



This product is composed of web application and WeChat mini program. It is aimed at financial industry research teams and provides them with data services, including one-stop management such as obtaining data, storing data, editing charts, writing research reports, and publishing.

Team members can work together online, which is more efficient and flexible.

TEAM WORK 2019.3–2020.1

My Role

Design Strategy

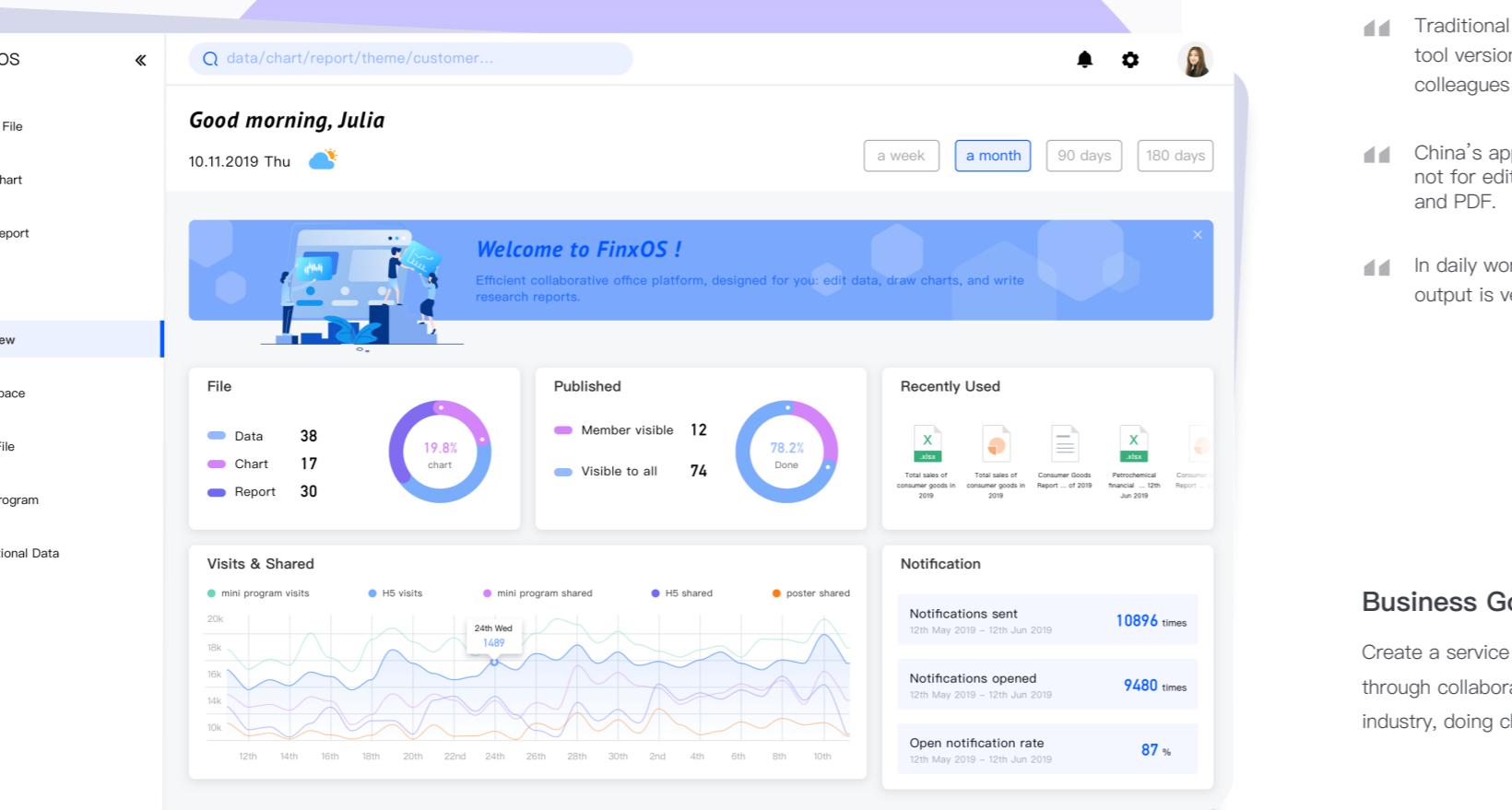
Research

Information Architecture

Style Guide

Web UI Design

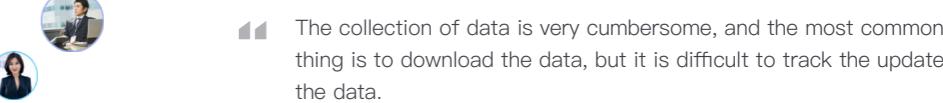
Mini Program UI Design



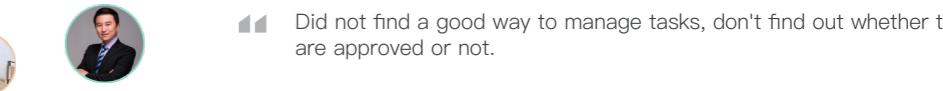
Validating the problem

I found that some users are facing similar problems. I interviewed some financial industry researchers. They have also used some other collaborative web applications. Their common problems and feelings are:

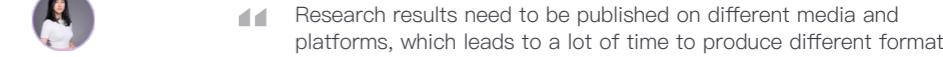
Traditional collaboration methods are limited by multiple platforms, tool versions, time and space, etc. Point-to-point file transfer between colleagues is troublesome and easy to make mistakes.



China's application market also has some mature collaboration tools, but not for editing data and charts, just some documents like Microsoft word and PDF.



In daily work, the efficiency of data collection, editing, integration and output is very low.



Design Strategy

Business Goal

Create a service system to be more efficient through collaboration for teams in the financial industry, doing chart editing and research reports

Target Users

- Securities firm
- Private Equity Fund
- Financial influencer's team

Cross Channels

- Web Application
- WeChat Mini Program – IOS & Android

General Tasks

- Obtain data – Search & Import
- Edit – Chart & Report
- Publish – Web & H5 & WeChat & Poster
- Management – Data & Member & Workspace

Technology Constraints

- Availability of internet
- Smartphone / Desktop device
- Technical support for the development of WeChat Mini Programs

Success Factor

- Quick jumping into functions
- Improve the efficiency of the financial research team

WeChat Mini Program: WeChat is China's largest social media platform. As of May 2020, WeChat monthly active users have exceeded 1.2 billion, and WeChat Mini Program daily active users have exceeded 400 million. Mini Program is an application that can be used on the WeChat platform without downloading and installing, many organizations, departments, companies, and self-media teams use it to improve their business.



Business Type

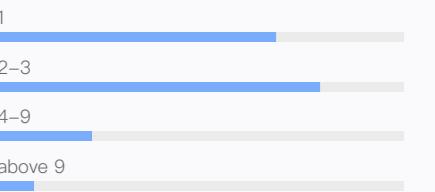
B2B: Business-to-business, we provide the products, services or information between business, rather than between business and consumers.



Quantitative Research

The purpose of the survey is to help us better understand their specific needs for data collection, chart editing, team work and Publication.

1. In a report, how many sets of data are needed for each chart?(multiple choices)

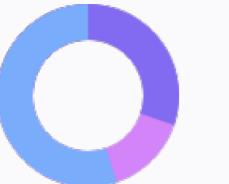


2. After obtaining the data, will you?



- Use data directly
- Data needs to be calculated before use

4. How many people are usually needed to complete a research report?



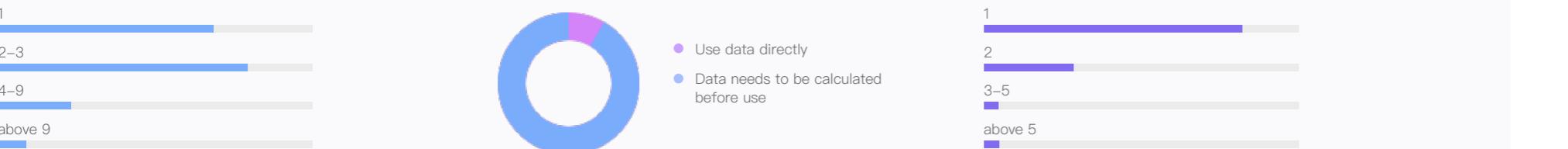
- Myself
- 2-3
- More than 3

5. Whether the collected data needs to be updated dynamically?

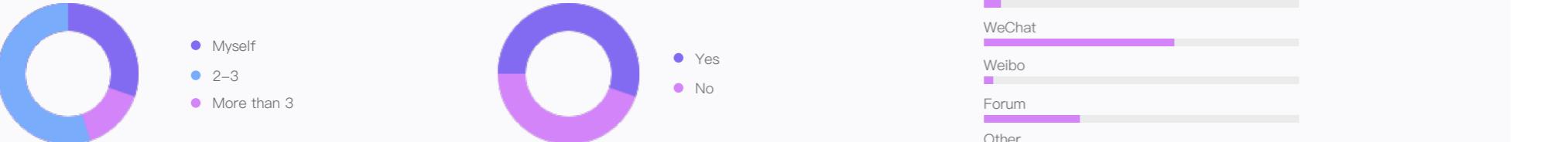


- Yes
- No

3. Generally, how many vertical axis of the charts need to display ?(multiple choices)

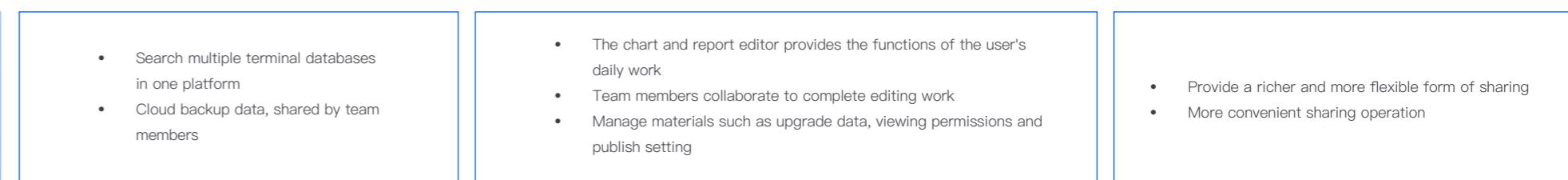
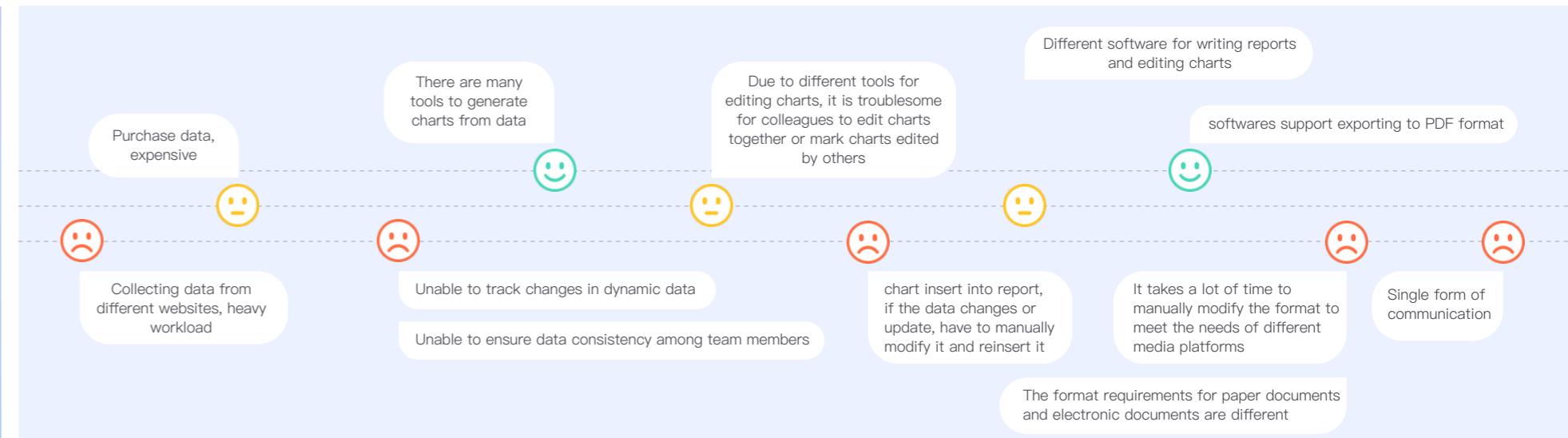
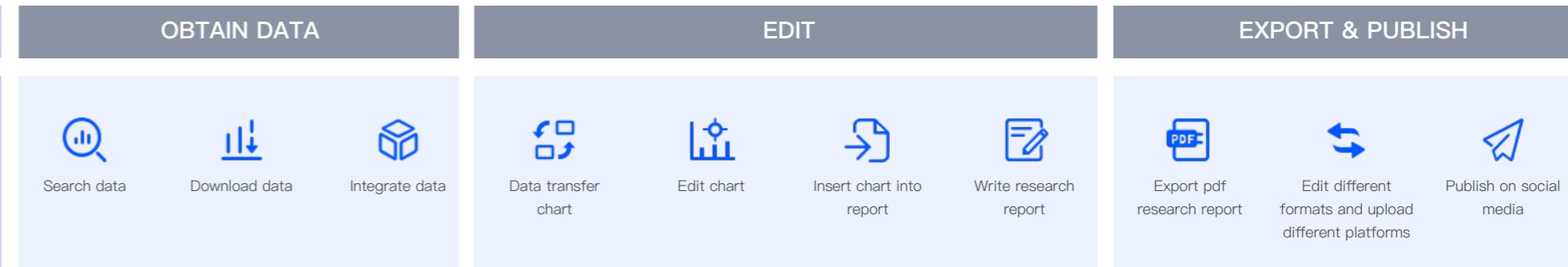


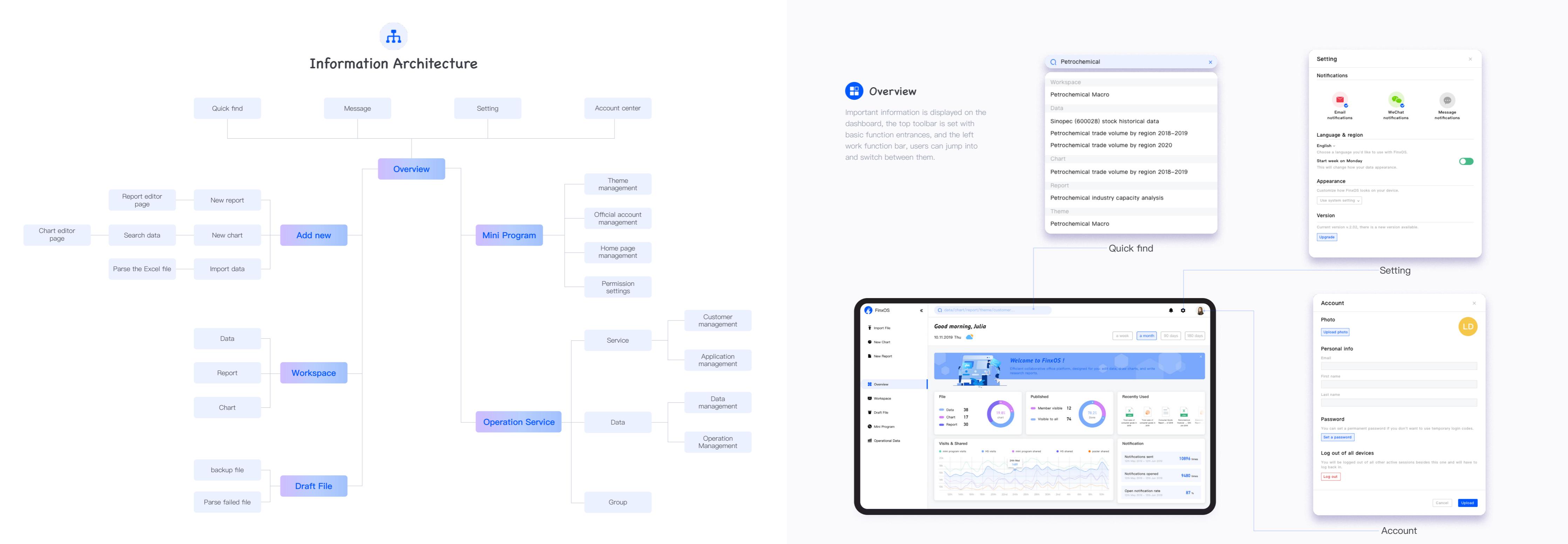
6. What platform does the chart or data need to be published on?(multiple choices)



Experience Map

The daily work content and process of the target users are similar. Through user interviews, I analyzed their different experiences at work, and we can see the problems that need to be improved .





Add new

Users can start a new file by adding charts, reports or uploading data, that meets the working habits of different users.

Search data Data support: Win.d | Bloomberg | Tushare

Macro & Industry | Financial assets | Custom data

All ▾ Please enter a keyword

Start search

Obtain Data

When users create new files, they need to obtain data. FinxOS provides powerful data support, covering almost all the latest and most complete data in the financial field;

when users select data, smart filters help them complete more efficiently and smoothly.

Uploading data

Uploading & Parsing

Macro Indicator changes.xlsx
Data: 12 Chart: 3

Credit spread.xlsx
Data: 3

Shanghai Composite Index Annual Close
Data: 5 Unresolved: 5

Yuefeng Securities related data.xlsx
Data: 20 Chart: 8

Yuefeng Group
Data: 23

Cancel Upload

New report

New report

Main title

abstract

Cover Photo

Upload photo

Workspace

Only view Parent Soup × Cristiano Ronaldo ×

Allow edit Parent Soup ×

Cancel Upload

Editor

Powerful editor with rich editing functions designed for financial professionals.

Type “/” for command /

Chart editing

- In the data preview stage, you can perform function calculations on the acquired data first, and then you can generate charts
- The display of the chart can be set according to the needs, such as the horizontal axis and the vertical axis, colors, data labels, etc.
- The chart supports dynamically updated data.
- Support chart annotation and comment

Report editing

- Support multiple formats for text editing
- Rich display form
- A variety of blocks can be inserted, including files, charts, links, audio and video, etc.

Block

Chart

List

Divider

Quote

Callout

Audio

File

Design is not just it looks like and Design is

Capture a Quote

Content

Words 105 Title 3 Para 2 Block 6

Report editor

EBS International > Everbright Spot

Export Share Publish

FinxOS

Import File

New Chart

New Report

Overview

Workspace

Draft File

Mini Program

Operational Data

Design is not just it looks like and Design is

Capture a Quote

Content

Words 105 Title 3 Para 2 Block 6

The results were largely in line with market expectation. In fact, Coolpad has already issued a profit alert in June, saying that its earnings would increase significantly in 1H14.

Ping An Insurance Group (2318 HK, NR) will increase its foreign investment in the coming three to five years, with the budget set at Rmb30bn (HK\$37.8bn) for this year. Chief investment officer Timothy Chan Tak-yin said y

Lastly edit : Julia 10:03

Everbright Spot

What's Inside

Coolpad Strong Interim Results in Line with Expectation –Kary Sei

Coolpad (2369 HK, Hold) announced a set of strong results with revenue and net profit increasing by 55% and 94% to HK\$14.9bn and HK\$413m respectively. The results were largely in line with market expectation. In fact, Coolpad has already issued a profit alert in June, saying that its earnings would increase significantly in 1H14.

Ping An Insurance Group (2318 HK, NR) will increase its foreign investment in the coming three to five years, with the budget set at Rmb30bn (HK\$37.8bn) for this year. Chief investment officer Timothy Chan Tak-yin said y

Chart editor

Untitled

Search for the data you want to add + New data

Chart time range 2018.01.01 To the latest

7 Days 30 Days 90 days 1 year 3 years 5 years 10 years

Stacking group 1 (2) Axis 2 Precision 2 digits

Industrial Production: Gold Thousand / USD / Month / Forward

Add conversion Frequency Magnitude Currency Offset

Frequency month Unit: kg

Group 1 Axis 1 Precision 2 digits

Group 2 Axis 1 Precision 2 digits

Group 3 Axis 2 Precision 2 digits

Display data value

Subtitle

Remarks

Publish 2019/01/01 23:45

Cancel Confirm

Search for the data you want to add + New data

Chart time range 2018.01.01 To the latest

7 Days 30 Days 90 days 1 year 3 years 5 years 10 years

Stacking group 1 (2) Axis 2 Precision 2 digits

Industrial Production: Gold Thousand / USD / Month / Forward

Add conversion Frequency Magnitude Currency Offset

Frequency month Unit: kg

Group 1 Axis 1 Precision 2 digits

Group 2 Axis 1 Precision 2 digits

Group 3 Axis 2 Precision 2 digits

Display data value

Subtitle

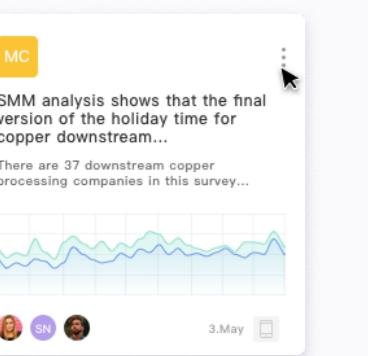
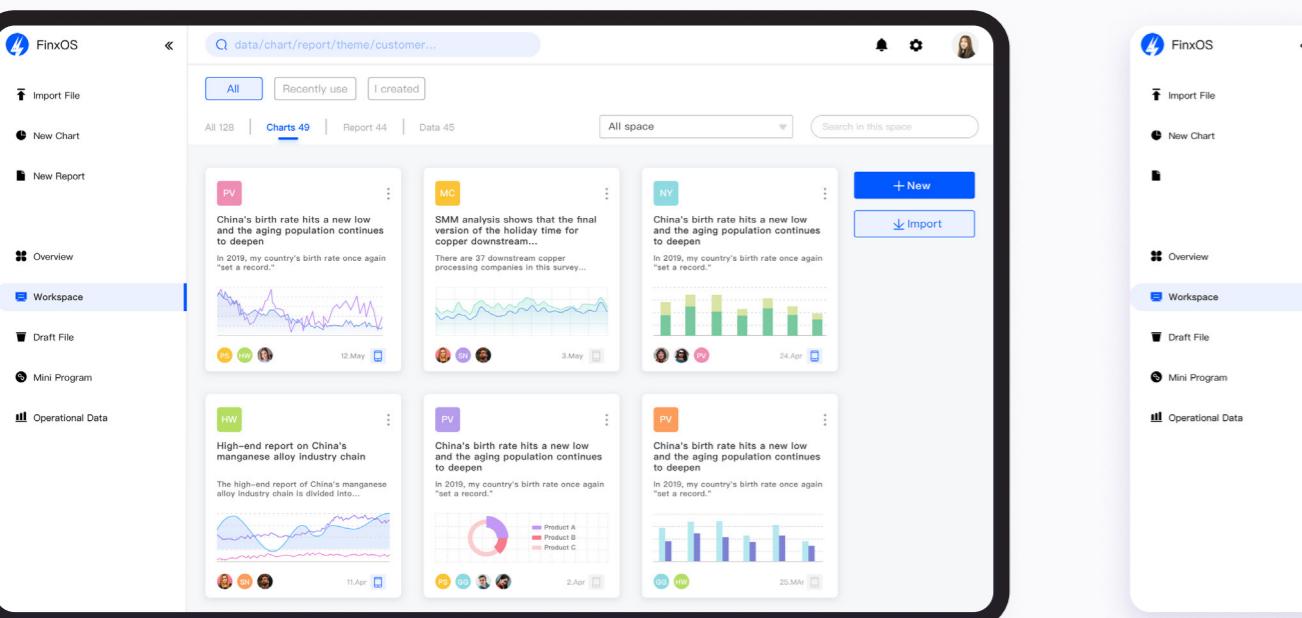
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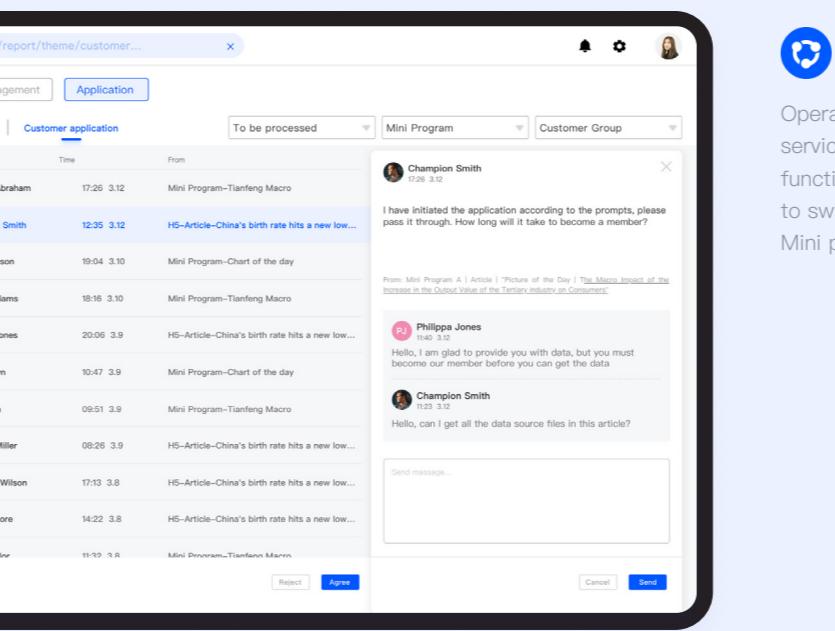
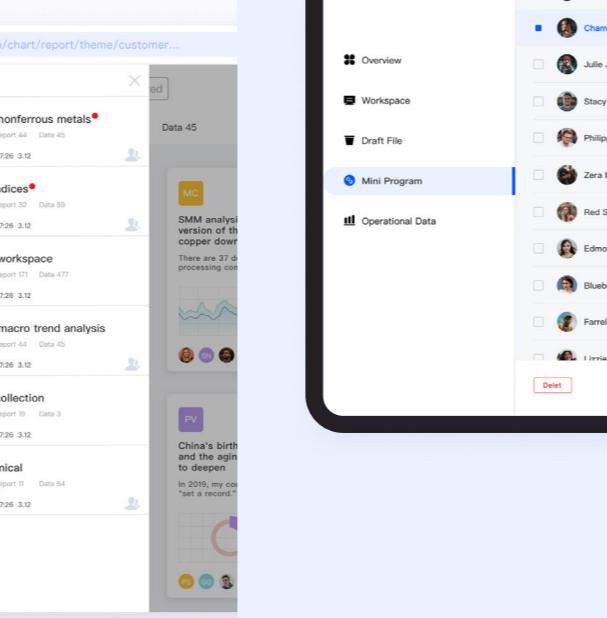
Cancel Confirm

Workspace

Different workspaces can help users manage files, store, sort and filter more effectively. Data can be backed up in the cloud or shared with team members.

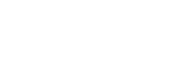
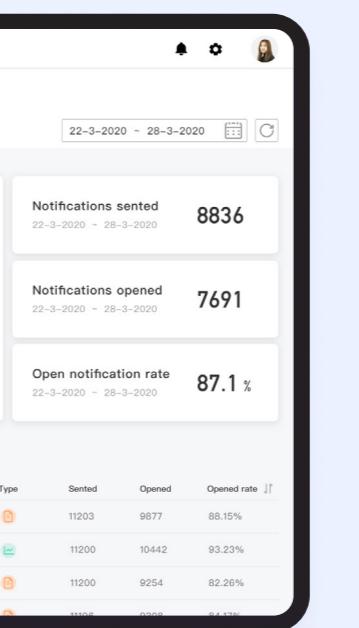


Click the button in the upper right corner of the card to perform more operations on the file. Hovering over the chart will display more supplementary information. Click the chart to enter the editing page.



Operation Management

Operation management covers user service, browsing data and other functions, one-stop operation, no need to switch to the background of WeChat Mini program.

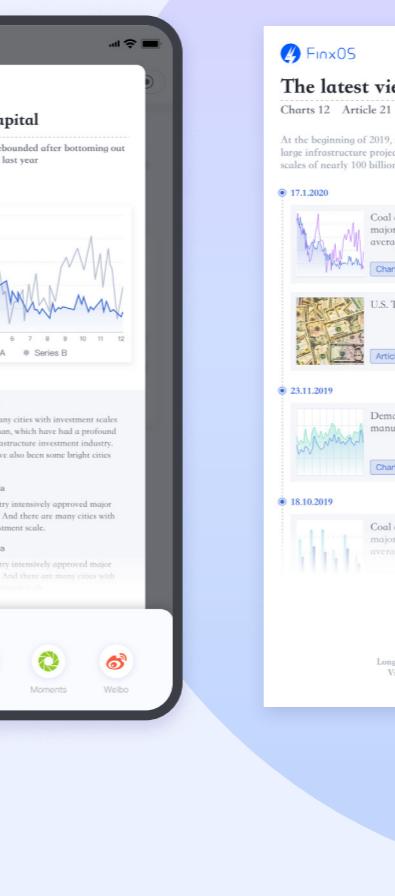
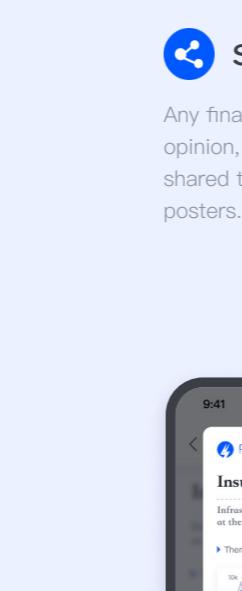
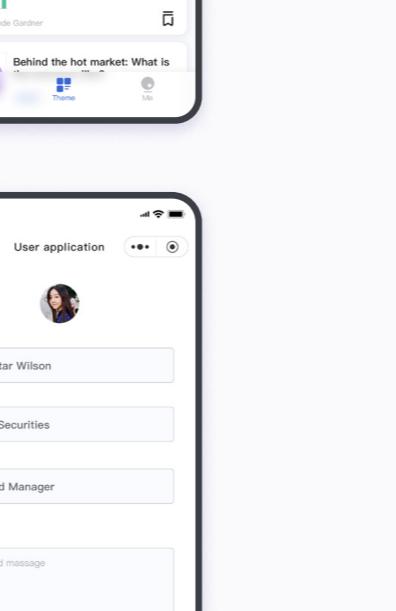
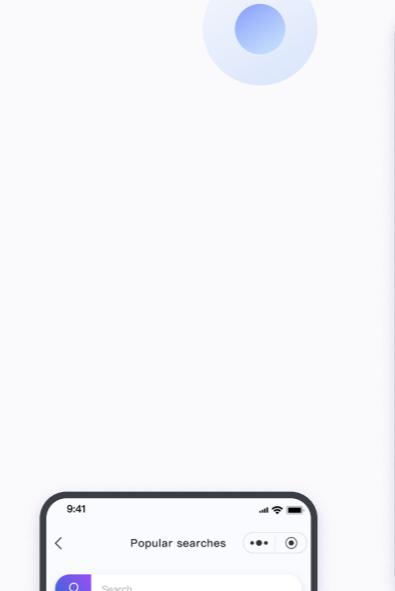
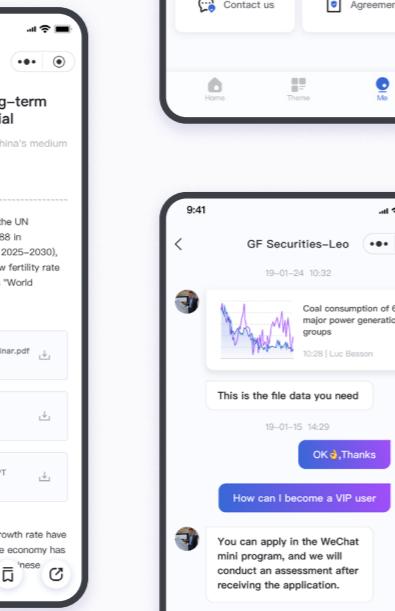
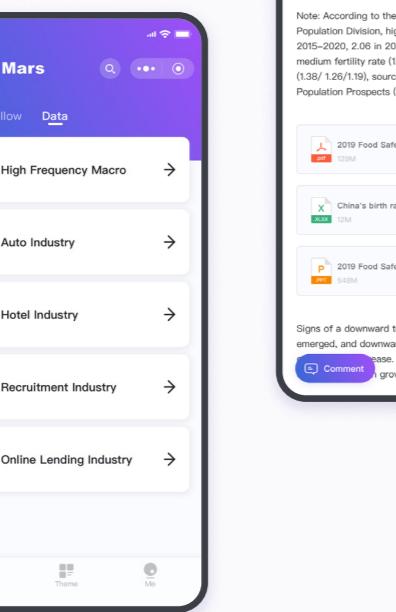
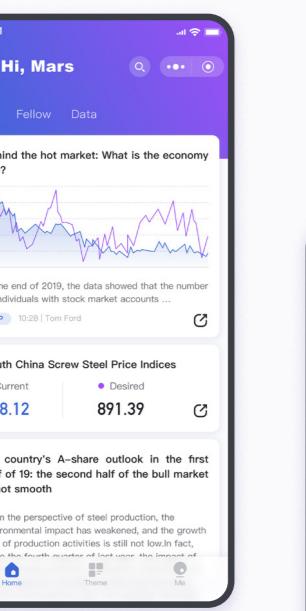


Style Guide & Icon

Mini Program

Customers only need to follow the Team's Mini Program on the WeChat platform, and they can use it without downloading and installing. They will receive notifications from WeChat, when the team member uploads a new research report, chart, fund or wealth management product.

Mini programs help fund companies, securities firm, financial influencer's team show their investment ideas and operational trends to their clients.



Share & Spread

Any financial topic, graphic report, text opinion, comment and analysis can be shared to various platforms in the form of posters.

