

Design specification

Company snapshot (co_snapshot)

Description: This page displays a "snapshot" or general overview of company information for any given company.

Navigation: A user clicks on a symbol in his watchlist or searches for a symbol or search string in the search field to reach this page.



Company name and quote
This title information is maintained on all company pages. The [add to watchlist](#) link opens the edit watchlist (cust_edit_watchlist) window with the symbol entered in the add field. The [set alert](#) link opens the edit alerts (cust_edit_alert) window with the symbol entered in the add field.

Multiple common equities
This box will only appear when a company has more than one common stock. Link goes to the Capitalization details (co_related_securities) page. When this box does not appear, that page is still accessible through the capitalization icon title link.

Company description
Limited to 256 characters.

Related materials
Company packet links to (cust_co_pkt) in a window. Excel report which links to co_excel_report. The rest link to a PDF file appears in a new window.

Capitalization
Title link points to the Capitalization details (co_related_securities) page.

Recommendations
Number of analysts supporting the various recommendation levels. The module title links to the company estimates (co_estimates) page. This pie chart appears on that page as well.

Pricing
Default chart is 1 year absolute price/volume chart. The time links refreshes and the selected time appears bold and is not a link. Advanced chart links to company chart (co_chart).

Ownership
Displays the ownership breakdown. Title links to the company ownership (co_ownership) page.

News
Displays the last 3 news articles in reverse chronological order. The title links to the co_news page. Each article can be viewed by clicking on the headline (co_news_story).

Financing History
Chart shows number of deals for the current year to date and the two previous years broken down by deal type. Title links to the company deals (co_deals) page.

Consensus estimates
Displays the current year estimates and 2 years forward estimates. The Drop-down includes cash flow or FFO, EPS, EBITDA, and sales. The default is cash flow or FFO estimates if either are available, otherwise EPS estimates are displayed. The drop-down should only display options when data is available. Module title links to the company estimates (co_estimates) page. Another link points to the Company individual estimates (co_estimates_ind_prev) page.

Research
Displays the most recent research comment and report. The link at the bottom and the title link point to co_research. Each document can be viewed by clicking on one of the file type links associated with it. Comments can be viewed as HTML (co_research_comment) and PDF files while reports are only available as PDF files. The PDF files will be opened in a new window.

Calendar
Upcoming events are displayed as a headline and a date. They are not links. The next 30 days of events are displayed.

Design specification

PAGES

PAGES

Multi-Levels

Search

Spread JS Grids

Multi-Levels

Multi-Levels w/ Categories - Green

Consolidating Cell Shading

Override

Page Navigation

Empty Page w/ Universal Filters

Wizard

Wizard w/ more steps

Grid Errors

UI Side Error (as you type)

Multiple Cell Error

Row Error

Modal and Confirmation

Simple Delete Confirmation

Delete With Downstream Data

Cannot Delete With Reasons

Navigate Away Confirmation

Data Transfer

Regular Transfer Box

Background: #F4F5F7

Freeze Pane

Standard cell formatting:
Arial 12pt #212121
Cell row height: 24px

Content Columns Header center-align
Arial Bold 12px #212121

Grouped Header Height: 30px

Normal Header Height: 40px (minimum)

Row Height: 24px

Merge cells when expanded

Amount is linked to another page

Amount is intentionally empty and is linked

Disabled (not applicable), Template, Fill #F2F6EC

Subtotal in Bold, Fill #F2F6EC

Regular for non-expandable base amount

Read only
Fill: #F4F5F7

Right Padding 10px

Level 6 at Indent=10

Level 5 at Indent=8

Level 4 at Indent=6

Level 3 at Indent=4

Level 2 at Indent=2

Left Padding 10px

Cell Fill Color Key:

Read Only
Fill: #F4F5F7

Category Row
Fill: #E4EAD6

Disabled, N/A, Template
Fill: #E8EAE6

Total/Subtotal Row/Column
Fill: #F2F6EC

1	2	3	4	5	6	Description	Book Adjustment	Adjusted Book Balance	Balance After Tax Reclass							
									Current Year	Prior Year						
1a Gross Receipts or Sales																
30-100 - Gross Receipts or Sales																
300 - Gross Sales - SIC 3311																
C3010030000501 - Gross Sales - SIC 3311																
Book Adjustments																
0100 - To Correct Gross Sales Income							6,872									
0112 - Adjust to RE																
Total Book Adjustments							6,872									
Total C3010030000501 - Gross Sales - SIC 3311							6,872	-5,490,730	-5,490,730	-5,490,730						
Total 300 - Gross Sales - SIC 3311							6,872	-5,490,730	-5,490,730	-5,490,730						
301 - Gross Sales - SIC 3312																
C3010030100502 - Gross Sales - SIC 3312								-5,428,882	-5,428,882	-5,428,882						
C3010030100503 - Gross Sales - SIC 3313								-5,360,162	-5,360,162	-5,360,162						
Total 301 - Gross Sales - SIC 3312								-10,789,044	-10,789,044	-10,789,044						
Total 30-100 - Gross Receipts or Sales							6,872	-16,279,774	-16,279,774	-16,279,774						
Total 1a Gross Receipts or Sales							6,872	-16,279,774	-16,279,774	-16,279,774						
1b Less Returns and Allowances																
30-105 - Returns and Allowances																
301 - Returns and Allowances - SIC 3312																
C3010530101002 - Returns and Allowances								-52,227	-52,227	-52,227						
C3010530101003 - Returns and Allowances								-51,540	-51,540	-51,540						
Total 301 - Returns and Allowances - SIC 3312								-103,767	-103,767	-103,767						
Total 30-105 - Returns and Allowances								-156,681	-156,681	-156,681						
Total 1b Less Returns and Allowances								-156,681	-156,681	-156,681						
1c Balance - Net Sales							6,872	-16,443,327	-16,443,327	-16,443,327						

Style Guides

PAGES

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Spread JS Grids

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Multi-Levels w/ Categories - Gre

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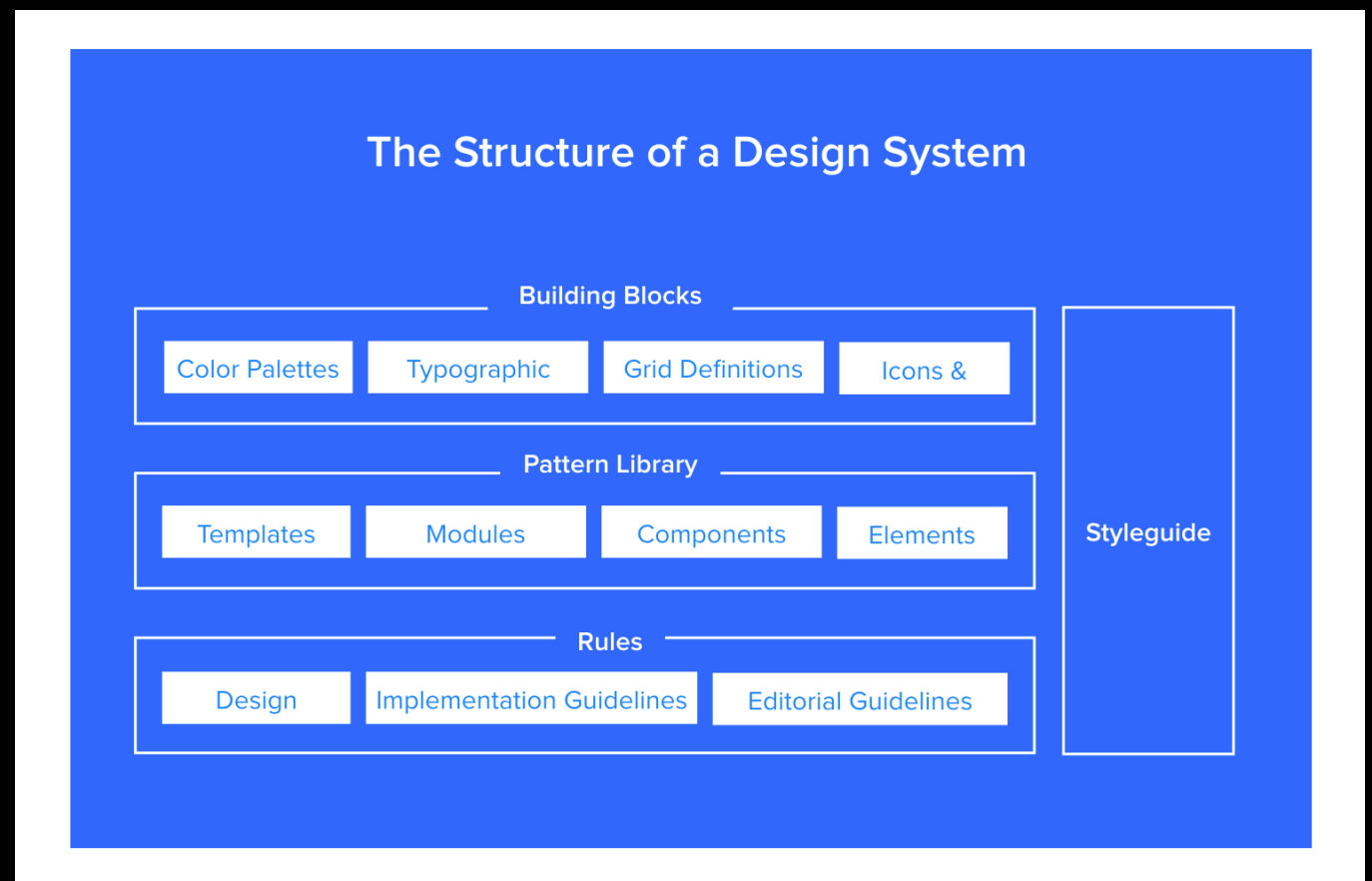
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						1c Balance - Net Sales	6,872	-16,443,327	-16,443,327	-16,443,327

Library or Style Guide or Design System?



<https://www.uxpin.com/studio/blog/design-systems-vs-pattern-libraries-vs-style-guides-whats-difference/>

Pulling it Together:

Style Guides Design Systems

Resources:

<https://marvelapp.com/styleguide/overview/introduction>

<http://www.bbc.co.uk/gel/#>

<https://gel.westpacgroup.com.au>

<https://accessibility-handbook.mybluemix.net/design/a11y-handbook/design>

<https://developer.apple.com/ios/human-interface-guidelines/overview/themes/>

Design patterns and conventions

WHY?

Design patterns and conventions

Universality



Design patterns and conventions

Where on a page

EG: navigation and breadcrumbs

How things look and behave

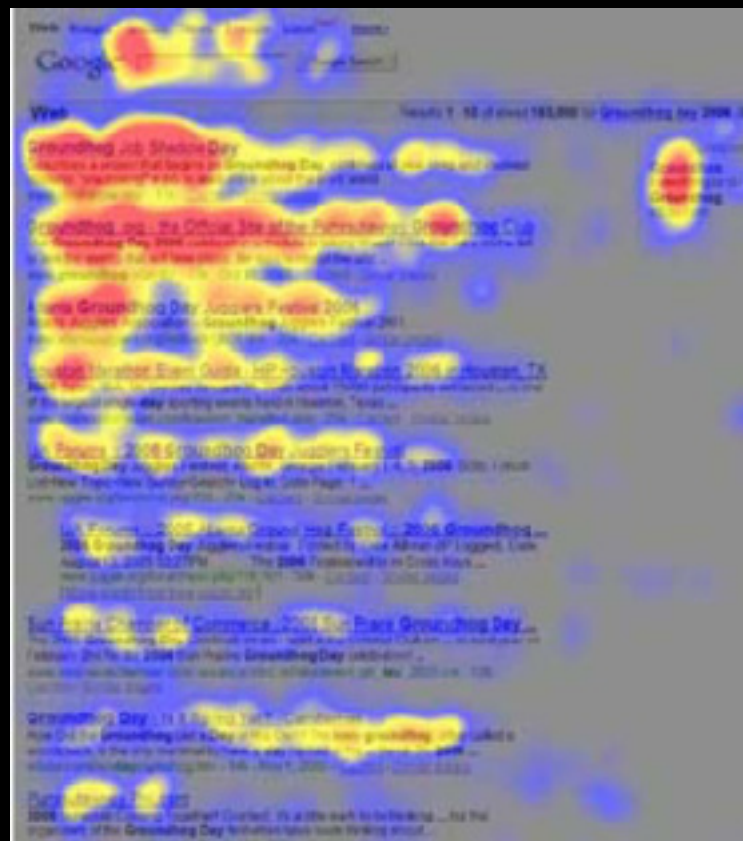
EG: search icon, share, play etc.

How users read

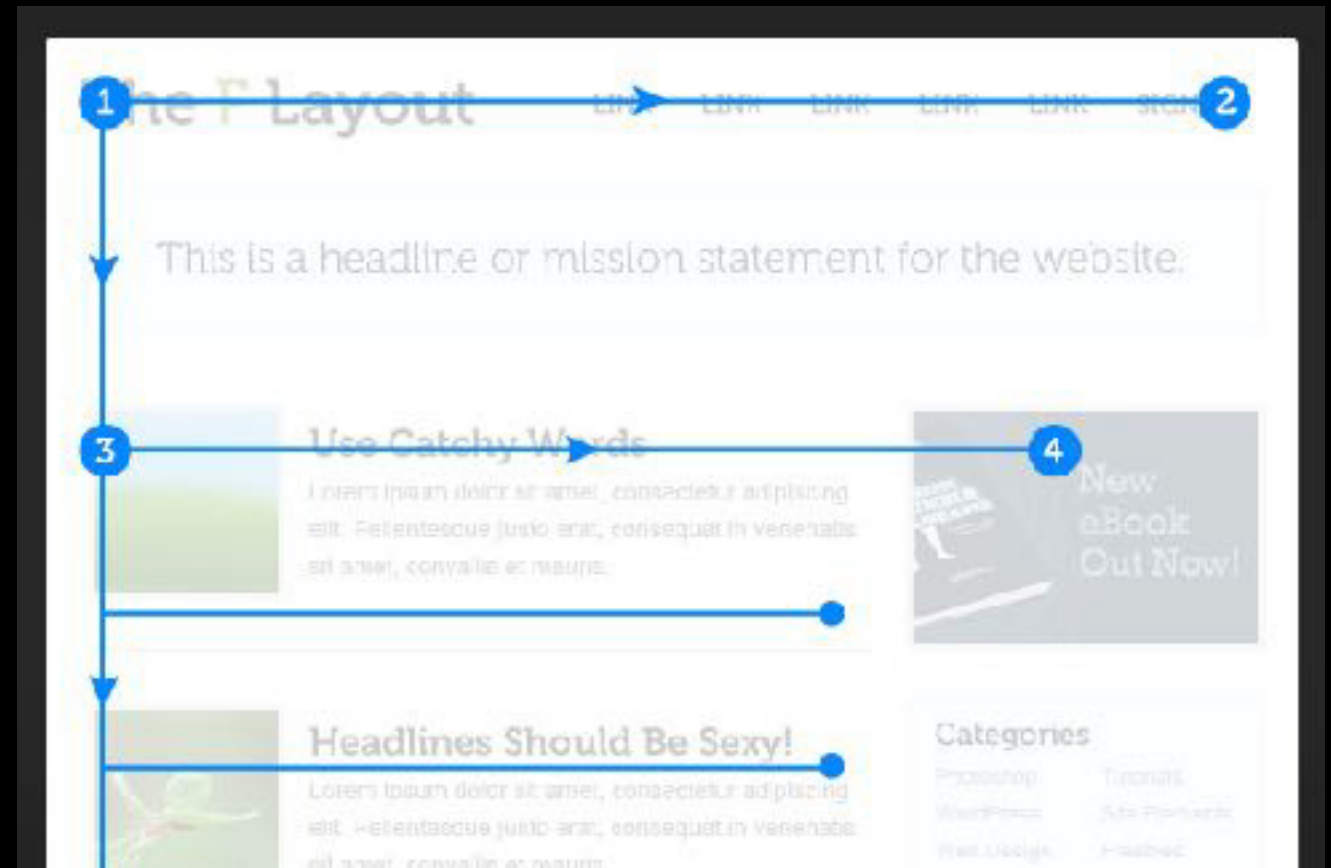
EG: skimming vs. reading

Design for eye tracking

F patterns are common for heavy text sites.



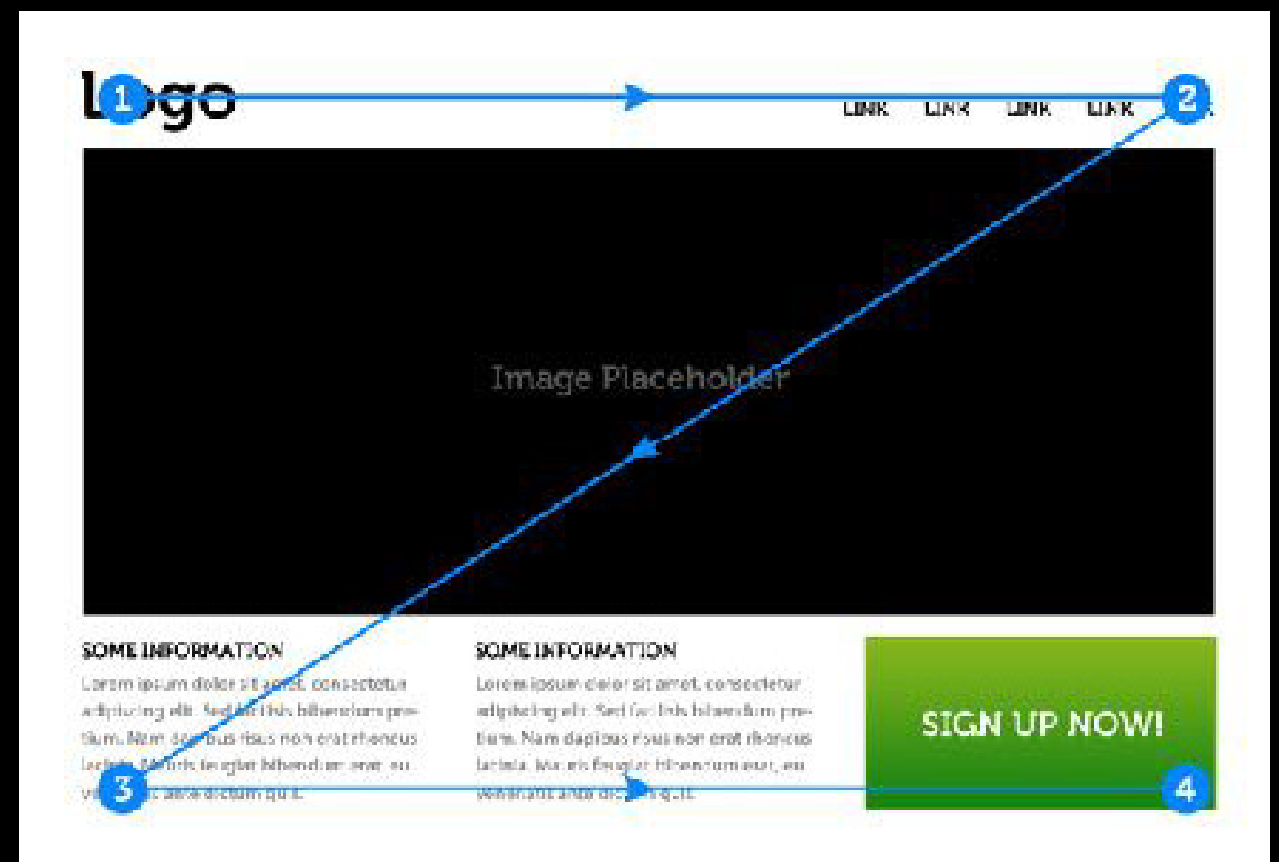
Nielson Norman Group



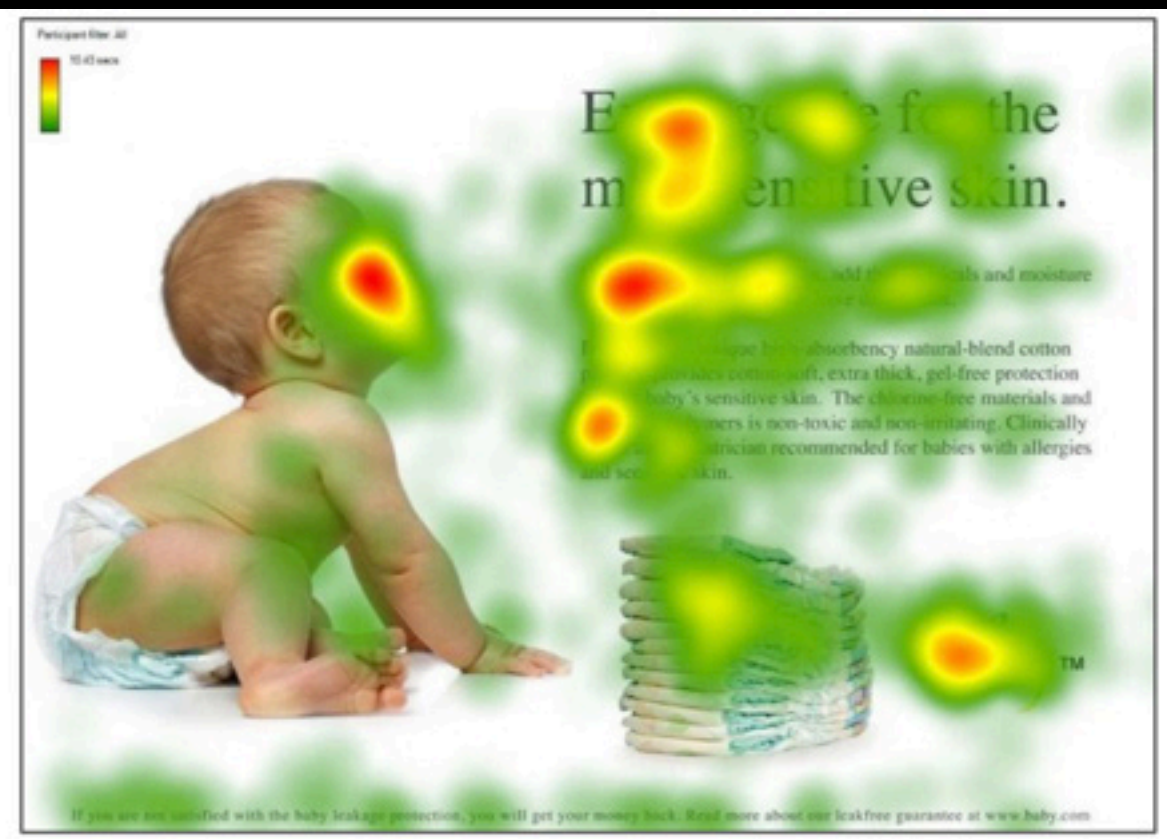
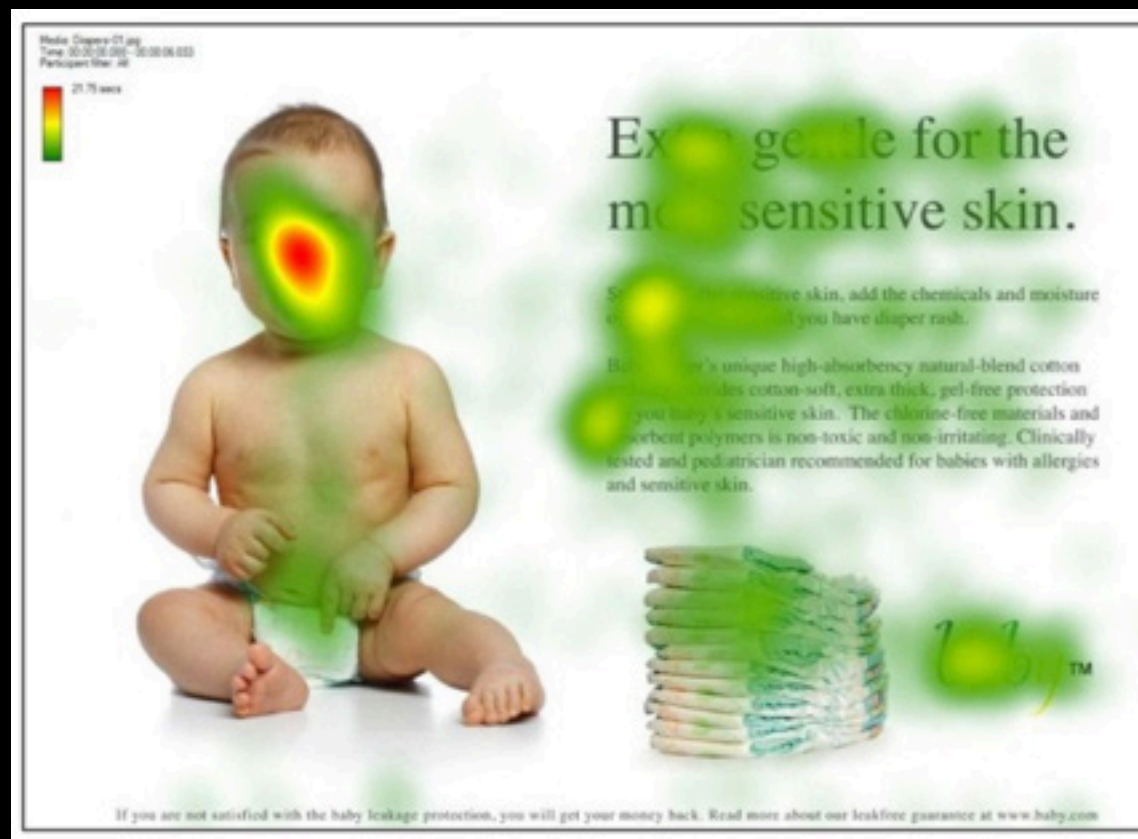
tutsplus.com

Design for eye tracking

Z patterns are better for image-dominant sites.



Design for eye tracking



Design for selectability

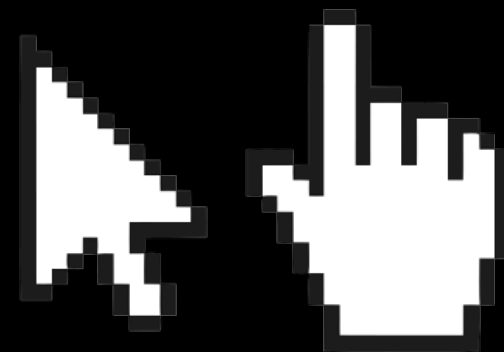


Design for selectability



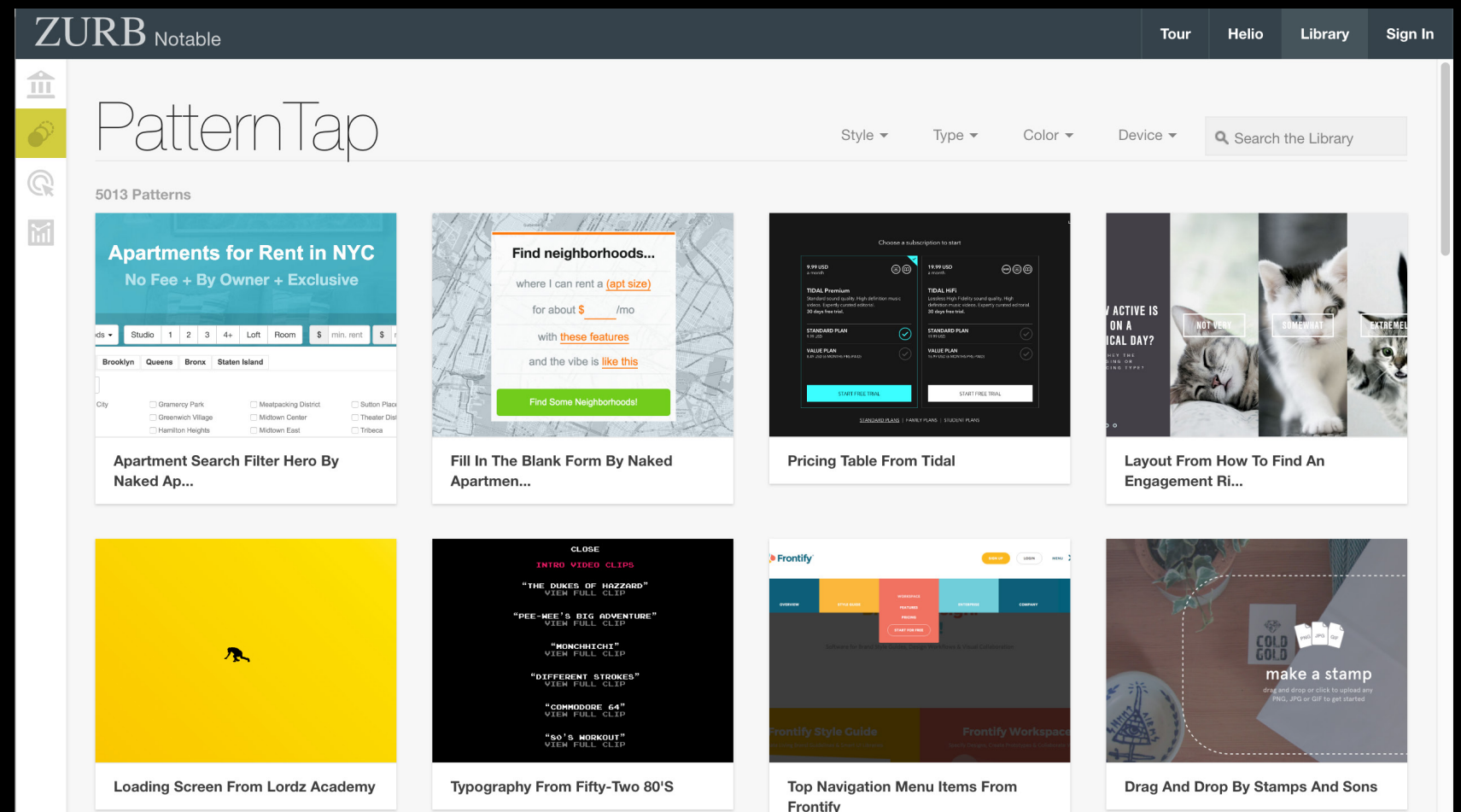
Design for selectability

Mobile and touch screens lack a hover state, so additional visual cues are needed.



Design pattern resources

<http://patterntap.com/patterntap>



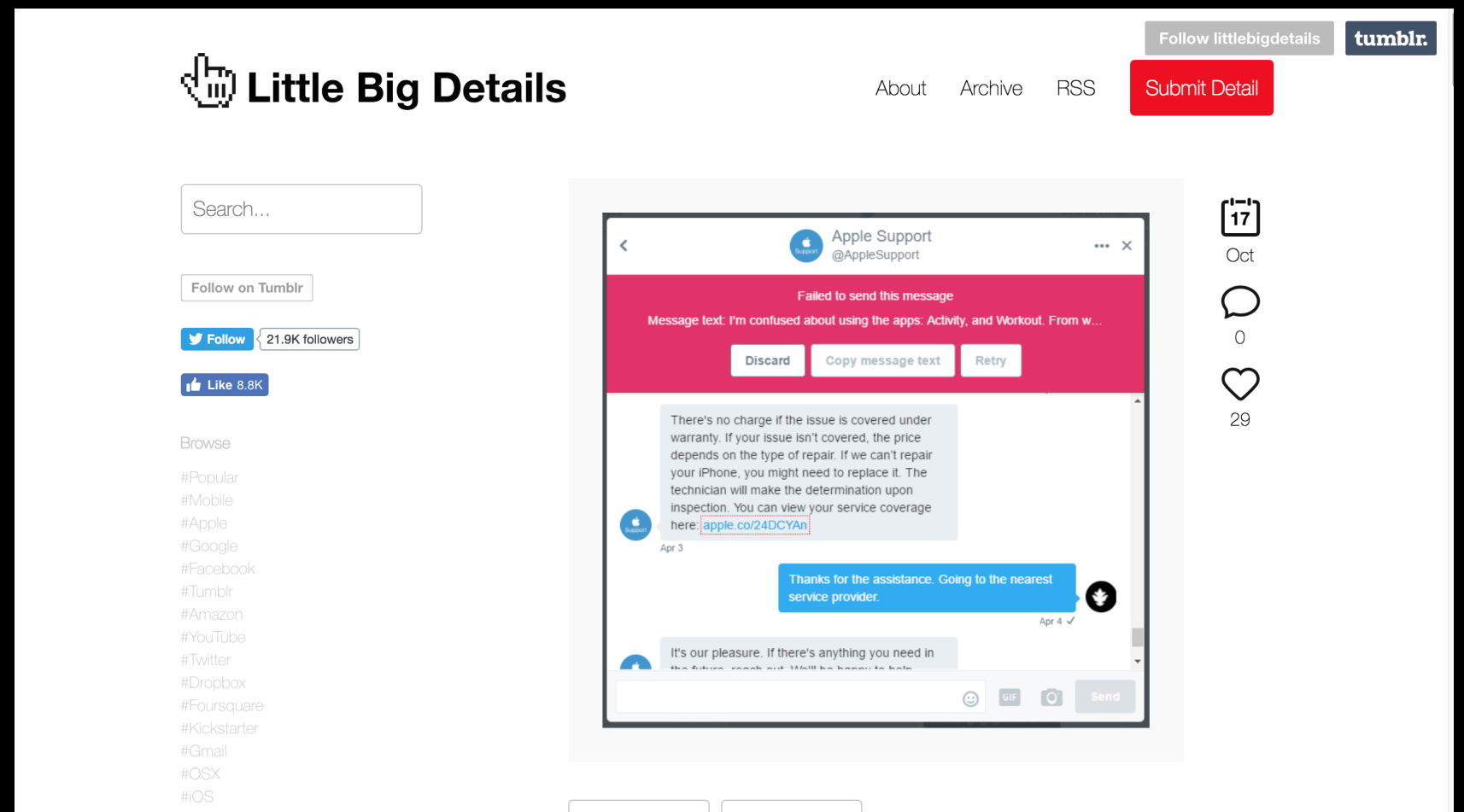
Design pattern resources

<http://ui-patterns.com>

User Interface Design Patterns			
Getting input	Navigation	Dealing with data	Social
Forms Password Strength Meter WYSIWYG Input Feedback Captcha Calendar Picker Structured Format Fill in the Blanks Expandable Input Keyboard Shortcuts Preview Drag and drop Autosave Forgiving Format Morphing Controls Settings Inplace Editor Good Defaults Input Prompt Undo	Tabs Navigation Tabs Module Tabs Jumping in hierarchy Notifications Breadcrumbs Modal Fat Footer Home Link Shortcut Dropdown Menus Vertical Dropdown Menu Horizontal Dropdown Menu Accordion Menu Content Carousel Tag Cloud Favorites Progressive Disclosure Cards Event Calendar Adaptable View Thumbnail Article List Continuous Scrolling Archive	Tables Table Filter Alternating Row Colors Sort By Column Formatting data Copy Box Dashboard Frequently Asked Questions (FAQ) Images Slideshow Gallery Image Zoom Search Autocomplete Search Filters	Reputation Collectible Achievements Leaderboard Testimonials Social interactions Chat Follow Activity Stream Friend list <small>Mini</small> Auto-sharing <small>Mini</small> Invite friends Friend Reaction
			Miscellaneous
			Shopping Product page Pricing table Coupon Shopping Cart Increasing frequency Tip A Friend

Design pattern resources

<http://littlebigdetails.com>



Heuristics

Mental shortcuts that allows people to solve problems and make quick judgments.

Heuristics play an important role in how we make decisions and parse information.

Heuristics

Heuristics help make life easier and allow us to make quick decisions *that are usually pretty accurate.*

But it's important to be aware of Cognitive Biases. We'll talk about these later in the session

Heuristics

10 Usability Heuristics



Visibility

Show system status, tell what's happening



Mapping

Use familiar metaphors & language



Freedom

Provide good defaults & undo



Consistency

Use same interface and language throughout



Error Prevention

Help users avoid making mistakes



Recognition

Make information easy to discover



Flexibility

Make advanced tasks fluid and efficient



Minimalism

Provide only necessary information in an elegant way



Error Recovery

Help users recognize, diagnose and recover from errors



Help

Use proactive and in-place hints to guide users

Heuristics

Read:
Chrome extension: UX Check

Interviews

Assumptions Worksheets

BUSINESS ASSUMPTIONS

1. I believe my customers have a need to: _____
2. These needs can be solved with: _____
3. My initial customers are (or will be): _____
4. The #1 value a customer wants to get out of my service is: _____
5. They can also get these additional benefits: _____
6. I will acquire the majority of my customers through: _____
7. I will make money by: _____
8. My primary competition in the market will be: _____
9. We will beat them due to: _____
10. My biggest product risk is: _____
11. We will solve this through: _____
12. We will know we are successful when we see the following changes in customer behavior:

13. What other assumptions do we have that, if proven false, will cause our business/project to fail:

USER ASSUMPTIONS

1. Who is the user? _____
2. Where does our product fit in their work or life? _____
3. What problems does our product solve? _____
4. When and how is our product used? _____
5. What features are important? _____
6. How should our product look and behave? _____

Interviews

the 7 Why's

Problem Definition

Hypothesis

Requirements

Interviews

Read:

<https://www.interaction-design.org/literature/article/how-to-conduct-user-interviews>

us.gov templates: <https://www.usability.gov/how-to-and-tools/resources/templates.html>