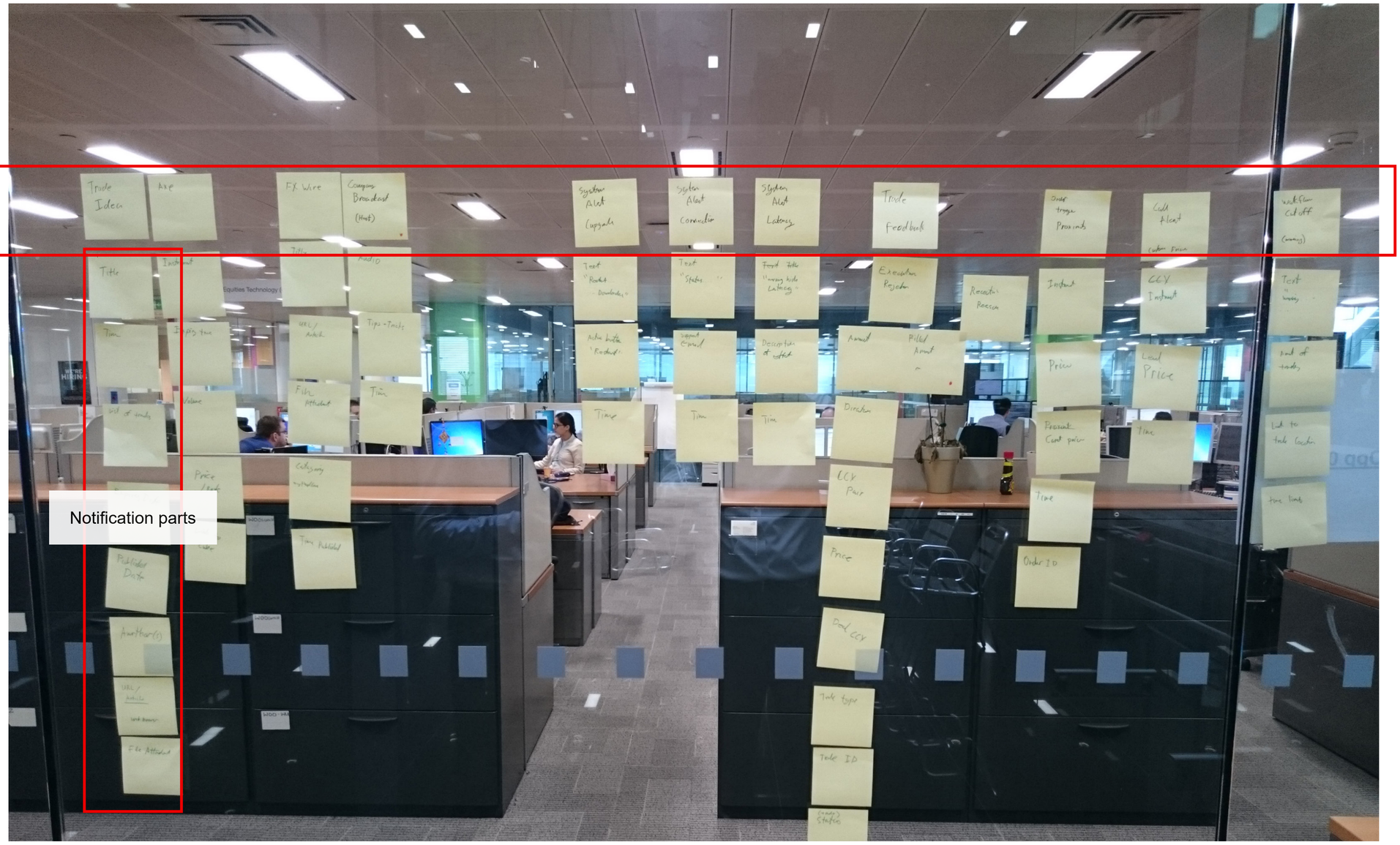
CitiVelocity Trading platform alerts and notification concepts.

A notifications area in any application and very easily become crowded with interruptions.

The following set of images describes the process taken to discover and analyse potential types of notification.

A workshop to discover and record everyone’s ideas

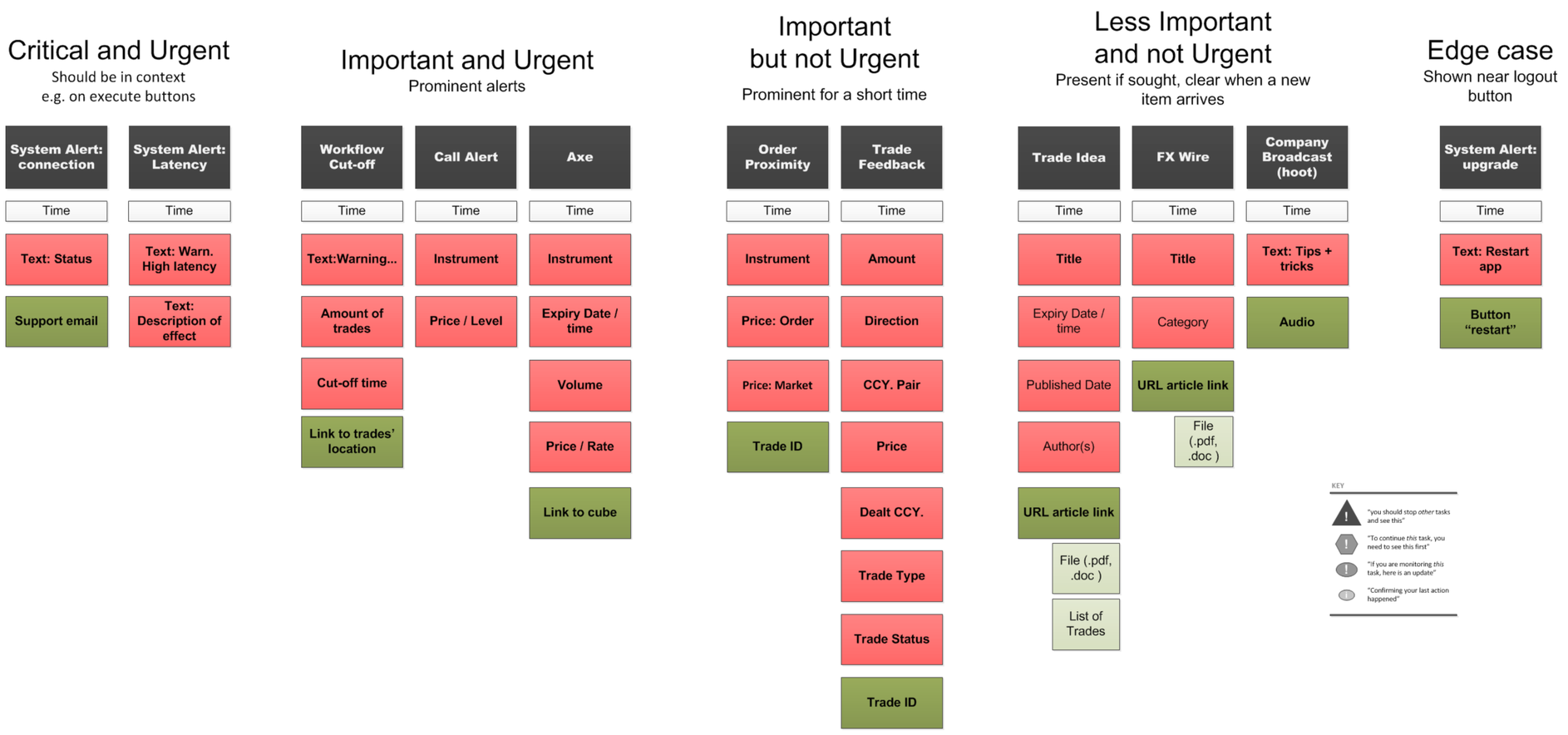
Type of notification



Transcribe the session digitally

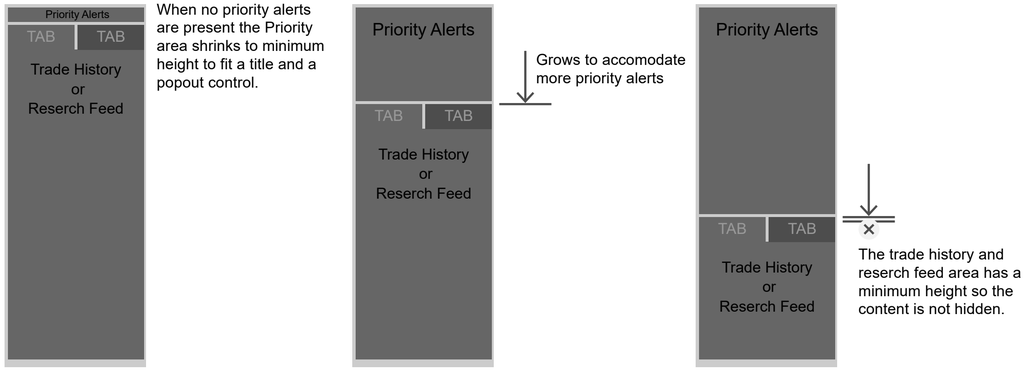
Trade Idea	Axe	FX Wire	Company Broadcast (hoot)	System Alert: upgrade	System Alert: connection	System Alert: Latency	Trade Feedback	Order Proximity	Call Alert	Workflow Cut-off
Title	Instrument	Title	Audio	Text: Restart app	Text: Status	Text: Warn. High latency	Execution	Instrument	Instrument	Text:Warning...
Time	Time	URL article link	Text: Tips + tricks	Button “restart”	Support email	Text: Description of effect	Amount	Price: Order	Price / Level	Amount of trades
List of Trades	Expiry Date / time	File (.pdf, .doc)	Time	Time	Time	Time	Direction	Price: Market	Time	Link to trades’ location
Expiry Date / time	Volume	Category					CCY. Pair	Time		Cut-off time
Published Date	Price / Rate	Time					Price	Trade ID		
Author(s)	Link to cube						Dealt CCY.			
URL article link							Trade Type			
File (.pdf, .doc)							Trade ID			
							Trade Status			
							Link to deal ticket			

Add meaningful groupings to the data

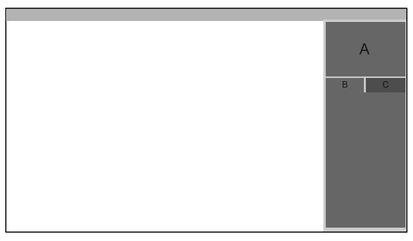


Layout options for the groups of alerts

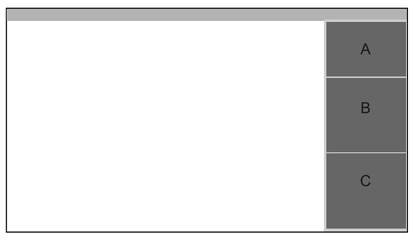
Area behaviors



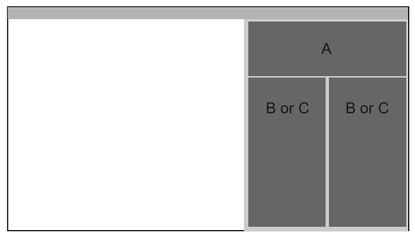
Layout options



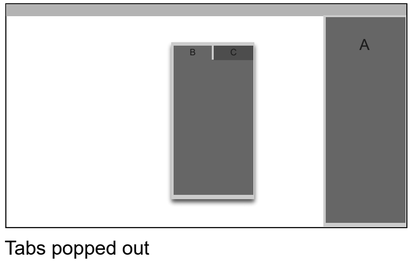
Default (tabs)



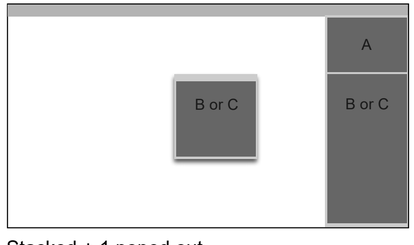
Stacked



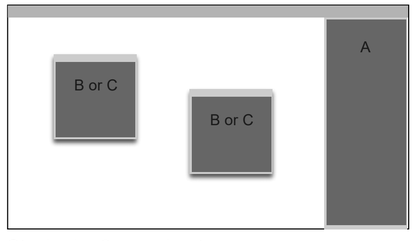
Double width



Tabs popped out



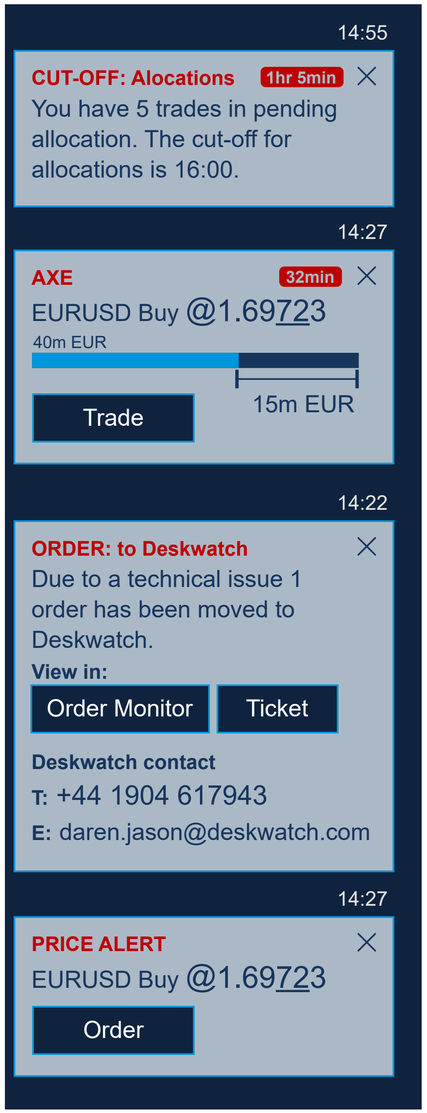
Stacked + 1 poped out



Stacked + 2 poped out

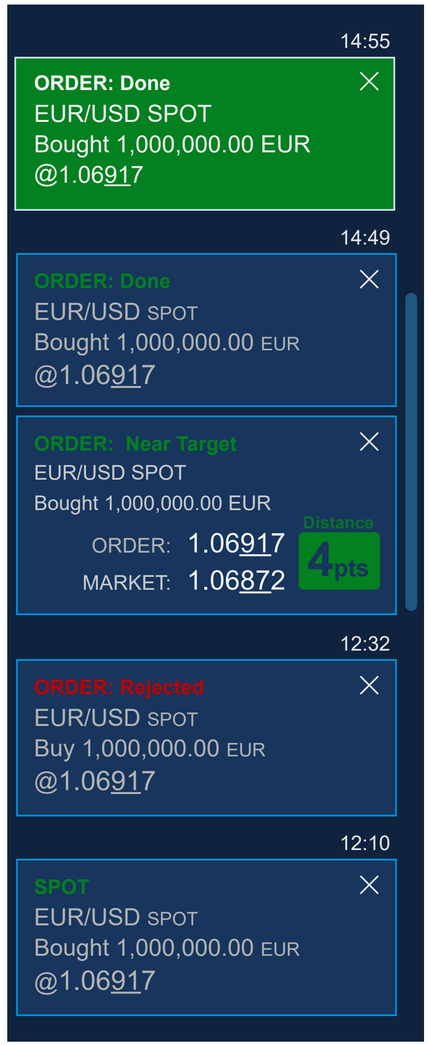
Concept visuals for the separate alert categories

Priority Alerts



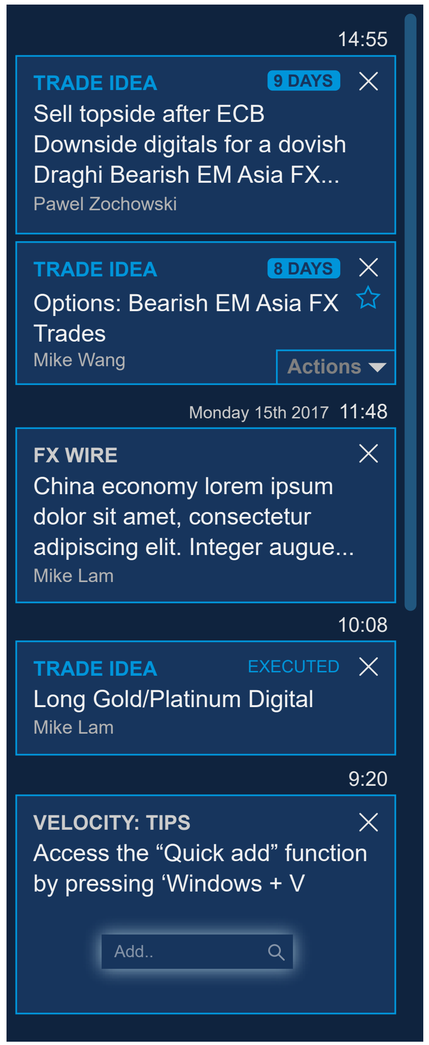
Workflow Cut-Offs,
Call Alerts, Axes

Trade History



Order Updates,
Trading Feedback

Reserch Feed



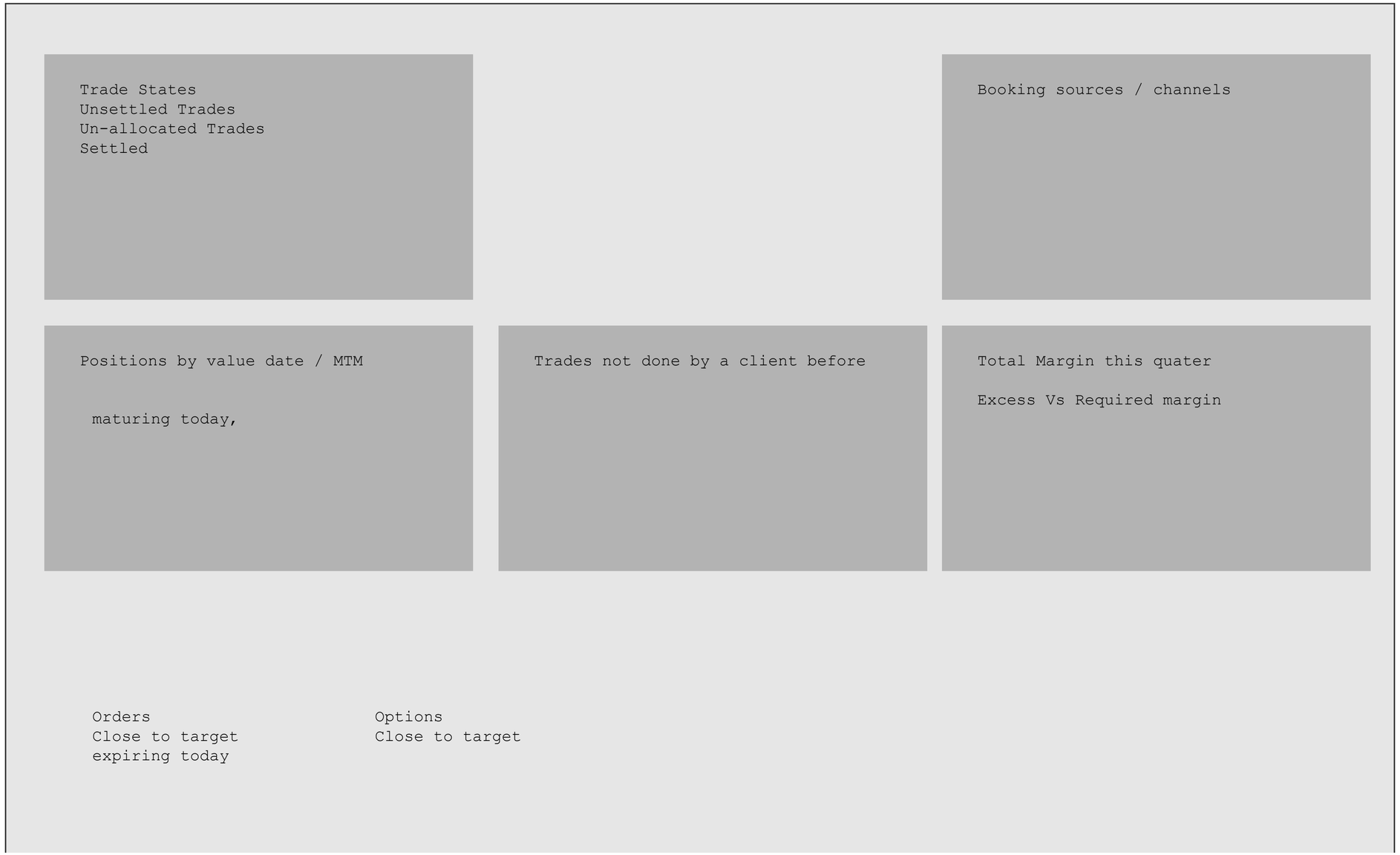
Trade Ideas,
FX Wire articles,
Company Broadcasts

CitiVelocity Trading platform FX trading blotter interaction design.

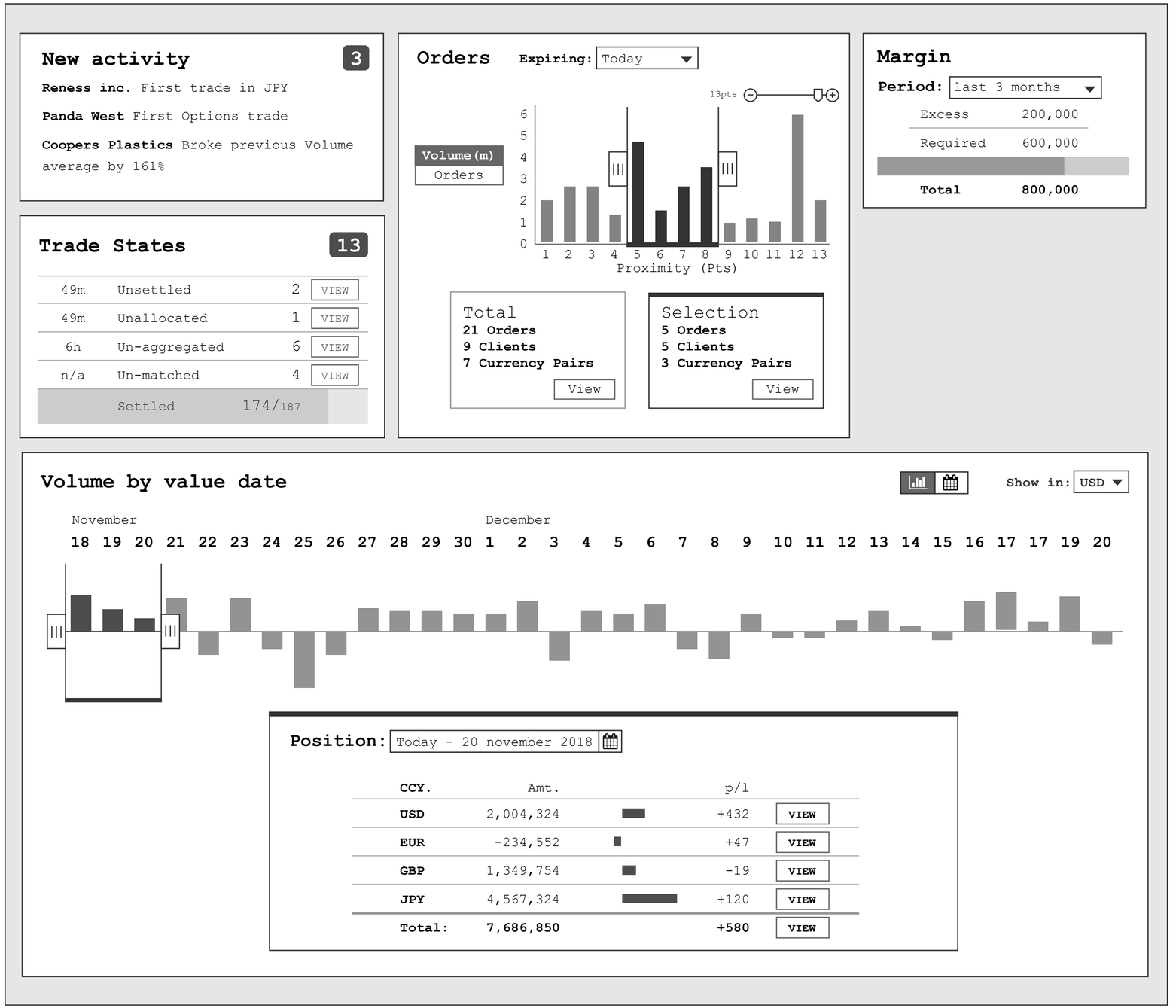
The users needed to be able to access a set of relevant data from the blotter quickly.

The scope was already described as a dashboard. Not only was this option explored but research was also conducted to understand the user needs.

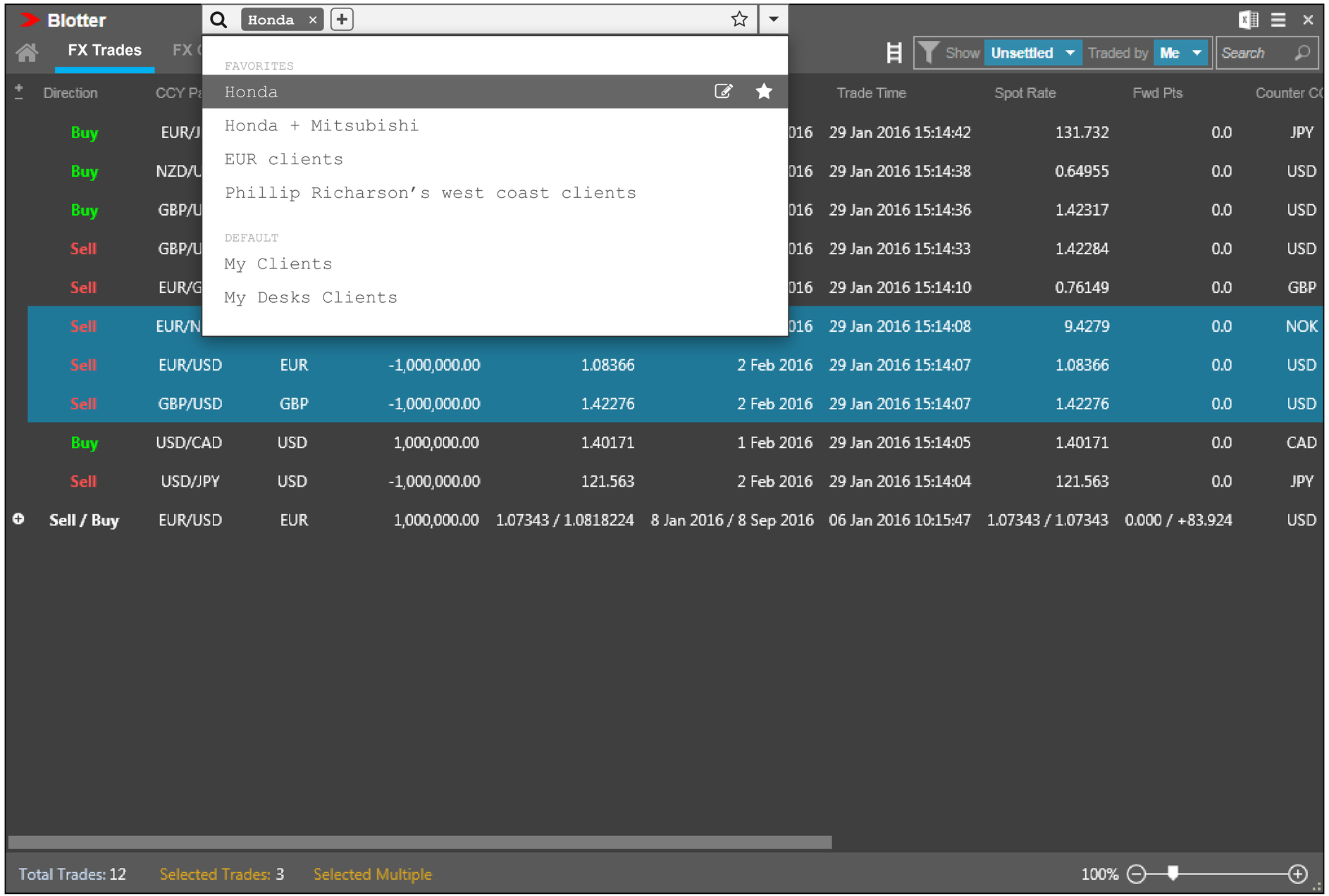
Starting with the contents of the scope document and the research findings. A very basic wireframe was made to aid discussion of scope.



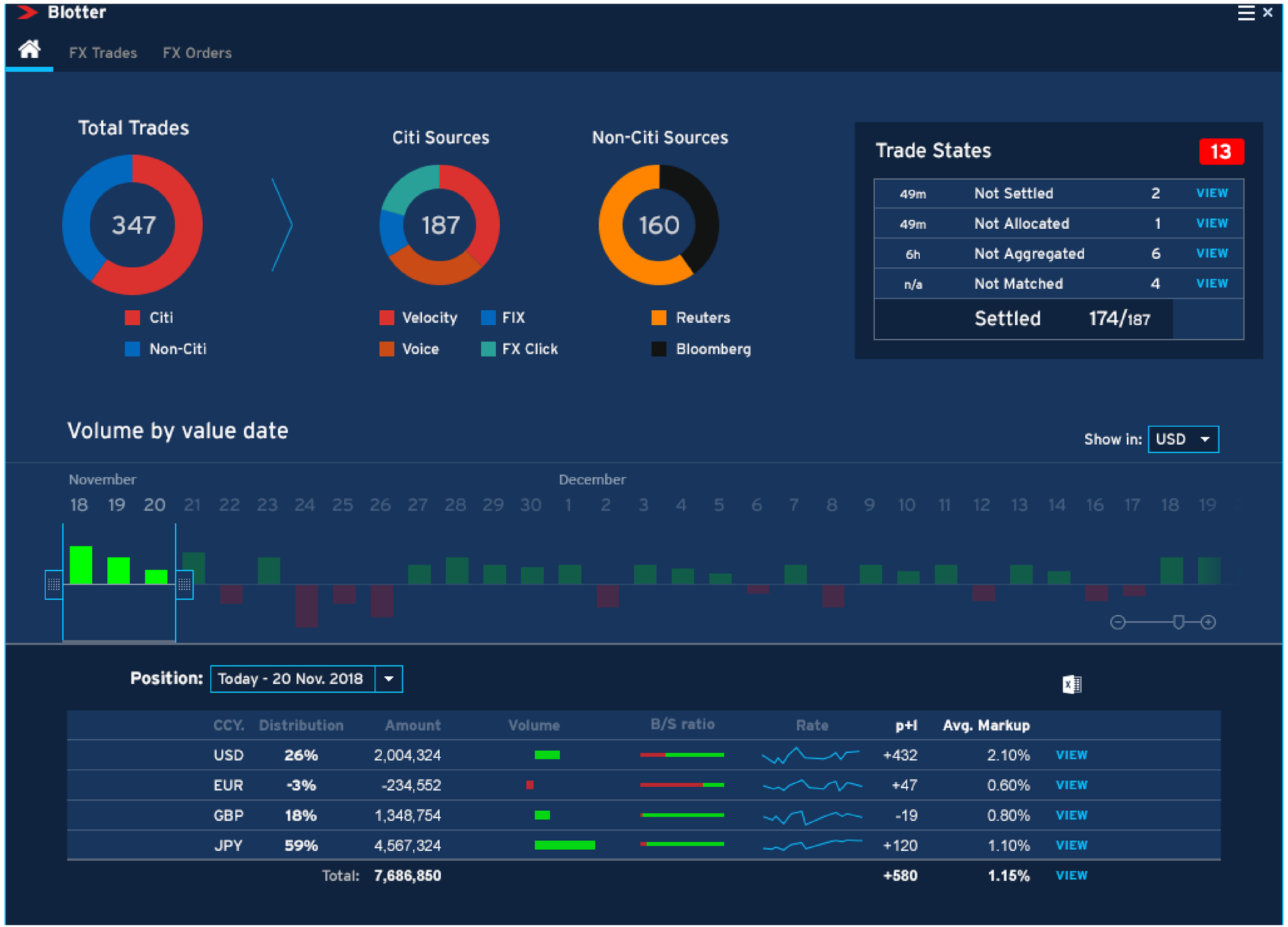
After scope had been refined a more detailed wireframe was made to discuss the interaction and functionality of the dashboard.



A hybrid visual of existing software and wireframed functionality to show how the concept would fit into existing work.

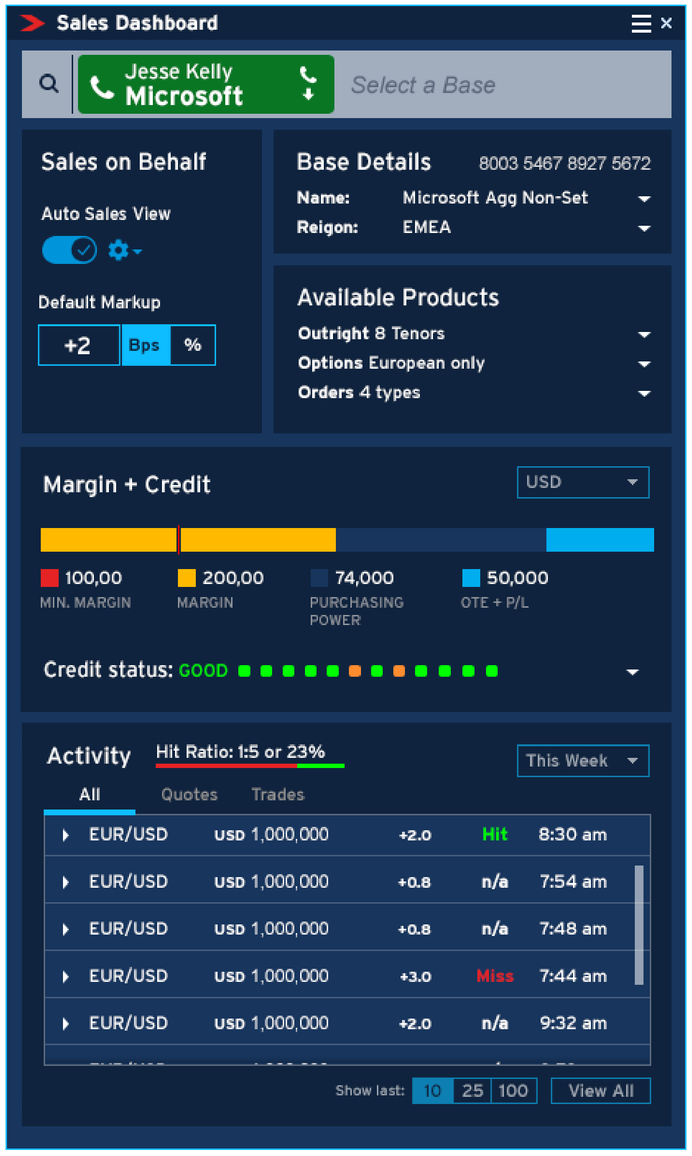


A Hi-fidelity visual of the dashboard concept



The features split into discreet areas that are tailored to the users tasks and modes of work.

This area is for analysis and reporting



This area is for responding to clients on the phone

CitiVelocity Trading platform FX trading blotter interaction design.

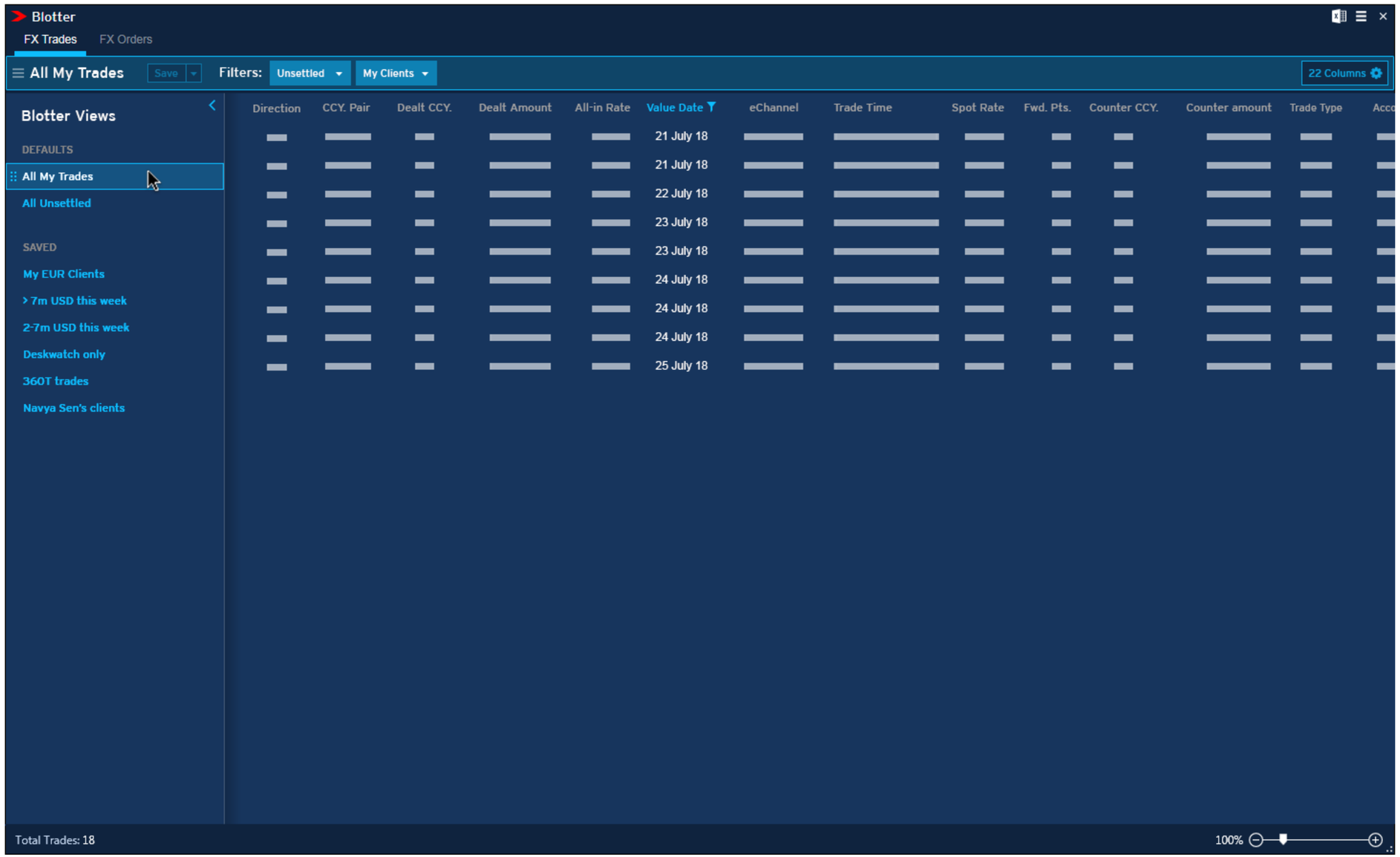
Working within an existing visual design language I designed the interactions in high fidelity to add new features to an existing blotter.

The following workflow describes functionality that allows the user to save and load views of a blotter that includes the settings for:

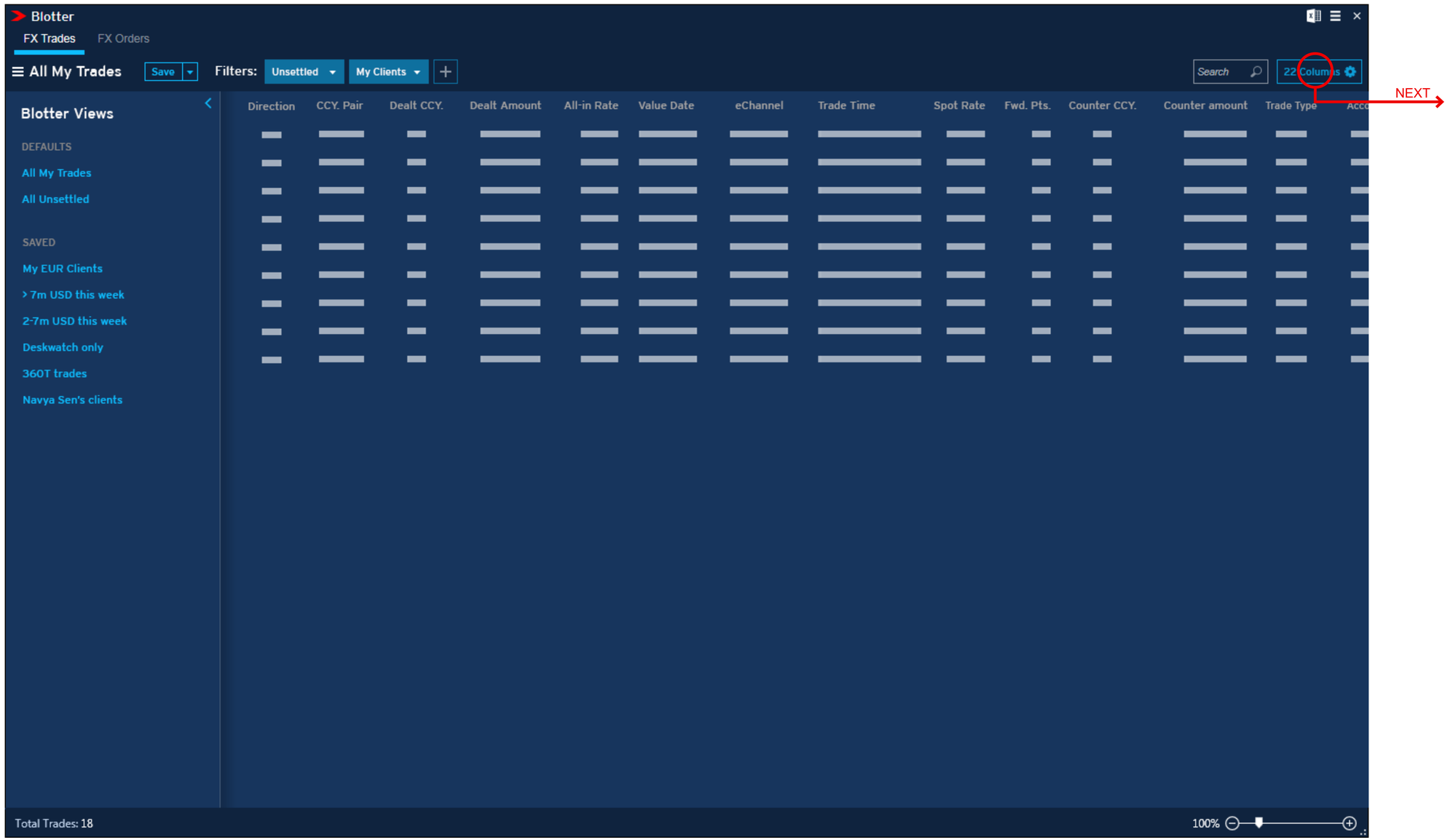
- Sorting
- Filtering
- Visible columns

A view of the blotter with a saved view loaded

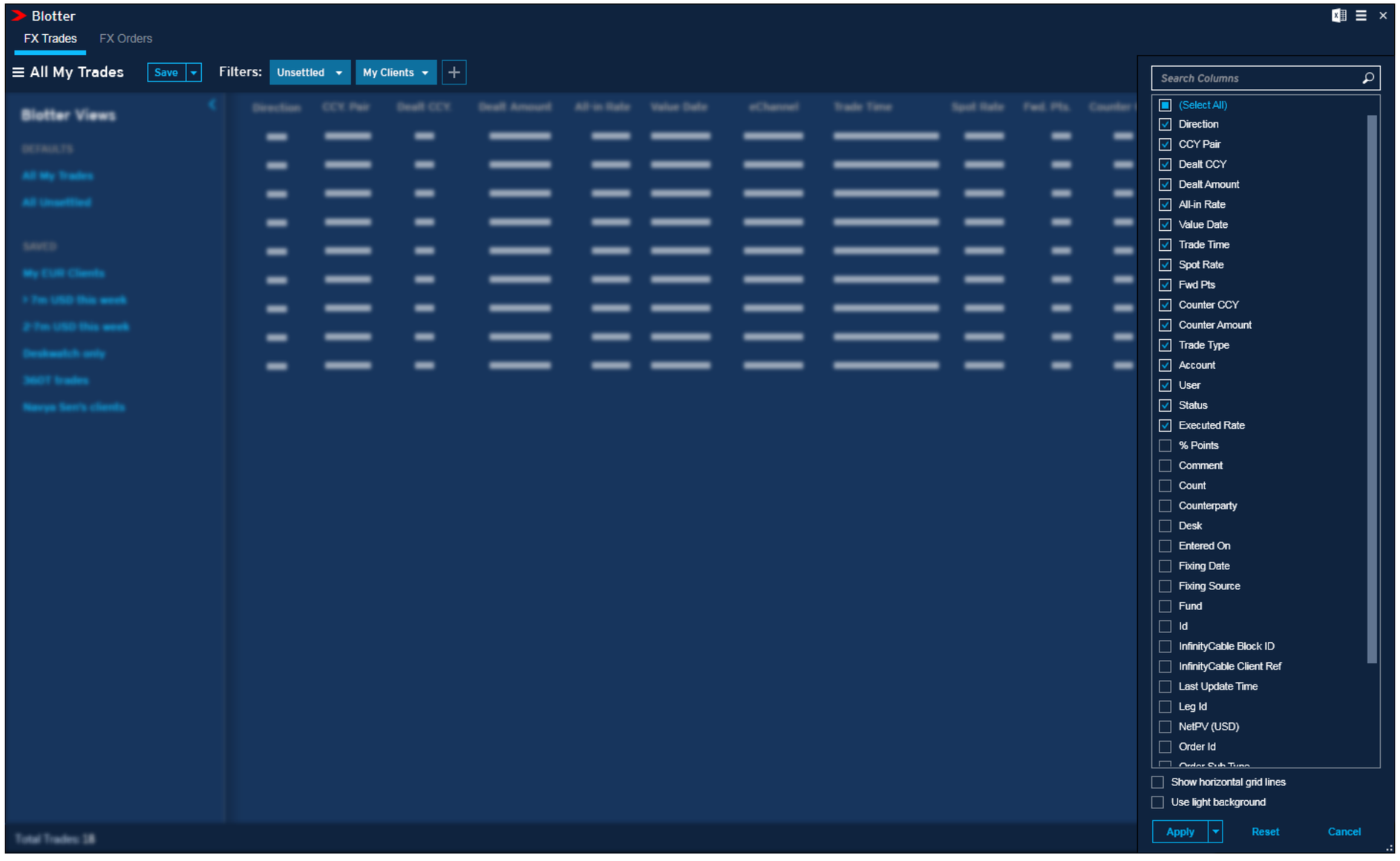
Hovering over a saved view in the side panel previews the filters it will apply.



One of the default views (All My Trades) loaded.

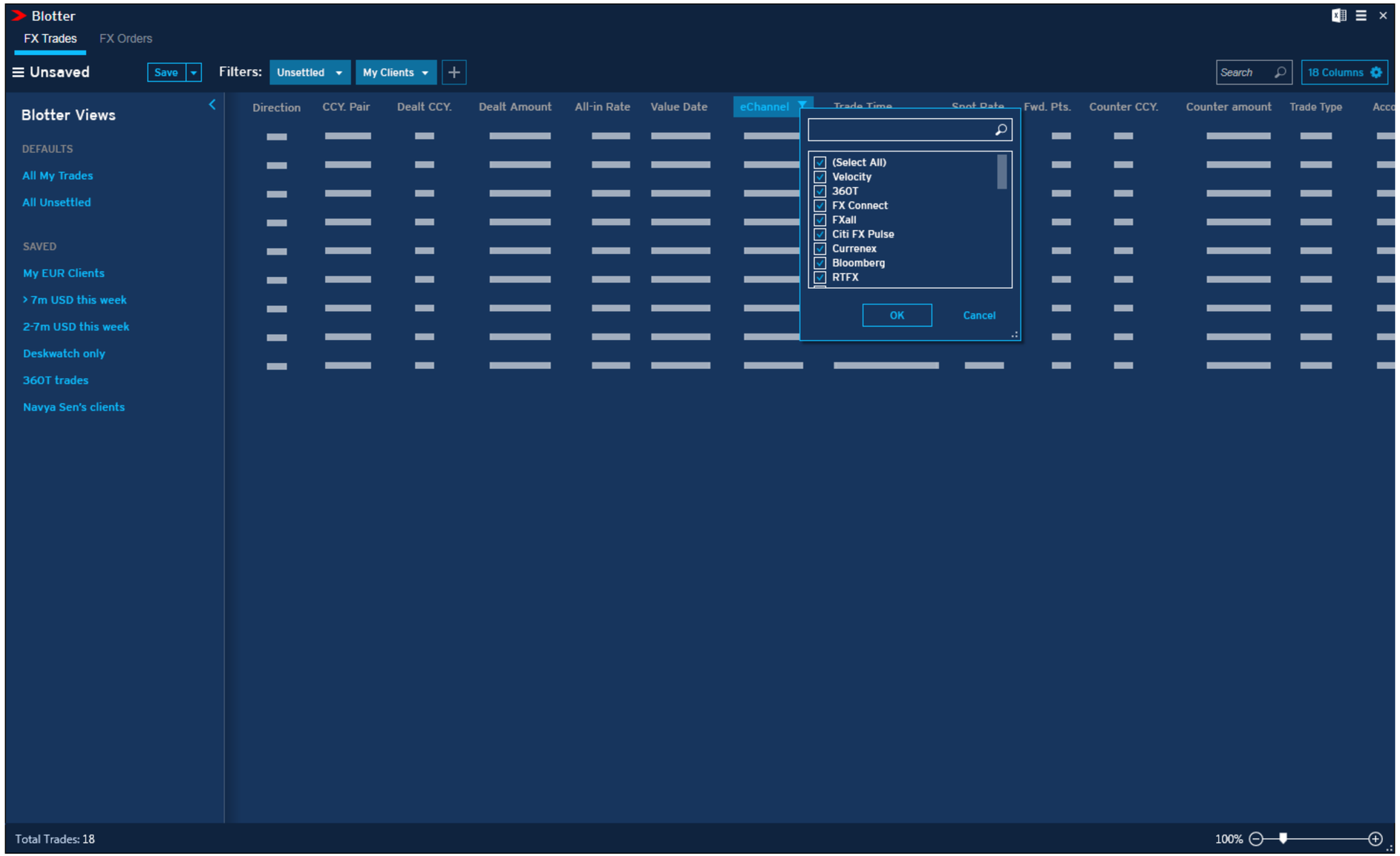


Configure the visible columns.

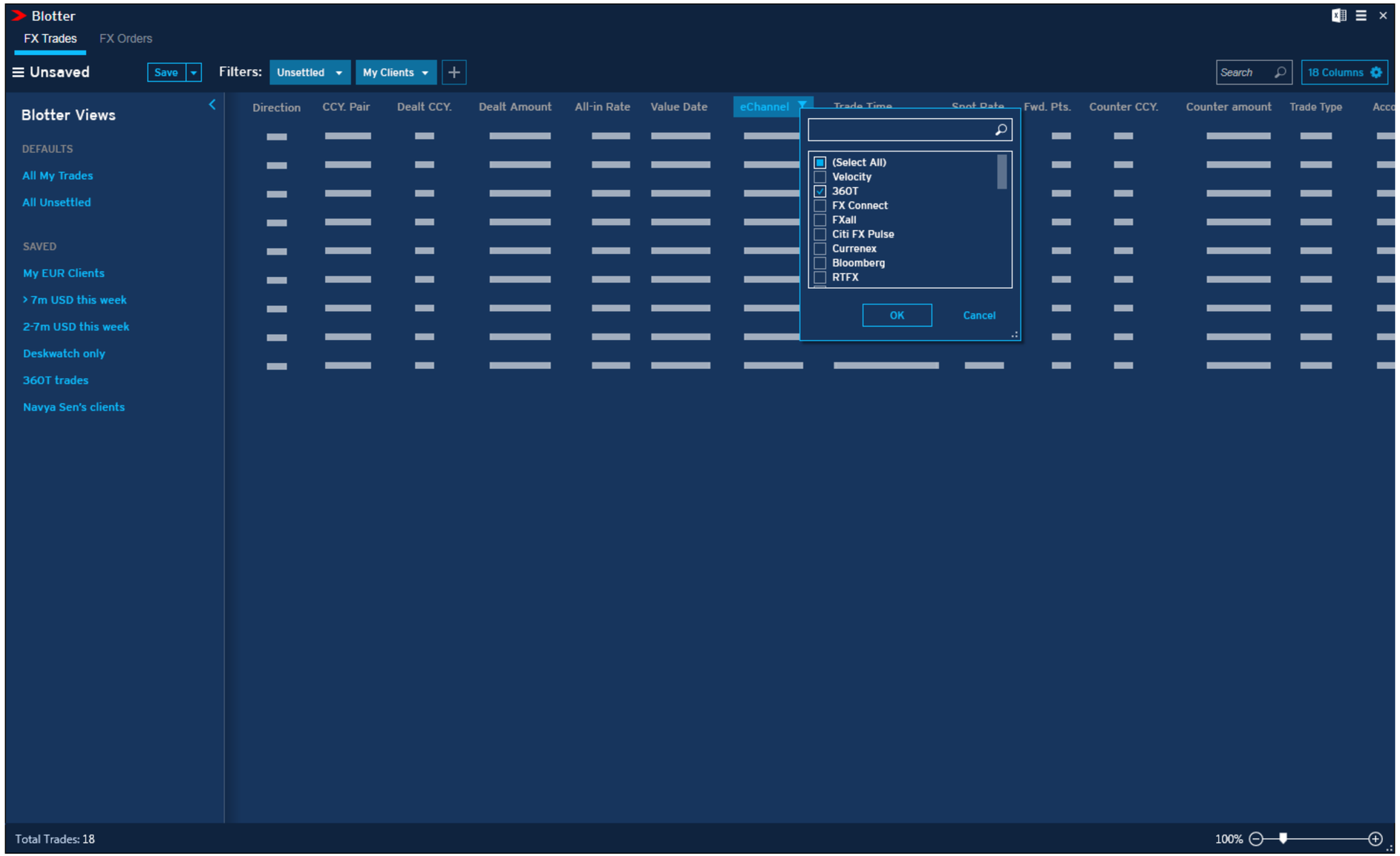


Click column header or the plus icon to the right of the filters to add a new filter.

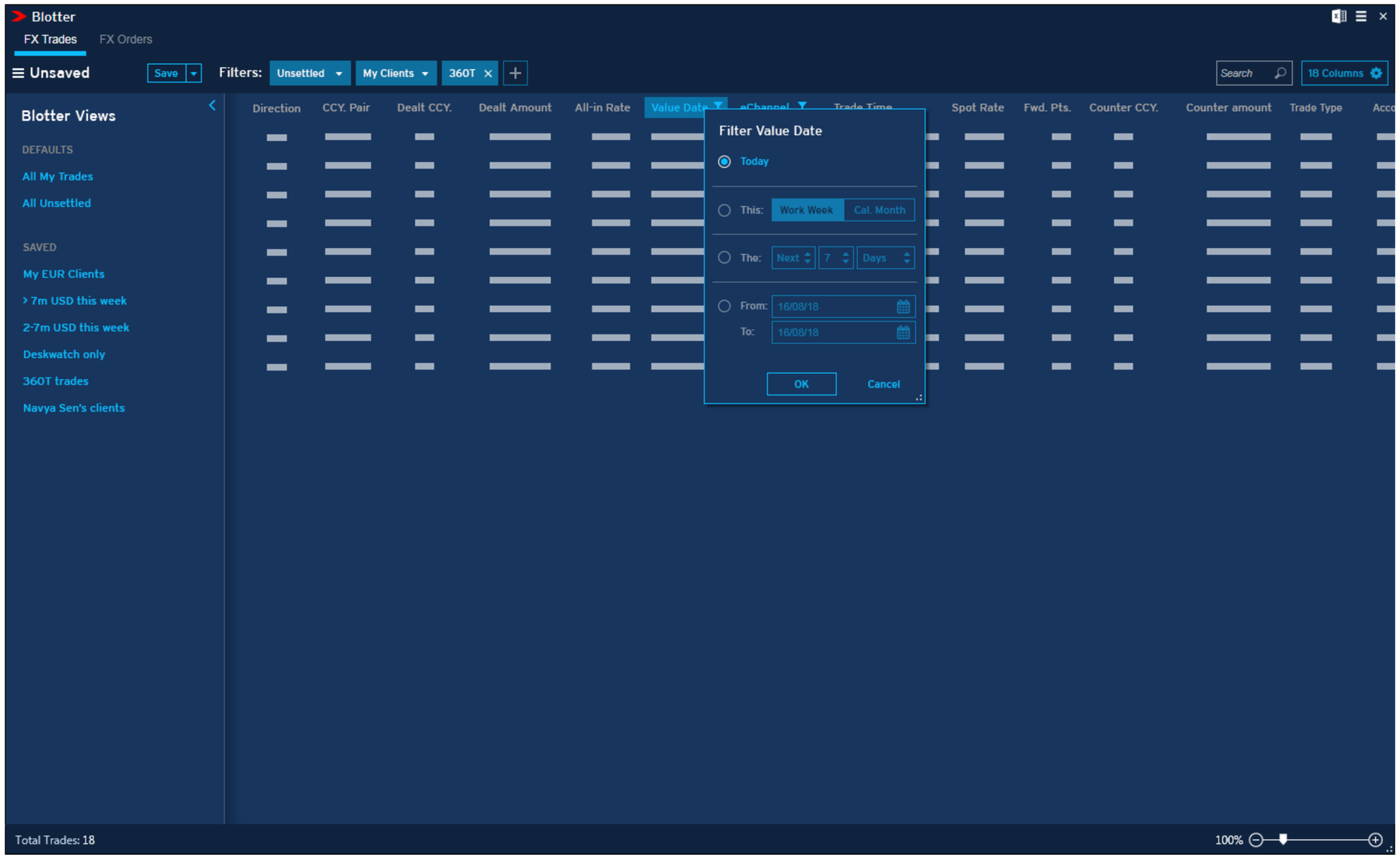
Once a change is made to a default, the view becomes “Unsaved”



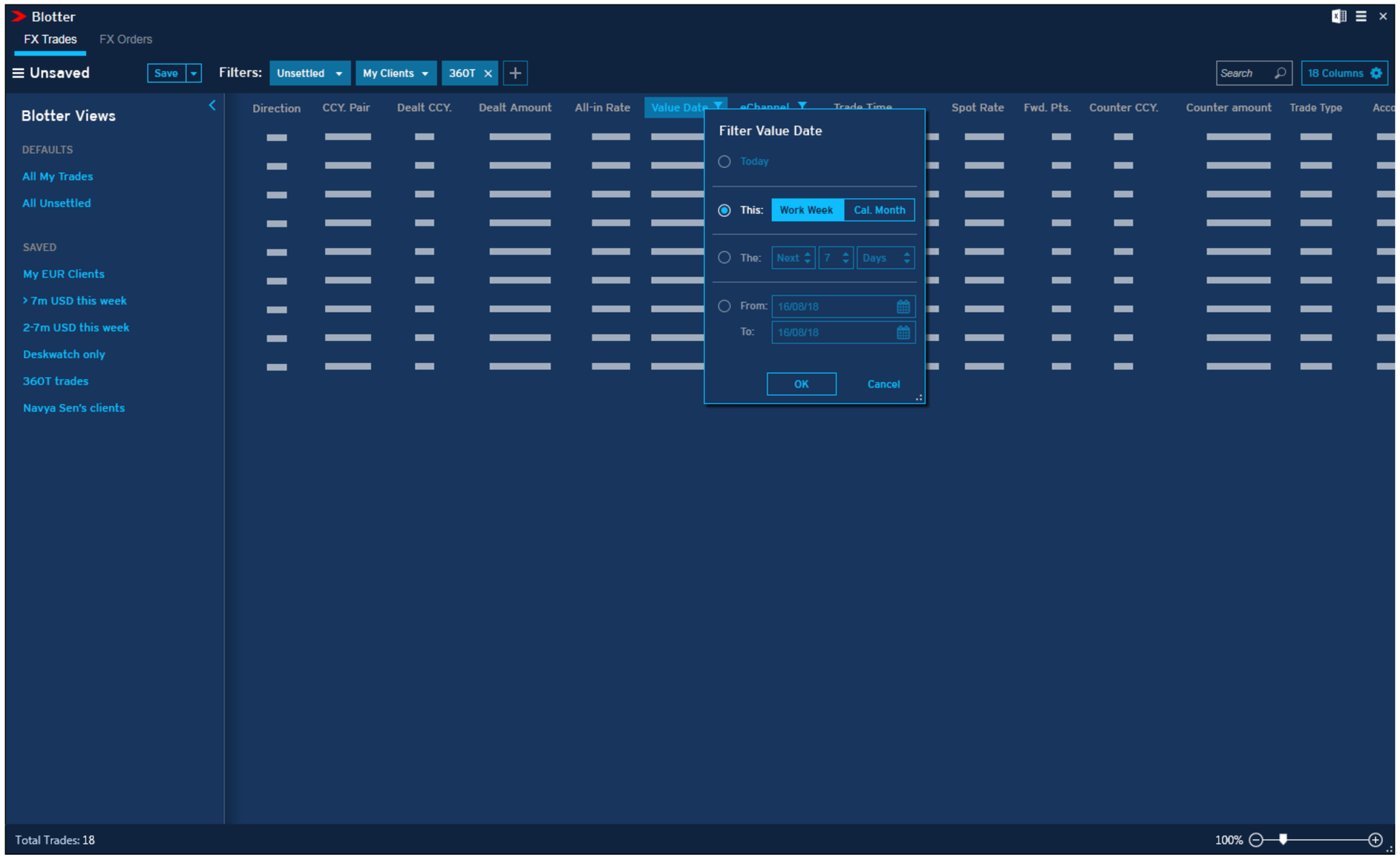
Click column header or the plus icon to the right of the filters to add a new filter.



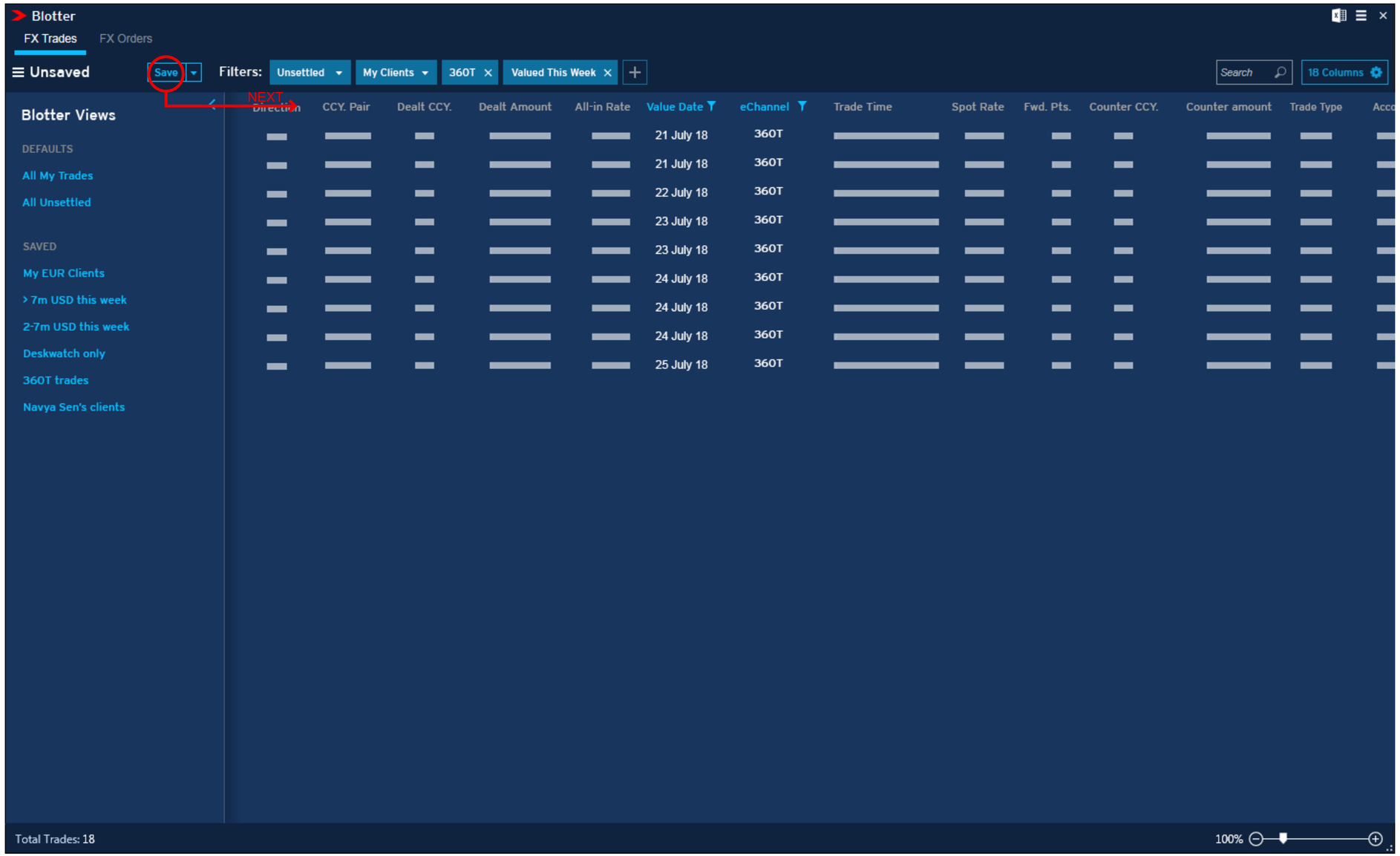
The applied filter now appears as a new pill at the end of the filters row.



Select the filter to only show values for “this week”

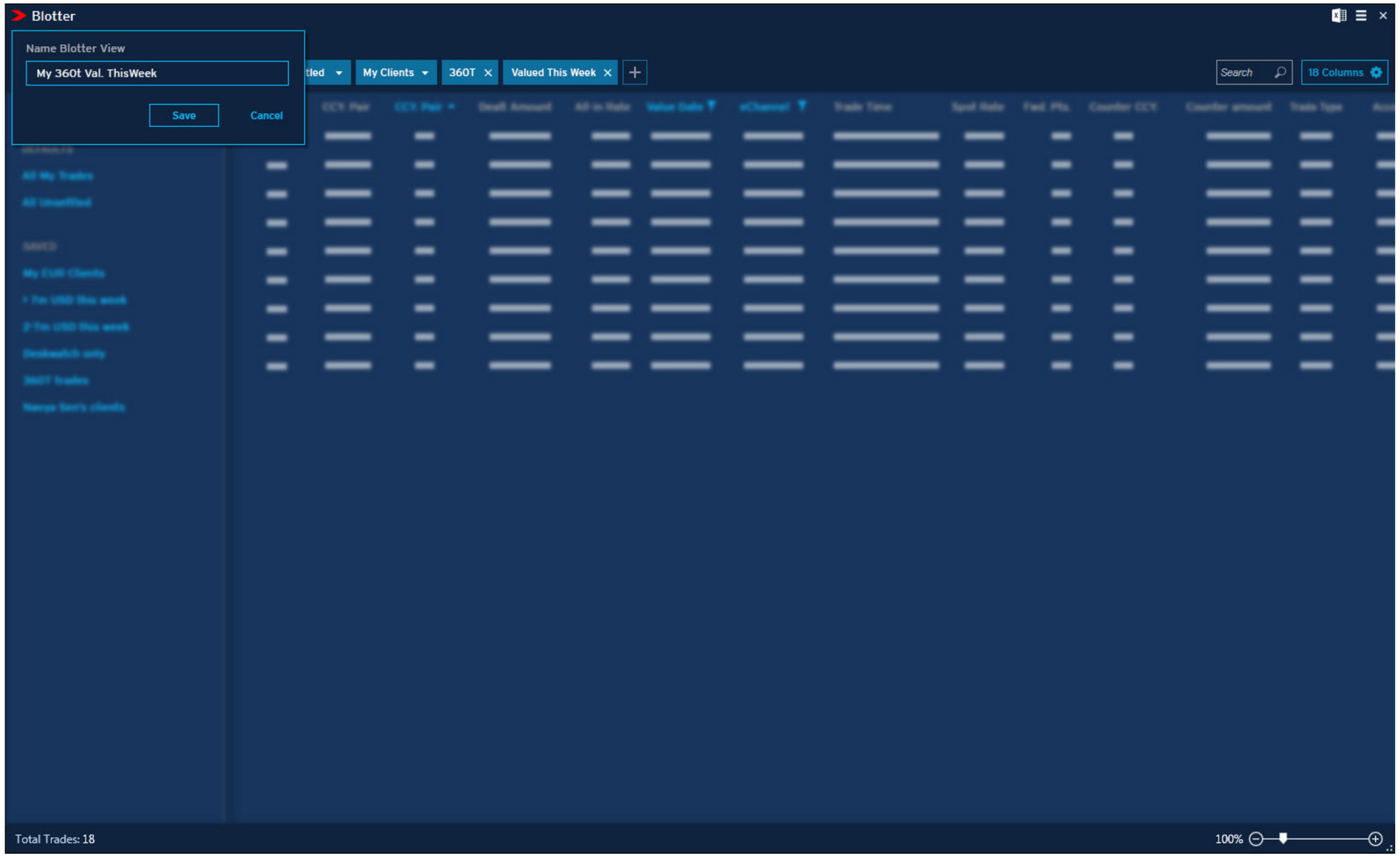


The active filters are shown in the filter bar and as highlighted column headers.

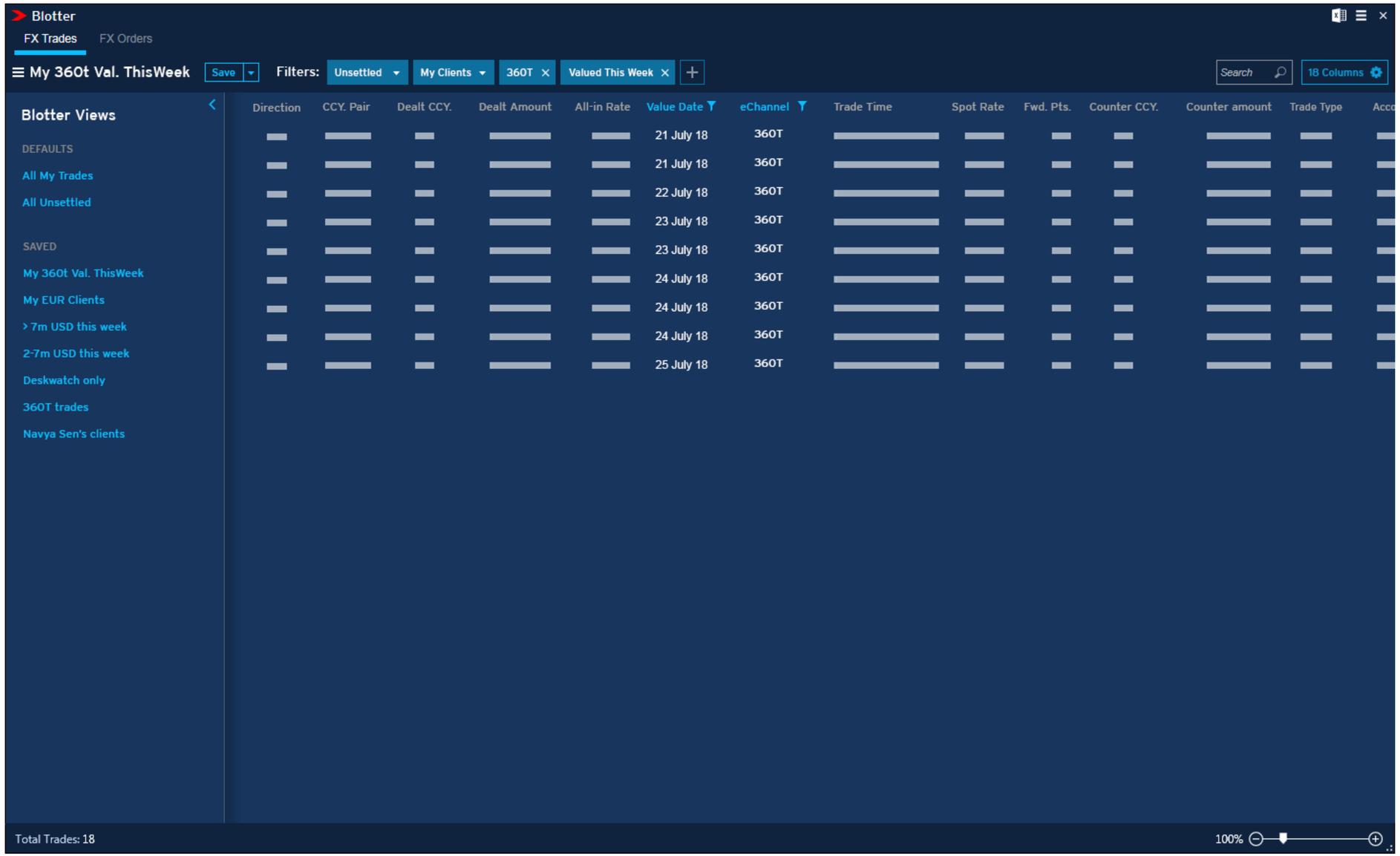


A modal to give the view a name before it can be saved.

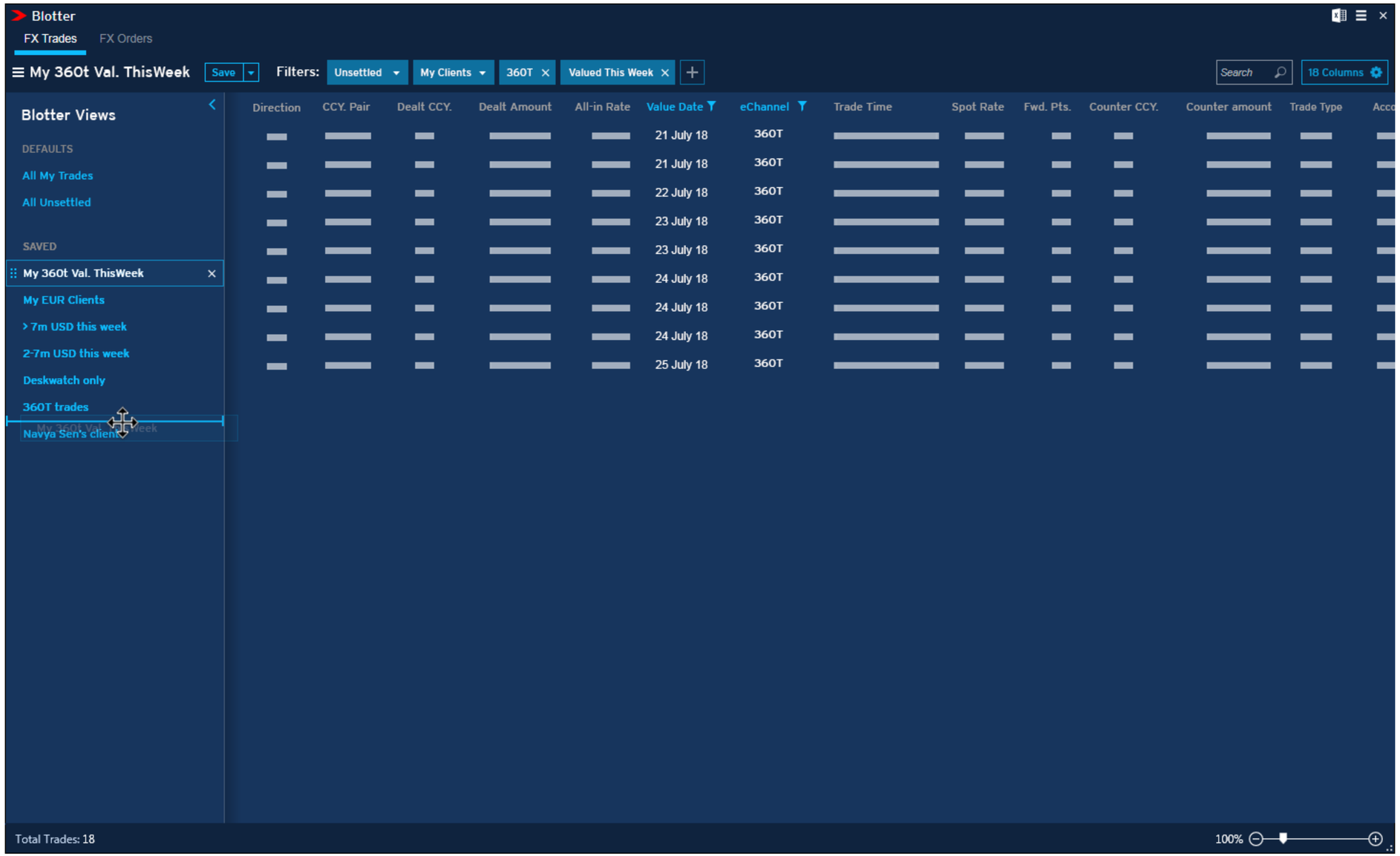
Because the view is unsaved the user is asked to give a name for the new view.



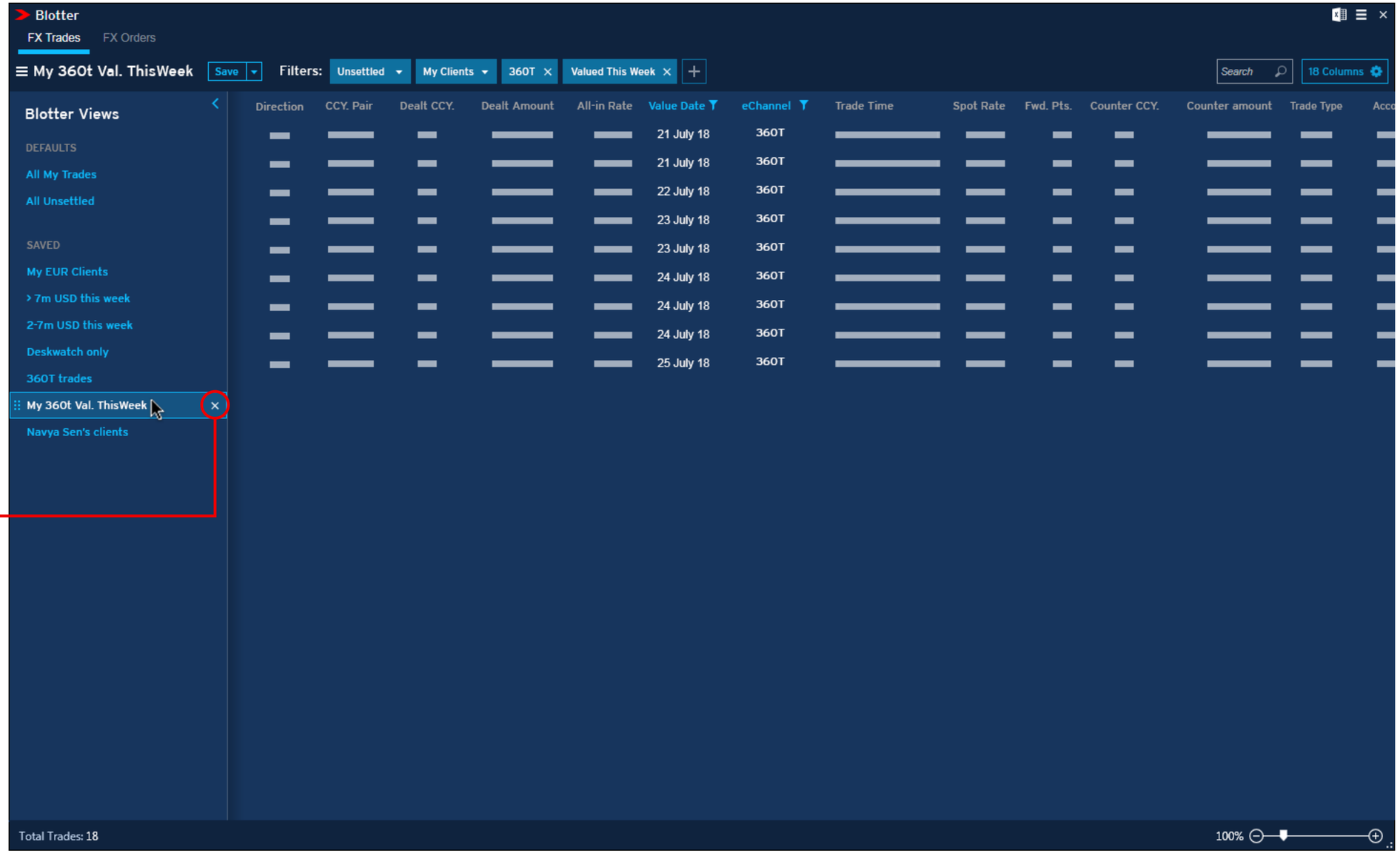
Now the new saved view appears at the top of the list and is currently selected.



Dragging the name of a blotter view to re-order the list.

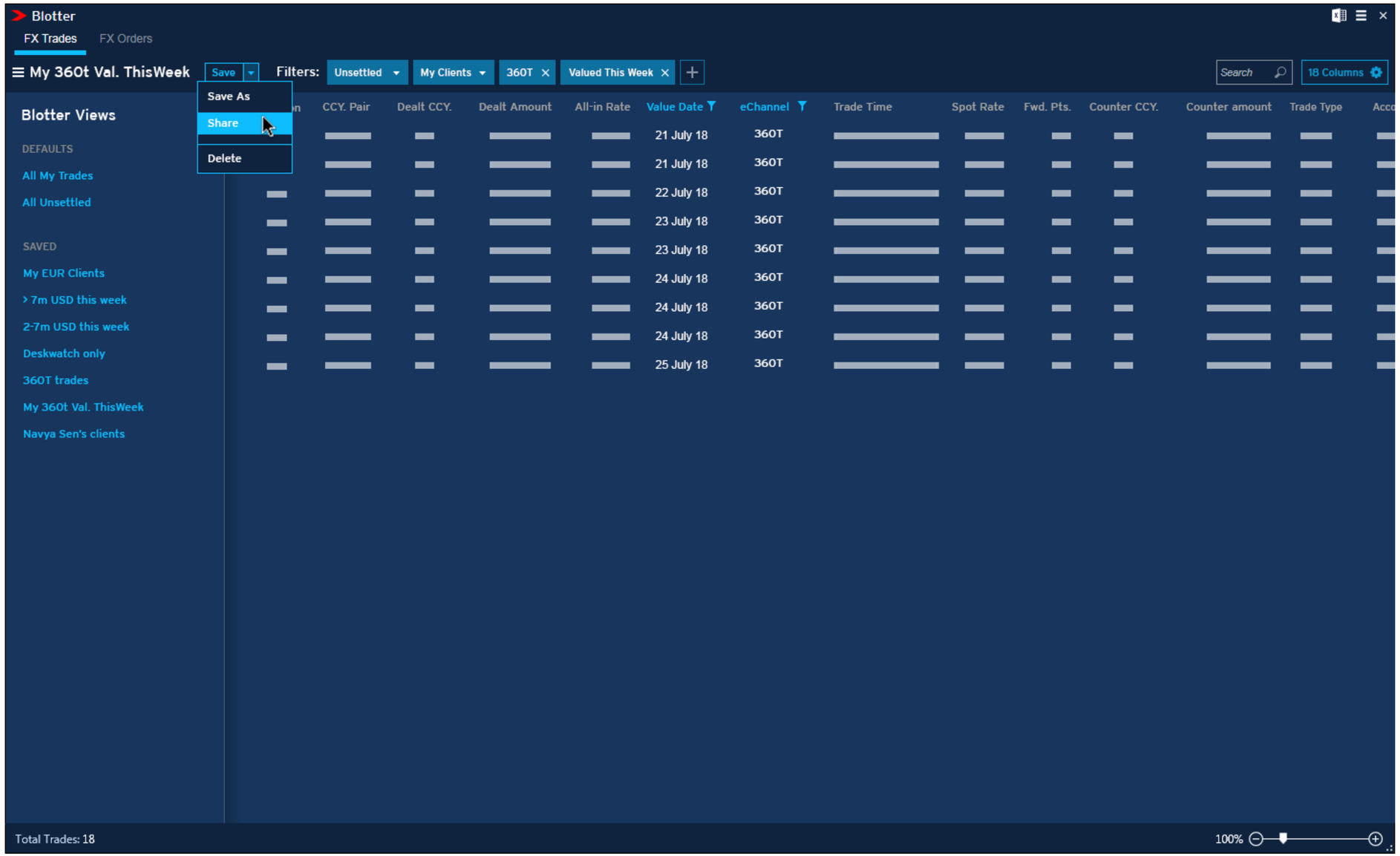


List of Saved views now reordered.



Saved views can be deleted by clicking the cross that appears on hover.

Options under the split button dropdown.



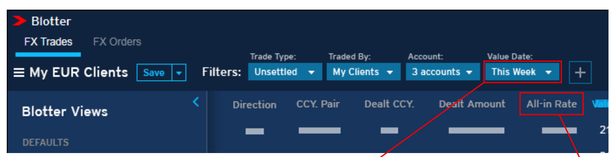
CitiVelocity Trading platform sorting and filtering detailed specifications.

Continuing from the overall interaction framework of the new blotter features, detailed specifications are described below for a standardised set of flexible components to sort and filter any type different types of data.

Sort and Filter framework

Description

Opened by clicking:

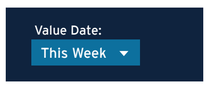


A filter pill

A column header

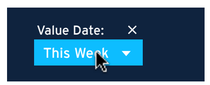
Hover States of pills

Normal



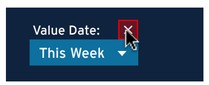
Close Icon hidden to reduce visual clutter. Dropdown background 50% opacity.

Hover



Close Icon becomes visible. Dropdown background 100% opacity.

Hover Close icon



Close Icon gains border and background colour.

Status indication in the pills

Filter Only

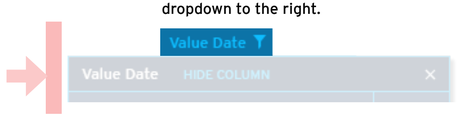
Sort Only

Filter and Sort

Positioning

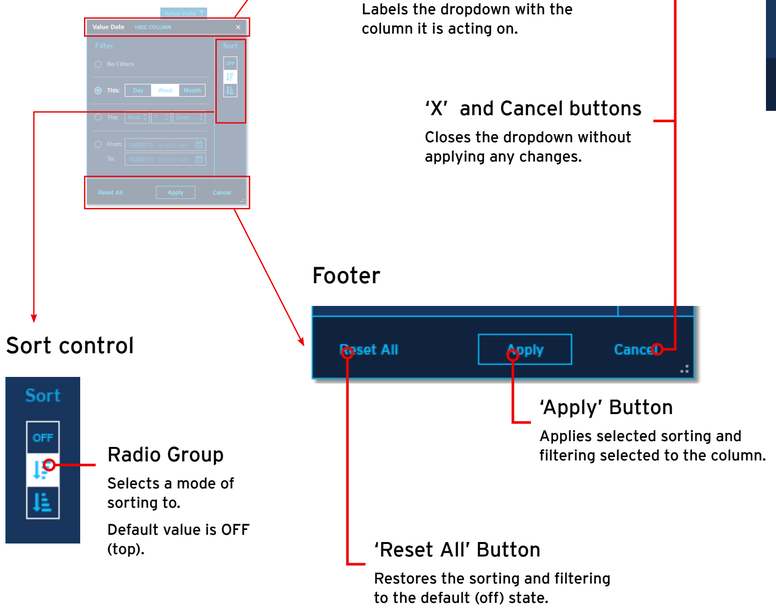
Preffered position is flush right with the element that opend it.

Edge of the screen or window pushes the dropdown to the right.



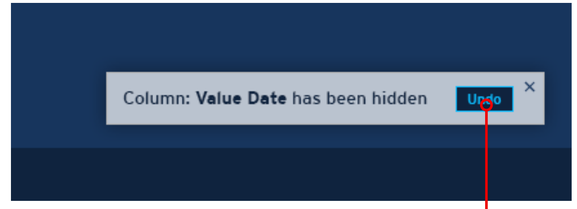
Should not push further than the left edge of the element that opened it.

Common attributes



'Hide Column' button

Hides the column from view then gives the following feedback at the bottom right of the blotter.

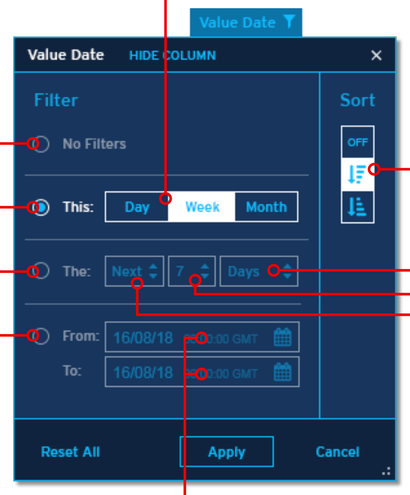


'Undo' button

Shows the column again.

Description

Time and date filter



Radio Group

Selects one of the visible values.

Default value is Day.

Relevant Columns

Date Only

16/08/18

1. Value date
2. Trade Date
3. Entered On
4. Fixing Date

Date Only

16/08/18 00:00:00 GMT

1. Trade time
2. Last Update Time

Radio Group

Selects a row of controls to then apply a filter.

Default value is No Filters (top).

Radio Group

Selects a mode of sorting to.

Default value is OFF (top).

'Next' Toggle/selectbox

Select from:

- Next
- Last

Default value depends on the coloum.

'7' Spinbox

Select a number between 1 and 31

Default value is 7.

'Days' Toggle/selectbox

Select from:

- Days
- Months
- Years

Default value is Days.

Date Picker

Opens a standard Date or Date and Time picker. Time is only shown when relevant.

The default value is the present day/time.

Description

String filter

Search

Filters the items in the list selection box below to those that contain the entered text.

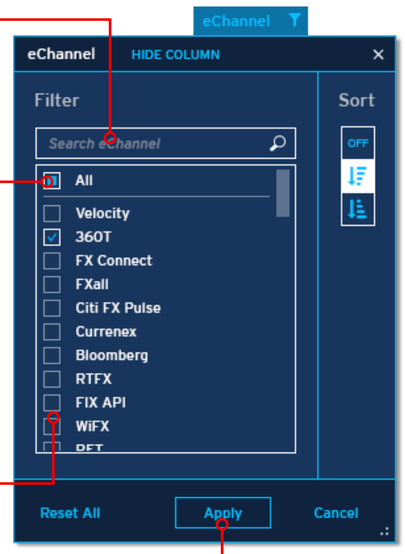
Tri-State checkbox

Is a control for and reflects the status of the rest of the items.

Empty Partial Checked

Item checkbox

A checkbox for each unique item in the column to be filtered.



NOTE: The Apply button is only active if one or more items are checked for filtering.

TEXT ONLY STRING
1. Direction
2. CCY Pair
3. Dealt CCY
4. Counter CCY
5. Trade Type
6. Status
7. Order Sub Type
8. Fund
9. Desk

NUMERIC STRING
10. USI Prefix

ALPHANUMERIC STRING
11. USI ID
12. Original ID
13. Order Id
14. Id
15. Account
16. User
17. Leg ID
18. Comment
19. Counterparty
20. Infinity Cable Block ID
21. Fixing Source
22. Infinity Cable Client Ref.
23. Tenor

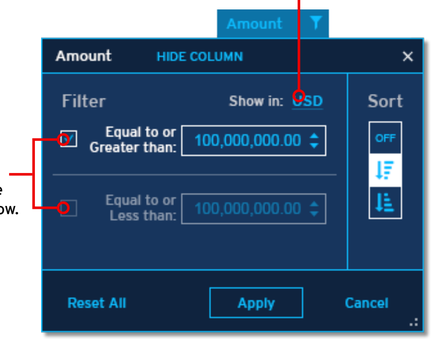
Amount filter

Show in Currency

The amounts are rationalized to a single currency that can be selected.

Checkboxes

Sets the filter rule on or off for the row.



Ordinal Data

FORMATTED NUMBER (ACCOUNTING)
1. Dealt Amount
2. Counter amount
3. Net PV (USD)

FORMATTED NUMBER (RATE)
4. All-in rate
5. Spot rate
6. Fwd pts
7. Executed Rate
8. Last spot rate

FORMATTED NUMBER (%)
9. % Points

INTERVAL
10. Count