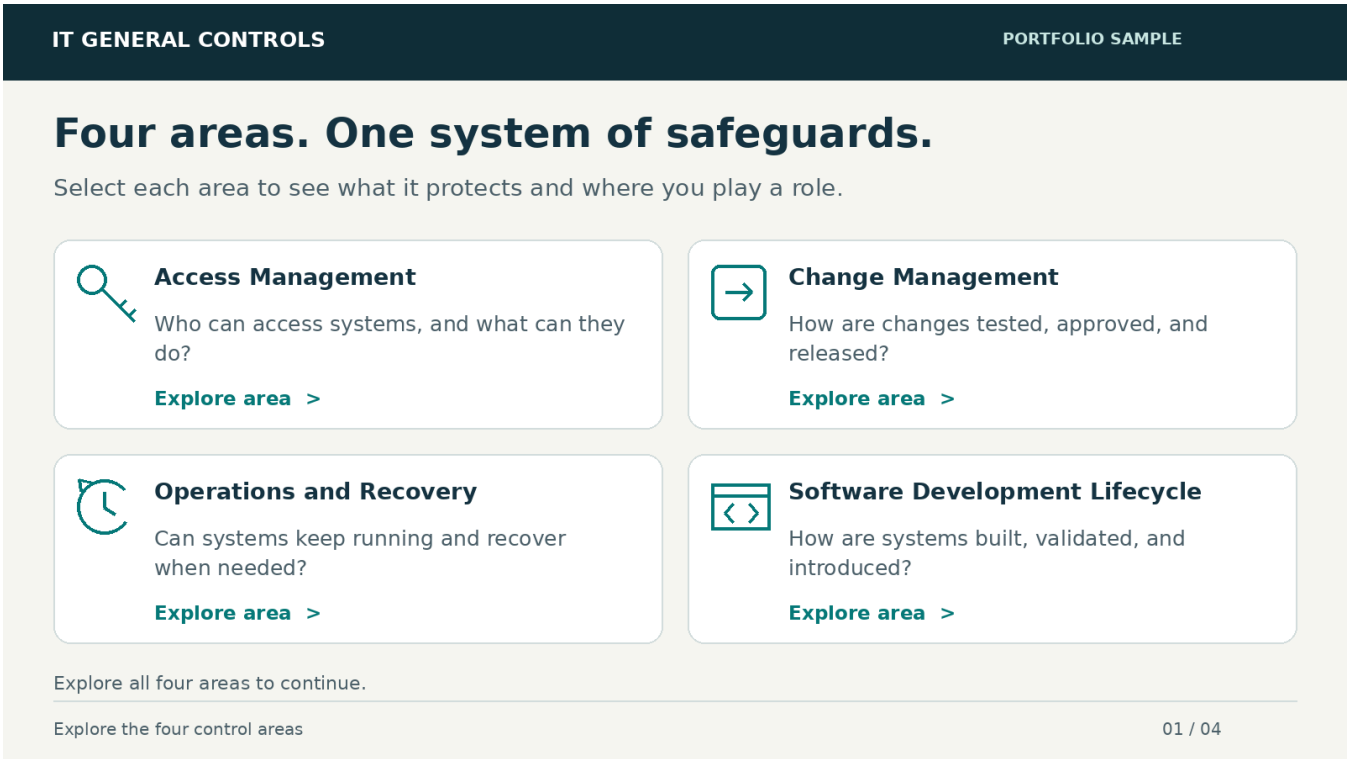
Instructional design portfolio- Kerrie Jannelle

I designed and developed a self-paced course that translated technical IT control requirements into practical explanations, workplace examples, and guidance on employee responsibilities learning to less errors and reduced audit preparation time.

Project	Details
Audience	Global IT employees and relevant contractors
Role and tool	Instructional Designer and Developer | Articulate Storyline
Focus	IT General Controls, SOX compliance, and audit readiness

The challenge

Global IT employees were struggling with audit preparation and needed to understand how IT General Controls supported reliable systems and financial reporting, and where their own responsibilities began. The source material included formal control statements, audit expectations, and process documentation. I needed to preserve that accuracy while making the requirements easier to interpret and apply to real world business specific scenarios.



Recreated navigation screen. The original storyboard specified four control-area buttons, with all four explored before continuing.

My role and approach

I partnered with an IT security subject matter expert and senior stakeholders to organize the technical content and shape the learning experience. My work included a needs analysis to discover goals and outcomes, writing learner-facing explanations and narration, storyboarding, designing interactions and examples, and developing the original course in Articulate Storyline.

The course focused on understanding controls, recognizing responsibilities, and applying audit preparation resources. Detailed procedures and control documentation remained available through supporting resources.

Translate complexity

I identified the essential behavior behind each control requirement. For Access Management, authorization, least privilege, access reviews, and timely removal of permissions became "Right person. Right access. Right time." This gave learners a memorable entry point into the detailed requirements.

Connect controls to consequences

I used examples of control failures to explain why the requirements mattered. Unnecessary production access could enable an unauthorized change. An untested backup could leave a team unable to restore data. These examples connected the controls to operational disruption and financial risk.

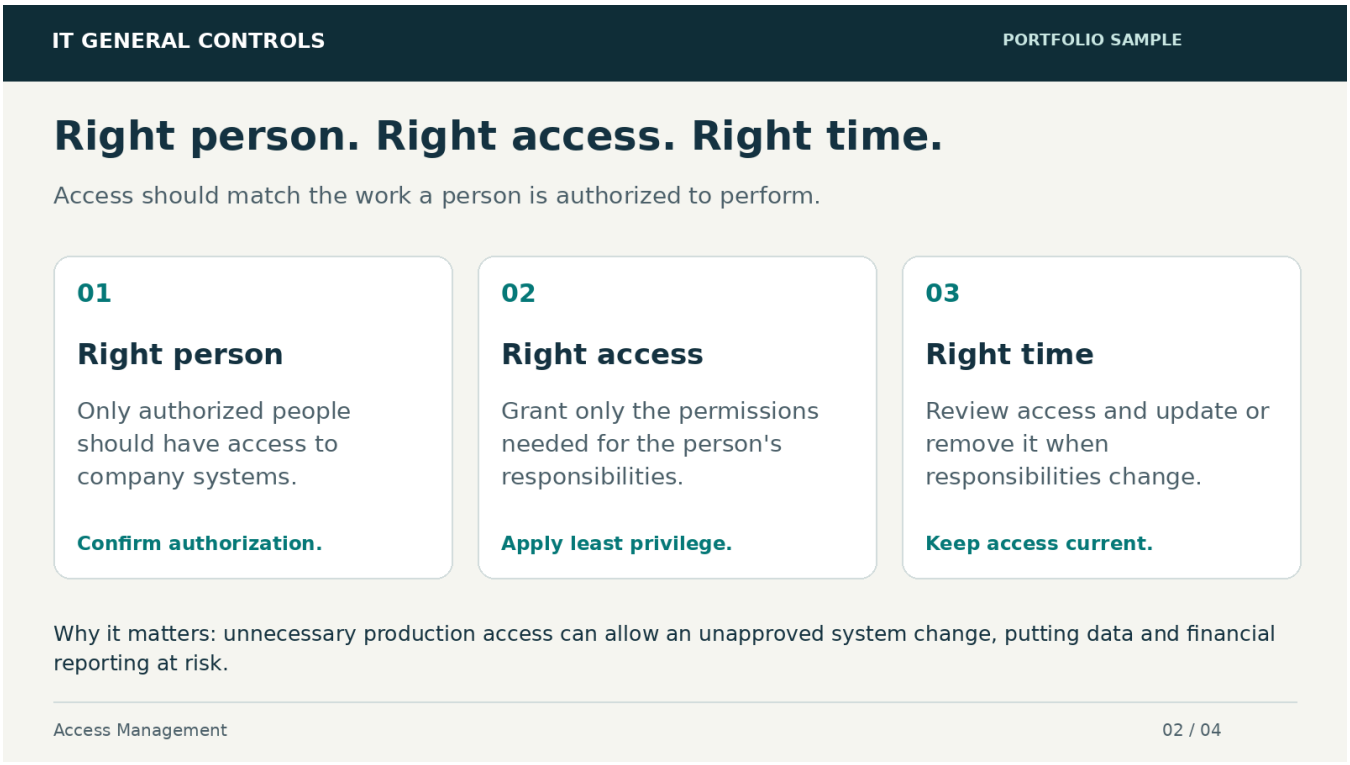
Build ownership

The opening established that people who manage systems, develop applications, approve access, or oversee operations all play a role. Later content connected that responsibility to maintaining process narratives, following documented controls, and retaining evidence of their operation.

From source material to learning

The Access Management source material covered several related requirements. I grouped them by the question each one answered for the learner. The summaries below paraphrase the requirements without reproducing internal control identifiers or procedures.

Source requirement summary	Learner concept
Access is authorized and supported by a business need.	Right person
Permissions align with current job responsibilities.	Right access
Access is reviewed and updated or removed as roles change.	Right time



Recreated concept screen. Each anchor connects a formal requirement to a behavior the learner can recognize.

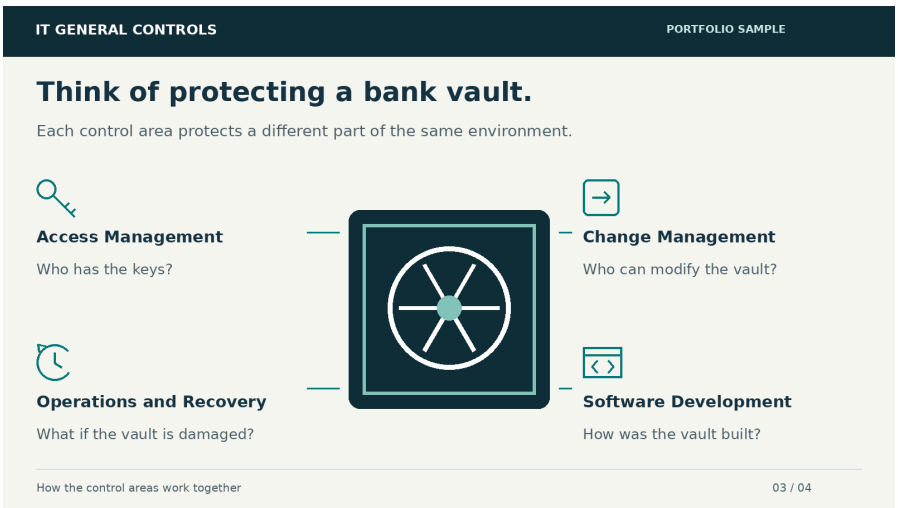
The design decision

I separated the concept explanation from the detailed control statements. Learners first encountered a clear mental model, then could consult the formal requirements for additional detail. The consequence example reinforced why appropriate access matters.

Preserve the accuracy of the requirement. Reduce the effort required to understand it.

Making the control areas memorable

The bank-vault analogy in the original storyboard gave learners a shared mental model for the four control areas. Each question explained a different responsibility within the same protected environment.



Recreated analogy screen based on the original storyboard. The questions distinguish the four areas while showing how they work together.

Interaction with a clear purpose

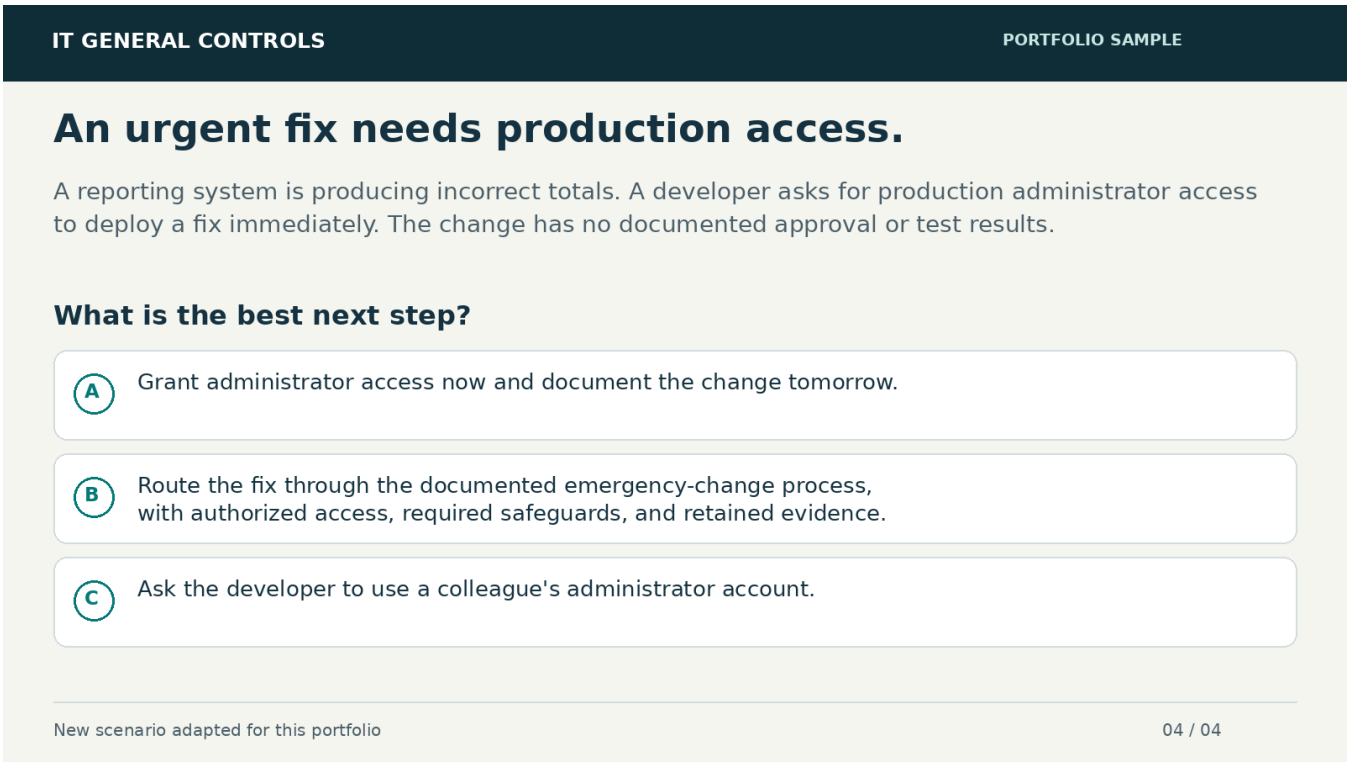
The four-area exploration gave the content a manageable structure. Requiring each area to be explored ensured coverage of the major topics. The interaction supported navigation and organization; it did not, by itself, demonstrate understanding.

Examples that reveal risk

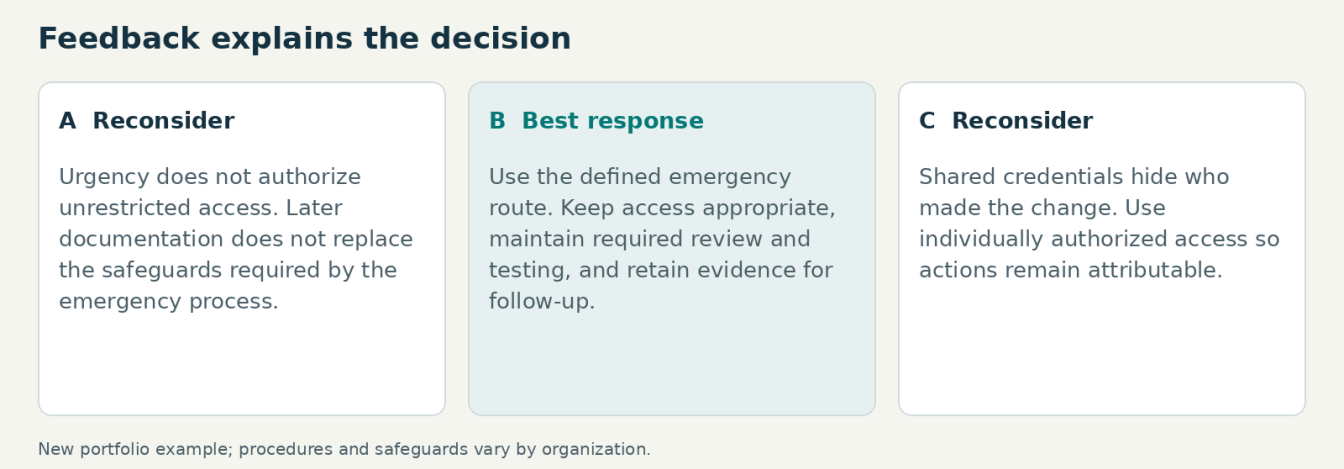
The original content paired each control area with a failure example. For recovery, regular backups had never been tested; after a system failure, the data could not be restored. That example made the difference between having a backup and being able to recover concrete.

A scenario and its feedback

This new portfolio scenario extends the original storyboard's examples of inappropriate production access and uncontrolled changes. It makes the learner choose a response under time pressure, then explains the reasoning behind each option.



New portfolio scenario. The best response uses the organization's documented emergency process rather than assuming urgency removes control requirements.



Static feedback sequence. Each response addresses the decision and its consequences; this is a design example rather than a functioning course.

Learning beyond the course

I connected awareness training to resources employees could use when preparing for an audit. The original storyboard directed learners to process-narrative guidance, an IT SOX control guide, development-framework resources, information-security policies, and compliance contacts.

These resources had distinct purposes: process guidance helped employees document how work was actually performed, while the control guide explained the requirements and how they were tested. Contact information gave learners a route for questions that depended on their team or situation.

An example of job support

The checklist below is an anonymized portfolio adaptation of the process-narrative guidance. It illustrates how the course could support action after completion.

Check	Question to ask
Current process	Does the narrative describe how the work operates today?
Responsibilities	Are the people who perform and approve the work clearly identified?
Controls and evidence	Does it explain the applicable controls and how their operation is demonstrated?
Maintenance	Has it been reviewed and updated according to the organization’s requirements?

The result

The 15 minute elearning brought the four control areas, practical failure examples, employee responsibilities, and supporting resources into one structured learning experience. The course assignment was initially rolled out to experienced IT security employees followed by new hires.

The course became a compliance course for anyone joining the team with yearly updates and process changes as needed.

Portfolio visuals are recreated and anonymized from the original storyboard.