## Disingenuous Unified Monetary Bank Site Redsign Project

**Design Summary** 

In this design, I tried to create a page that would allow users to set up alerts for their accounts without training. My goal was that they should be able to understand the page right away. I used several methods to achieve this. First, I tried to bring as much of the information about the alerts and how to create them to the front of the page. My first drafts hid the alert type from the user. In this draft, all alerts and the ability to edit them and the ability to create a new alert is on the My Alerts landing page. This means that users can now see all their alerts at once and makes the path toward editing clearer.

Second, I wanted to be sure I could design the interface to support the user in not making errors. For example, when the user has an edit panel open, the links to edit or create other kinds of accounts are disabled until the user saves or cancels the interaction. This will prevent the user from navigating away without saving and simplifies the interaction. The user can only do that proscribed set until they set their alert or decide they don't want to finish it.

Finally, I highlighted the priority of the save, cancel and remove controls to support the user against error. The save button has a standout color and is in the primary button position. This allows the user to quickly locate it and save the alert. The cancel button is a lighter color and is in the secondary button position so that the user is less likely to click it and undo all their work. I gave the remove control a different shape, mimicking the add alert control, but with a minus symbol. This should allow users to recognize the control, since the user had to have clicked the add button to create the account. The visual distinction from the

other controls in the panel—save and cancel—is important so that the user does not inadvertently click the control.

The use of these techniques should allow users to learn the interface and support them when they return to it after extended periods of time. My Alert Homepage Nathan Petts - HCI 454 A3

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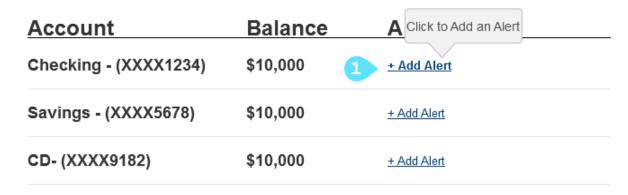
Accounts	
Transfers	
My Alerts	
Pay My Bills	

Account	Balance	Alerts Click to Edit
Checking - (XXXX1234)	\$10,000	• Email me the Current Balance Weekly  • Text me when more than \$500 is deposited  + Add Alert
Savings - (XXXX5678)	\$10,000	1 + Add Alert
CD - (XXXX9182)	\$10,000	• Text me the Current Balance Monthly • Email me 45 days before my CD matures • Email me the Year to Date Interest Monthly

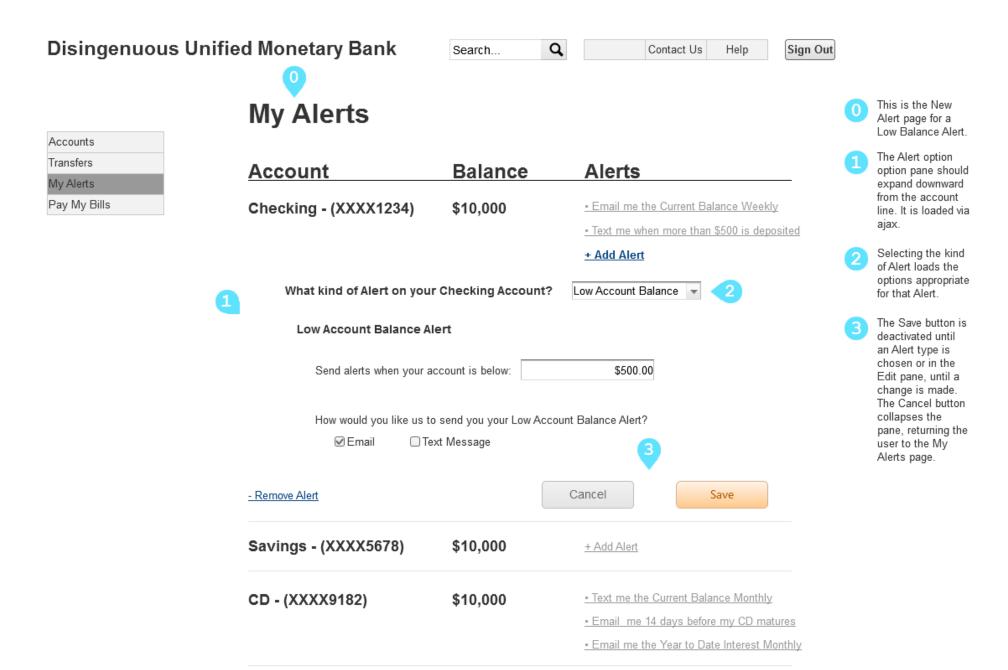
- This is My Alerts page with several alerts set.
- Users add new alerts by clicking Add Alert. This has a prominent hover state to afford clicking and a tooltip for further learnability.
- Users can edit their alerts by clicking on the Alert link text. This also has a hover state and tooltip to encourage the user. Also this action mimics adding an alert, an action the user has already performed.
- Once all three types of Alerts have been set on an account, the Add Alert link disappears. This prevents users from setting too many alerts. This can be changed if user testing shows that people want to set more than one alert of each type.

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- This is the My
  Alerts page that
  the user would see
  the first time they
  visit it.
- Add Alert links
  have a prominent
  hover state and a
  tool tip to guide
  the user in
  creating the alert.



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## My Alerts

This is the Success Message for Adding an Alert.



Account	Balance	Alerts
Checking - (XXXX1234)	\$10,000	• Email me the Current Balance Weekly
Your Low Balance Alert has been	n Set	• Text me when more than \$500 is deposited
	1	Email me when my Balance is below \$500
Savings - (XXXX5678)	\$10,000	+ Add Alert
CD - (XXXX9182)	\$10,000	<ul> <li>Text me the Current Balance Monthly</li> <li>Email me 14 days before my CD matures</li> <li>Email me the Year to Date Interest Monthly</li> </ul>

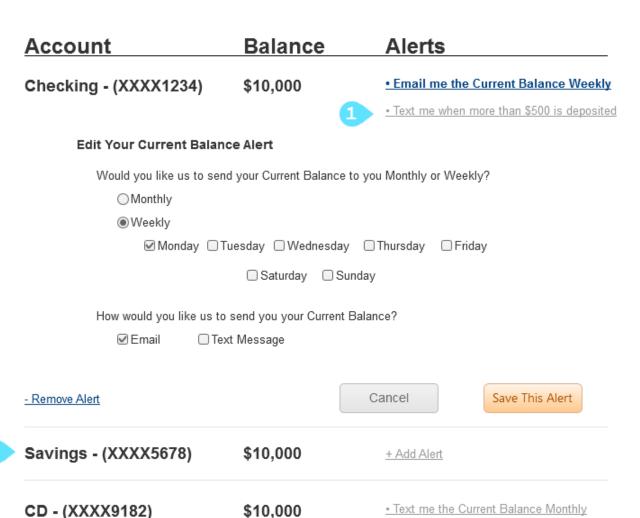
Alerts Appear here when they have been created.

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Email me 14 days before my CD matures
 Email me the Year to Date Interest Monthly



Accounts
Transfers
My Alerts
Pay My Bills



- This is the Edit page for a Current Balance Alert.
- All other alert links are greyed out when an Alert is being edited or created. This prevents the ambiguity of navigating to another Alert when the user has not clicked save or cancel.
- The Alerts
  available for
  Savings Accounts
  are the same as
  for Checking
  Accounts.

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# Accounts Transfers My Alerts Pay My Bills

Account	Balance	Alerts
Checking - (XXXX1234)	\$10,000	• Email me the Current Balance Weekly
Your Current Balance Alert has b	peen Saved	Text me when more than \$500 is deposited     Add Alert
Savings - (XXXX5678)	\$10,000	+ Add Alert
CD - (XXXX9182)	\$10,000	<ul> <li>Text me the Current Balance Monthly</li> <li>Email me 14 days before my CD matures</li> <li>Email me the Year to Date Interest Monthly</li> </ul>



# Accounts Transfers My Alerts Pay My Bills

## My Alerts

Account	Balance	Alerts
Checking - (XXXX1234)	\$10,000	• Email me the Current Balance Weekly
		• Text me when more than \$500 is deposited
Edit Your Large Deposi	t Alert	
Send alerts on deposits	above:	\$500.00

How would you like us to send you your Large Deposit Alert?

☐ Email ☑ Text Message

- Remove Alert		Cancel
Savings - (XXXX5678)	\$10,000	+ Add Alert
CD - (XXXX9182)	\$10,000	<ul> <li>Text me the Current Balance Monthly</li> <li>Email me 14 days before my CD matures</li> <li>Email me the Year to Date Interest Monthly</li> </ul>

CD Edit Current Balance Alert Nathan Petts - HCI 454 A3

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## Accounts Transfers My Alerts Pay My Bills

Account	Balance	Alerts
Checking - (XXXX1234)	\$10,000	• Email me the Current Balance Weekly
J ( ,	. ,	• Text me when more than \$500 is deposited
		+ Add Alert
Savings - (XXXX5678)	\$10,000	+ Add Alert
CD - (XXXX9182)	\$10,000	• Text me the Current Balance Monthly
		• Email me 14 days before my CD matures
		• Email me the Year to Date Interest Monthly
Edit Your Current Bala	ance Alert	
Would you like us to s	end your Current Balanc	e to you Monthly or Weekly?
Monthly		
• Weekly		
☑ Monday □ Tuesday □ Wednesday □ Thursday □ Friday		
	☐ Saturday ☐ S	Sunday
How would you like us	to send you your Currer	nt Balance?
	Text Message	
- Remove Alert		Cancel Save This Alert

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# Accounts Transfers My Alerts Pay My Bills

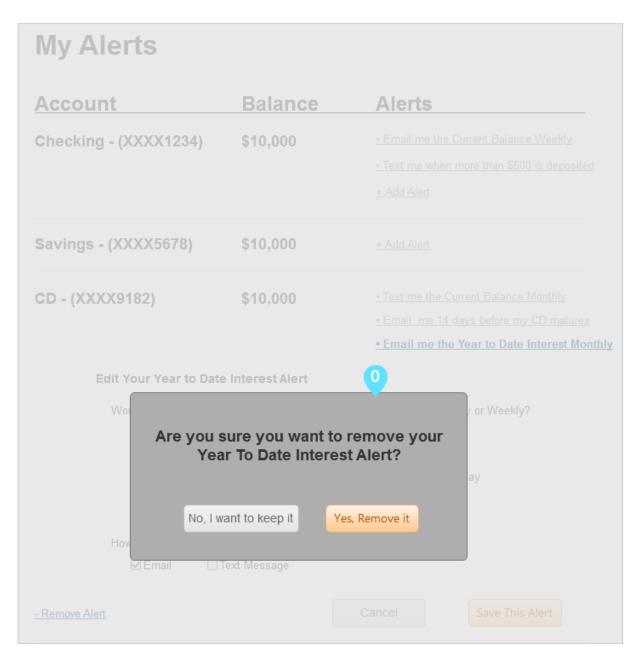
Account	Balance	Alerts	
Checking - (XXXX1234)	\$10,000	• Email me the Current Balance Weekly	
		• Text me when more than \$500 is deposited	
		+ Add Alert	
Savings - (XXXX5678)	\$10,000	+ Add Alert	
CD - (XXXX9182)	\$10,000	• Text me the Current Balance Monthly	
		<ul> <li>Email me 14 days before my CD matures</li> </ul>	
		• Email me the Year to Date Interest Monthly	
Edit Your Maturity Date Alert			
How many days before your CD matures would you like an Alert? 14			
How would you like us to send you your Maturity Date Alert?			
☐ Email 🕢 ¯	Text Message		
- Remove Alert		Cancel Save This Alert	

Remove Alert Pop-up Nathan Petts - HCI 454 A3

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