

Simon C. Wong's Portfolio

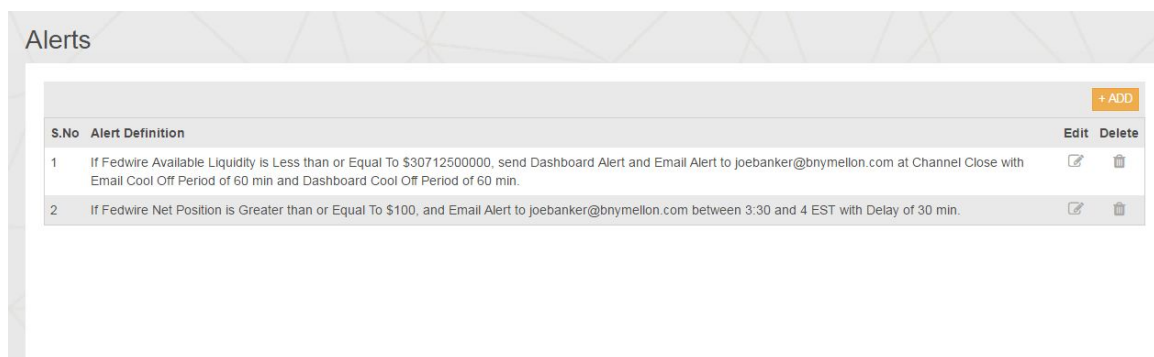
BNY Mellon

One of the most often used applications at BNY's Treasury department is their alerting application. The current Alerts application needed a redesign so it can be more extensible for new features and more user-friendly so new and existing users can easily create alerts to warn them of any monetary change they want to monitor.

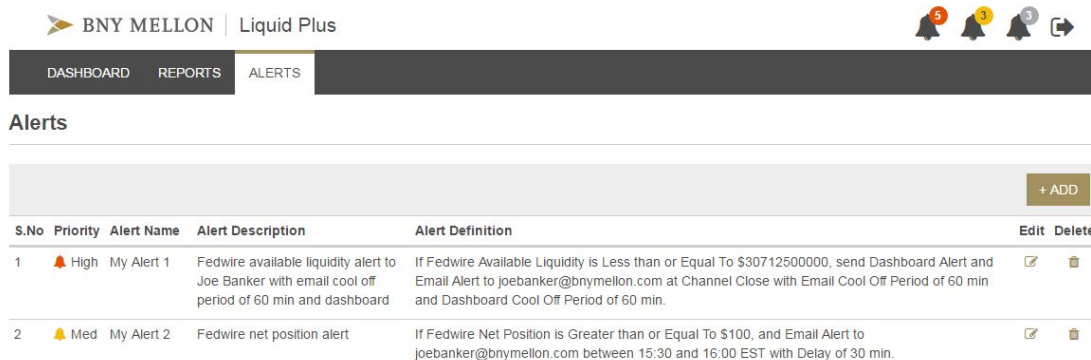
Technologies used: Rapid prototyping (1-2 days turnaround) using HTML5, CSS3, Bootstrap, Font Awesome, ES6, CanvasJS, D3js, jQuery UI, and AngularJS.

Before:

The Alerts Dashboard IA design was unchanged but the company corporate styles were applied.



After:



Simon C. Wong

Before:

Most of the change is on the edit/new alert page. The original design is one big form which will only grow bigger as new functionalities are added and can be intimidating to a new user.

Most of the options are hidden in combo boxes and so the user must click on each one to see all his choices before he can select one.

In addition, putting the form in a modal does not really serve any purpose and limits the available space.

The screenshot shows a web application interface with a top navigation bar containing 'Dashboard', 'Reports', 'Alerts', and 'User Management'. The 'Alerts' tab is active. Below the navigation bar, there is a section titled 'Alerts' with a table of alert definitions. The table has two columns: 'S.No' and 'Alert Definition'. It contains two rows of data. To the right of the table, there are '+ ADD', 'Edit', and 'Delete' buttons. Overlaid on this is a modal window titled 'Add New Alert'. The modal has a close button (X) in the top right corner. Inside the modal, there is a section titled 'New Alert' with a description: 'If <channel> <metric> is Less than or Equal To <value>, send Dashboard Alert at <scheduled time> EST.' Below this, there are input fields for '<channel>', '<metric>', and 'is Less than or Equal To'. There is also a field for '#'. Below these fields, there are two radio button options: 'send Dashboard Alert' (which is selected) and 'send Email Alert to' (with an input field). Below these, there are two radio button options for scheduling: 'At' (with an input field and a time zone dropdown set to 'EST') and 'At' (with a dropdown set to 'Channel Open'). Below these, there are two radio button options for delay: 'Cool Off Period' (with 'Email' and 'Dashboard' input fields and 'Min' labels) and 'Delay' (with an input field and a 'Min' label). At the bottom right of the modal, there are 'Cancel' and 'Save' buttons.

| S.No | Alert Definition |
|------|--|
| 1 | If Fedwire Available Liquidity is Less than or Equal To <value>, send Dashboard Alert at <scheduled time> EST. |
| 2 | If Fedwire Net Position is Greater than <value>, send Dashboard Alert at <scheduled time> EST. |

Simon C. Wong

After:

The new design utilizes the corporate styles and divides the alert into several sections thus allowing more room for new features like adding a 2nd alert condition or using a range operation.

Each alert section is accessible from a traditional left navigation or just by clicking on the alert preview at the top. The alert preview in this design now serves both as a guide with it's blue highlighting and as navigation.

With the modal gone and each section having ample of space, all options are now exposed either via exposed combo selector or radio buttons so a user can easily scan all his choices without clicking or hovering on anything.

I also proposed a new functionality, "Save As New Alert" depicted by a simple checkbox on the top control bar. This only appears when editing alerts and will basically allow a user to use an existing alert as template for a new alert, thus reducing the work required when creating a new alert from scratch.

The screenshot displays the BNY Mellon Liquid Plus Alerts interface. At the top, the header includes the BNY Mellon logo and 'Liquid Plus' text, along with notification icons (5, 3, 3) and a share icon. Below the header is a navigation bar with 'DASHBOARD', 'REPORTS', and 'ALERTS' tabs. The 'Alerts' section is active, showing a list of alerts. The 'My Alert 1' alert is selected, and its configuration page is displayed. The configuration page includes a 'General' tab, a 'Channels / Metrics' section, and a 'Delivery' section. The 'Channels / Metrics' section contains two lists: 'Channel' and 'Metric'. The 'Channel' list includes 'Fedwire', 'Fundswire', 'Securities', 'CHIPS', 'Chaps', 'Frankfurt Branch', 'Frankfurt Branch Target2', 'Frankfurt Branch EBA', 'Frankfurt SANV Net', and 'Frankfurt SANV Target2'. The 'Metric' list includes 'Incoming Value', 'Outgoing Value', 'Incoming Volume', 'Outgoing Volume', 'Net Items', 'Net Position', 'Net Debit Cap', 'Highest Positive Net', 'Lowest Positive Net', 'Opening Balance', 'Fedwire Overdraft', 'Available Liquidity', and 'Pending Value'. The 'Available Liquidity' metric is highlighted. Below the lists is an 'ADD 2ND CONDITION' button. The top control bar of the alert configuration page includes a 'Save as New Alert' checkbox, a 'CANCEL' button, and a 'SAVE ALERT' button.

BNY MELLON | Liquid Plus

DASHBOARD REPORTS ALERTS

Alerts

Save as New Alert CANCEL SAVE ALERT

My Alert 1

Edit High Priority Alert

If Fedwire Available Liquidity is Less than or Equal To \$30712500000, send Dashboard Alert and Email Alert to joebanker@bnymellon.com at Channel Close with Email Cool Off Period of 60 min and Dashboard Cool Off Period of 60 min.

Channel *

- Fedwire
- Fundswire
- Securities
- CHIPS
- Chaps
- Frankfurt Branch
- Frankfurt Branch Target2
- Frankfurt Branch EBA
- Frankfurt SANV Net
- Frankfurt SANV Target2

Metric *

- Incoming Value
- Outgoing Value
- Incoming Volume
- Outgoing Volume
- Net Items
- Net Position
- Net Debit Cap
- Highest Positive Net
- Lowest Positive Net
- Opening Balance
- Fedwire Overdraft
- Available Liquidity
- Pending Value

ADD 2ND CONDITION

BNY MELLON | Liquid Plus 5 3 3

Simon C. Wong

Morgan Stanley

At Morgan Stanley, one of the chief applications their financial advisors use is their portfolio management system to create/edit portfolios for their clients.

Technologies used: AngularJS, HTML5, CSS3, D3js, jQuery, jQuery UI.

Before:

The original application's create/edit page below suffers from a bad design because it requires the user to fill the allocation of the asset class in order to choose from a list of 93 sub asset classes. For instance, if a user fills the allocations for 2 Equity asset classes and 1 Fixed Income asset class, he cannot see the selected Fixed Income asset without scrolling down (See below "before" screenshot).

Also the selected portfolio is not obvious since the filled allocation is the only sign that it is selected.

Lastly, the original application does not satisfy a use-case of when a user only wants to select the asset classes first and then fill out all the allocations later.

The screenshot shows the Morgan Stanley Portfolio Manager interface. The header is blue with 'Morgan Stanley' and 'Portfolio Manager' on the left, and 'Hello Simon' on the right. Below the header, there is a section titled '- Equity'. It contains a table with 10 rows of asset classes. Each row has a text input field for the allocation percentage, followed by a '%' sign, and an 'Add Investments' link. The first two rows have values entered: '60' and '20'.

| Asset Class | Allocation (%) | Action |
|-----------------------------------|------------------------|---------------------------------|
| US Equity Large Cap Growth | 60 % | Add Investments |
| US Equity Mid Cap Growth | 20 % | Add Investments |
| US Equity Small Cap Growth | <input type="text"/> % | Add Investments |
| US Equity Large Cap Value | <input type="text"/> % | Add Investments |
| US Equity Mid Cap Value | <input type="text"/> % | Add Investments |
| US Equity Small Cap Value | <input type="text"/> % | Add Investments |
| US Equity Large Cap Blend | <input type="text"/> % | Add Investments |
| US Equity Mid Cap Blend | <input type="text"/> % | Add Investments |
| US Equity Small Cap Blend | <input type="text"/> % | Add Investments |
| US Equity Large Cap International | <input type="text"/> % | Add Investments |

After:

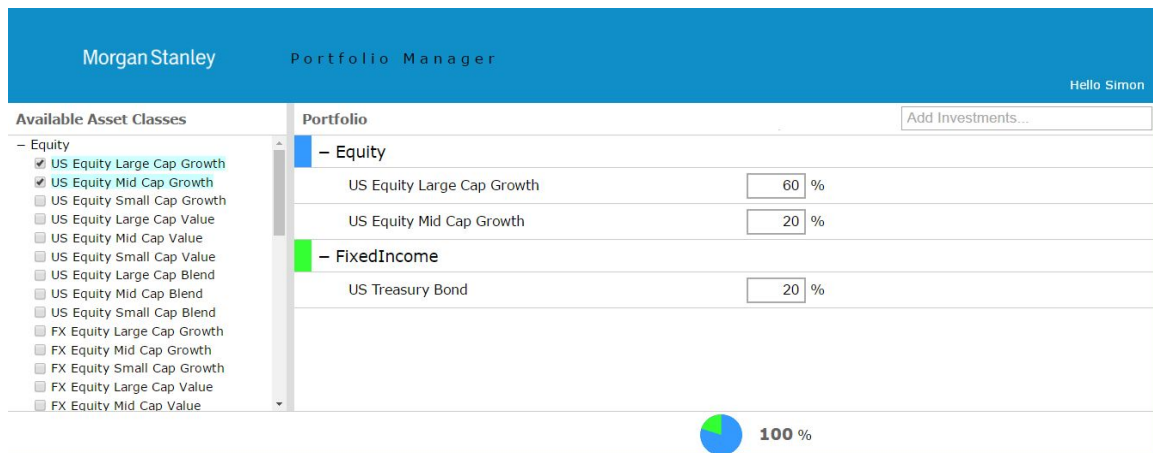
In the much improved new design, the available list of asset classes is now separate as a tree list selection on the left where the user selects from it. The selected assets are then displayed prominently on the right where the user can clearly see his portfolio.

For a small portfolio such as the one below, the user can easily view it without the need to scroll down. The user can actually see the Fixed Income asset class here that he was not able to see on the previous design without scrolling down. Even for a larger portfolio, the user can be assured that his portfolio is clearly displayed on the right and that the asset classes he wants for the portfolio are selected.

The use-case of the FA selecting the asset classes and leaving the allocations blank to be filled out later can now be achieved with the new design.

In addition, industry-standard colors are now associated with each first-level asset class so they can be easily distinguishable.

The footer is now fixed so the total is visible at all times. A pie chart of the portfolio using the asset classes' associated colors is also added on the footer and serves as a useful visual cue.



Before:

The second step of creating a portfolio requires the selection of the actual investments under each asset class. In the old design, the user clicks on the Add Investments link to reveal a typeahead search under the asset class. The user then adds the investments under each asset class using this search feature.

Although this may seem harmless at first glance and when creating a simple portfolio such as the one below, the user will soon find this to be quite a chore when dealing with a large portfolio with 20 different asset classes. Now, selecting the investments would mean clicking all 20 Add Investments links and cycling through all 20 typeahead searches just to fill out the investments for all 20 asset classes.

The screenshot displays the Morgan Stanley Portfolio Manager interface. At the top, the header includes 'Morgan Stanley', 'Portfolio Manager', and a user greeting 'Hello Simon'. Below the header, a section titled '- Equity' lists several asset classes. Each asset class has a corresponding percentage input field and an 'Add Investments' link. The asset classes and their current values are:

- US Equity Large Cap Growth: 60 %
- US Equity Mid Cap Growth: 20 %
- US Equity Small Cap Growth: (empty) %
- US Equity Large Cap Value: (empty) %

Investments are listed under each asset class:

- Under US Equity Large Cap Growth: Microsoft Corporation (MSFT) 50 %, Apple Inc (AAPL) 50 %.
- Under US Equity Mid Cap Growth: Panera Bread Co (PNRA) 100 %.

A typeahead search is open for the 'US Equity Small Cap Growth' asset class, showing suggestions: 'bbby', 'BBBY', 'Bed Bath & Beyond', and 'NASDAQ'. An 'Add Investment...' input field is also visible above the 'US Equity Mid Cap Growth' section.

Simon C. Wong

After:

In the new design, it is no longer necessary to click on any link to add investments. There is only one typeahead search on the top which searches through all the investments for all the user's selected asset classes.

And since the typeahead is keyboard-friendly, the user can now easily select all the investments for the portfolio without moving the mouse cursor.

All the results from the typeahead are nicely grouped by the sub level asset classes the user has selected for the portfolio and in the same order.

Checkboxes are also added on the typeahead results to allow multiple selection.

The investment allocation textbox styles are made lighter to differentiate it from the asset class allocation textbox.

The screenshot displays the Morgan Stanley Portfolio Manager interface. The top navigation bar includes the Morgan Stanley logo, the title "Portfolio Manager", and a user greeting "Hello Simon".

On the left, the "Available Asset Classes" section lists various asset classes under the "Equity" category, with checkboxes for selection. The "Equity" category is expanded, showing sub-categories like "US Equity Large Cap Growth", "US Equity Mid Cap Growth", etc.

The main "Portfolio" section shows the current allocation. It includes a search bar with the text "aa". Below the search bar, the "Equity" section is expanded, showing a list of investments with checkboxes for selection. The list includes "US EQUITY LARGE CAP GROWTH" (with sub-items AAPL, AAL) and "US EQUITY MID CAP GROWTH" (with sub-items AAP, AIR, AAV). The "FixedIncome" section is also visible, showing "US Treasury Bond" with a 20% allocation.

At the bottom right, a pie chart shows the total allocation of 100%.

Simon C. Wong

Thomson Reuters

As Lead Interaction Designer, one of my most exciting tasks was to design mobile user interfaces based on the company's existing desktop theme.

Technologies used: Designed treatments using Adobe Photoshop.



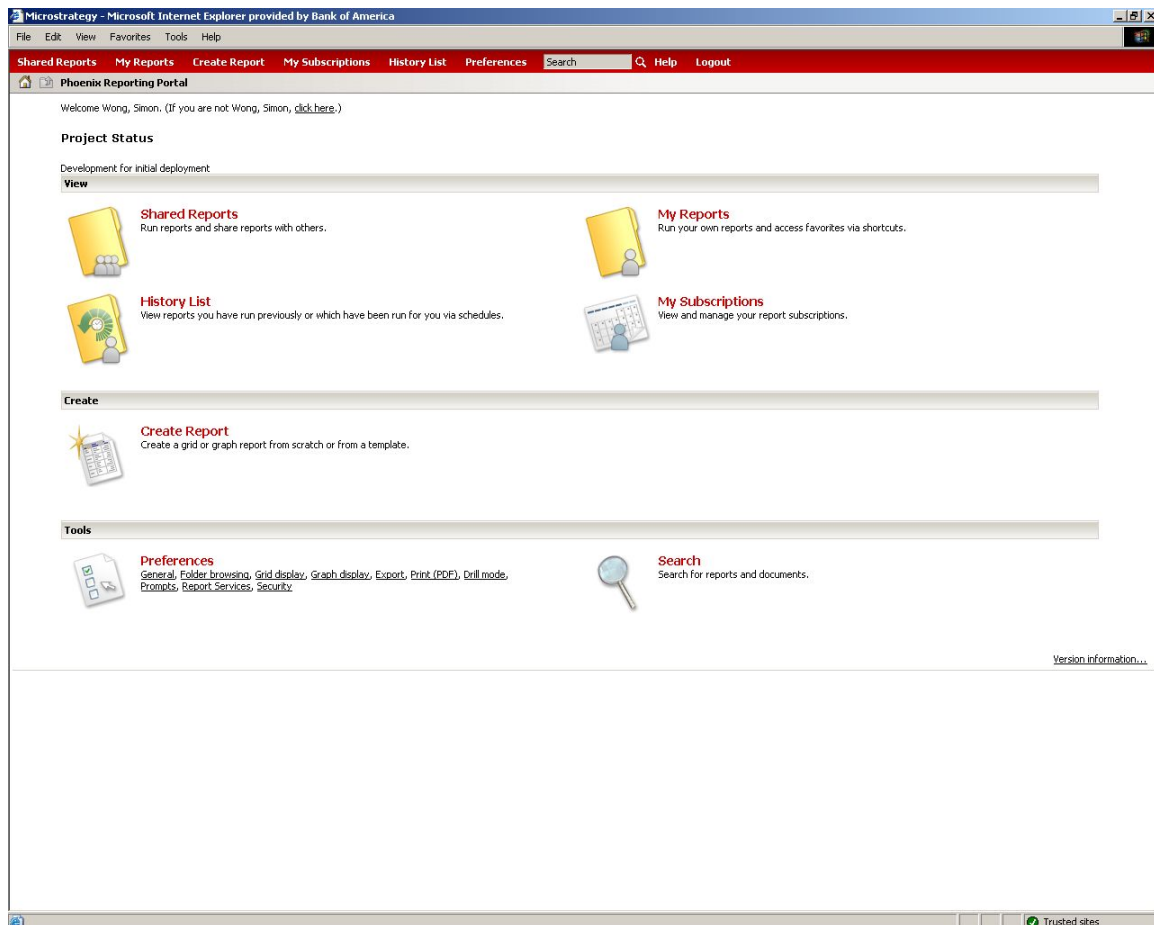
Simon C. Wong

Bank of America

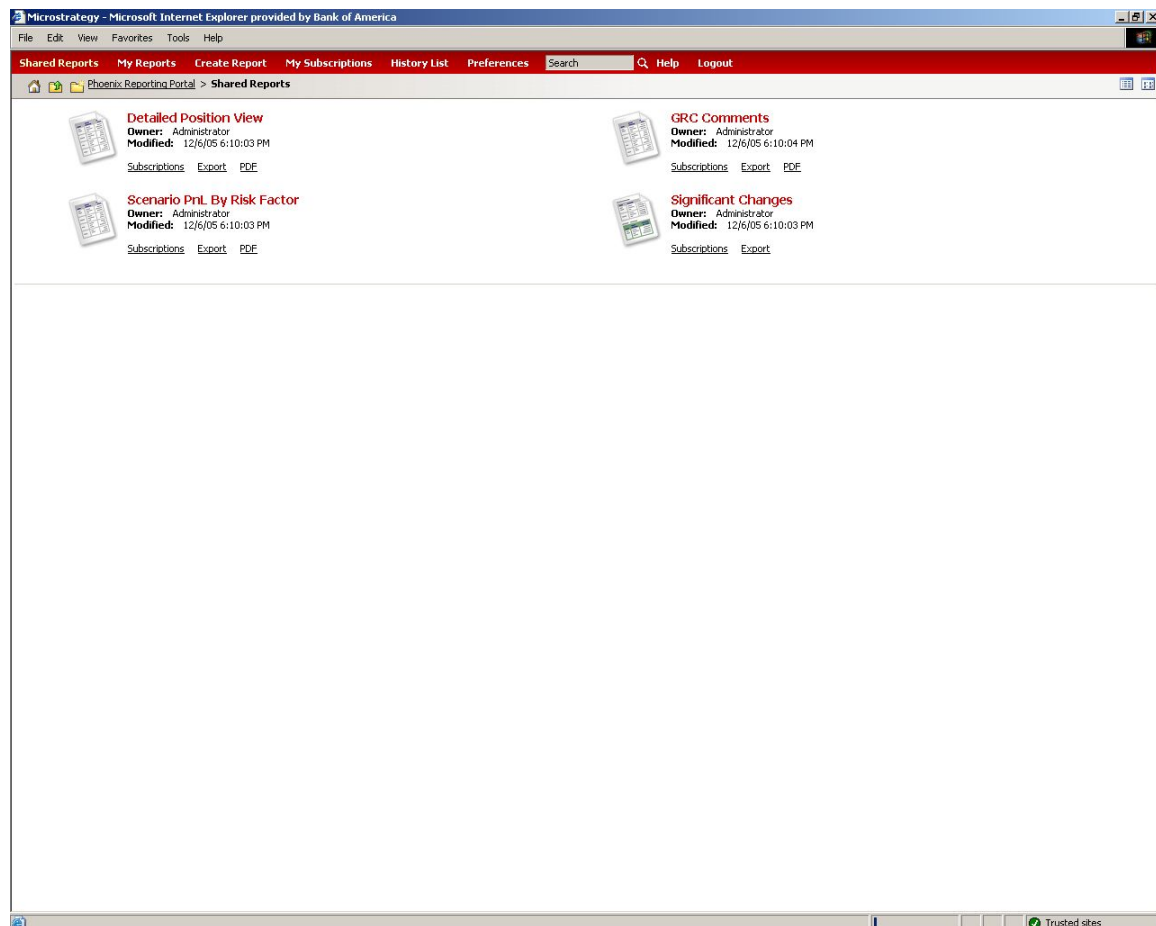
MicroStrategy Web Universal is a powerful on-line reporting tool. I customized this third-party application to adhere to company design guidelines and improve usability of the application primarily by reducing the number of page reloads required to accomplish a particular task. This was accomplished by consolidating key page functionalities onto one page.

Technologies used: MicroStrategy Web Universal, HTML, CSS, JavaScript, Java. Weblogic Application Server. Wireframes created in Visio. Created and enhanced images using Adobe Photoshop.

Before:



Simon C. Wong



Microstrategy - Microsoft Internet Explorer provided by Bank of America

File Edit View Favorites Tools Help

Shared Reports My Reports Create Report My Subscriptions History List Preferences Search Q Help Logout

Phoenix Reporting Portal > Shared Reports > Detailed Position View

Summary of your selections

1. Choose "Attribute(s)" for the position view report. (Required)
Choose "Attribute(s)" for the position view report.
This prompt requires at least one selection.
2. Choose "Metric(s)" for the position view report. (Required)
Choose "Metric(s)" for the position view report.
This prompt requires at least one selection.
3. Sequence ID (for Admin only, DO NOT change). (Required)
Sequence ID (for Admin only, DO NOT change).
This prompt requires at least one selection.

Available: Benchmark Price, Benchmark Security, Coupon Frequency, Coupon Rate, Day Count Basis, Exception Details, Exception Type, Exercise Style, Feed, Floater Indicator

Selected: Business Unit, Instrument Desc, Instrument Type, Issue Ccy, Maturity Date, Position Type

Available: MTM Base, MTM USD, Quantity

Selected: Notional

Available: 1295, 1296, 1297, 1298, 1394, 1523, 1524, 1527, 1528

Selected: --- none ---

1 - 30 of 51

Run Report Cancel

Done Trusted sites

Simon C. Wong

Microstrategy - Microsoft Internet Explorer provided by Bank of America

File Edit View Favorites Tools Help

Shared Reports My Reports Create Report My Subscriptions History List Preferences Search Help Logout

Phoenix Reporting Portal > Shared Reports > Detailed Position View

File View Data Format Last update: 12/9/2005 7:40:09 PM

PAGE-BY: Criteria: COB: 11/17/2005 Portfolio: All Metrics Values \$ % + -

Data rows: 1 - 100 of 1973 Data columns: 1

| Business Unit | Instrument Desc | Instrument Type | Issue Ccy | Maturity Date | Position Type | Position ID | Notional |
|-----------------|-----------------|-----------------|-----------|---------------|---------------|-------------|------------------|
| EMO_SINGAPORE_F | FX FWD | AUD | | 11/18/2005 | Position | 2244603 | 0.00 |
| EMO_SINGAPORE_F | FX FWD | AUD | | 11/21/2005 | Position | 2244605 | 0.00 |
| EMO_SINGAPORE_F | FX FWD | AUD | | 11/22/2005 | Position | 2244607 | 366.68 |
| EMO_SINGAPORE_F | FX FWD | EUR | | 11/18/2005 | Position | 2244609 | 0.00 |
| EMO_SINGAPORE_F | FX FWD | EUR | | 11/21/2005 | Position | 2244611 | 0.00 |
| EMO_SINGAPORE_F | FX FWD | EUR | | 11/22/2005 | Position | 2244613 | (0.08) |
| EMO_SINGAPORE_F | FX FWD | JPY | | 11/18/2005 | Position | 2244615 | 0.00 |
| EMO_SINGAPORE_F | FX FWD | JPY | | 11/21/2005 | Position | 2244617 | 0.00 |
| EMO_SINGAPORE_F | FX FWD | JPY | | 11/22/2005 | Position | 2244619 | 922,794.00 |
| EMO_SINGAPORE_F | FX FWD | SGD | | 11/18/2005 | Position | 2244604 | 0.59 |
| EMO_SINGAPORE_F | FX FWD | SGD | | 11/18/2005 | Position | 2244610 | 0.00 |
| EMO_SINGAPORE_F | FX FWD | SGD | | 11/18/2005 | Position | 2244616 | (46.21) |
| EMO_SINGAPORE_F | FX FWD | SGD | | 11/18/2005 | Position | 2244622 | (4,586,727.75) |
| EMO_SINGAPORE_F | FX FWD | SGD | | 11/18/2005 | Position | 2245902 | (16.44) |
| EMO_SINGAPORE_F | FX FWD | SGD | | 11/21/2005 | Position | 2244606 | (0.39) |
| EMO_SINGAPORE_F | FX FWD | SGD | | 11/21/2005 | Position | 2244612 | 0.00 |
| EMO_SINGAPORE_F | FX FWD | SGD | | 11/21/2005 | Position | 2244618 | 25.55 |
| EMO_SINGAPORE_F | FX FWD | SGD | | 11/21/2005 | Position | 2244624 | 1,368,537.70 |
| EMO_SINGAPORE_F | FX FWD | SGD | | 11/21/2005 | Position | 2245904 | (3.78) |
| EMO_SINGAPORE_F | FX FWD | SGD | | 11/22/2005 | Position | 2244608 | (455.59) |
| EMO_SINGAPORE_F | FX FWD | SGD | | 11/22/2005 | Position | 2244614 | 0.16 |
| EMO_SINGAPORE_F | FX FWD | SGD | | 11/22/2005 | Position | 2244620 | (13,210.67) |
| EMO_SINGAPORE_F | FX FWD | SGD | | 11/22/2005 | Position | 2244626 | 88,637,557.75 |
| EMO_SINGAPORE_F | FX FWD | SGD | | 11/22/2005 | Position | 2245906 | (51,579.13) |
| EMO_SINGAPORE_F | FX FWD | SGD | | 11/23/2005 | Position | 2244628 | (167,730,000.00) |
| EMO_SINGAPORE_F | FX FWD | SGD | | 11/25/2005 | Position | 2244630 | (48,708,000.00) |
| EMO_SINGAPORE_F | FX FWD | SGD | | 11/29/2005 | Position | 2244632 | 32,342,000.00 |
| EMO_SINGAPORE_F | FX FWD | SGD | | 11/30/2005 | Position | 2244634 | 50,936,000.00 |
| EMO_SINGAPORE_F | FX FWD | SGD | | 12/1/2005 | Position | 2244636 | (33,864,000.00) |
| EMO_SINGAPORE_F | FX FWD | SGD | | 12/5/2005 | Position | 2244638 | 16,111,000.00 |
| EMO_SINGAPORE_F | FX FWD | SGD | | 12/6/2005 | Position | 2244640 | (453,041,250.00) |
| EMO_SINGAPORE_F | FX FWD | SGD | | 12/7/2005 | Position | 2244642 | (49,680,000.00) |
| EMO_SINGAPORE_F | FX FWD | SGD | | 12/9/2005 | Position | 2244644 | (33,496,241.21) |
| EMO_SINGAPORE_F | FX FWD | SGD | | 12/12/2005 | Position | 2244646 | 167,040,000.00 |
| EMO_SINGAPORE_F | FX FWD | SGD | | 12/13/2005 | Position | 2244648 | 167,380,000.00 |
| EMO_SINGAPORE_F | FX FWD | SGD | | 12/14/2005 | Position | 2244650 | 0.00 |
| EMO_SINGAPORE_F | FX FWD | SGD | | 12/16/2005 | Position | 2244652 | 83,150,000.00 |
| EMO_SINGAPORE_F | FX FWD | SGD | | 12/19/2005 | Position | 2244654 | 83,080,000.00 |
| EMO_SINGAPORE_F | FX FWD | SGD | | 12/22/2005 | Position | 2244656 | 82,825,000.00 |
| EMO_SINGAPORE_F | FX FWD | SGD | | 12/28/2005 | Position | 2244658 | (1,676,490.00) |
| EMO_SINGAPORE_F | FX FWD | SGD | | 12/29/2005 | Position | 2244660 | 100,000,000.00 |
| EMO_SINGAPORE_F | FX FWD | SGD | | 1/3/2006 | Position | 2244662 | (83,560,000.00) |

1 2 3 4 5 of 20 page(s)

Done Trusted sites

Simon C. Wong

After:

As a result, all the above page functionalities are consolidated onto one single page and are easily identifiable and accessible. Having everything in one page along with the implementation of the AJAX components virtually eliminates all page reloading.

Microstrategy - Microsoft Internet Explorer provided by Bank of America

File Edit View Favorites Tools Help

Detailed Position View For internal use only

Process Mgr Positions Exceptions Scenarios Market Data Portfolio Mgr Reports

File View Data Format

Last update: 12/9/2005 7:27:21 PM

Shared Reports

- Detailed Position View
- GRC Comments
- Scenario PNL By Risk Factor
- Significant Changes

PROMPTS

1. Choose "Attribute(s)" for the position view report | 2. Choose "Metric(s)" for the position view report | 3. Sequence ID (for Admin only, DO NOT change)

1. Choose "Attribute(s)" for the position view report

This prompt requires at least one selection.

Available: Benchmark Price, Benchmark Security, Coupon Frequency, Coupon Rate, Day Count Basis

Selected: Business Unit, Instrument Desc, Instrument Type, Issue Ccy, Maturity Date

PAGE-BY: Criteria: COB: 11/17/2005 Portfolio:

Run Report

1 2 3 4 5 of 20 page(s)

Data rows: 1 - 100 of 1973 Data columns: 1

| Business Unit | Instrument Desc | Instrument Type | Issue Ccy | Maturity Date | Position Type | Position ID | Notional |
|-----------------|-----------------|-----------------|-------------|---------------|---------------|-------------|------------------|
| BMG_SINGAPORE_F | FX FWD | AUD | 11/1/8/2005 | Position | 2244603 | | 0.00 |
| BMG_SINGAPORE_F | FX FWD | AUD | 11/21/2005 | Position | 2244605 | | 0.00 |
| BMG_SINGAPORE_F | FX FWD | AUD | 11/22/2005 | Position | 2244607 | | 366.68 |
| BMG_SINGAPORE_F | FX FWD | EUR | 11/1/8/2005 | Position | 2244609 | | 0.00 |
| BMG_SINGAPORE_F | FX FWD | EUR | 11/21/2005 | Position | 2244611 | | 0.00 |
| BMG_SINGAPORE_F | FX FWD | EUR | 11/22/2005 | Position | 2244613 | | (0.08) |
| BMG_SINGAPORE_F | FX FWD | JPY | 11/1/8/2005 | Position | 2244615 | | 0.00 |
| BMG_SINGAPORE_F | FX FWD | JPY | 11/21/2005 | Position | 2244617 | | 0.00 |
| BMG_SINGAPORE_F | FX FWD | JPY | 11/22/2005 | Position | 2244619 | | 922,794.00 |
| BMG_SINGAPORE_F | FX FWD | SGD | 11/1/8/2005 | Position | 2244604 | | 0.59 |
| BMG_SINGAPORE_F | FX FWD | SGD | 11/1/8/2005 | Position | 2244610 | | 0.00 |
| BMG_SINGAPORE_F | FX FWD | SGD | 11/1/8/2005 | Position | 2244616 | | (46.21) |
| BMG_SINGAPORE_F | FX FWD | SGD | 11/1/8/2005 | Position | 2244622 | | (4,586,727.75) |
| BMG_SINGAPORE_F | FX FWD | SGD | 11/1/8/2005 | Position | 2244602 | | (16.44) |
| BMG_SINGAPORE_F | FX FWD | SGD | 11/21/2005 | Position | 2244606 | | (0.39) |
| BMG_SINGAPORE_F | FX FWD | SGD | 11/21/2005 | Position | 2244612 | | 0.00 |
| BMG_SINGAPORE_F | FX FWD | SGD | 11/21/2005 | Position | 2244618 | | 25.55 |
| BMG_SINGAPORE_F | FX FWD | SGD | 11/21/2005 | Position | 2244624 | | 1,368,537.70 |
| BMG_SINGAPORE_F | FX FWD | SGD | 11/21/2005 | Position | 2245904 | | (3.78) |
| BMG_SINGAPORE_F | FX FWD | SGD | 11/22/2005 | Position | 2244608 | | (455.58) |
| BMG_SINGAPORE_F | FX FWD | SGD | 11/22/2005 | Position | 2244614 | | 0.16 |
| BMG_SINGAPORE_F | FX FWD | SGD | 11/22/2005 | Position | 2244620 | | (13,210.67) |
| BMG_SINGAPORE_F | FX FWD | SGD | 11/22/2005 | Position | 2244626 | | 86,637,557.75 |
| BMG_SINGAPORE_F | FX FWD | SGD | 11/22/2005 | Position | 2245906 | | (51,579.13) |
| BMG_SINGAPORE_F | FX FWD | SGD | 11/23/2005 | Position | 2244628 | | (167,730,000.00) |
| BMG_SINGAPORE_F | FX FWD | SGD | 11/25/2005 | Position | 2244630 | | (49,709,000.00) |
| BMG_SINGAPORE_F | FX FWD | SGD | 11/29/2005 | Position | 2244632 | | 32,342,000.00 |
| BMG_SINGAPORE_F | FX FWD | SGD | 11/29/2005 | Position | 2244634 | | 25,000,000.00 |

1 2 3 4 5 of 20 page(s)

Trusted sites

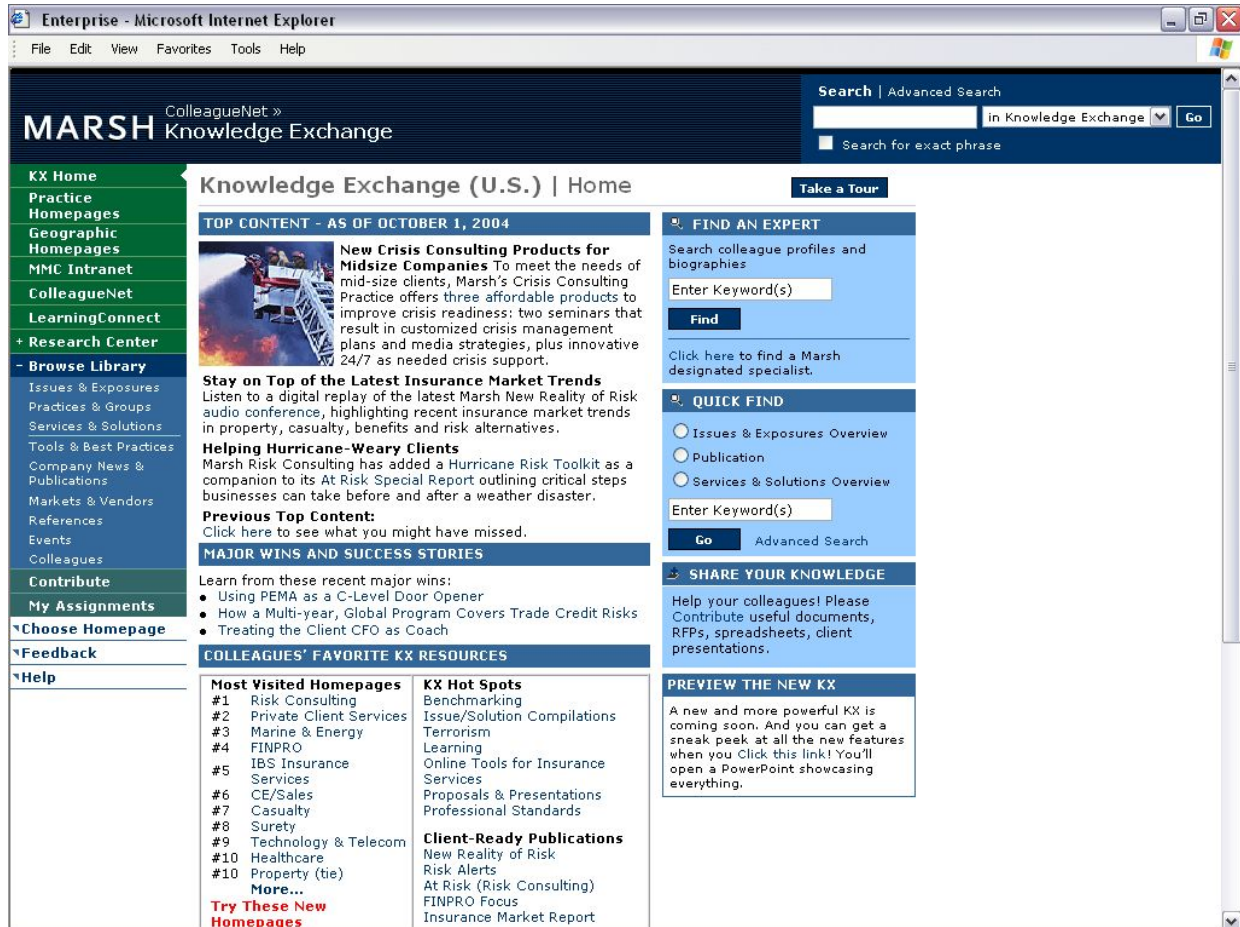
Simon C. Wong

Marsh Inc.

Knowledge Exchange is the central repository where Marsh employees find and exchange information in many different areas of risk and insurance. For this site, I consolidated all search widgets into one central search tool and reorganized the left navigation for better usability.

Technologies used: HTML, CSS, JavaScript, and OScript using Open Text's Livelihood Enterprise Server. Wireframes created in Visio. Created and enhanced images using Adobe Photoshop.

Before:



Simon C. Wong

After:

The aftermath is there is only one search tool with the option for more advanced search capabilities. The left navigation was organized so that all menu items in green are pertinent to this site, all blue ones are related to resources external to the site, and all white ones for auxiliary help tools.

MARSH Knowledge Exchange U.S. (TEST VERSION)

Welcome, Admin [Add New Item...](#)

Personal Enterprise Tools Help

Go to a Community Homepage

Search Knowledge Exchange [Tips](#)

[Go](#)

☐ Search for exact phrase [More Options](#)

What are you trying to do?

- [Complete an RFP](#)
- [Find an expert](#)
- [Answer an unusual client question](#)
- [Understand Marsh's on-line knowledge resources](#)
- [Get Insurance market updates](#)

Top Content as of August 9, 2004 [Previous Items](#)

At-Risk Assessment Guidelines
This two-page Word document provides guidelines for implementing and following a best practice At-Risk Assessment strategy to minimize lost business through the early identification of clients we may be "at risk" of losing due to critical warning signs. By conducting an assessment, the client executive can use the information to prioritize their clients and determine those who need additional resources, assistance, review, etc. The goal is to reduce or eliminate any risk factors and client dissatisfiers and retain the business at risk.

Automotive Industry Practice (AIP) Issues Grid
Table identifying automotive industry issues and the impact on the industry. Includes market trends, MMC strategy and colleague contact information.

HealthCare Services and Solutions for Workforce Issues
What are the health care workforce issues? What are the Marsh and MMC solutions?

KX Announcements

- [We Need Your Feedback](#)
There's still time to complete and submit the KX User Survey. The deadline has been extended to September 24th. [Click this link](#) to help make the KX even better!

Major Wins and Success Stories

- [Chicago Success Story for Braqq Communities, LLC](#)
- [Construction Solutions Enjoys Great Success!](#)

What's Happening on KX

- [Most Used Items](#)
- [Whats New](#)
- [Upcoming Events](#)
- [New Colleagues](#)
- [Most Active Practice - Risk Consulting](#)

Client-Ready Publication

- [Issues & Exposures/Terrorism](#)
- [Proposals & Presentations](#)
- [Benchmarking](#)
- [Industry Issue/Solution Compilations](#)

KX by the Numbers

KX Users

| Month | Users |
|-------|--------|
| 2004 | 12,000 |
| Mar | 11,000 |
| Apr | 10,000 |
| May | 9,000 |
| Jun | 8,000 |
| Jul | 7,000 |
| Aug | 6,000 |

Knowledge Exchange has been visited **139,366** times by a total of **12,876** users (Updated weekly)

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MMC Marsh & McLennan Companies

Simon C. Wong

Before:

For the results section, there was too much clutter.

Marsh Knowledge Exchange

Search | Advanced Search

test in Knowledge Exchange Go

Search for exact phrase

You are in: Home » Search »

Search Results

You searched for "test" Within Knowledge Exchange

Hide Descriptions «Previous (Results: 1 to 20 of approximately 554) Next»

Narrow your results (click the arrow to show options)

Search Results

| Type | Name | Date | Size | Rel |
|----------|--|------------|---------|-----|
| Document | OB Risk Management Rounds, Volume 2, No. 1, February 2003 Location: OB Risk Management Rounds (HealthCare) Designed to assist Marsh clients develop cogent clinical loss control solutions. Published every other month, you can either email a copy or print out a copy and mail it to a client or prospect. I | 04/21/2004 | 1 Item | 86% |
| Document | CBT 1 Training Information Location: Billing Activities CBT 1 for Invoicing consists of three sections: a pre-test, the actual lessons, and a post-test. A score of 80% on the post-test is necessary in order to pass. | 04/02/2004 | 1 Item | 86% |
| Document | CBT 2 Training Information Location: Billing Activities CBT 2 for Invoicing consists of three sections: a pre-test, the actual lessons, and a post-test. A score of 80% or better on the post-test necessary to pass. | 04/02/2004 | 1 Item | 86% |
| Document | Anthrax Exposure - Royal's Position Location: External News & Publications Royal | 10/25/2003 | 1 Item | 86% |
| Document | Using Test Your Workers' Compensation Losses to jumpstart consulting opportunities - Location: Computer Applications & Models Dimensions | 10/25/2003 | 0 Items | 86% |
| Document | SalesMax - Online Location: Guidelines, Policies, Procedures; Best P... Procedures for a Sales Professional candidate to take an online competency assessment | 10/25/2003 | 1 Item | 86% |
| Document | Selection Process for a Sales Professional Location: Administrative & Internal Description of the selection process and decision matrix for a Sales Professional | 10/25/2003 | 1 Item | 85% |
| Document | HealthCare - Managed Care Practice Overview | 03/15/2004 | 1 Item | 85% |

Search Elsewhere

Try your search for test again using:

- All MMC Sites
- Marsh.com
- Google
- SilverPlume (Insurance Manuals)
- Dialog NewsRoom

* More search options will be available soon.

RESEARCH CENTER

Try browsing these sources to find insurance and business intelligence information:

- AM Best Insurance Reports
- Country Info
- Country Risk
- Dialog NewsRoom
- Economist Intelligence Unit (EIU)
- IRMI Glossary
- Oden Regulatory Compliance
- OneSource
- SilverPlume (Insurance Manuals)

Need assistance?

Can't find what you are looking for?

Click for help

Simon C. Wong

After:

After redesign, the results section contains only 3 columns, having the most important data placed in these columns, while the rest of the data under the main column. The same search tool from home page (miniaturized) was implemented on right column and the restructured left navigation on the left column.

Livelihood - Result Page - Microsoft Internet Explorer

File Edit View Favorites Tools Help

MARSH Knowledge Exchange U.S. (TEST VERSION)

You are in: [Home](#) > [Search](#)

Search Results

Results 1 - 8 of about 8 for test

[Hide Descriptions](#) <<Previous | Next>>

| Type | Name | Last Modified |
|----------|---|---------------|
| Document | Test for Simon (0 Items) - 87% Test for Simon Found in: Colleagues Primary Practice: Global Risk Practices: FINPRO Intended Audience: Colleagues [Compliance: Not Reviewed] | 07/29/2004 |
| Document | Test for Simon (0 Items) - 87% Test for Simon Found in: Why oh why do blue birds fly? Primary Practice: Global Risk Practices: FINPRO Intended Audience: Colleagues [Compliance: Not Reviewed] | 07/29/2004 |
| Document | attachments galore (2 Items) - 86% nice attachments Found in: Practices & Groups Primary Practice: Global Risk Practices: FINPRO Intended Audience: Colleagues [Compliance: Not Reviewed] | 08/31/2004 |
| Document | test 5 (0 Items) - 85% test 5 Found in: Alternative Risk Financing Primary Practice: Global Risk Practices: FINPRO Intended Audience: Colleagues [Compliance: Not Reviewed] | 08/09/2004 |
| Document | another test (20 KB) - 85% The quick brown fox jumped over the lazy dogs Found in: Colleagues Display Cover Page Primary Practice: Global Risk Practices: FINPRO Intended Audience: Clients Colleagues [Compliance: Not Reviewed] | 08/06/2004 |
| Document | another test (20 KB) - 85% The quick brown fox jumped over the lazy dogs Found in: reply 4 Display Cover Page Primary Practice: Global Risk Practices: FINPRO Intended Audience: Clients Colleagues [Compliance: Not Reviewed] | 08/06/2004 |
| Document | TEST ATTA / GQ (4 Items) - 82% TEST ATTA / GQ Found in: Colleagues Primary Practice: Global Risk Practices: FINPRO Intended Audience: Colleagues [Compliance: Not Reviewed] | 08/31/2004 |

Search

test [Go](#)

☐ Search for exact phrase

[More Options](#) [Search Tips](#)

Include

☒ Client Issues ☒ Biographies
☒ Marsh Solutions ☒ Events
☒ Publications ☒ Other

Practices

< All Practices >

Industries

< All Industries >

Compliance

☐ Compliant Documents Only

[Advanced Search](#)

Tips

Combine keywords to refine your search. You can use multiple keywords by separating them with spaces or commas.

[More Tips](#)

Search Elsewhere

Try your search for **test** again using:

- [SilverPlume](#)
- [Dialog](#)
- [Google](#)
- [All MMC Sites \(Sites Included\)](#)
- [Marsh Sites \(Sites Included\)](#)
- [Mercer \(Sites Included\)](#)

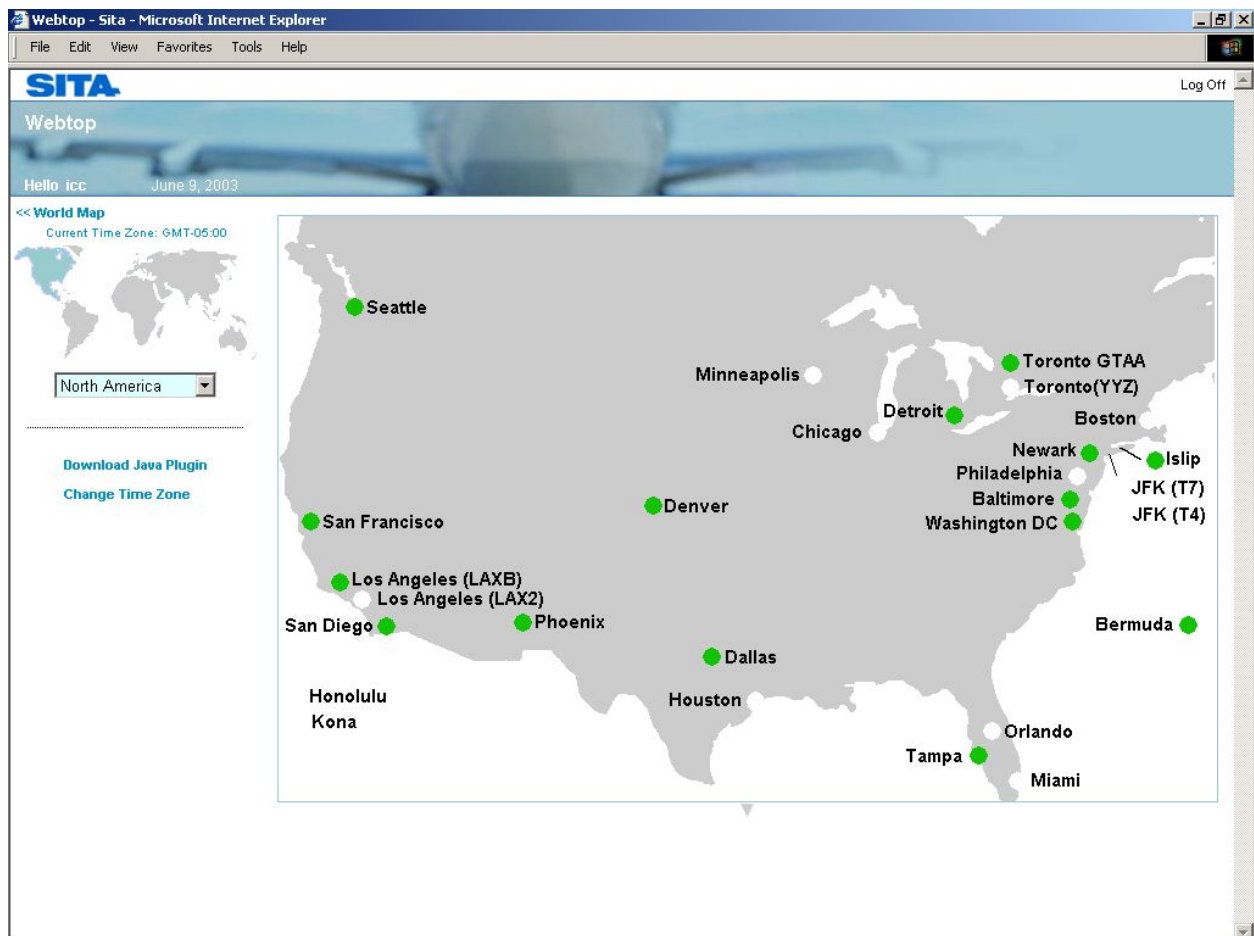
Simon C. Wong

Sita Airport Services

At Sita, I designed, coded, and tested the operations group's centerpiece web-based application that enables its personnel to troubleshoot and monitor the status of hardware components belonging to over 90% of the world's airports and other facilities around the world.

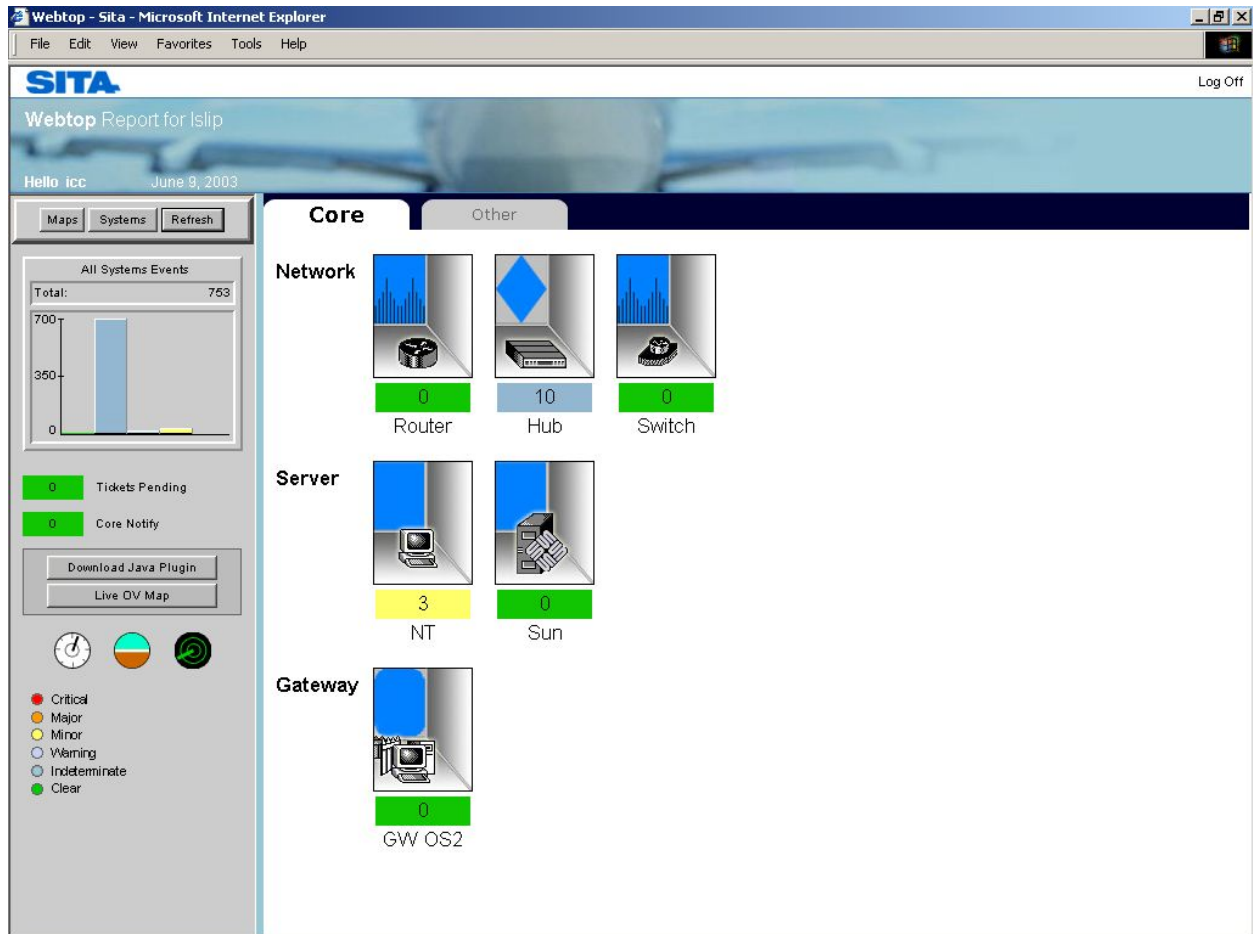
Technologies used: HTML, CSS, JavaScript, and Java Applets using Micromuse's Webtop Application Server. Created and enhanced images using Adobe Photoshop.

This is one of the main screens of the application. From this screen, a user can choose any geographical region in the world. Each dot represents a client's location which is normally an airport. A green dot represents no critical issues with the hardware. A red dot indicates a critical issue. Clicking on the dot will drill down to a more detailed view with all the hardware components belonging to that location (See next page).



Simon C. Wong

Here is a page listing all the hardware components for Islip Airport. Core hardware components are listed under one tab. All other auxiliary components are on another tab. Stats and tools are found on the left column.



Simon C. Wong

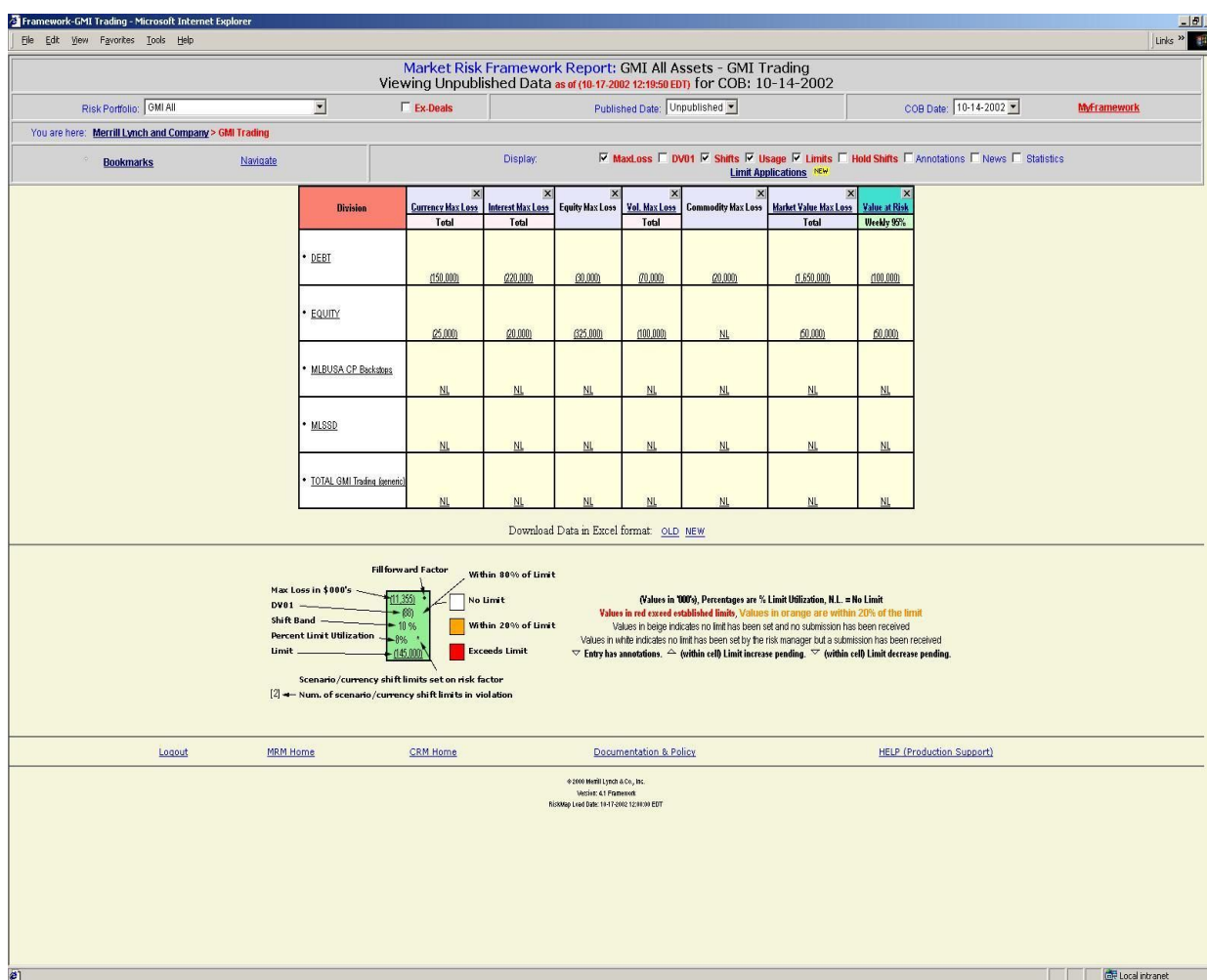
Merrill Lynch

At the Risk Management department of Merrill Lynch, I designed, prototyped, and integrated all risk applications, created a central repository for early design prototypes allowing senior management and users to discover and interact with early working designs, and redesigned the department's web site.

Technologies used: Java Server Pages, Java Servlets, Java Beans, JDBC, DHTML, CSS, JavaScript, ServletExec, Apache Web Server, and Sybase Database. Created and enhanced graphics using Adobe Illustrator and Photoshop.

Before:

One of the key projects that I oversaw was the redesign of their central risk application, Framework. The original "Before" design was terribly outdated and using OTB 1st generation html controls. The IA design consists of a standard drill down approach without any ability for user customizations.



Simon C. Wong

After:

The result is not only a better and more stunning visual design, but one which greatly improves usability by allowing the user greater freedom in viewing, customizing, and saving reports pertinent to his business unit. The new application also allows a way to exchange and receive reports via a built-in email, scheduler, and address book feature.

Limits Reporting - Microsoft Internet Explorer

Address: http://riskdata.riskdevel.ml.com:82/reporting/limits_home/limits.jsp?

Search: Web Shopping Travel Dictionary Encyclopedia Fun

Links: Corporate Risk Management AltaVista - World - BabelFish Translation Clear Cache Horde My Summary Live365 - Listen huntley+sitordance

Hello huntley harvey

Merrill Lynch Eclipse

Market Risk

Report Name: Report COB Date: 10-15-2002 View Define Publish Print Preview Virtual Hierarchy Tool

GMI Trading for COB Date: 10-15-2002

as of 10-17-2002 at 12:19 PM

*Values in 000s unless otherwise specified.

Print Preview Published Reports Delete Get Help

| Risk Measure | Max Loss | Max Loss Chg | Shift | Perm Limit | Ext. | Total Limit | % Util | VAR |
|---|------------|--------------|----------|------------|------|-------------|--------|-----|
| A | (16,698) | (5,617) | -50 | 0 | 0 | 0 | 0 | 0.0 |
| AA | (6,957) | 801 | -50 | 0 | 0 | 0 | 0 | 0.0 |
| AAA | (14,058) | (6,653) | -50 | 0 | 0 | 0 | 0 | 0.0 |
| AAA+ | (1) | 0 | 50 | 0 | 0 | 0 | 0 | 0.0 |
| Agency Debentures | (5,646) | (2,197) | 50 | 0 | 0 | 0 | 0 | 0.0 |
| BB | (96) | 840 | -50 | 0 | 0 | 0 | 0 | 0.0 |
| BBB | (2,826) | (1,689) | -50 | 0 | 0 | 0 | 0 | 0.0 |
| Commodity | (333) | (3) | 10 | 0 | 0 | 0 | 0 | 0.0 |
| Convertibility | (11,669) | 819 | -10 | 0 | 0 | 0 | 0 | 0.0 |
| Credit Spread (Info) | (303,872) | (19,569) | 50 | 0 | 0 | 0 | 0 | 0.0 |
| Credit Spread (Info)-Agency Debentures | (11,191) | 136 | -50 | 0 | 0 | 0 | 0 | 0.0 |
| Credit Spread (Info)-Investment Grade | (65,032) | 6,021 | 50 | 0 | 0 | 0 | 0 | 0.0 |
| Credit Spread (Info)-Investment Grade-A | (16,698) | (5,617) | -50 | 0 | 0 | 0 | 0 | 0.0 |
| Credit Spread (Info)-Investment Grade-AA | (6,957) | 801 | -50 | 0 | 0 | 0 | 0 | 0.0 |
| Credit Spread (Info)-Investment Grade-AAA | (14,058) | (6,653) | -50 | 0 | 0 | 0 | 0 | 0.0 |
| Credit Spread (Info)-Investment Grade-AAA+ | (1) | 0 | 50 | 0 | 0 | 0 | 0 | 0.0 |
| Credit Spread (Info)-Investment Grade-BBB | (2,826) | (1,689) | -50 | 0 | 0 | 0 | 0 | 0.0 |
| Credit Spread (Info)-Investment Grade-IG | (96,297) | 3,315 | 50 | 0 | 0 | 0 | 0 | 0.0 |
| Credit Spread (Info)-Investment Grade-IGNR | (7,239) | (2,464) | 50 | 0 | 0 | 0 | 0 | 0.0 |
| Credit Spread (Info)-Sub-Investment Grade | (14,188) | (1,681) | 50 | 0 | 0 | 0 | 0 | 0.0 |
| Credit Spread (Info)-Sub-Investment Grade-BB | (96) | 840 | -50 | 0 | 0 | 0 | 0 | 0.0 |
| Credit Spread (Info)-Sub-Investment Grade-SIG | (14,427) | (908) | 50 | 0 | 0 | 0 | 0 | 0.0 |
| Credit Spread (Info)-Swap Spread | (2,144) | 11,490 | -10 | 0 | 0 | 0 | 0 | 0.0 |
| Currency | (1,858) | 4,912 | 2 | 0 | 0 | 0 | 0 | 0.0 |
| Currency USD | (1,858) | 4,912 | 2 | 0 | 0 | 0 | 0 | 0.0 |
| Curve (Info) | (77,980) | 18,449 | Max Loss | 0 | 0 | 0 | 0 | 0.0 |
| Daily95 | (24,908) | 4,907 | Max Loss | 0 | 0 | 0 | 0 | 0.0 |
| Daily99 | (41,779) | 6,303 | Max Loss | 0 | 0 | 0 | 0 | 0.0 |
| Distressed/GPI Senior Financing | (162,823) | 495 | -25 | 0 | 0 | 0 | 0 | 0.0 |
| Distressed/GPI Sub Debt/1st Loss | (258,290) | (10,027) | -25 | 0 | 0 | 0 | 0 | 0.0 |
| DV01 | 1 | (6) | -1 | 0 | 0 | 0 | 0 | 0.0 |
| Electricity | (333) | (3) | 10 | 0 | 0 | 0 | 0 | 0.0 |
| Equities | (8,801) | (854) | -25 | 0 | 0 | 0 | 0 | 0.0 |
| Equity | 762 | 702 | 2 | 0 | 0 | 0 | 0 | 0.0 |
| Equity - Convertible Volatility | (16,224) | (1,308) | -10 | 0 | 0 | 0 | 0 | 0.0 |
| Equity Volatility | (13,165) | 1,490 | 10 | 0 | 0 | 0 | 0 | 0.0 |
| Fx Volatility | (14,960) | 724 | -10 | 0 | 0 | 0 | 0 | 0.0 |
| Hedge (Info) | (12,531) | 26,452 | 50 | 0 | 0 | 0 | 0 | 0.0 |
| High Yield B and Below | (13,044) | 58,498 | -25 | 0 | 0 | 0 | 0 | 0.0 |
| IG | (247,831) | 10,869 | 50 | 0 | 0 | 0 | 0 | 0.0 |
| IGNR | (7,239) | (2,464) | 50 | 0 | 0 | 0 | 0 | 0.0 |
| Info Market Value | 22,304,512 | 1,136,469 | 0 | 0 | 0 | 0 | 0 | 0.0 |
| Interest | (134,450) | 63,712 | 50 | 0 | 0 | 0 | 0 | 0.0 |
| Interest Volatility | (18,252) | (1,962) | 10 | 0 | 0 | 0 | 0 | 0.0 |
| Interest Volatility New | (1,158) | (43) | para+10% | 0 | 0 | 0 | 0 | 0.0 |
| Investment Grade | (222,236) | 13,816 | 50 | 0 | 0 | 0 | 0 | 0.0 |
| Legacy Factors | (1,178) | (46) | Max Loss | 0 | 0 | 0 | 0 | 0.0 |
| Less Liquid Mkts | (347) | 3,436 | 50 | 0 | 0 | 0 | 0 | 0.0 |
| Liquid Mkts | (134,103) | 60,275 | 50 | 0 | 0 | 0 | 0 | 0.0 |
| Loan | (249,632) | 1,418 | -25 | 0 | 0 | 0 | 0 | 0.0 |
| Market Value | (701,742) | 48,894 | -25 | 0 | 0 | 0 | 0 | 0.0 |
| Market Value (Info) | (14,364) | (21,182,407) | Max Loss | 0 | 0 | 0 | 0 | 0.0 |
| Net Corporates | (5,622) | 0 | -25 | 0 | 0 | 0 | 0 | 0.0 |

Applet snoopy started

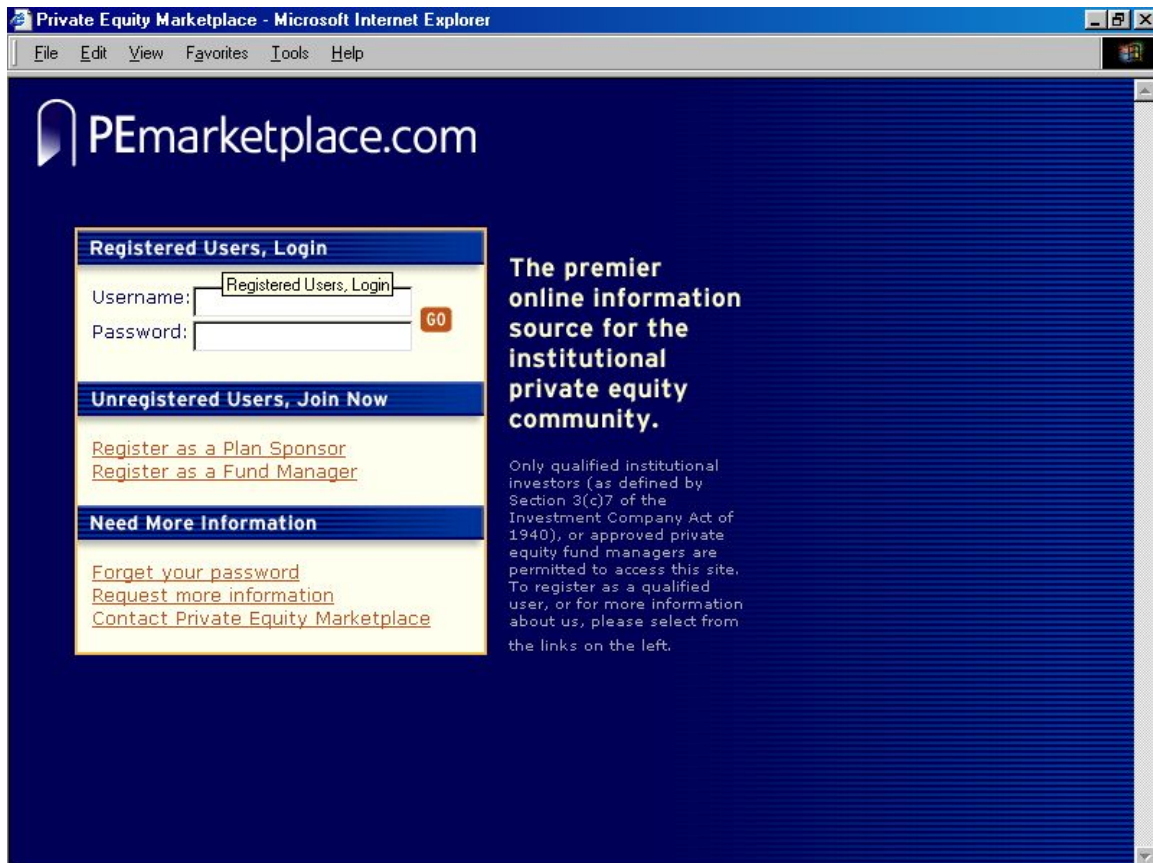
Local intranet

Simon C. Wong

2Bridge

At 2Bridge, I designed, prototyped, and implemented a financial research application for one of their top clients. This application is much like Yahoo! Finance where the user can find information on stocks and other financial data and can also customize it based on his personal settings.

Technologies used: Weblogic EJBs, Servlets, JSPs, JDBC, HTML, JavaScript, and Oracle stored procedures running on Weblogic Web Server.



MyOffice - Microsoft Internet Explorer

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PEmarketplace.com

MyOffice

State Board of Investments

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MyHoldings

| Fund | Firm | Original Commitment \$millions | Reported Int Value \$millions | % Fund Not Invested | IRR** |
|---------------------------------------|-------------------------------------|--------------------------------|-------------------------------|---------------------|-------|
| Benchmark Capital II | Benchmark Capital | 20.0 | 40.0 | 0% | 60% |
| Benchmark Capital III | Benchmark Capital | 25.0 | 35.0 | 44% | 40% |
| Mayfield VII | Mayfield Fund | 10.0 | 16.0 | 0% | 30% |
| Summit Ventures IV | Summit Partners | 50.0 | 148.0 | 10% | 35% |
| Summit Ventures V | Summit Partners | 100.0 | 155.0 | 60% | 30% |
| TPG III | Texas Pacific Group | 150.0 | 150.0 | 100% | 0% |

*Based on most recent reported value of entire fund
**IRR is net of fees

MyNews

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In a trend that gives plan sponsors increasing reasons to look towards so-called "second-tier" private equity firms, General Partner Carries of as high as 35% have begun to surface...

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\$9 Million in mezzanine funding for the wireless internet application developer is confirming Summit as the leader in backings in wireless internet software backings...

[-Benchmark's Hughes named to Managing Director, Technology](#)
Building on his success and record returns with Benchmark New Frontiers, Jim Hughes will be overseeing the creation of 3 separate technology funds, specializing in...

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Search by one or more of:

☐ Firm
☐ Fund
☐ Principal

Total Capital
>

Type of fund
Venture Capital

MyCalendar

January, 2000

| S | M | T | W | T | F | S |
|---|----|----|----|----|----|----|
| | | | | | | 1 |
| 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| 9 | 10 | 11 | 12 | 13 | 14 | 15 |

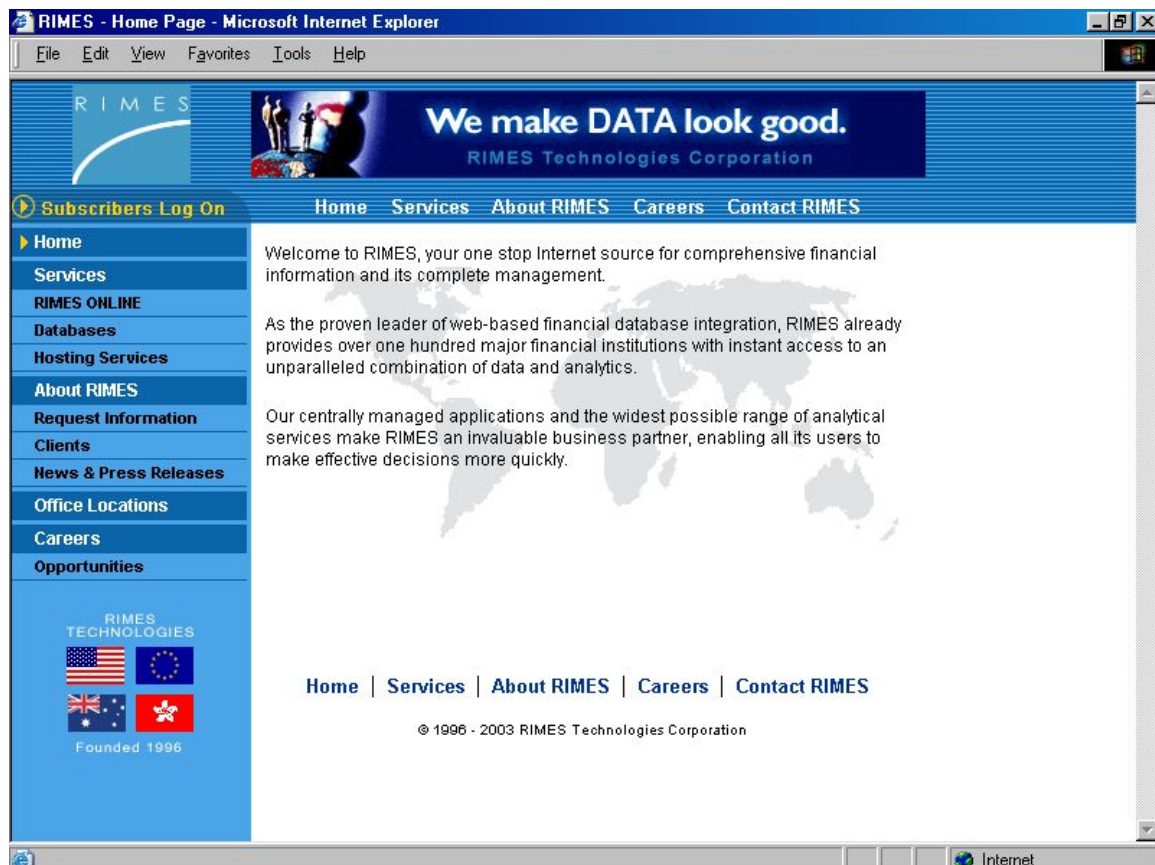
My Computer

Simon C. Wong

Rimes

As one of the leading providers of financial software and data, the Rimes official web site needed a simple, yet sophisticated, and professional feel. Since there is a great deal of content to start with, it is important to keep it simple so as not to intimidate the user, but still maintain a corporate feel.

Technologies used: Active Server Pages, JavaScript, VBScript, HTML, and Microsoft IIS Web Server. Created graphics using Adobe Illustrator and Photoshop.

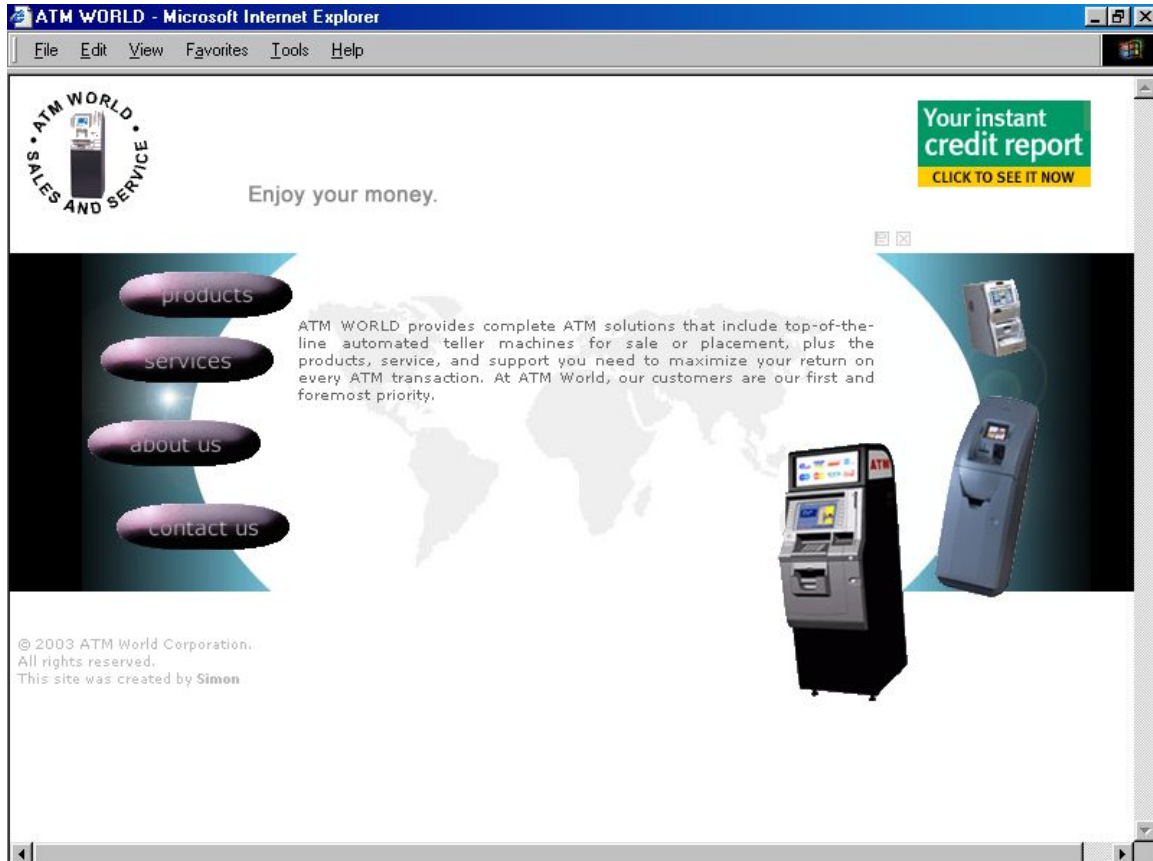


Simon C. Wong

ATM World

At ATM World, I designed a professional web site for them so they can remain competitive with other ATM distributors. An on-line listing of their products offers a convenient way for their customers to stay informed.

Technologies used: DHTML, JavaScript, and CSS. Created and enhanced graphics using Adobe Illustrator and Photoshop.



Simon C. Wong

Atlas ATM is a sister site to ATM World of which I also designed.

