

GIM Internal Digital Sales Enablement

Orion Web & Mobile

UX Work in Progress (WIP) Documentation
for work completed the week of January 18, 2016

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Table of Contents

Table of Contents

Items to be Addressed this Week

Front End Code - Update

Tools & Resources Navigation and Pages

Tools & Resources Flyout Menu Mockup - Vertical Tabs	6
Tools & Resources Flyout Menu	7
Tools & Resources Flyout Menu Mockup - Not Recommended	8
Tools & Resources Landing Pages	9
Tools & Resources Flyout Menu Mockup - Not Recommended	10
Tools & Resources Landing Page Mockup - Link List	11
Tools & Resources Landing Page Mockup - Accordions	12

Library

Library Mockups	14
Library with Content Formats as Search Type Controls	15
Site Search Concept	16

First Use

Welcome Page Takeover Mockup	18
Country Selection Module Mockup - Help Removed	19
First Use Modal Mockup	20

Recipient Email Template

Recipient Email Mockups - no Thumbnails no Descriptions	22
Recipient Email Mockups - Thumbnails at Right	23
Recipient Email Mockups - Thumbnails at Left	24

Bread Crumbs & Sub-page Navigation
Using Teams Content

Team Flyout Menu	26
Sub-Landing Page Exploration with Breadcrumbs and Subpage Navigation (Teams Example)	27
Sub-Landing Page Module Order Concept (Teams Example)	28
Page Layout Base on Hierarchy (Teams Example)	29

Items to be Addressed this Week

INTERFACE DESIGN

Tools and Resources Nav

- Flyout Menu Hierarchy - refine menu – in process
- Page Layouts - concept wireframes – in process

Team Page

- Navigation validation – in process
- Sub-navigation & breadcrumbs refinement – in process

Library

- Search types “radio buttons” concepting – in process
- Site search redesign – in process

VISUAL DESIGN

First Use

- Select Countries Flow – in process
- Skip Flow – in process

Email Recipient Template

- No thumbnail no description concept – delivered for review Jan. 19th

Library

- Get started on full page with details – in process

FRONT END CODE REQUESTS

OutBox/Email Page and Settings

- Compose, sending, sent, settings – in process for reviewed Jan. 21th

Favorites

- Get started on full page with details – in process

Front End Code - Update

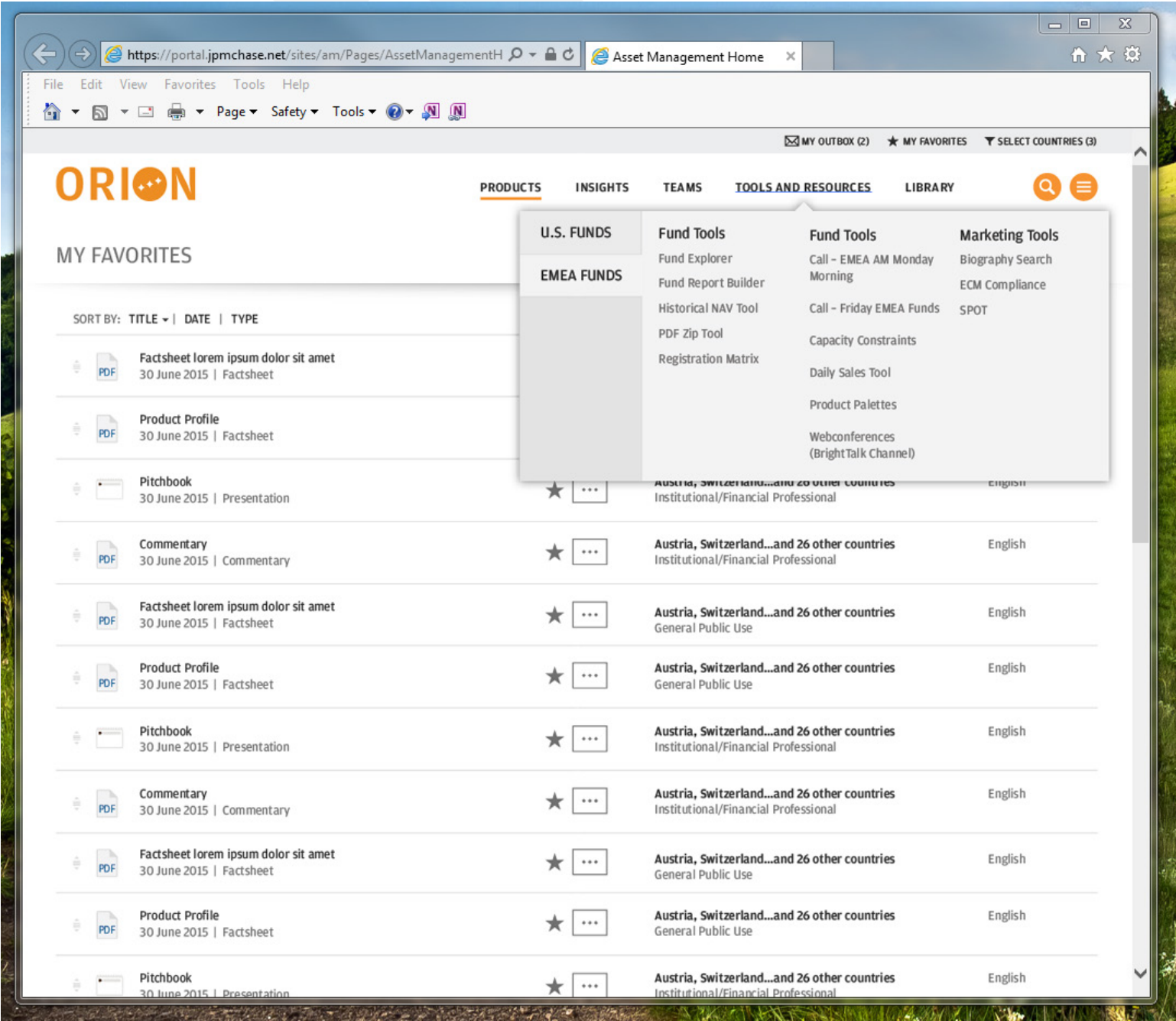
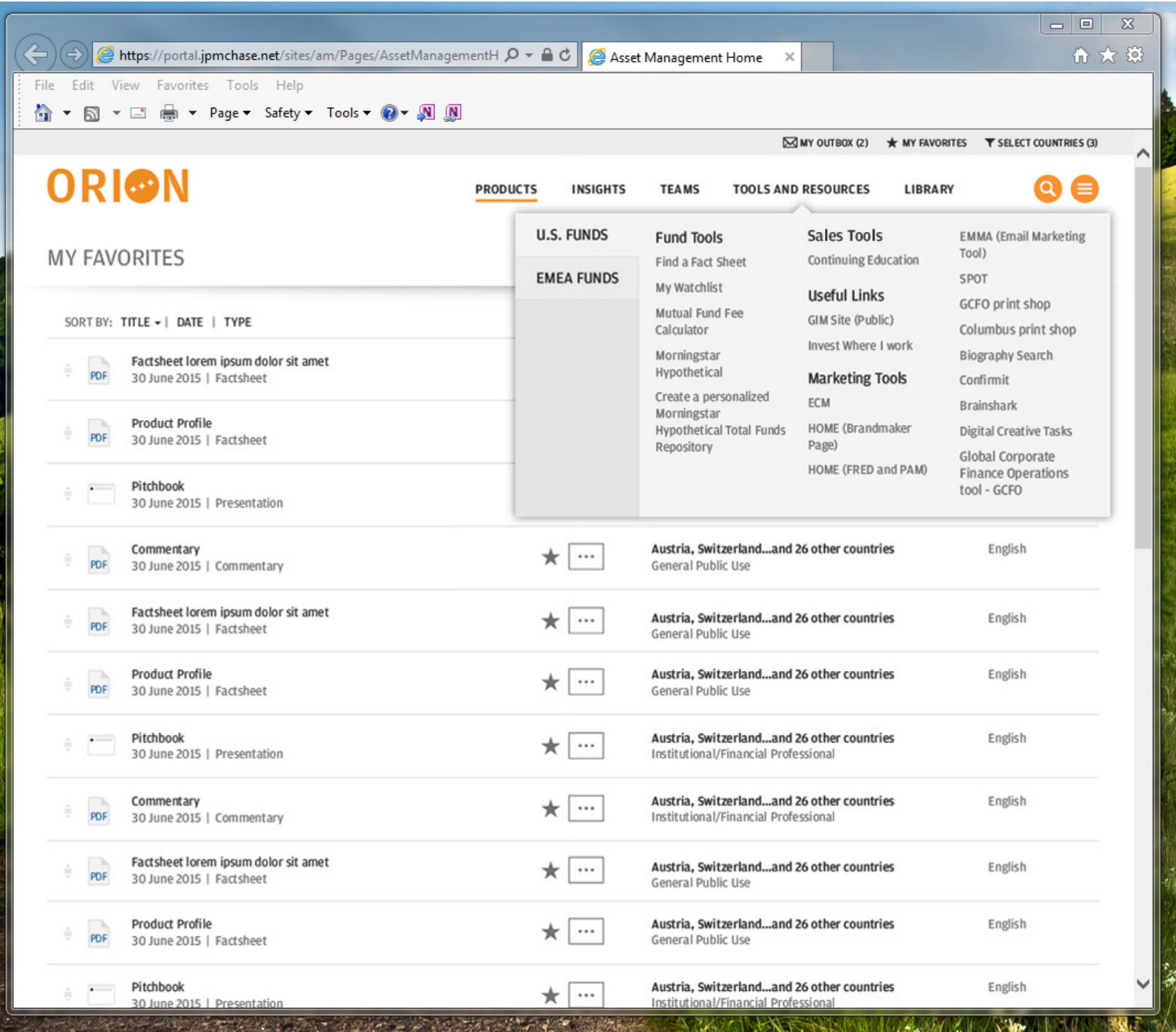
OutBox front end code is expected to be available for review Jan. 26
- Universal Filter updates have created a two day delay in OutBox Delivery.

Favorites will be estimated and forecast Friday Jan. 22. Updates to follow.

Library is expected to follow favorites. Tech needs by Feb. 15

Tools & Resources Navigation and Pages

Tools & Resources Flyout Menu Mockup - Vertical Tabs



Tools & Resources Flyout Menu

TOOLS & RESOURCES		
United States Funds	-	<div><div><div></div></div><div><div></div></div></div> <div><div><div></div></div><div><div></div></div></div>
EMEA Funds	+	<div><div><div></div></div><div><div></div></div></div> <div><div><div></div></div><div><div></div></div></div>
		<div><div><div></div></div><div><div></div></div></div> <div><div><div></div></div><div><div></div></div></div>

TOOLS & RESOURCES		
United States Funds	+	<div><div><div></div></div><div><div></div></div></div> <div><div><div></div></div><div><div></div></div></div>
EMEA Funds	-	<div><div><div></div></div><div><div></div></div></div> <div><div><div></div></div><div><div></div></div></div>
		<div><div><div></div></div><div><div></div></div></div> <div><div><div></div></div><div><div></div></div></div>

Tools & Resources Flyout Menu Mockup - Not Recommended

ORION

PRODUCTS

INRHTS

TEAMS

TOOLS AND RESOURCES

LIBRARY

MY OUTBOX (2)

MY FAVORITES

SELECT COUNTRIES (3)

U.S. FUNDS

AMEA FUNDS

MY FAVORITES

SHORT BY:	TITLE	DATE	TYPE	ACTIONS	APPROVED FOR	LANGUAGE
	Factbook Issues Issues dollar alt asset 30-Jun-2015 Factbook			Austria, Switzerland...and 20 other countries General Public Use	English	
	Product Profile 30-Jun-2015 Factbook			Austria, Switzerland...and 20 other countries General Public Use	English	
	Pitchbook 30-Jun-2015 Presentation			Austria, Switzerland...and 20 other countries Investment/Financial Professional	English	
	Commentary 30-Jun-2015 Commentary			Austria, Switzerland...and 20 other countries Investment/Financial Professional	English	
	Factbook Issues Issues dollar alt asset 30-Jun-2015 Factbook			Austria, Switzerland...and 20 other countries General Public Use	English	
	Product Profile 30-Jun-2015 Factbook			Austria, Switzerland...and 20 other countries General Public Use	English	
	Pitchbook 30-Jun-2015 Presentation			Austria, Switzerland...and 20 other countries Investment/Financial Professional	English	
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	Factbook Issues Issues dollar alt asset 30-Jun-2015 Factbook			Austria, Switzerland...and 20 other countries General Public Use	English	
	Product Profile 30-Jun-2015 Factbook			Austria, Switzerland...and 20 other countries General Public Use	English	
	Pitchbook 30-Jun-2015 Presentation			Austria, Switzerland...and 20 other countries Investment/Financial Professional	English	
	Commentary 30-Jun-2015 Commentary			Austria, Switzerland...and 20 other countries Investment/Financial Professional	English	

Tools & Resources Landing Pages

TOOLS & RESOURCES	
U.S. Funds	>
EMEA Funds	>



As a Typical Landing Page

PRODUCTS

TEAMS

TOOLS & RESOURCES

LIBRARY



U.S. Funds

FUND TOOLS

Find a Fact Sheet

MyWatchlist

Mutual Fund Fee Calculator

Morningstar Hypothetical

Create a personalized Morningstar hypothetical Total Funds Repository

EMMA (Email Marketing Tool)

SPOT

Print Shop – Columbus

Print Shop – GCFO

Biography Search

ConfirmIt

Brainshark

Digital Creative Tasks

SALES TOOLS

Continuing Education

MARKETING TOOLS

ECM Compliance

HOME (Brandmaker Page)

HOME (FRED and PAM)

ADDITIONAL LINKS

GIM Site (Public)

Invest Where I work



With Featured Tools

PRODUCTS

TEAMS

TOOLS & RESOURCES

LIBRARY



U.S. Funds

Tool XYZ

Resources ABC

Click Me

FUND TOOLS

Find a Fact Sheet

MyWatchlist

Mutual Fund Fee Calculator

Morningstar Hypothetical

Create a personalized Morningstar hypothetical Total Funds Repository

EMMA (Email Marketing Tool)

SPOT

Print Shop – Columbus

Print Shop – GCFO

Biography Search

ConfirmIt

Brainshark

Digital Creative Tasks

SALES TOOLS

Continuing Education

MARKETING TOOLS

ECM Compliance

HOME (Brandmaker Page)

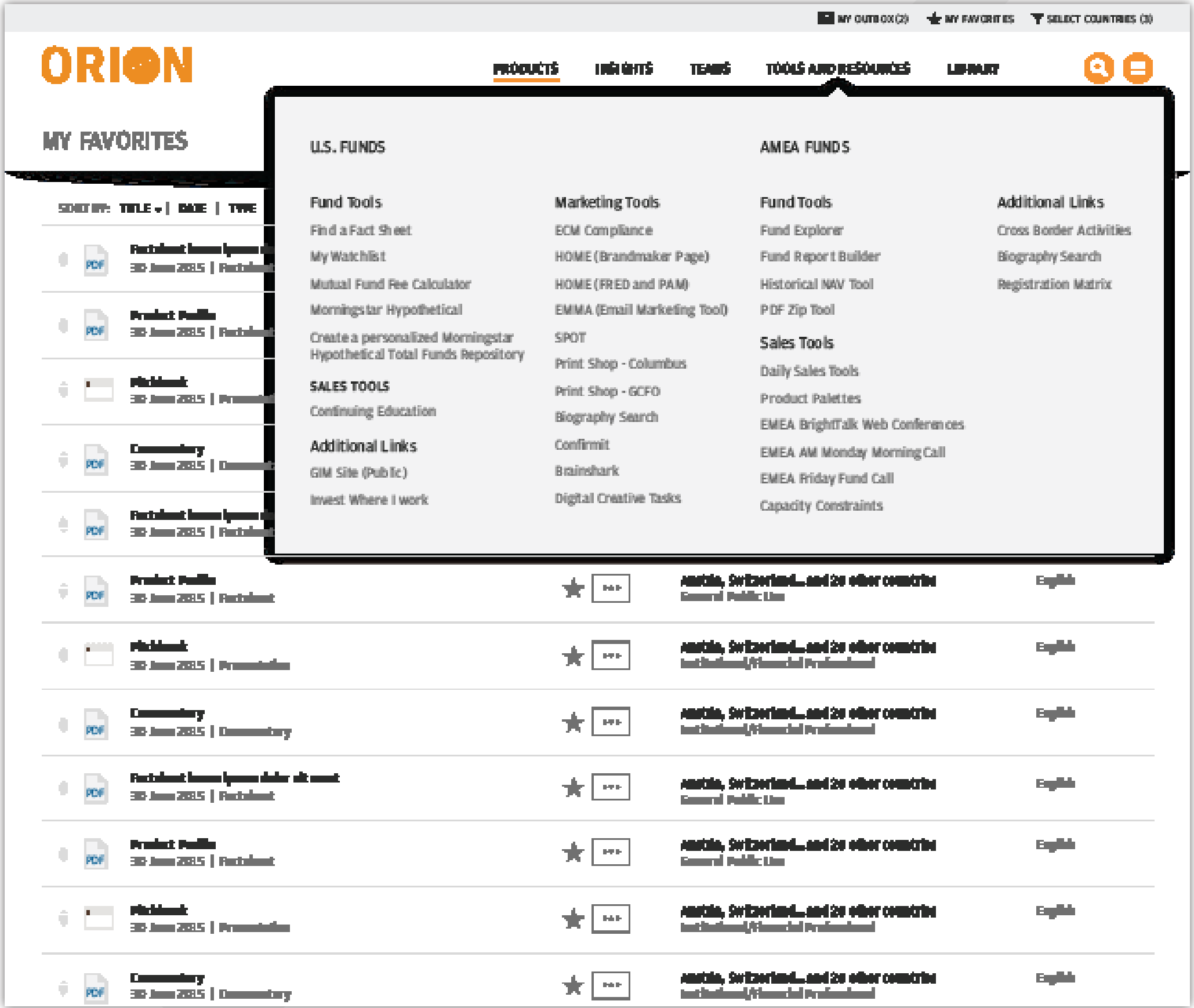
HOME (FRED and PAM)

ADDITIONAL LINKS

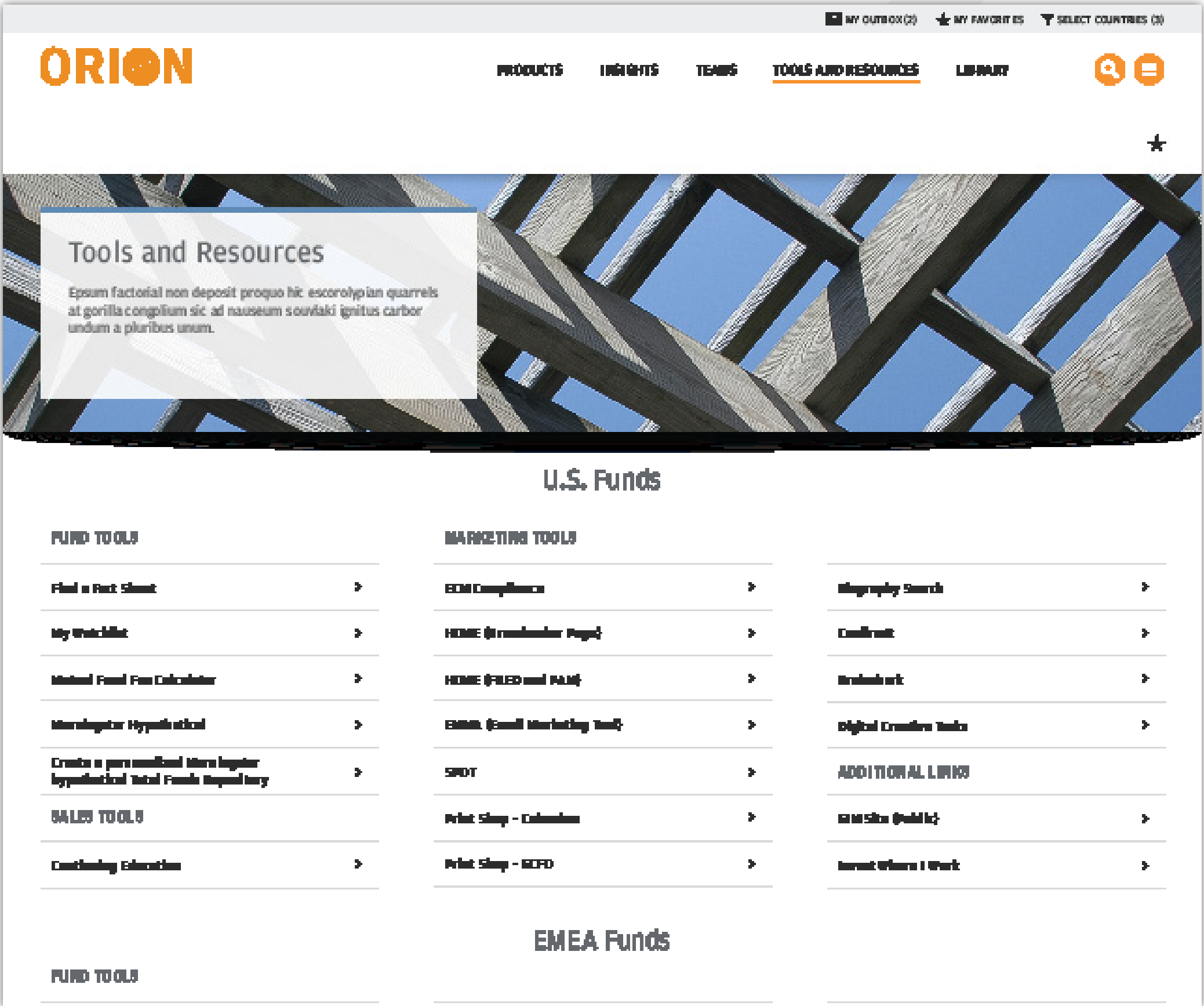
GIM Site (Public)

Invest Where I work

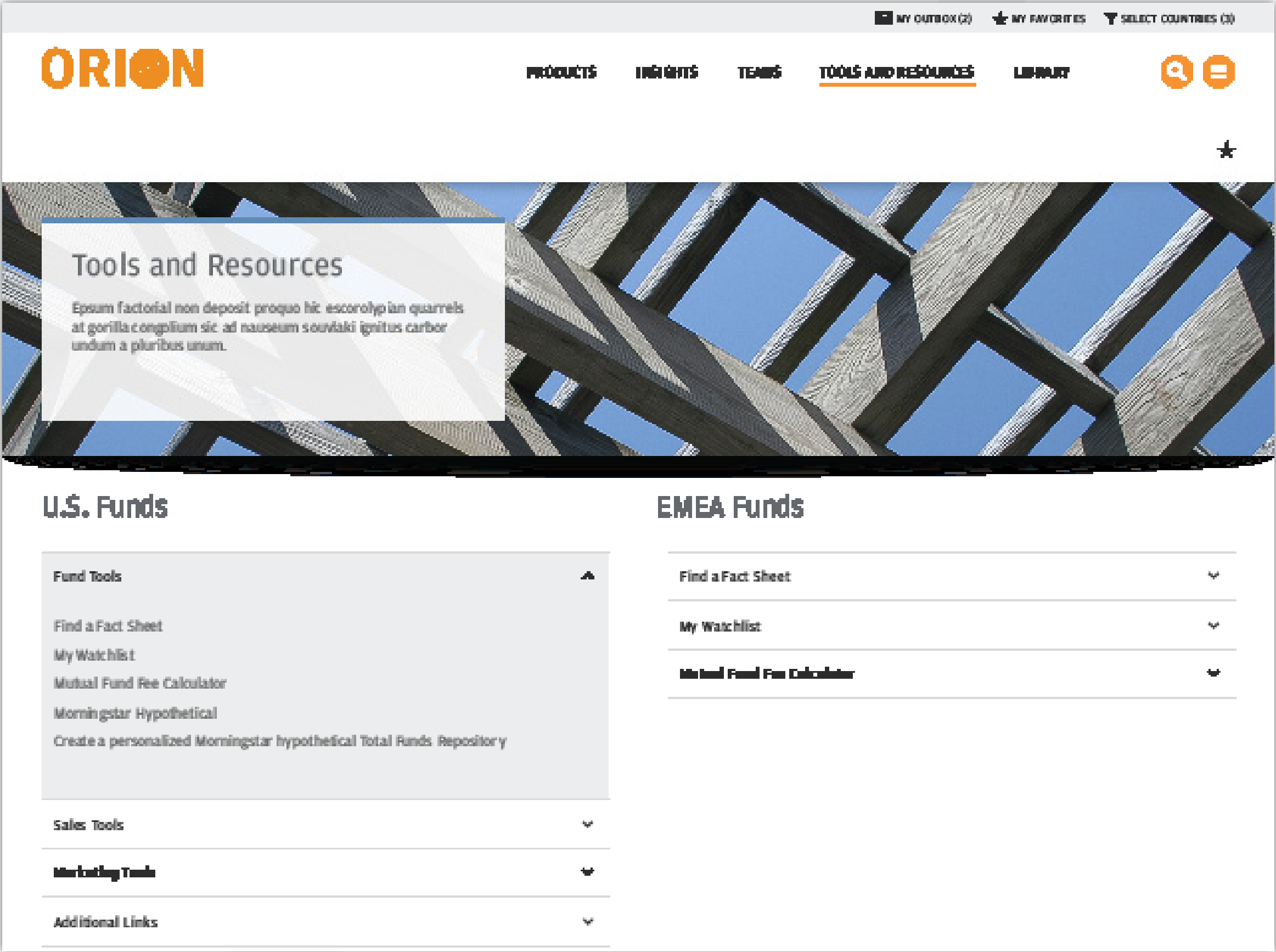
Tools & Resources Flyout Menu Mockup - Not Recommended



Tools & Resources Landing Page Mockup - Link List



Tools & Resources Landing Page Mockup - Accordions



Library

Library Mockups

ORION

PRODUCTS TEAMS TOOLS AND RESOURCES LIBRARY

MY OUTBOX (1)

MY FAVORITES

SELECT COUNTRIES (3)

LIBRARY

Results for

Countries:

Brazil

Canada

Chile

SELECT COUNTRIES

Search:

"jpmorgan"

Content Type:

Market Bulletin

Product Bulletin / Commentary

Capabilities Brochure

Audio/Video Script

Newsletter

Filters

Clear Filters

CONTENT TYPE (#)

Product Materials (#)

Analysis & Reports (#)

Bulletins & Commentaries (#)

☒ Market Bulletin/Commentary (#)

☒ Product Bulletin/Commentary (#)

☐ Blog (#)

Promotions & Advertising (#)

☐ Product (#)

☐ Non-Product (#)

Event Materials (#)

Training (#)

News (#)

Additional Materials (#)

☒ Capabilities Brochure (#)

☐ FAQs (#)

☐ FINRA Letter (#)

☒ Audio/Video Script (#)

☐ Transcript (#)

☒ Newsletter (#)

CONTENT FORMAT (#)

LANGUAGE (#)

DATE (#)

jpmorgan

Search

Showing 1 - 25 of 1475 results

View 25

SORT BY: TITLE | DATE | TYPE

ACTIONS

APPROVED FOR

PDF

ABC Factsheet

30 June 2015 | Factsheet

☆

...

U.S.; UK...and 3 other countries

General Public Use

PDF

BDC Factsheet

30 June 2015 | Factsheet

★

...

U.S.; UK...and 3 other countries

General Public Use

WXY Pitchbook

30 June 2015 | Presentation

★

...

U.S.; UK...and 3 other countries

General Public Use

PDF

XYZ Commentary

30 June 2015 | Commentary

☆

...

U.S.; UK...and 3 other countries

General Public Use

JPMorgan Liquidity Funds - Singapore Dollar Liquidity Fund

LU0440258506

C - ACC (CNY)

☆

...

European Equities

Web Page

★

...

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...

10

>

ORION WEB & ORION MOBILE UX DOCUMENTATION

GLOBAL INVESTMENT MANAGEMENT INTERNAL DIGITAL SALES ENABLEMENT

J.P. MORGAN ASSET MANAGEMENT 14

Library with Content Formats as Search Type Controls

My Outbox (1)

My Favorites

Select Countries (3)

PRODUCTS

TEAMS

TOOLS & RESOURCES

LIBRARY

Results for

Countries: Brazil X Canada X Chile X

Select Countries

Search: "pmorgan" X

Results for

Clear Filters

CONTENT TYPE (#)

Product Materials (#)

Analysis & Reports (#)

Bulletins & Commentaries (#)

Promotions & Advertising (#)

Event Materials (#)

Training (#)

News (#)

Additional Materials (#)

CONTENT FORMAT (#)

LANGUAGE (#)

DATE (#)

jpmorgan

Search

All | Products | Materials | Web Pages | Media

Showing 1-25 of 1475 results

SORT BY: TITLE | DATE | TYPE

ACTION

APPROVED FOR

ABC Factsheet

30 June 2015 | {{content type}}

☆

...

U.S.; U.K. and 3 other countries
General Public Use

BDC Factsheet

30 June 2015 | {{content type}}

★

...

U.S.; U.K. and 3 other countries
General Public Use

WXY Pitchbook

30 June 2015 | {{content type}}

★

...

U.S.; U.K. and 3 other countries
General Public Use

XYZ Commentary

30 June 2015 | {{content type}}

☆

...

U.S.; U.K. and 3 other countries
General Public Use

JPMorgan Liquidity Funds - Singapore Dollar Liquidity Fund

LU0440258506

C - ACC (CNY)

☆

...

European Equities

Web Page

★

...

<

1

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10

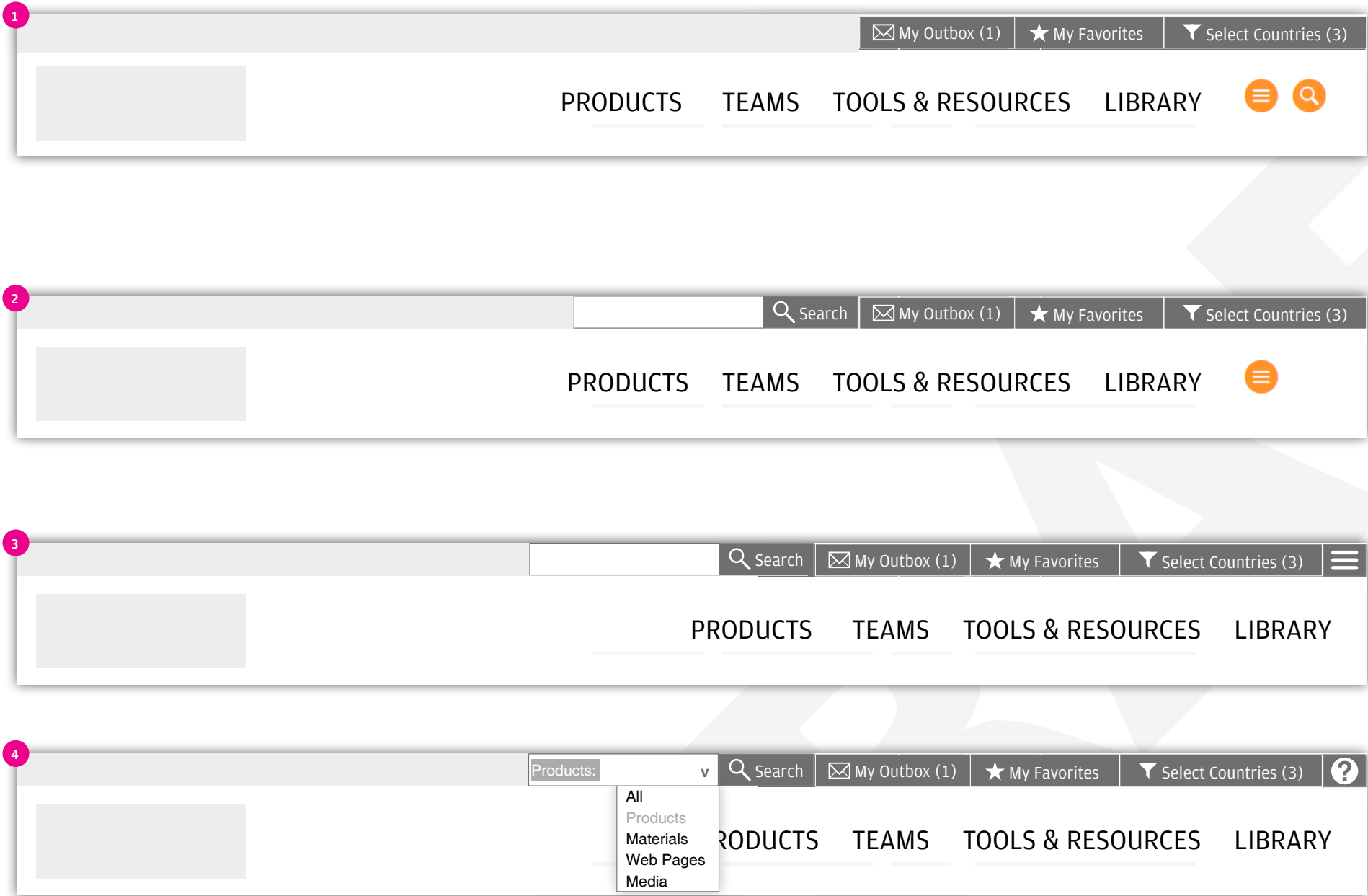
>

ORION WEB & ORION MOBILE UX DOCUMENTATION

GLOBAL INVESTMENT MANAGEMENT INTERNAL DIGITAL SALES ENABLEMENT

J.P. MORGAN ASSET MANAGEMENT 15

Site Search Concept



NOTES

Concpets are illustrative only and would require broad review acceptance.

- 1 current state
- 2 search moved to utility navigation, exposing input field before click as a best practice.
- 3 Hamburger menu also moved to utility nav, paving the way for utility items to be more readily expected in the hamburger.
- 4 Here 'help' has replaced the hamburger and content formats are available to choose before searching.

First Use

Welcome Page Takeover Mockup

CLOSE

Refine Products

Countries (All)

SELECT COUNTRIES

Product Types (All)

SELECT PRODUCT TYPES

Enter Product Name

Favorites (14)

Focus (42)

All (136)

NAME	YTD VS. BENCHMARK	
JPMorgan SmartRetirement® Income Fund	4.5%	-4.1%
Lorem ipsum	4.5%	4.1%
Strategic Income Opportunities Fund - A (JSOAX)	-4.5%	4.1%
Lorem ipsum	4.5%	-4.1%
Lorem ipsum sit dolor amet	-4.5%	4.1%
Lorem ipsum	4.5%	-4.1%
JPMorgan SmartRetirement® Income Fund	4.5%	4.1%
Lorem ipsum	-4.5%	-4.1%
Lorem ipsum sit dolor amet	4.5%	-4.1%
Lorem ipsum	4.5%	4.1%
JPMorgan SmartRetirement® Income Fund	4.5%	4.1%
JPMorgan SmartRetirement® Income Fund	-4.5%	4.1%
JPMorgan SmartRetirement® Income Fund	-4.5%	4.1%
JPMorgan SmartRetirement® Income Fund	4.5%	4.1%
Lorem ipsum sit dolor amet	4.5%	-4.1%
Lorem ipsum	-4.5%	4.1%
Lorem ipsum sit dolor amet	4.5%	4.1%
Lorem ipsum	4.5%	4.1%
Lorem ipsum sit dolor amet	4.5%	-4.1%
Lorem ipsum	4.5%	4.1%
Lorem ipsum sit dolor amet	4.5%	4.1%

PRODUCT SELECTOR

WELCOME

Would you like to set your countries?

SELECT COUNTRIES

SKIP

Content on Orion can be changed based on country settings. If no countries are chosen in settings, content for all countries will be displayed.

MY OUTBOX (2)

MY FAVORITES

SELECT COUNTRIES (ALL)

OBJECTS

INSIGHTS

TEAMS

TOOLS AND RESOURCES

LIBRARY

SEARCH

MENU

WELCOME

Would you like to set your countries?

SELECT COUNTRIES

SKIP

Content on Orion can be changed based on country settings. If no countries are chosen in settings, content for all countries will be displayed.

DATA AVAILABLE FROM 31/08/2004

START DATE

08

2004

END DATE

08

2015

DATA FOR SELECTED PERIOD

PERFORMANCE

JPM America Equity B (acc) - USD

118.72%

Benchmark

109.69%

ACTIONS

APPROVED USE

LANGUAGE

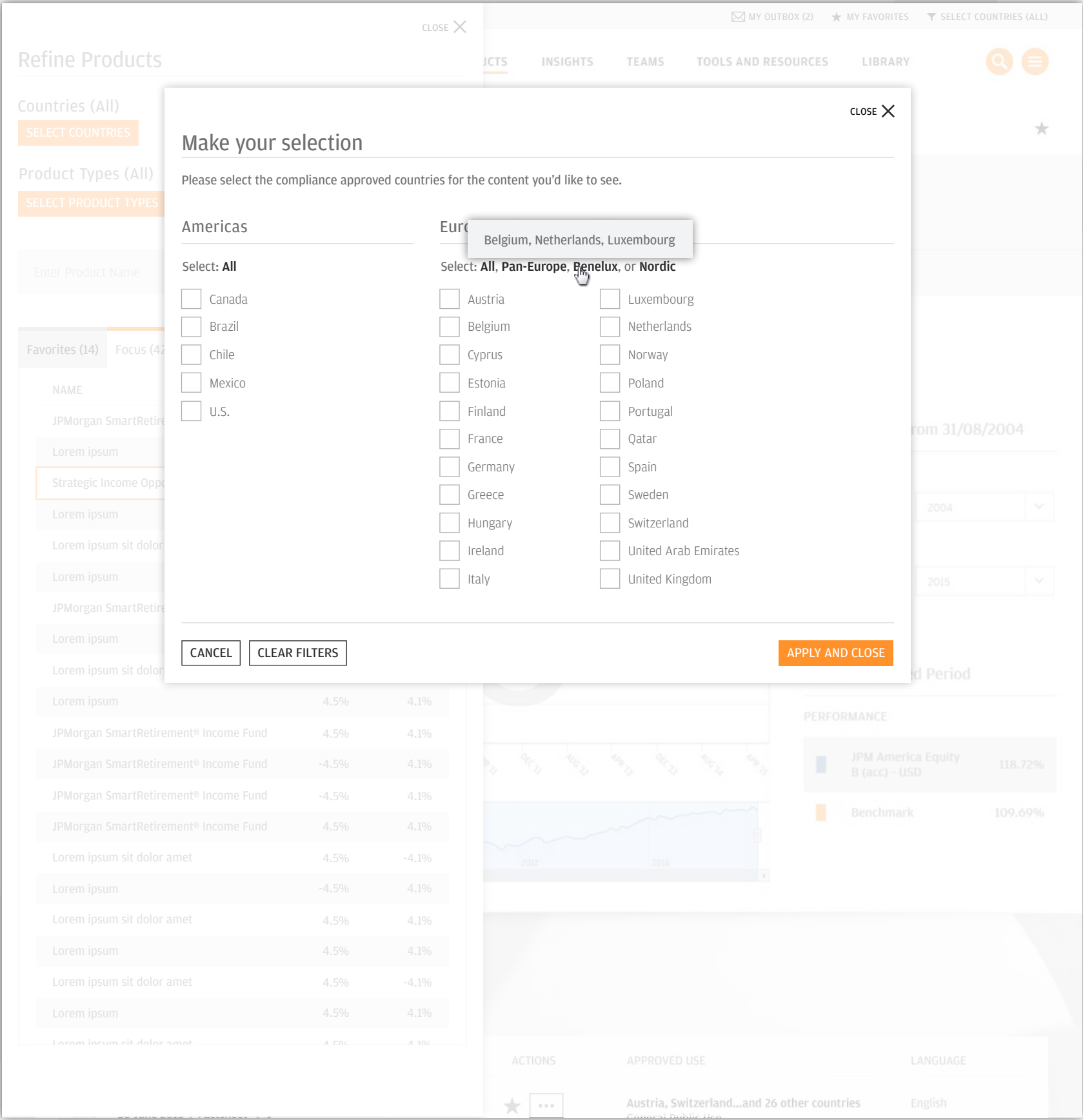
★

...

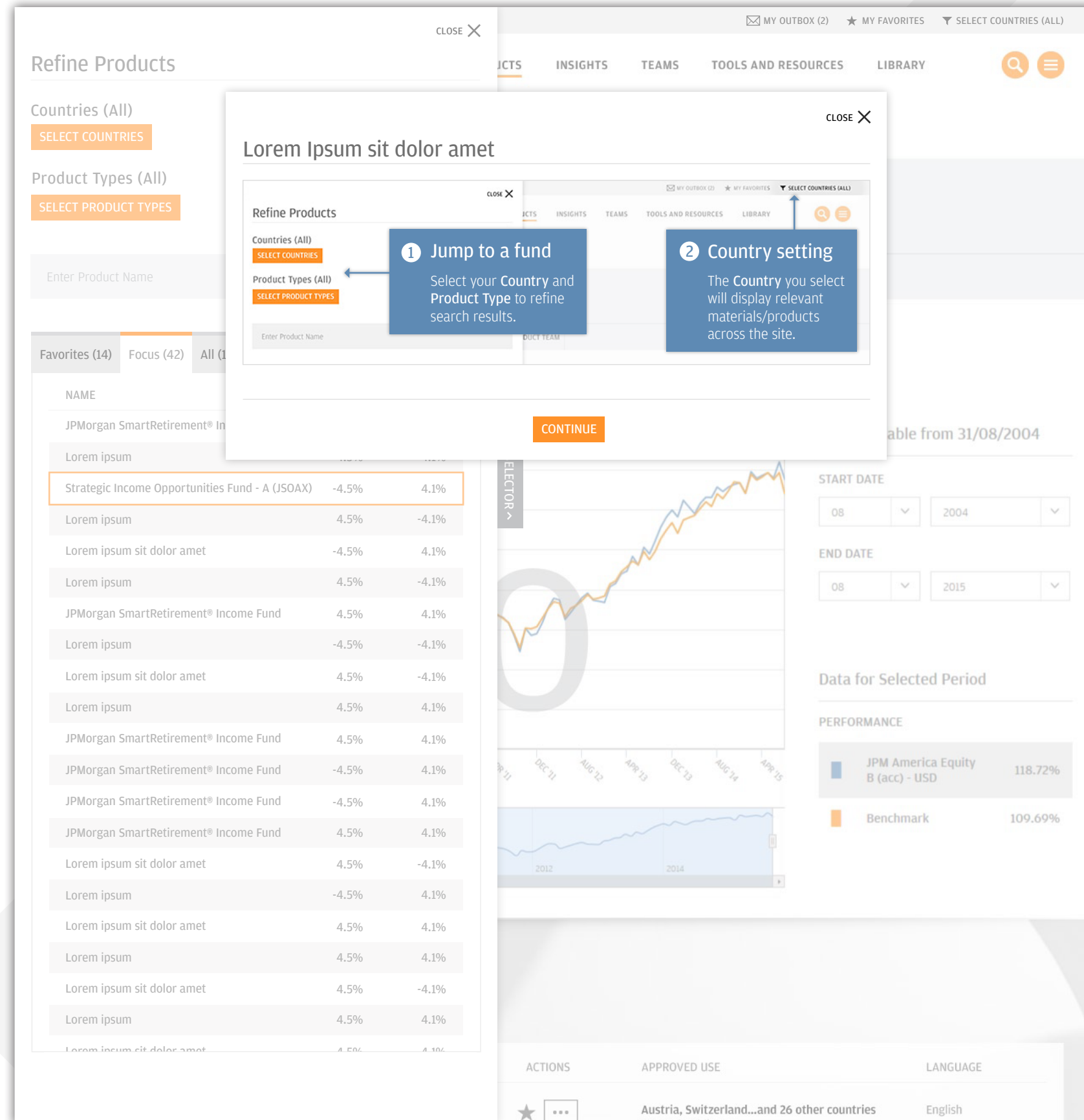
Austria, Switzerland...and 26 other countries

English

Country Selection Module Mockup - Help Removed

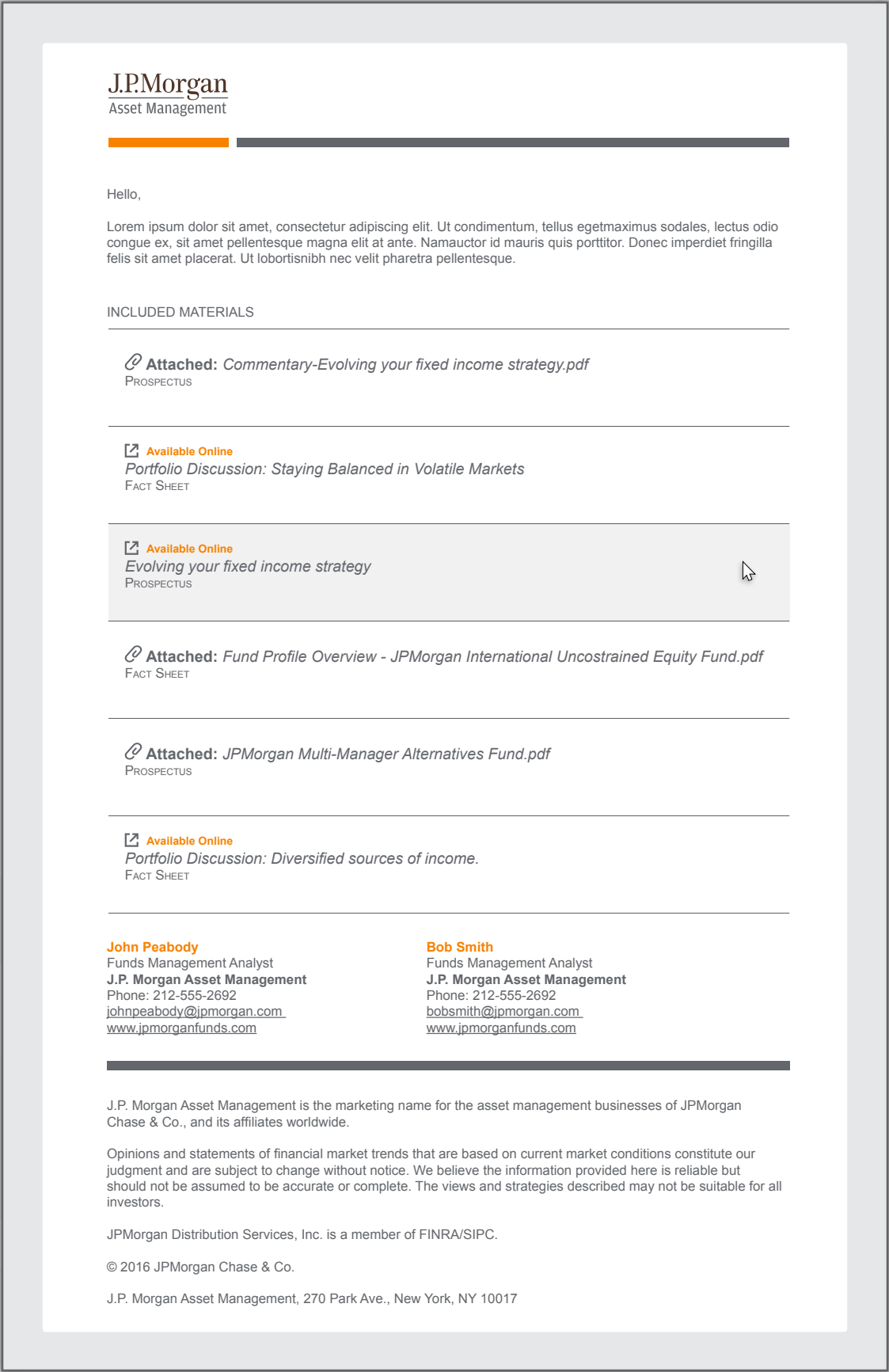


First Use Modal Mockup



Recipient Email Template

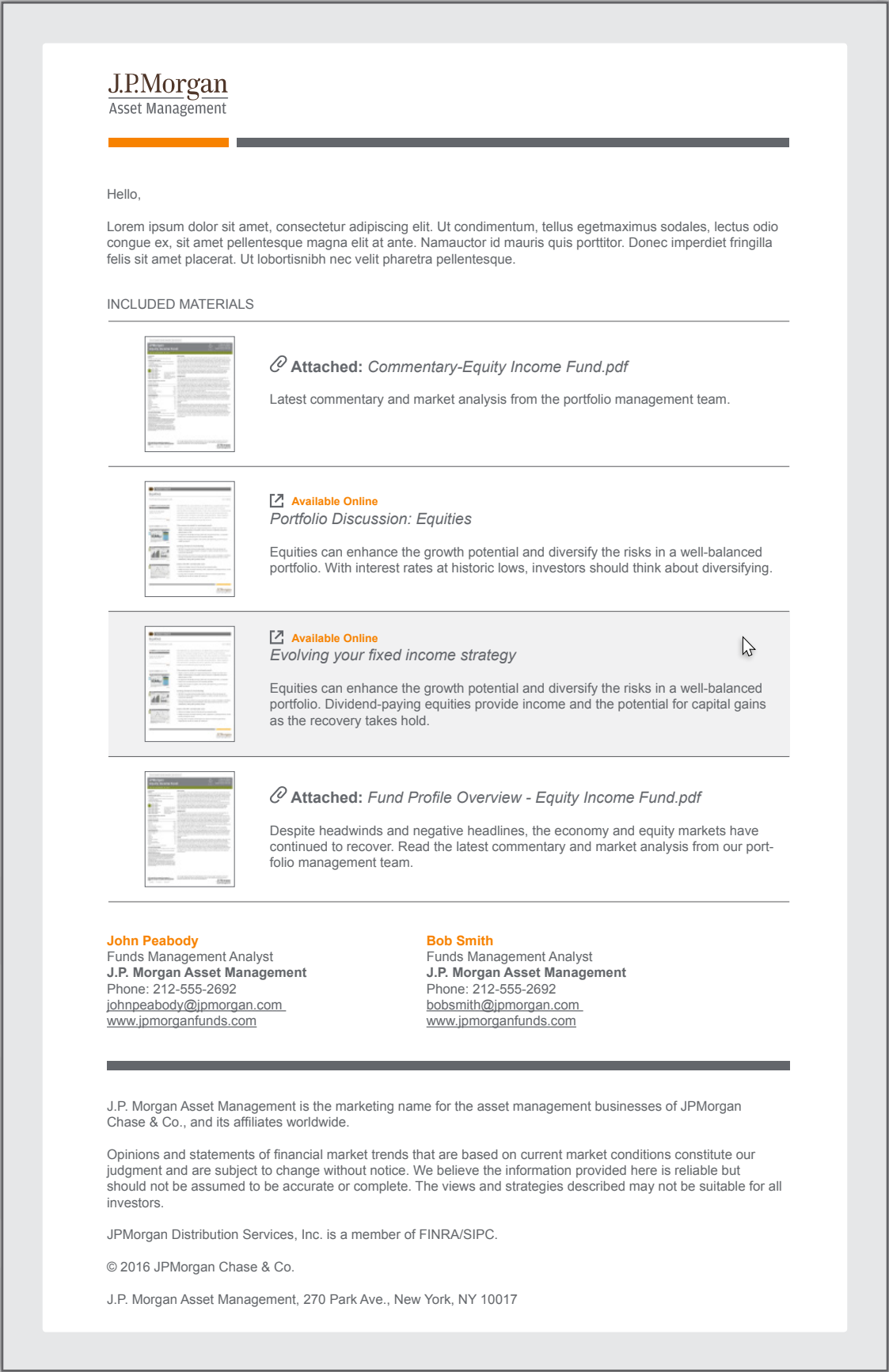
Recipient Email Mockups - no Thumbnails no Descriptions



Recipient Email Mockups - Thumbnails at Right



Recipient Email Mockups - Thumbnails at Left



Bread Crumbs & Sub-page Navigation Using Teams Content

Team Flyout Menu

Teams			
U.S. Funds Channels	+	Brand Resources? >	Learning & Development
U.S. Funds Cross Channel	-	Communications Control >	Best of CA Panels >
U.S. Funds Product Desk	+	Forms & Applications >	Insights >
EMEA Funds Cross Channel	+	Fulfillment >	Sales & Marketing Campaigns >
EMEA Funds Product Desks	+	Events	Strategic Product Management >
		Roadshows >	
		Webcasts >	
		Wealth Management Summits >	
		Investment Forums >	
		Global Institutional senior sales & investor summit >	

Sub-Landing Page Exploration with Breadcrumbs and Subpage Navigation (Teams Example)

PRODUCTS

TEAMS

TOOLS & RESOURCES

LIBRARY

TEAMS

>

U.S. FUNDS

>

CROSS CHANNEL

>

EVENTS

Events

Roadshows

Webcasts

Wealth Management Summits

Investment Forums

Global Institutional Senior Sales & Investor Summit

Text Module

FEATURED GROUP LINKS

Link

>

Link

>

Link

>

Link

>

Link

>

Link

>

Link

>

Link

>

Link

>

Team Picks

SORT BY: TITLE DATE TYPE	ACTIONS	APPROVED FOR	LANGUAGE
<div>ABC Factsheet</div> <div>30 June 2015 factsheet</div>	<div>★</div> <div>...</div>	U.S.; U.K. and 3 other countries General Public Use	English
<div>BDC Factsheet</div> <div>30 June 2015 factsheet</div>	<div>☆</div> <div>...</div>	U.S.; U.K. and 3 other countries General Public Use	English
<div>WXY Pitchbook</div> <div>30 June 2015 presentation</div>	<div>☆</div> <div>...</div>	U.S.; U.K. and 3 other countries General Public Use	English
<div>XYZ Commentary</div> <div>30 June 2015 Commentary</div>	<div>☆</div> <div>...</div>	U.S.; U.K. and 3 other countries General Public Use	English

PRODUCT TEAM

General Team

Firstname Lastname

1-000-000-0000

group.email@jpmorgan.com

first.Jastname@jpmorgan.com

Firstname Lastname

1-000-000-0000

first.Jastname@jpmorgan.com

first.Jastname@jpmorgan.com

Firstname Lastname

1-000-000-0000

first.Jastname@jpmorgan.com

first.Jastname@jpmorgan.com

PRODUCTS

TEAMS

TOOLS & RESOURCES

LIBRARY

TEAMS

>

U.S. FUNDS

>

CROSS CHANNEL

>

EVENTS

>

ROAD SHOWS

Road Shows

Text Module

FEATURED GROUP LINKS

Link

>

Link

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Link

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Link

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Link

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Link

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Team Picks

SORT BY: TITLE DATE TYPE	ACTIONS	APPROVED FOR	LANGUAGE
<div>ABC Factsheet</div> <div>30 June 2015 factsheet</div>	<div>★</div> <div>...</div>	U.S.; U.K. and 3 other countries General Public Use	English
<div>BDC Factsheet</div> <div>30 June 2015 factsheet</div>	<div>☆</div> <div>...</div>	U.S.; U.K. and 3 other countries General Public Use	English
<div>WXY Pitchbook</div> <div>30 June 2015 presentation</div>	<div>☆</div> <div>...</div>	U.S.; U.K. and 3 other countries General Public Use	English
<div>XYZ Commentary</div> <div>30 June 2015 Commentary</div>	<div>☆</div> <div>...</div>	U.S.; U.K. and 3 other countries General Public Use	English

PRODUCT TEAM

General Team

Firstname Lastname

1-000-000-0000

group.email@jpmorgan.com

first.Jastname@jpmorgan.com

Firstname Lastname

1-000-000-0000

first.Jastname@jpmorgan.com

first.Jastname@jpmorgan.com

Firstname Lastname

1-000-000-0000

first.Jastname@jpmorgan.com

first.Jastname@jpmorgan.com

Sub-Landing Page Module Order Concept (Teams Example)

NOTES

1 Header - Teams to use standard header.

2 Breadcrumbs - is to be used as a contextual indicator and should only be considered when there is one or more pages between the primary landing page (in this example Teams) and the current page.

3 Page Title - Teams to use standard H1 header style.

4 In-page Sub-page Navigation - are for use when a page have 5 or fewer primary sub pages such as a sub navigation. When a page has 6 or greater sub-pages, consider a link list.

4a Various styles could be used to display in-page navigation. An old wireframe illustration is included here for reference.

7 Link Lists - can be included as a navigational or feature element but should be clearly labeled as either, surfacing relevant sub pages or featured pages as needed.

8 Material List Module(s) - may be included in order to present relevant materials. Up to one manually curated and one dynamically curated list is recommended per Teams page either tabbed or stacked.

10 Contact (Text) Module -

11 Footer - Teams to use standard footer.

1

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10

11

4a

Global

U.S.

EMEA

Other

PRODUCTS

TEAMS

TOOLS & RESOURCES

LIBRARY

TEAMS > U.S. CROSS CHANNEL > EVENTS > ROAD SHOWS

Road Shows

Equities > Fixed Income > Other > Other >

Text Module

FEATURED GROUP LINKS

Link > Link > Link >

Link > Link > Link >

Link > Link > Link >

Team Picks

SORT BY: TITLE | DATE | TYPE

ABC Factsheet

30 June 2015 | factsheet

★

U.S.; U.K. and 3 other countries

General Public Use

English

BDC Factsheet

30 June 2015 | factsheet

☆

U.S.; U.K. and 3 other countries

General Public Use

English

WXY Pitchbook

30 June 2015 | presentation

☆

U.S.; U.K. and 3 other countries

General Public Use

English

XYZ Commentary

30 June 2015 | Commentary

☆

U.S.; U.K. and 3 other countries

General Public Use

English

PRODUCT TEAM

General Team

group.email@jpmorgan.com

Firstname Lastname

1-000-000-0000

first.lastname@jpmorgan.com

Firstname Lastname

1-000-000-0000

first.lastname@jpmorgan.com

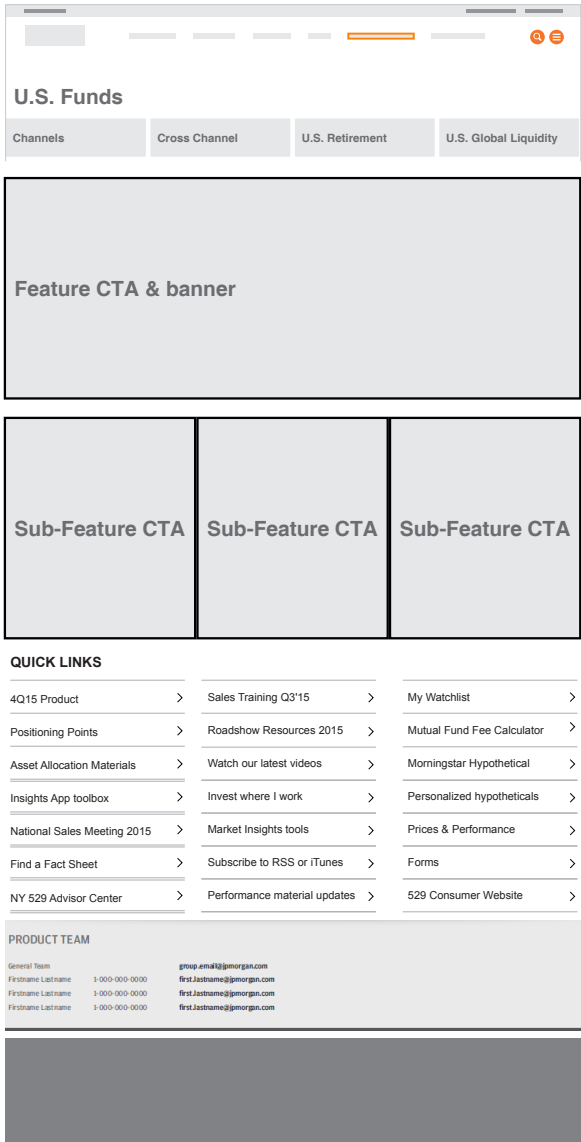
Firstname Lastname

1-000-000-0000

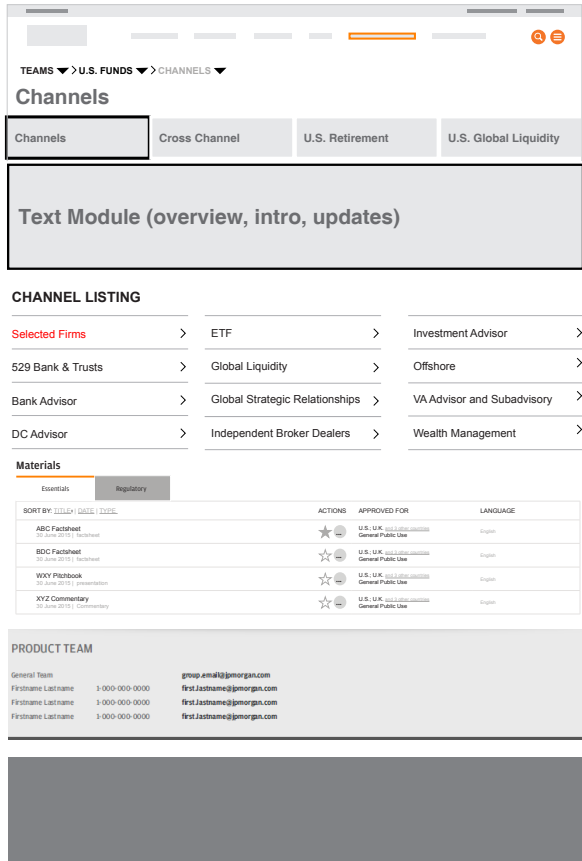
first.lastname@jpmorgan.com

Page Layout Base on Hierarchy (Teams Example)

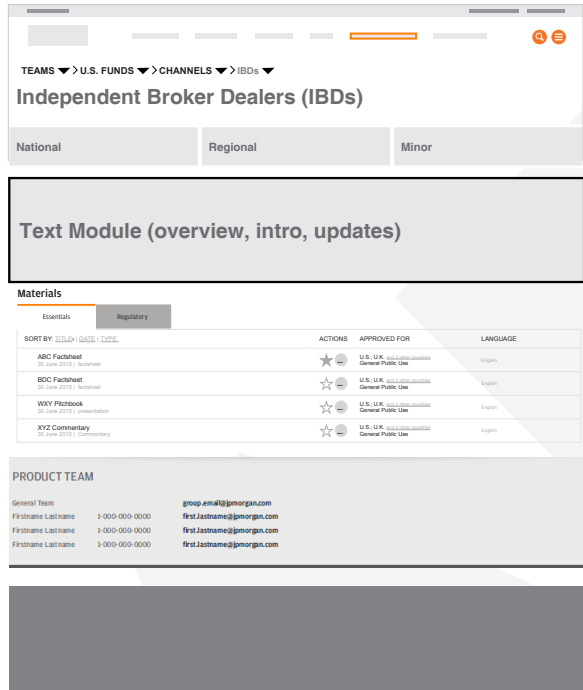
2nd Level Page



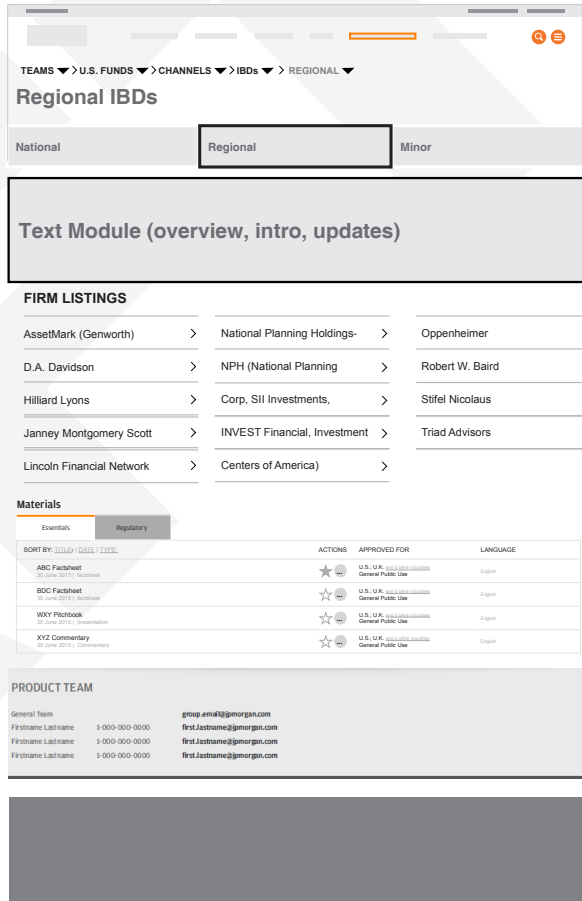
3rd Level Page



4th Level Page



5th Level Page



6th Level Page

