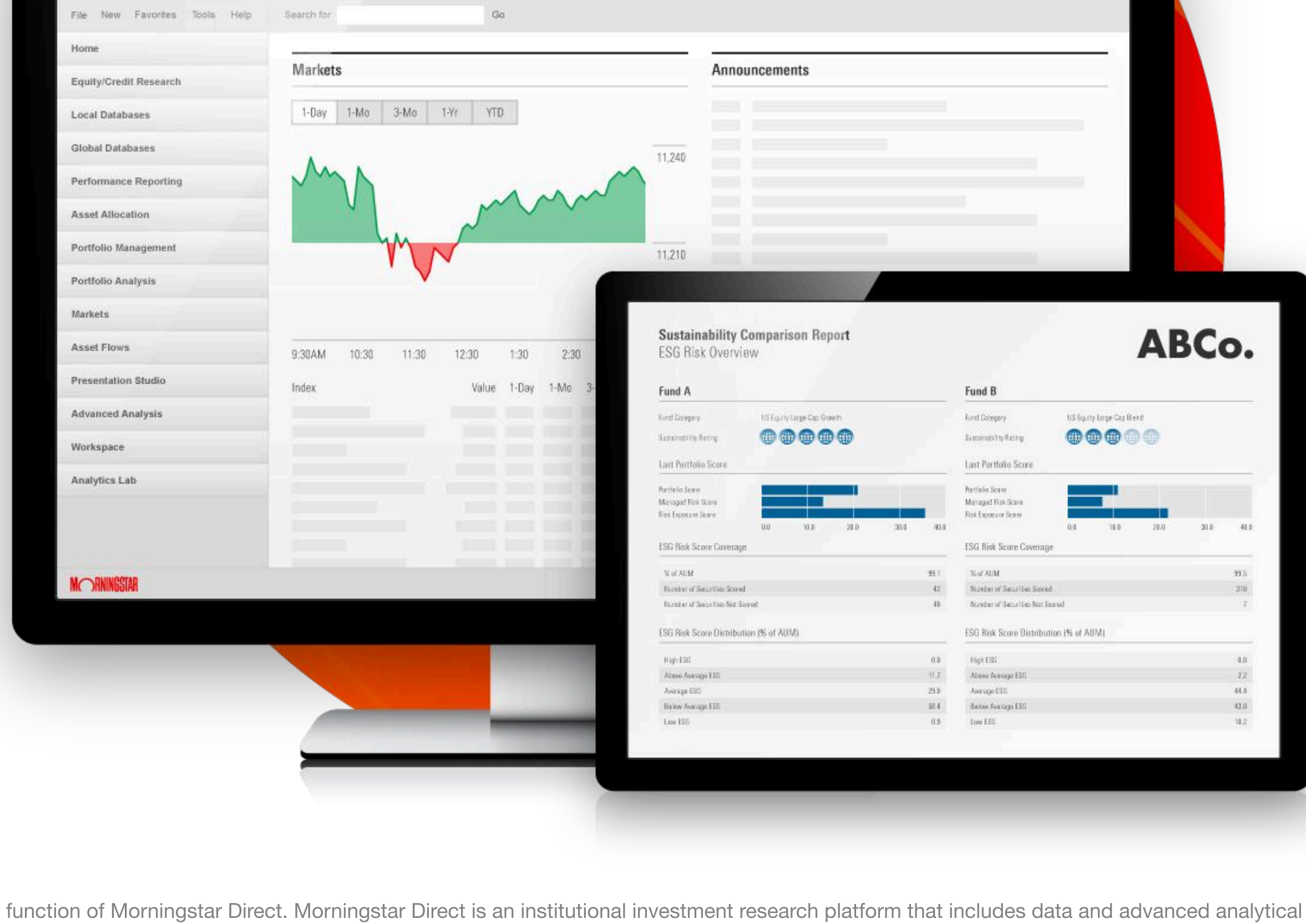


UX DESIGN

ANALYSIS TOOL

A Morningstar Project 2020



ABOUT THIS PROJECT

This project is to design the Workspace, the core function of Morningstar Direct. Morningstar Direct is an institutional investment research platform that includes data and advanced analytical tools on the complete range of securities. In Workspace, users can create performance comparisons and in-depth analyses of an investment's underlying investment style, as well as custom-branded reports and presentations. In this project, I worked as design manager as well as design lead.

USER & PROBLEMS



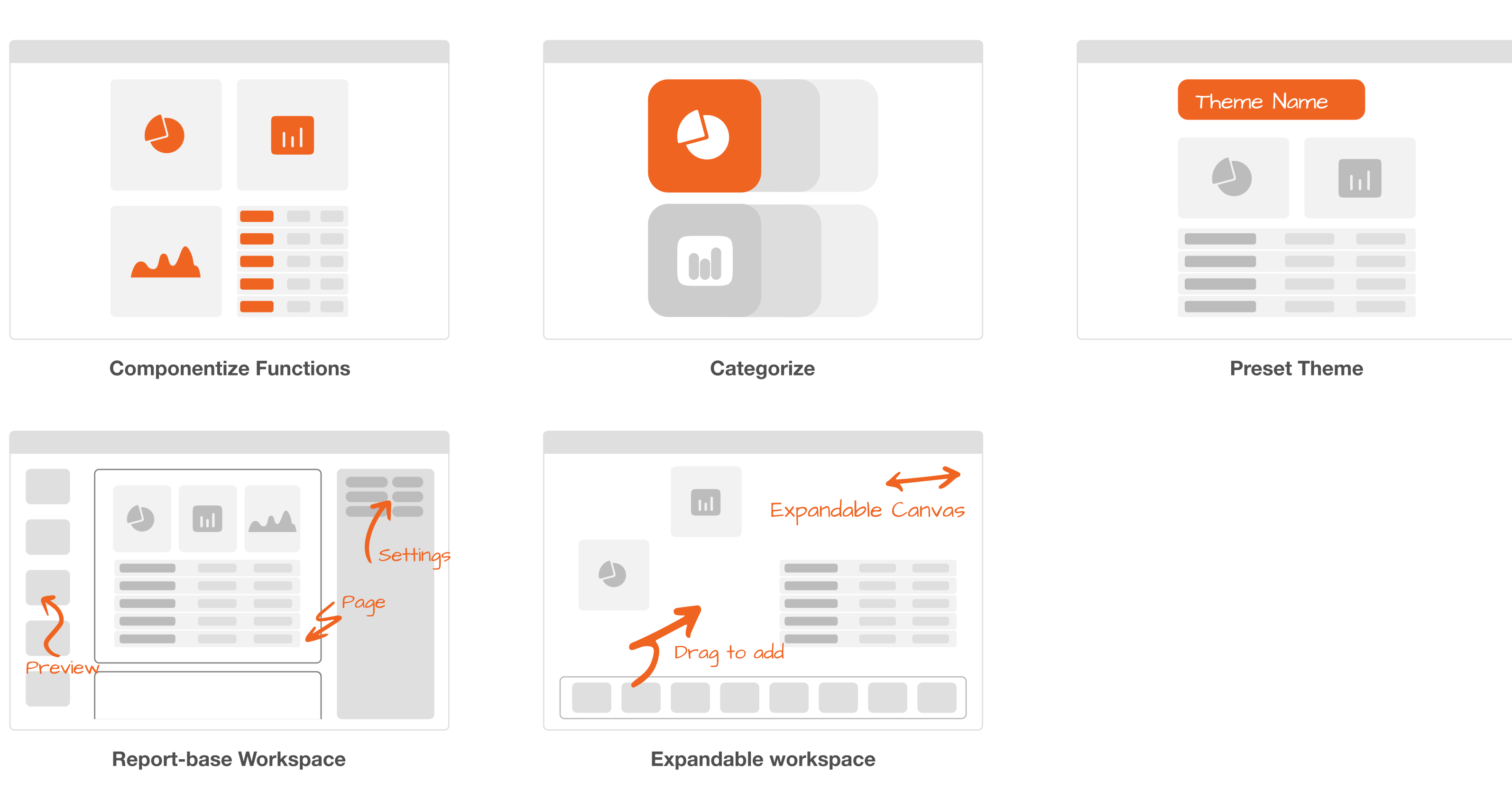
THE USER

The user are portfolio managers, investment consultants, financial product managers, wealth managers, and other professionals. The user manages and monitors assets including money, stocks and bonds, commodities, equities and other financial products. The user aims to maximise client's return on investment and ensures that their works improve income and financial stability. The user is responsible for understanding clients' wealth goals, present situation and performance expectations, and then managing client assets with all three of those factors in mind.

USABILITY ISSUES

Category	User Problems	Times referenced	Care to Strategy
Finding / Browsing Data	Searching for data points is difficult because need to know the exact name in M' database	5	5
	Searching for investments/indexes is difficult because need to know the exact name in M' database	5	5
	Unclear what data points are available/applicable to a given investment univer	4	4
	Can't tell the difference between Most Recent and Time-Series data points.	3	2
	Can't Search for data points in Search Criteria - have to browse through a huge list of nested data points.	4	4
	Browsing data points (how do I know what data points are even available to me?). Overwhelming amount of data	3	5
Overall navigation & usability	What would Morningstar suggest I start with? Rather than just present a flat list of everything?	3	4
	Finding benchmarks or accessing lists in PS	3	4
	Too many things to click, too complex and get around. Better flow between different components/modules.	5	5
	Different areas to run different reports. Need to go different places to accomplish a workflow.	4	3
	It's old interface is not modern, looks like what I used in grade school.	5	3
	Some old graphics in older areas of the application, other graphics are great.	2	2
Help, training, and self-service	Presentation Studio is clunky and difficult to use. Could be more like Powerpoint interface, simpler options.	5	4
	Undo button in PS (already addressed with PS versioning)	3	2
	How / where to get started. Poor getting started materials, training. Overwhelming amount of data.	4	5
	Import is difficult to use.	3	4
	Data point definitions difficult to find, not always available.	4	4
	Methodology documents are often outdated or not available where I need them.	4	4
Missing function	Help documentation is tough to find. It's not available where I need it. It's not searchable self help.	3	3
	Exporting more than 5,000 rows.	5	1
	Random periods of slowness.	5	5
	App sometimes crashes unexpectedly.	3	4
	App randomly "hangs".	4	2
	Overall just feels slow.	4	4

BRAINSTORMING

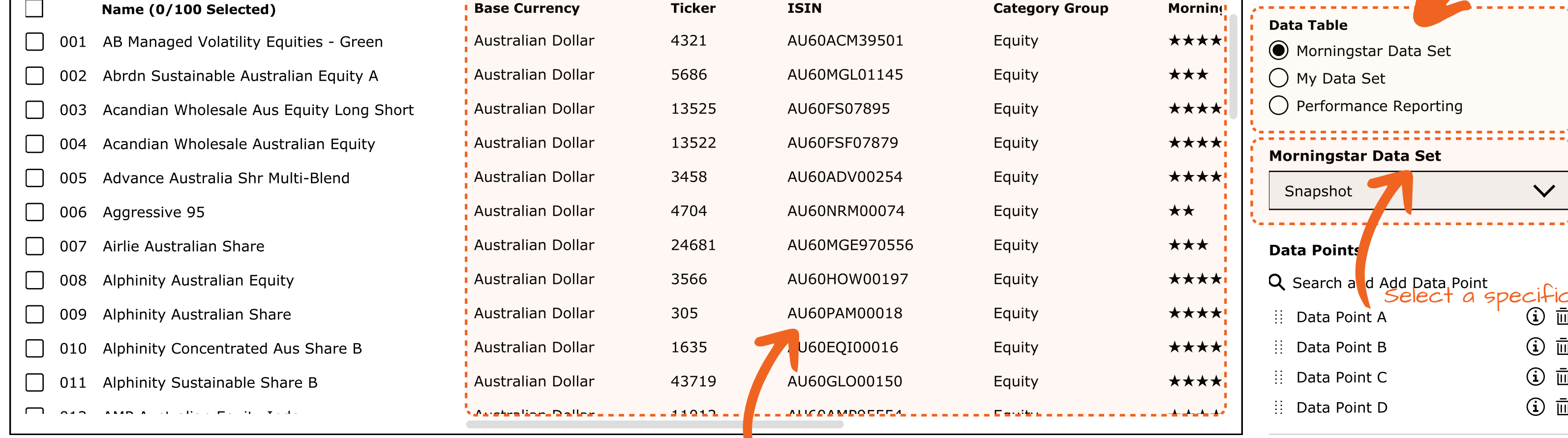


USER JOB AND UX DESIGN

JOB 1

User wants to review raw data from preset and custom data sets, and conduct a historic performance review.

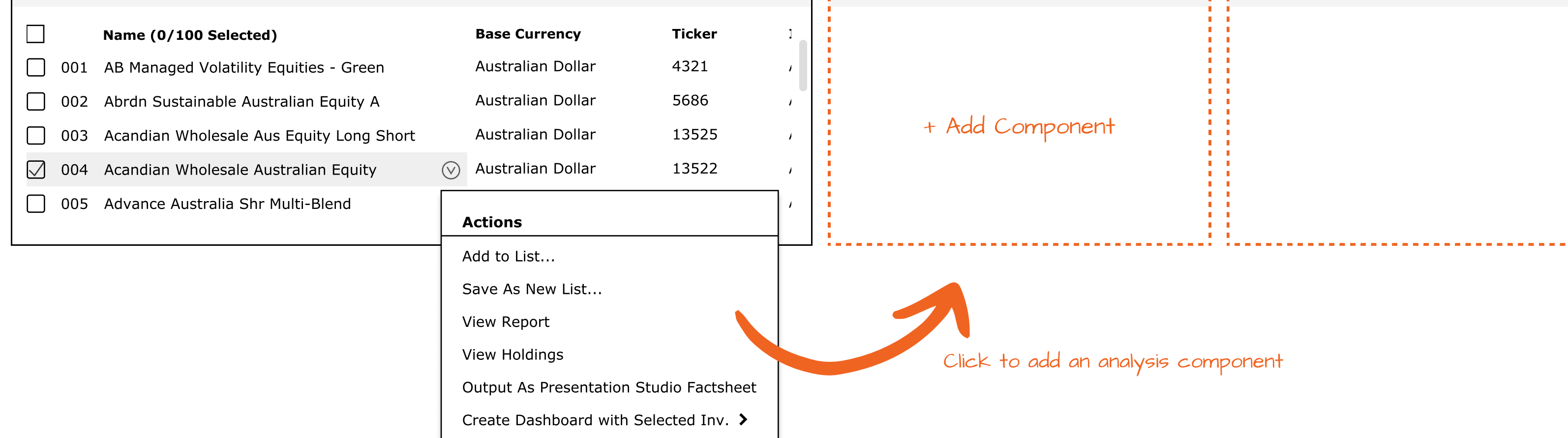
DESIGN Data table component design and the framework of settings pane.



JOB 2

User wants to view an investment's holdings and report, etc. without removing overall data table.

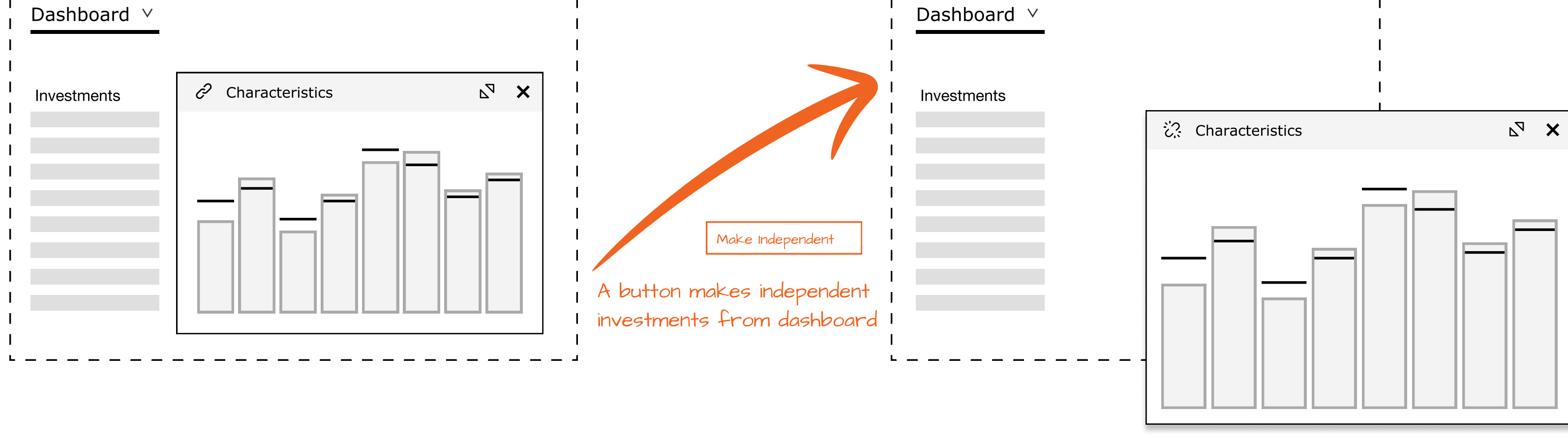
DESIGN Access from an investment, user can add analysis components.



JOB 3

User wants to assign investment set A for the entire dashboard, also wants investment set B for a specific component.

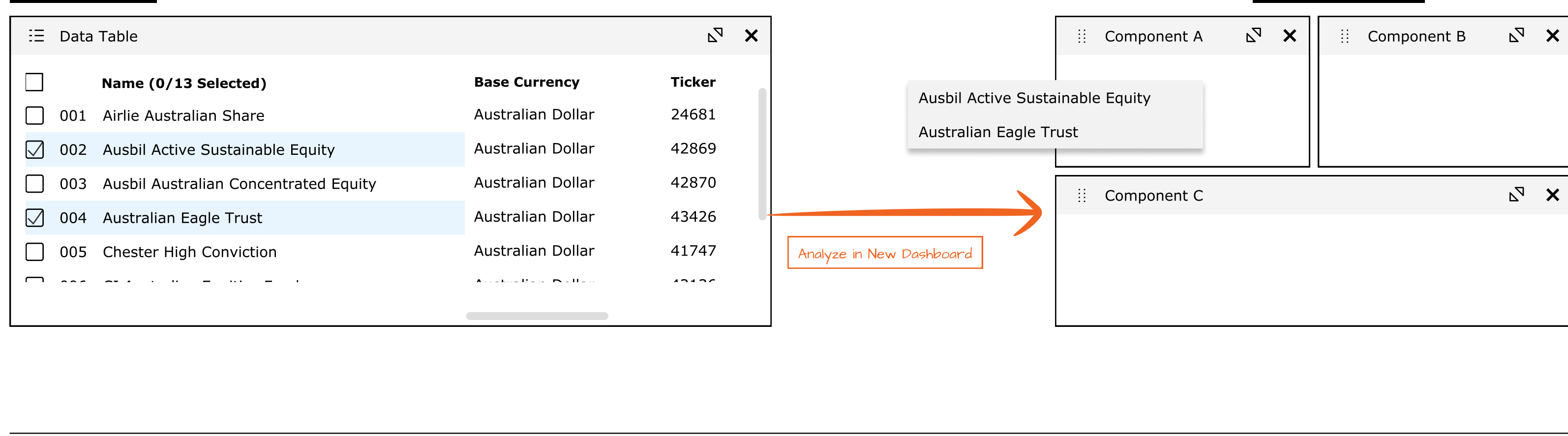
DESIGN Access from an investment, user can add analysis components.



JOB 4

When user discovers outstanding investments, user wants to analyze them in a dedicated dashboard.

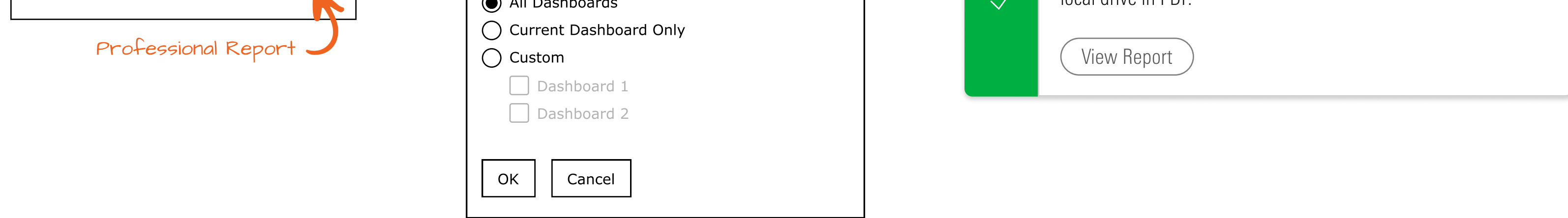
DESIGN Access from an investment, user can add analysis components.



JOB 5

User wants to quickly download a pdf to send to colleagues, also wants more professional report when ready.

DESIGN Access from an investment, user can add analysis components.

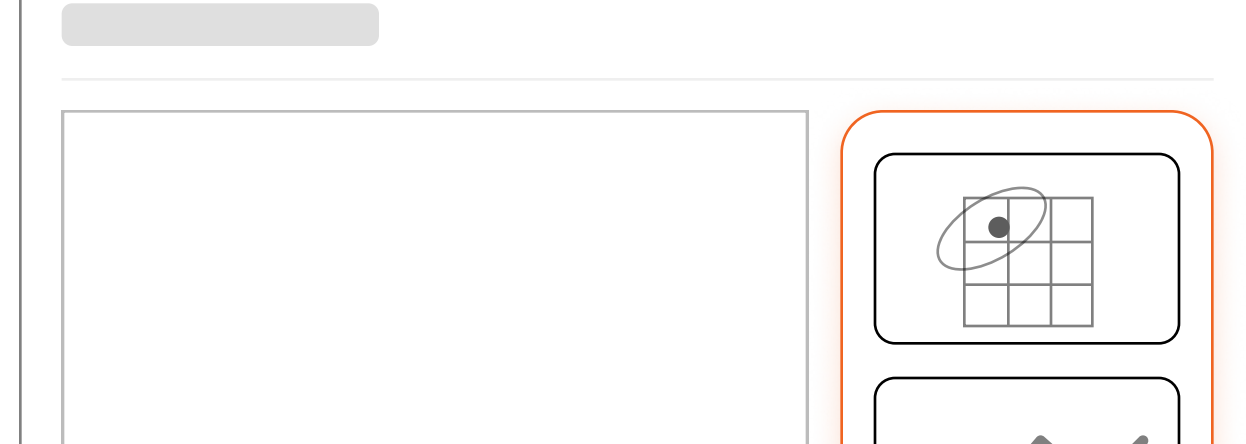


DETAILS ITERATION -- AN EXAMPLE OF ADDING COMPONENT

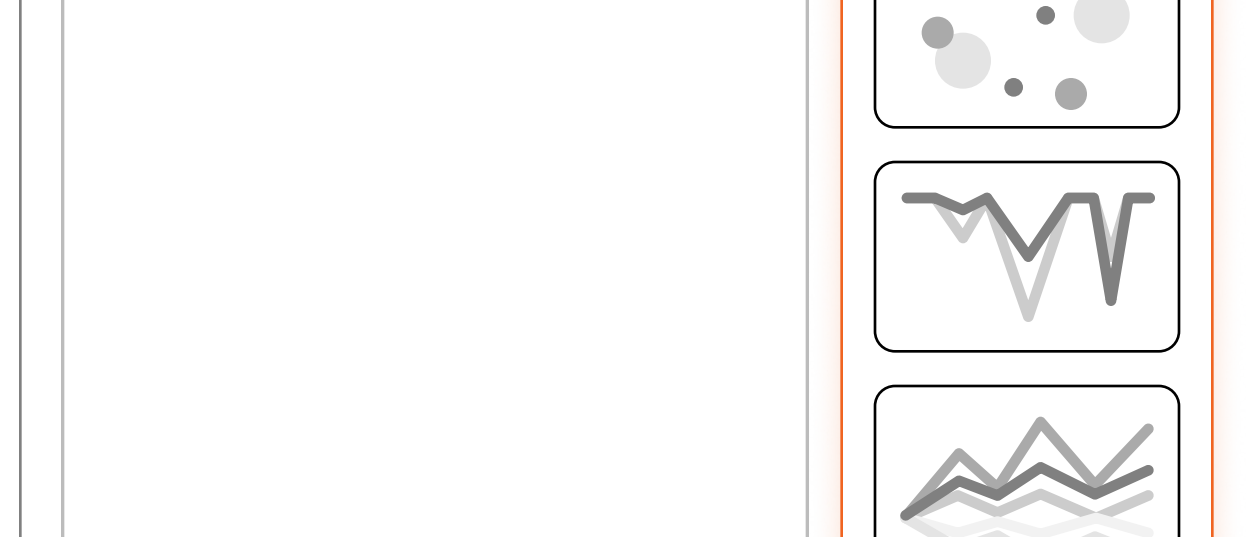
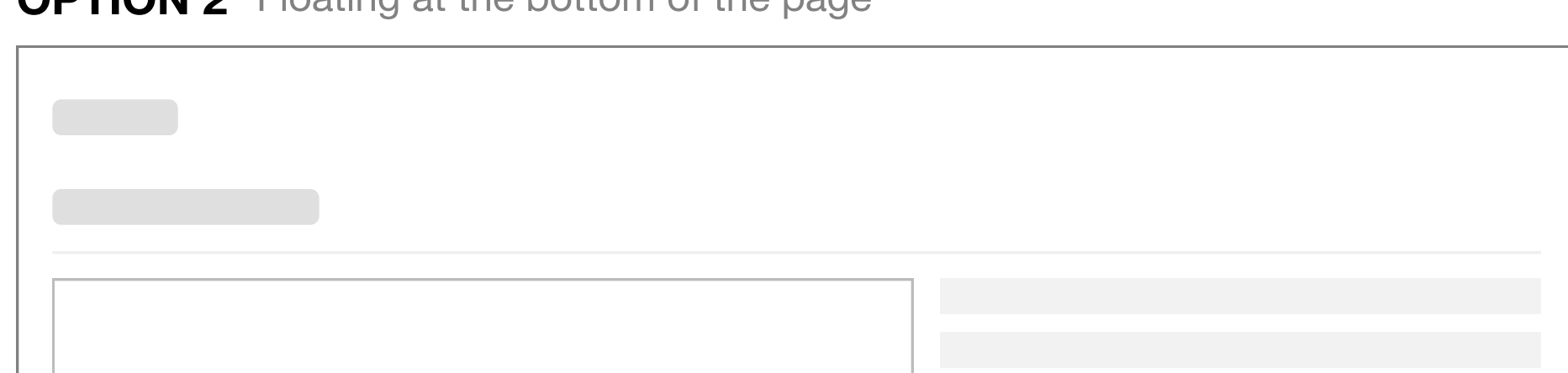
OPTION 1



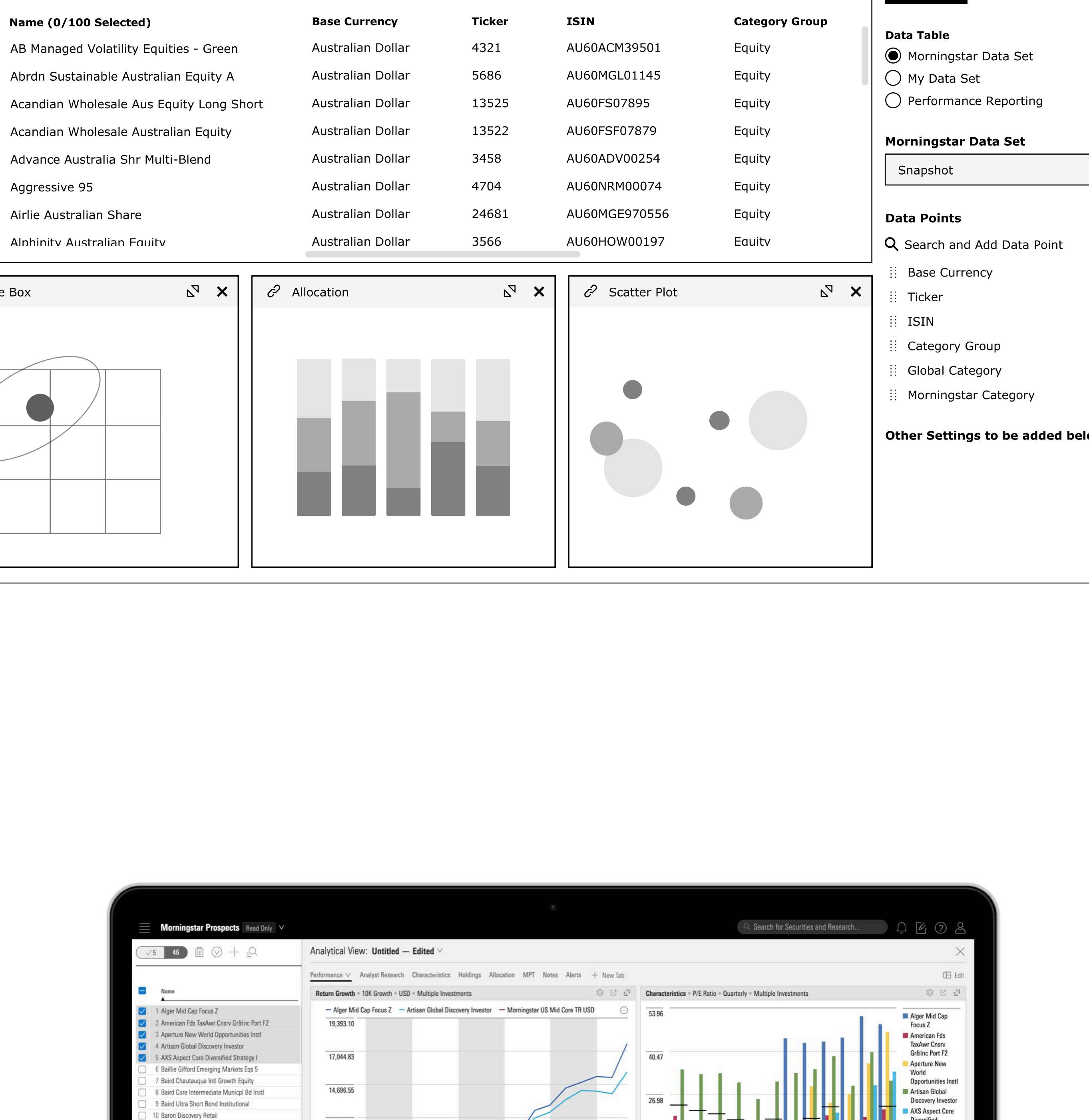
OPTION 3



OPTION 2



FINAL UX DESIGN



CLICK HERE TO PLAY WITH FULL UX PROTOTYPE

CHOOSE A FLOW FROM THE LEFT PANE OF PROTOTYPE