GIM Internal Digital Sales Enablement Orion Web & Mobile

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

Prepared by: David Andre

DRAFT

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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

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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

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Tools & Resources Navigation and Pages

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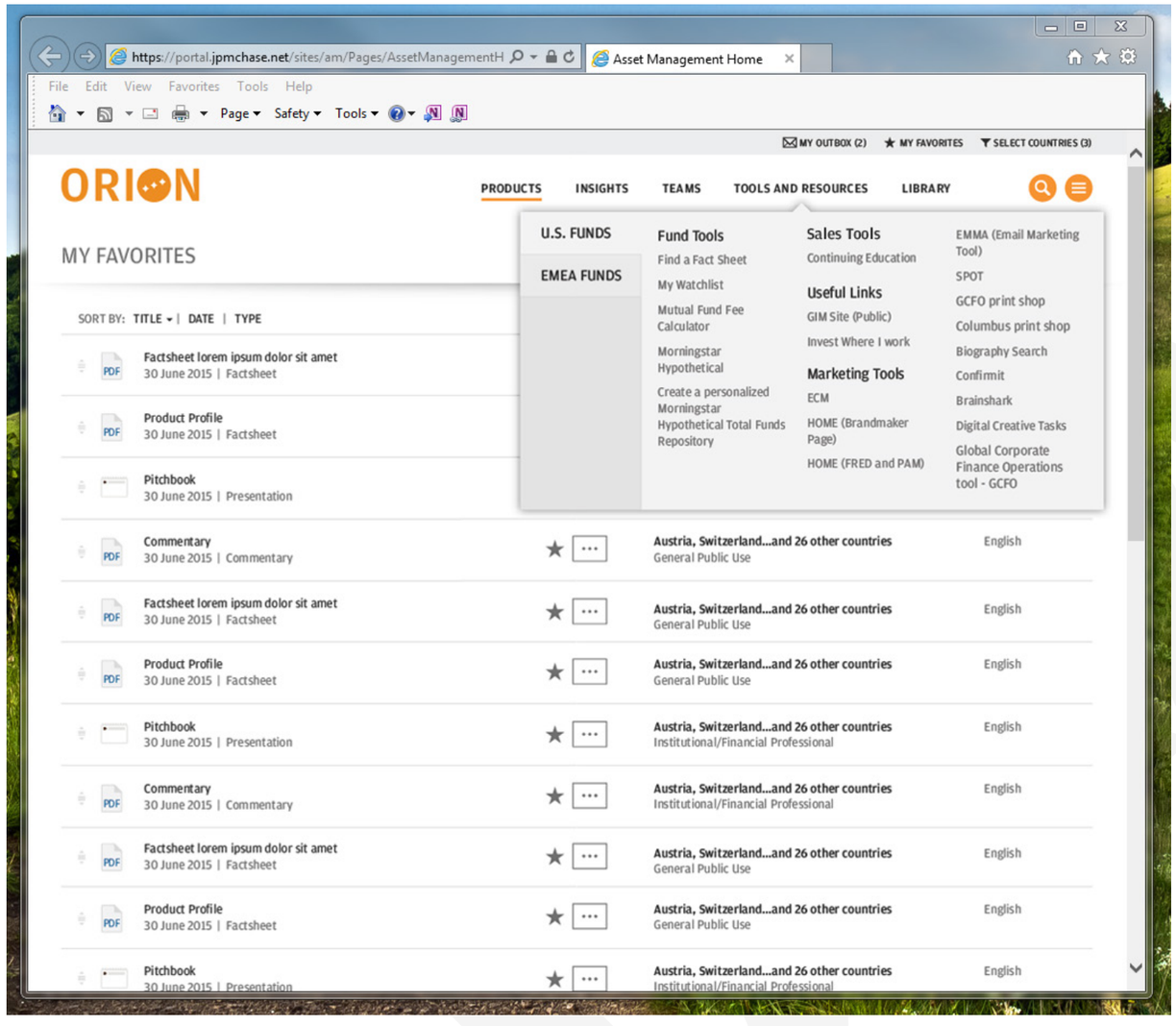
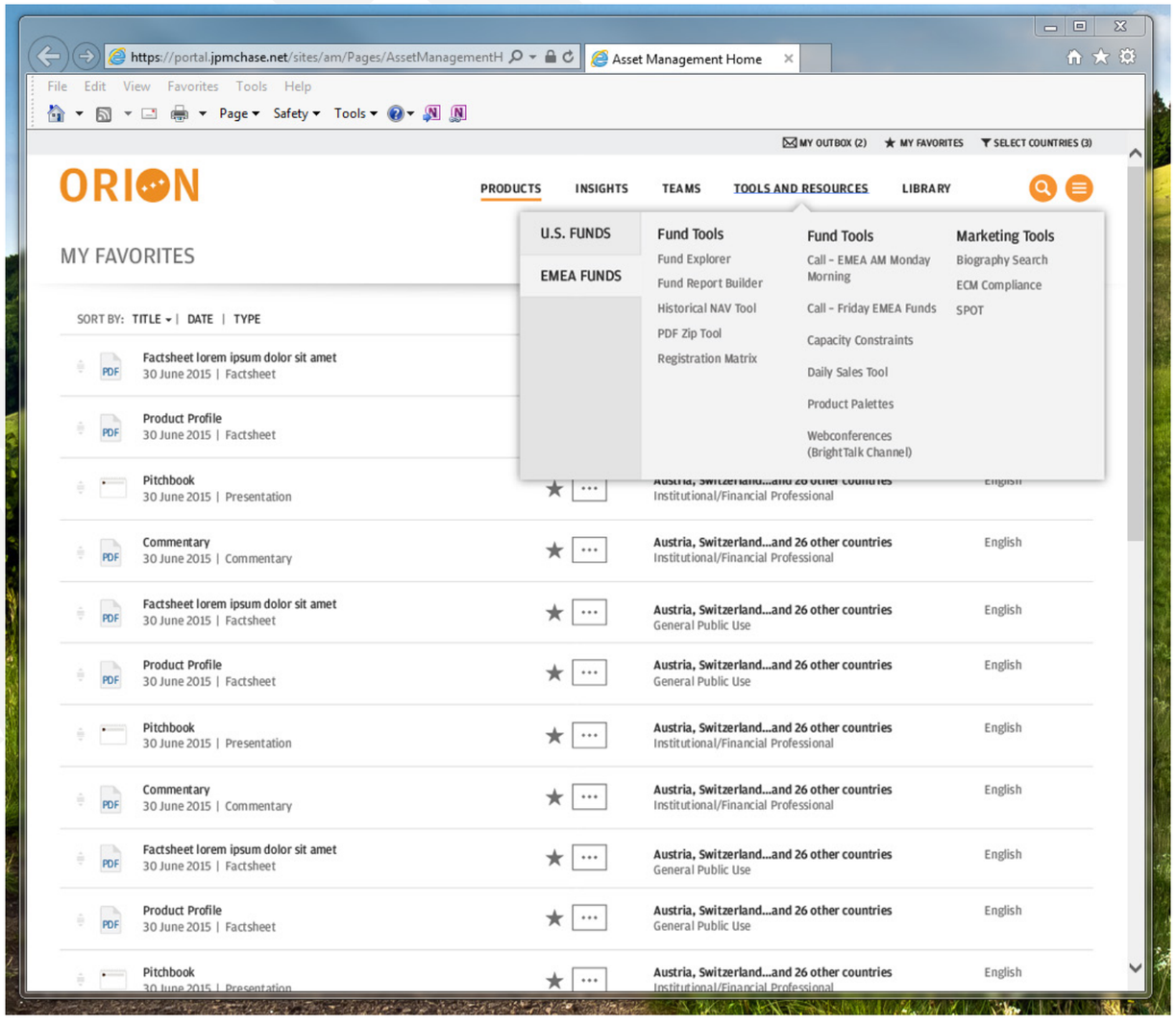
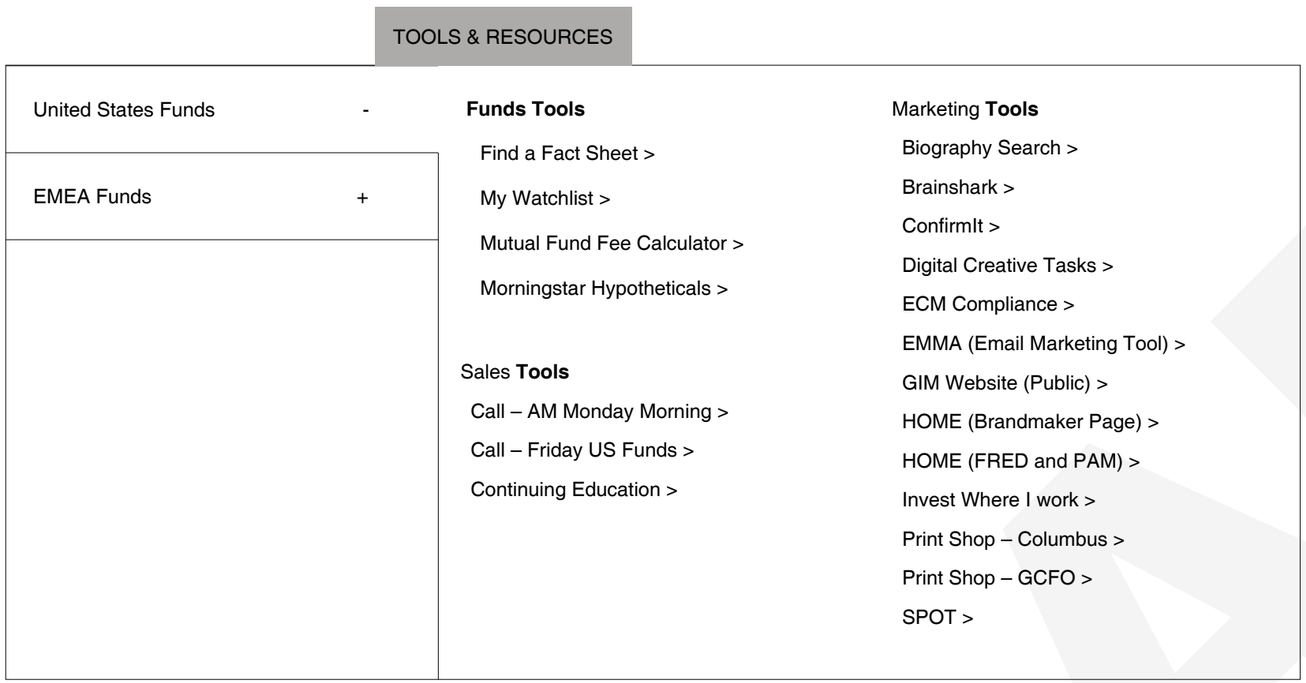
Tools & Resources Flyout Menu Mockup - Vertical Tabs

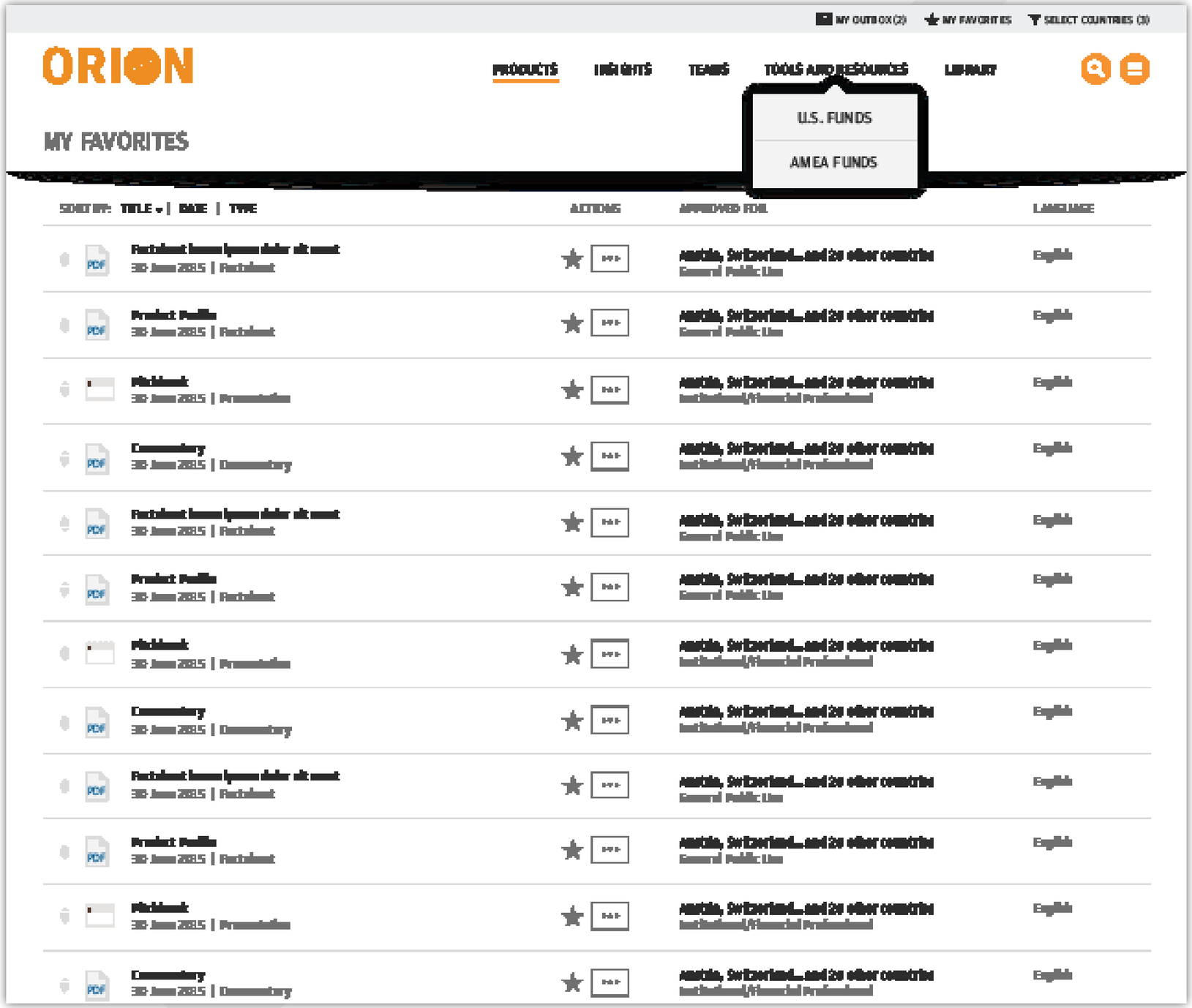




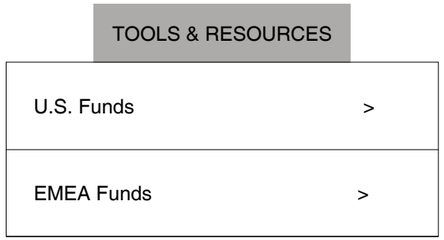
Tools & Resources Flyout Menu



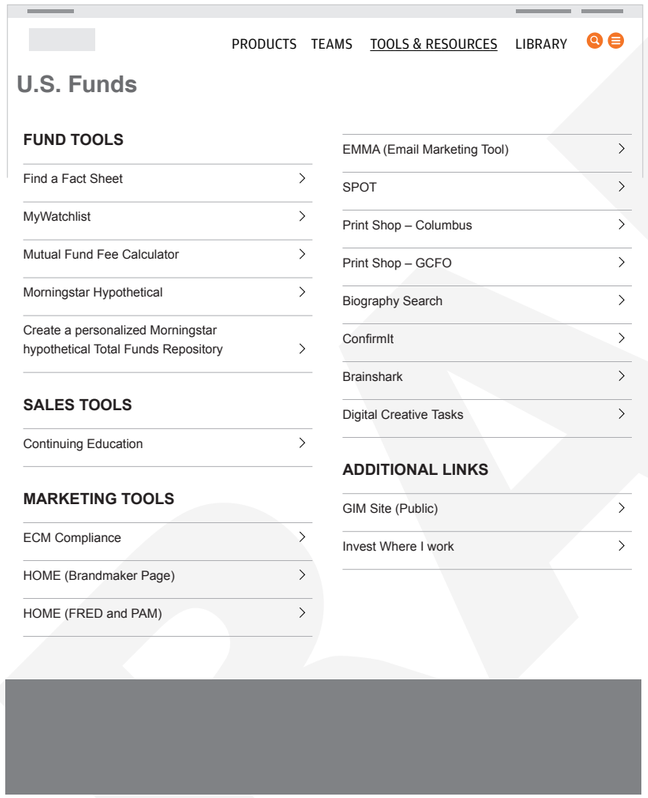
Tools & Resources Flyout Menu Mockup - Not Recommended



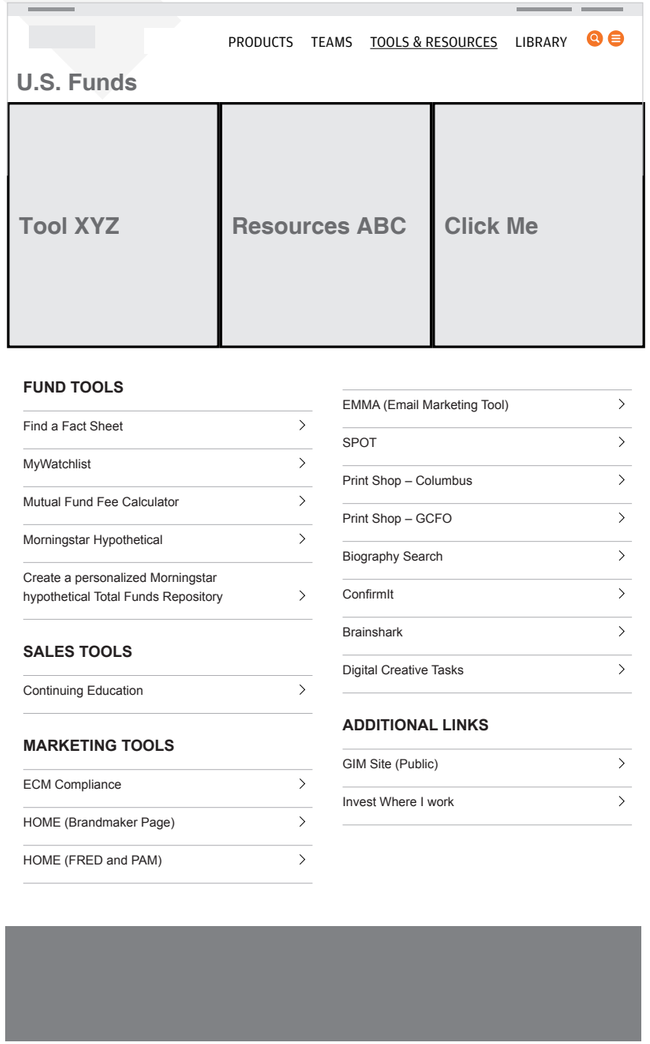
Tools & Resources Landing Pages



As a Typical Landing Page



With Featured Tools



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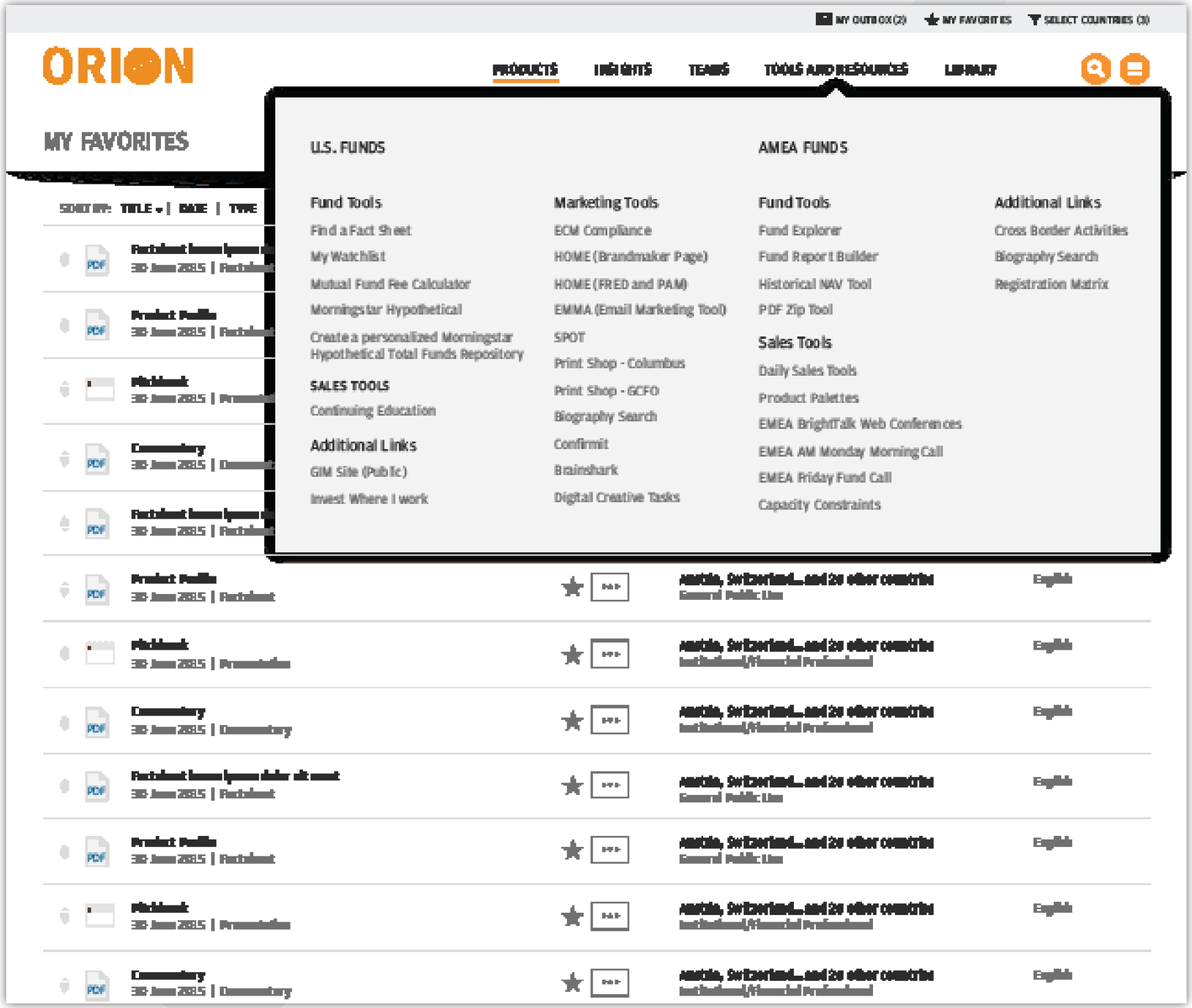
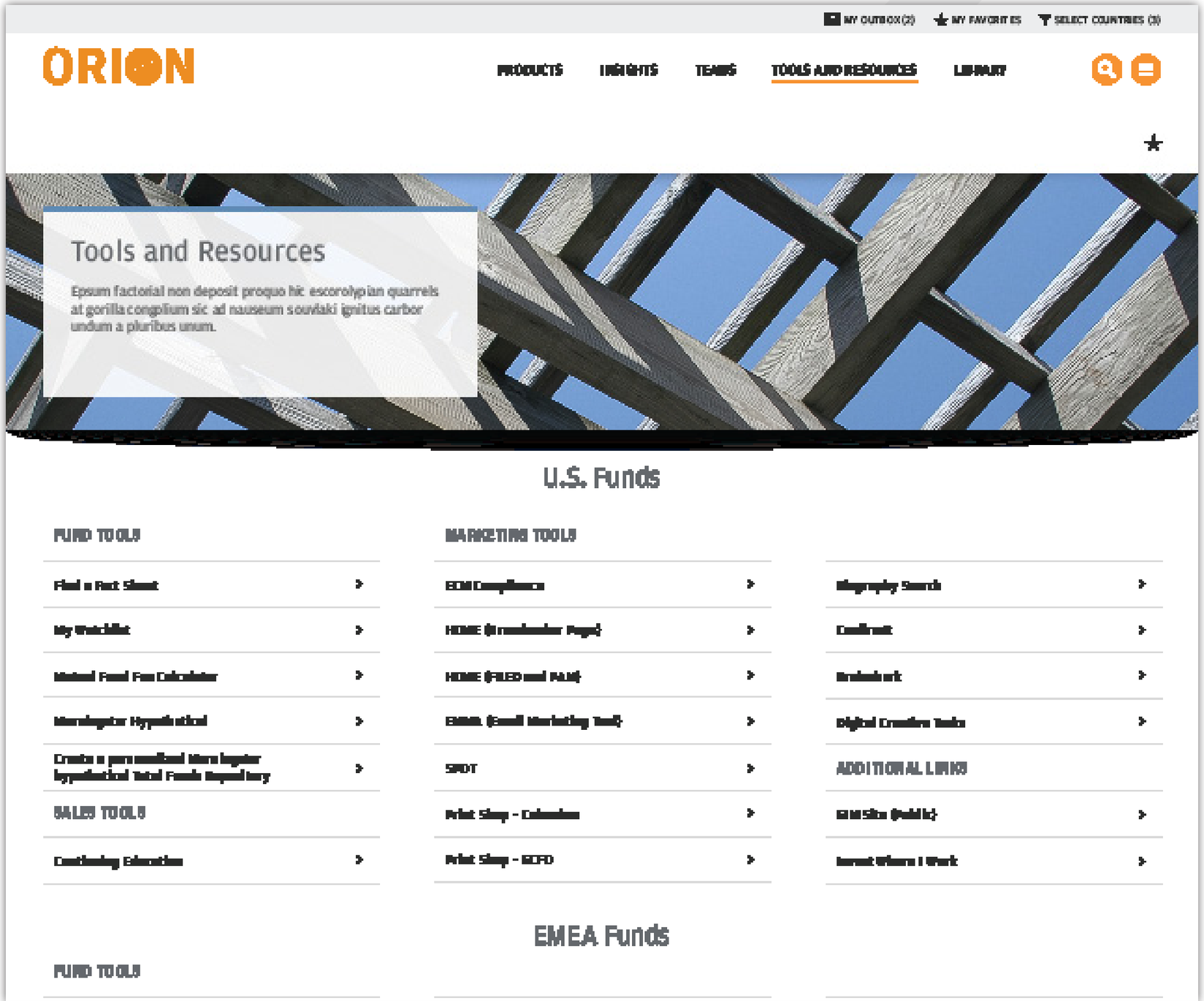
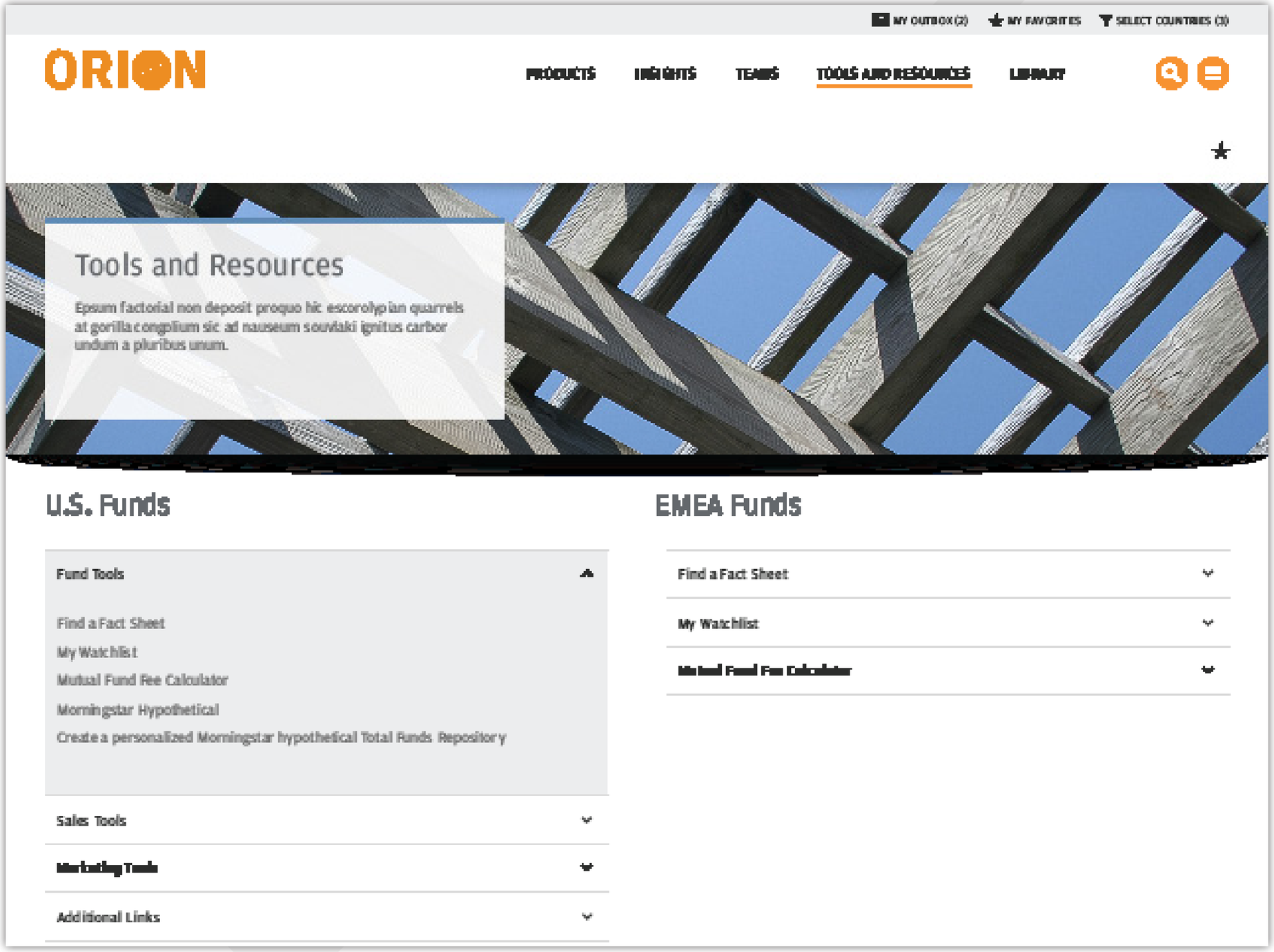
Tools & Resources Flyout Menu Mockup - Not Recommended



Tools & Resources Landing Page Mockup - Link List



Tools & Resources Landing Page Mockup - Accordions



Library

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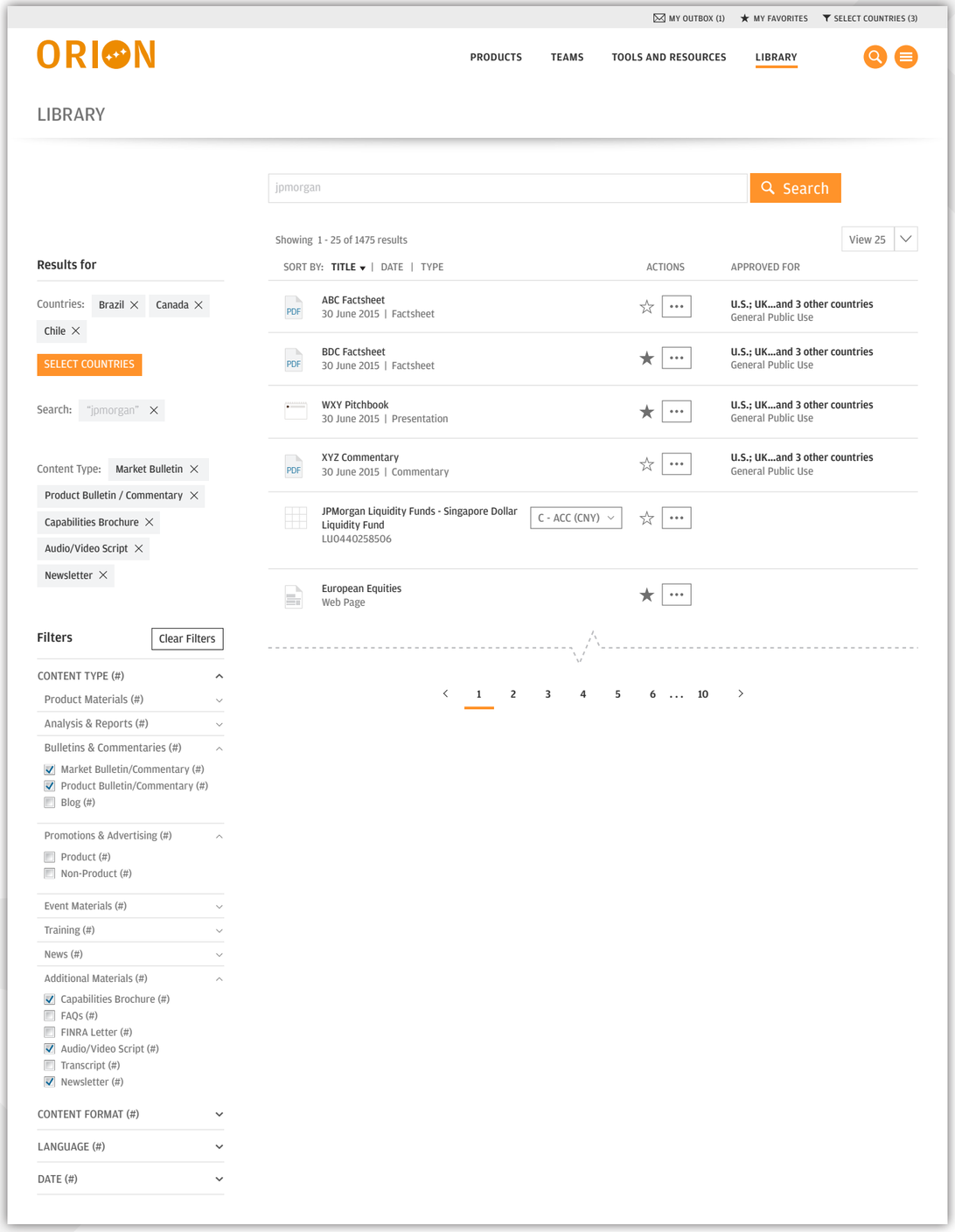
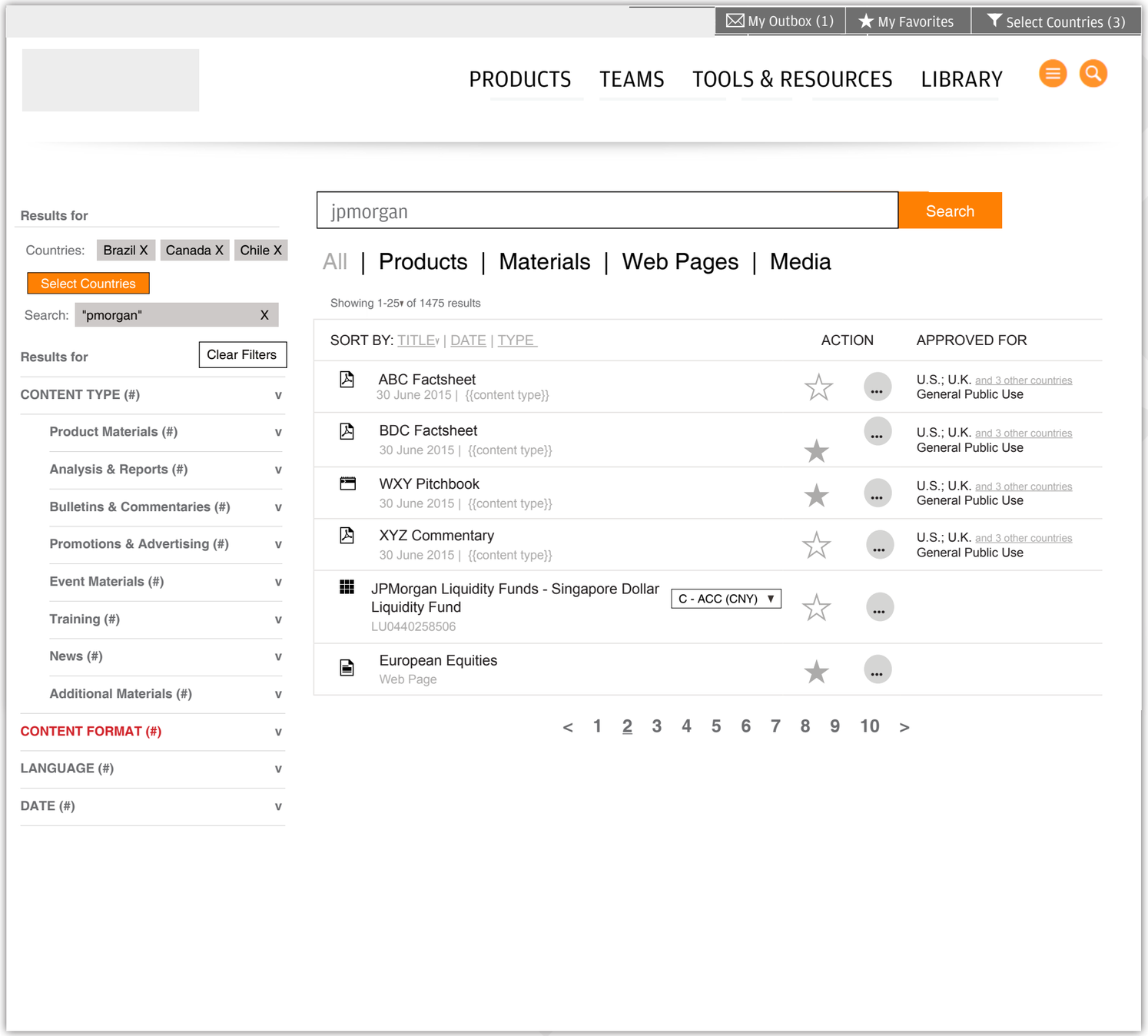
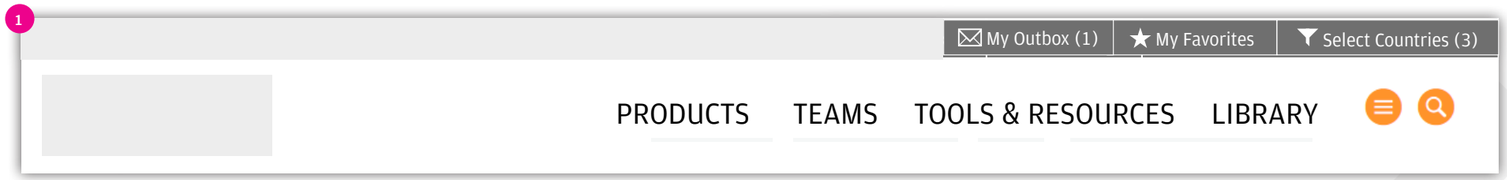
Library Mockups

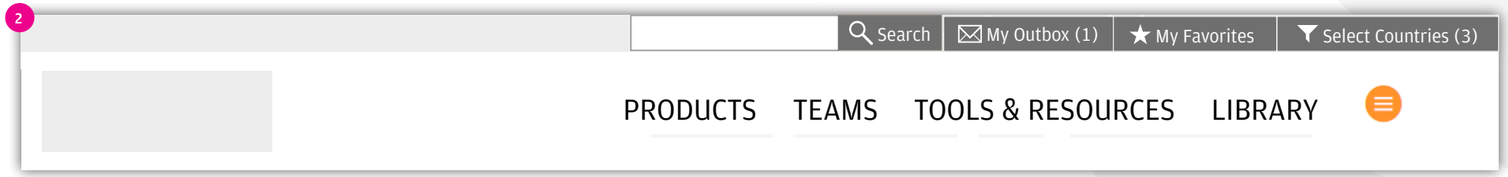


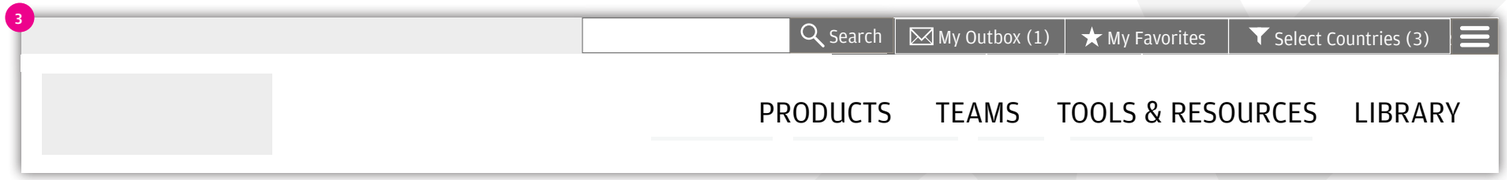
Library with Content Formats as Search Type Controls

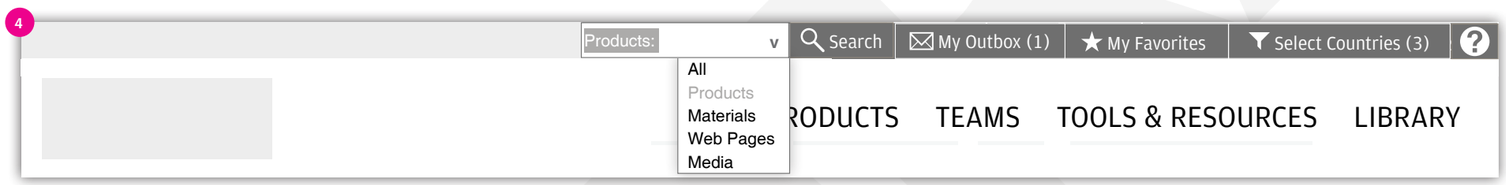


Site Search Concept









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

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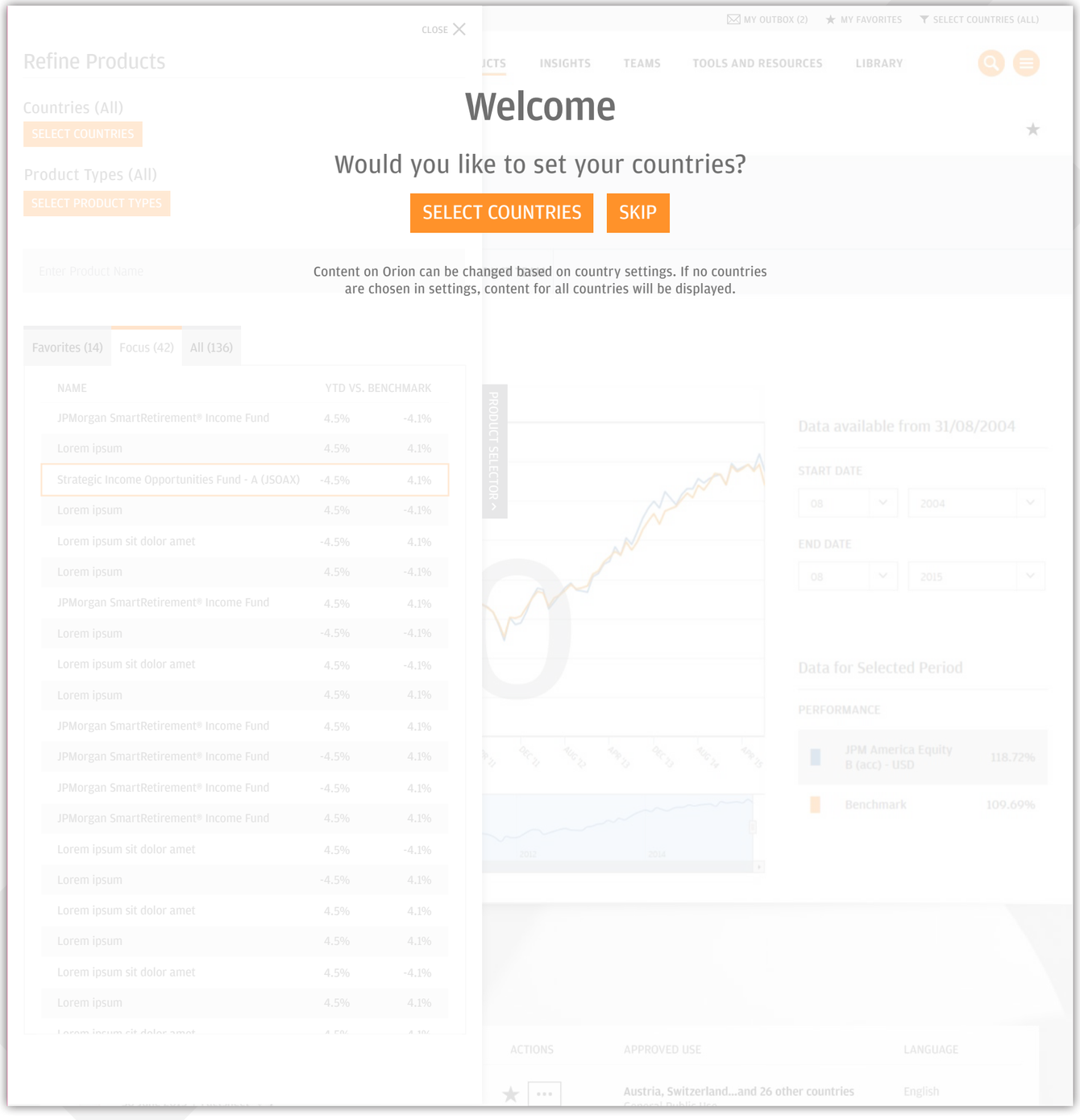
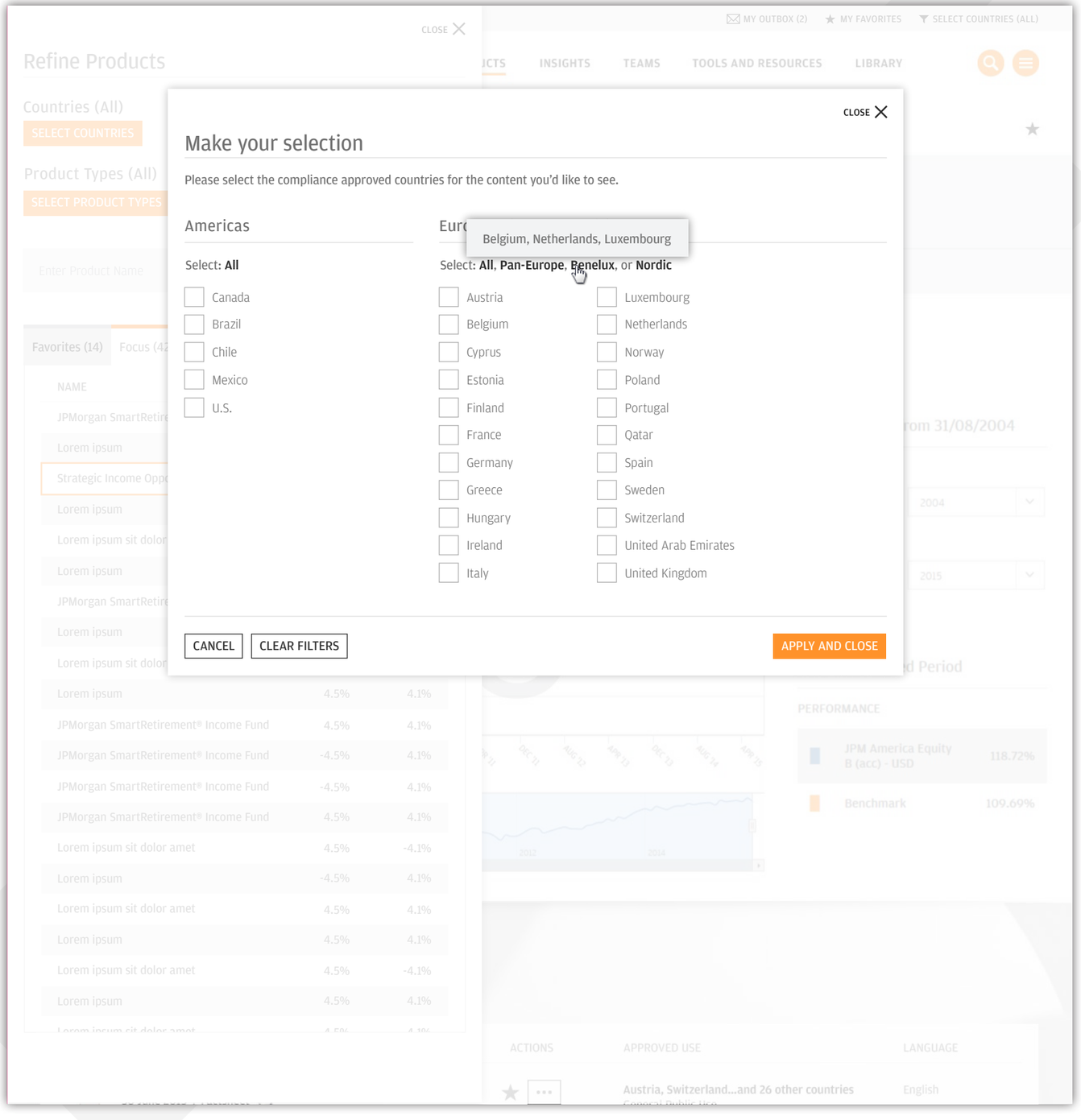
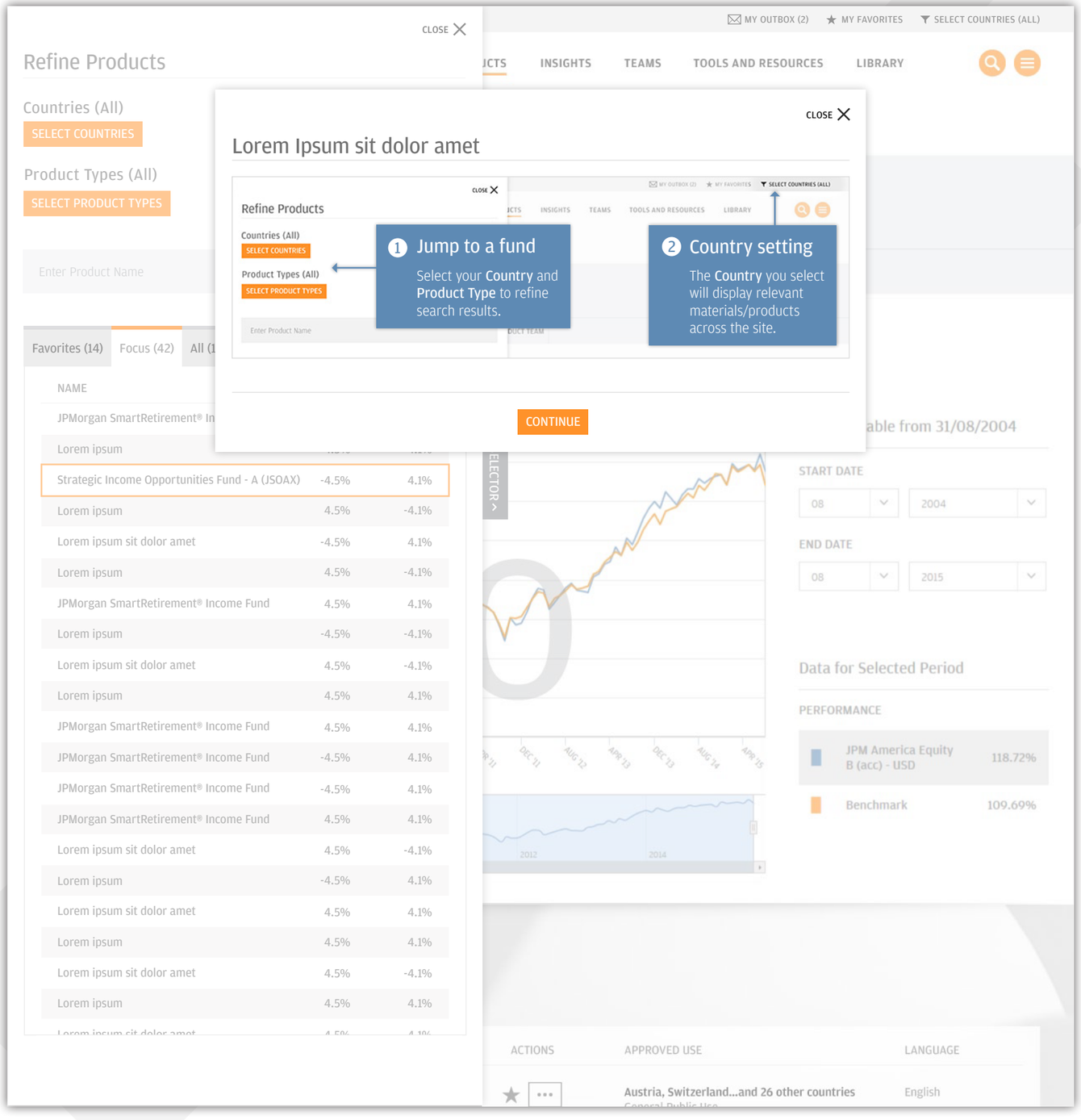
Welcome Page Takeover Mockup



Country Selection Module Mockup - Help Removed



First Use Modal Mockup



Recipient Email Template

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Recipient Email Mockups - no Thumbnails no Descriptions

J.P.Morgan
Asset Management

Hello,

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Ut condimentum, tellus egetmaximus sodales, lectus odio congue ex, sit amet pellentesque magna elit at ante. Namauctor id mauris quis porttitor. Donec imperdiet fringilla felis sit amet placerat. Ut lobortisnibh nec velit pharetra pellentesque.

INCLUDED MATERIALS

Attached: *Commentary-Evolving your fixed income strategy.pdf*
PROSPECTUS

Available Online
Portfolio Discussion: Staying Balanced in Volatile Markets
FACT SHEET

Available Online
Evolving your fixed income strategy
PROSPECTUS

Attached: *Fund Profile Overview - JPMorgan International Unconstrained Equity Fund.pdf*
FACT SHEET

Attached: *JPMorgan Multi-Manager Alternatives Fund.pdf*
PROSPECTUS

Available Online
Portfolio Discussion: Diversified sources of income.
FACT SHEET

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J.P. Morgan Asset Management, 270 Park Ave., New York, NY 10017

Recipient Email Mockups - Thumbnails at Right

J.P.Morgan
Asset Management

Hello,

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Ut condimentum, tellus egetmaximus sodales, lectus odio congue ex, sit amet pellentesque magna elit at ante. Namauctor id mauris quis porttitor. Donec imperdiet fringilla felis sit amet placerat. Ut lobortisnibh nec velit pharetra pellentesque.

INCLUDED MATERIALS

Attached: *Commentary-Equity Income Fund.pdf*

Latest commentary and market analysis from the portfolio management team.

Available Online
Portfolio Discussion: Equities

Equities can enhance the growth potential and diversify the risks in a well-balanced portfolio. With interest rates at historic lows, investors should think about diversifying.

Available Online
Evolving your fixed income strategy

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Despite headwinds and negative headlines, the economy and equity markets have continued to recover. Read the latest commentary and market analysis from our port-folio management team.

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Recipient Email Mockups - Thumbnails at Left

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Asset Management

Hello,

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Ut condimentum, tellus egetmaximus sodales, lectus odio congue ex, sit amet pellentesque magna elit at ante. Namauctor id mauris quis porttitor. Donec imperdiet fringilla felis sit amet placerat. Ut lobortisnibh nec velit pharetra pellentesque.

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Bread Crumbs & Sub-page Navigation Using Teams Content

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Team Flyout Menu

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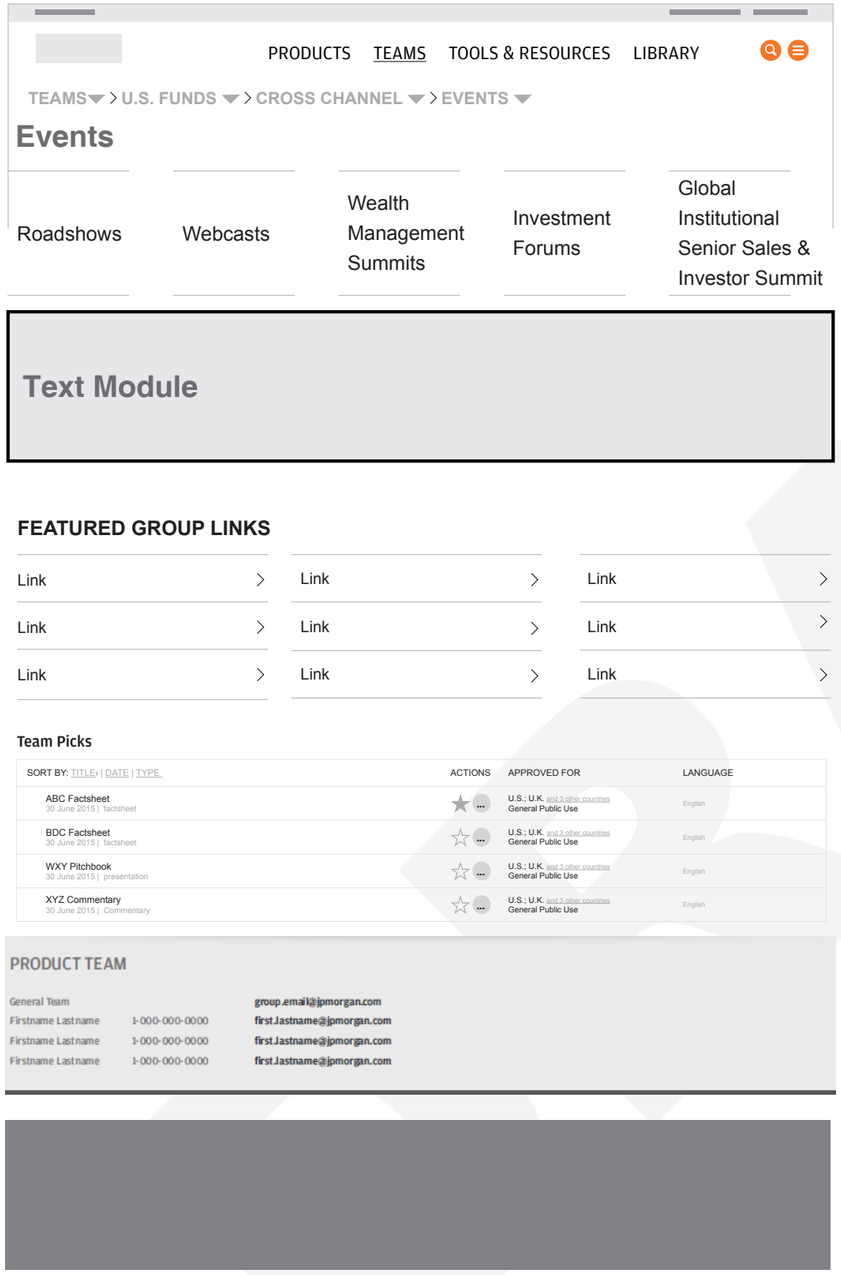
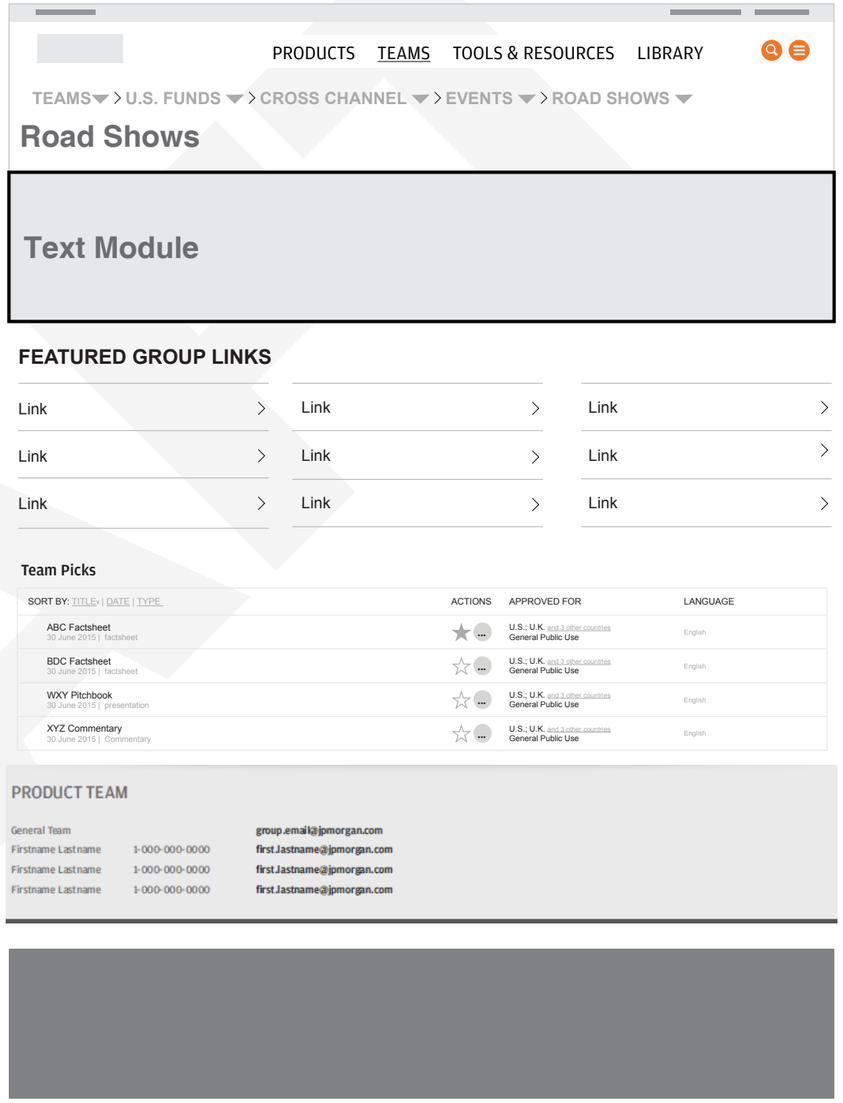
Sub-Landing Page Exploration with Breadcrumbs and Subpage Navigation (Teams Example)





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.

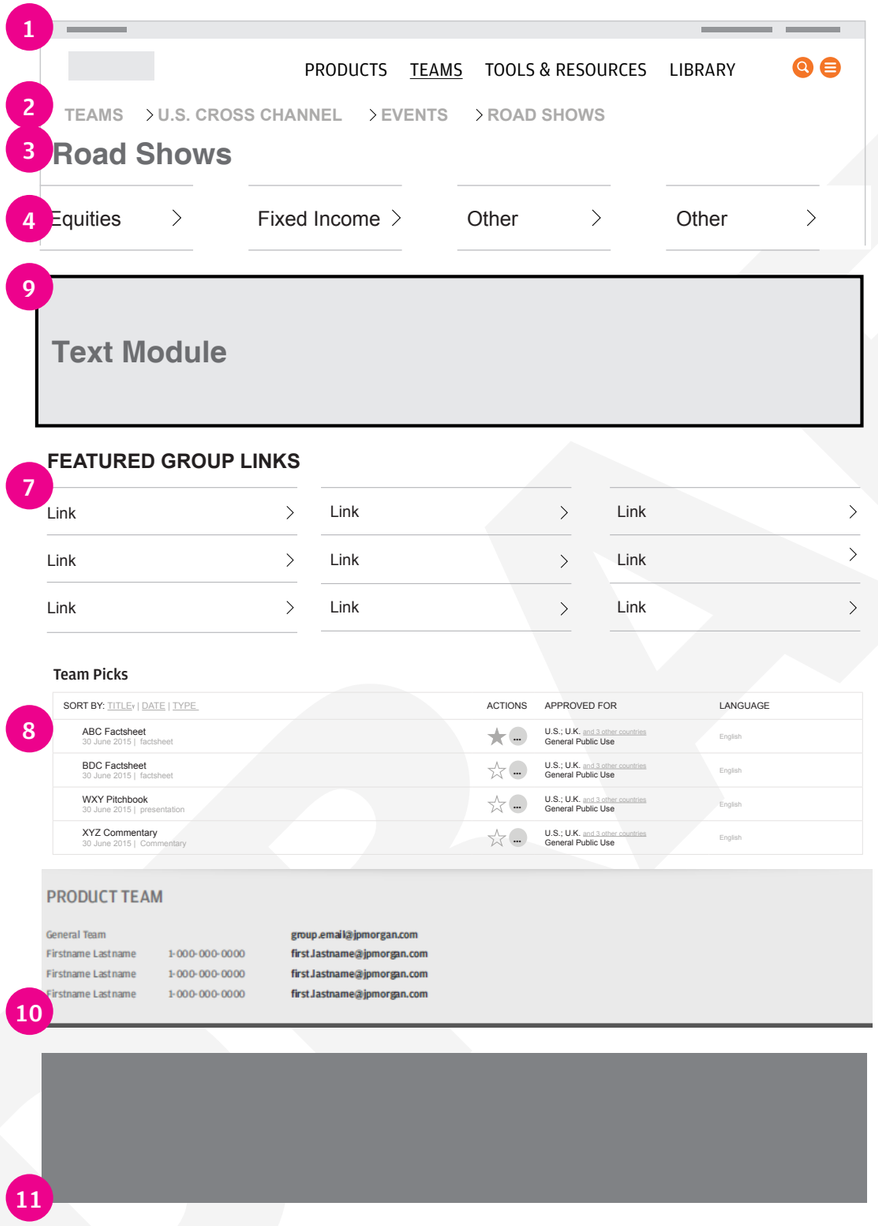
4a Various styles could be used to display in-page navigation. An old wireframe illustration is included here for reference.

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.

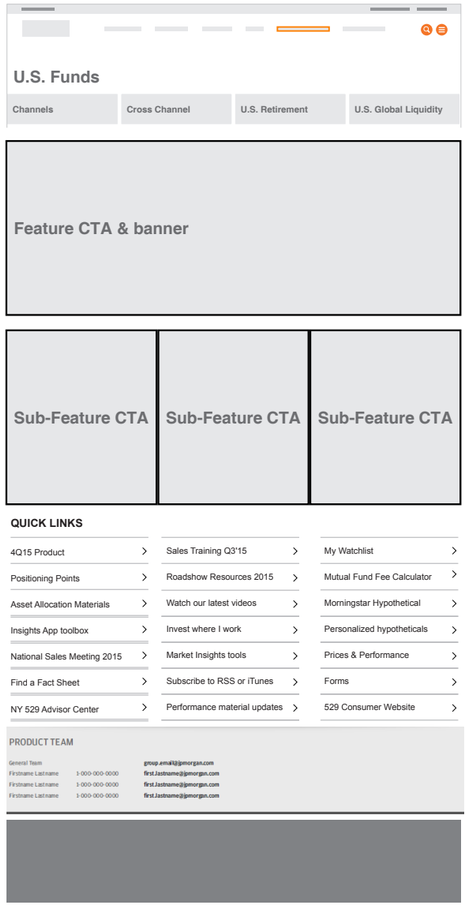
10 Contact (Text) Module -

11 Footer - Teams to use standard footer.

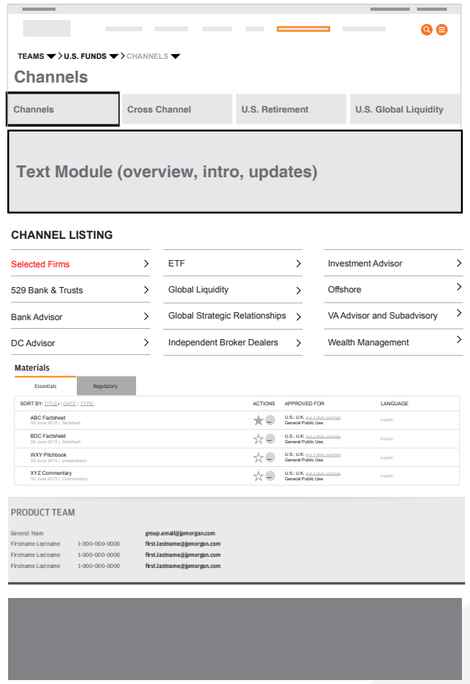


Page Layout Base on Hierarchy (Teams Example)

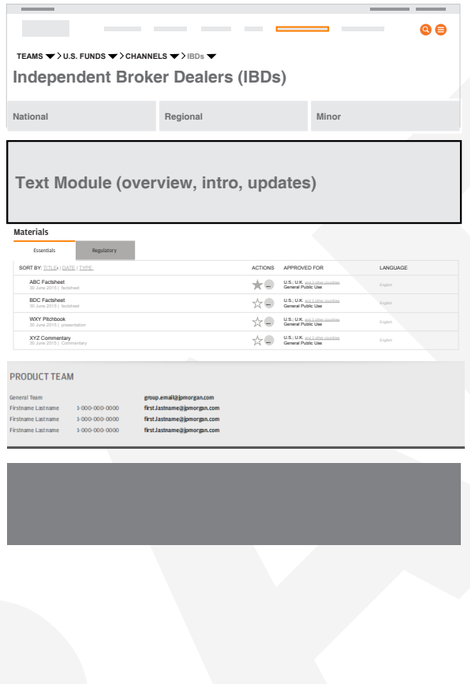
2nd Level Page



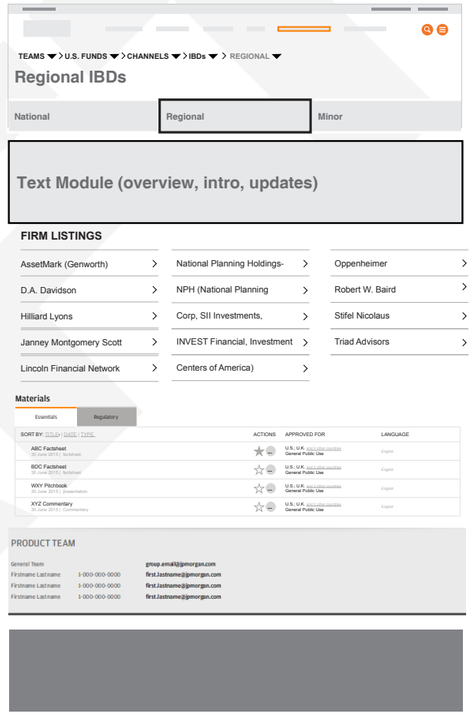
3rd Level Page



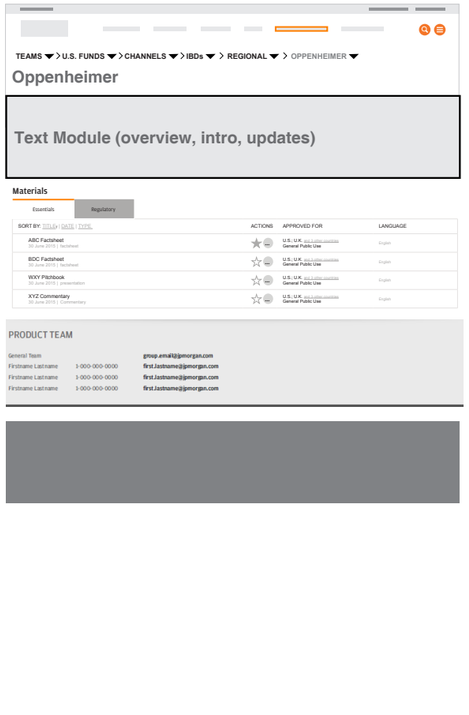
4th Level Page



5th Level Page



6th Level Page



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