



UX/UI

MAKE TOMORROW, TODAY



BENEFITS PORTALS

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DESIGN PRINCIPLES FOR BENEFITS PORTALS



BENEFITS PORTALS DESIGN PRINCIPLES

1

SIMPLE, SIMPLE, SIMPLE

Great experiences are simple experiences.

Fewer choices make decisions easier, so limit the distractions by removing obstacles and unnecessary "nice to haves".

Everything in the design should have a purpose – otherwise it is nothing but noise.

2

START WITH THE PROBLEM

Good design should have a purpose – to solve actual, real-world problems either encountered by the user or desired by the business.

To be effective, you must be able to answer "why"?

Zoom out for a better view of the issue or problem.

3

HUMANIZE THE PRODUCT

Focus on the impact of the product or solution as opposed to the product or solution itself.

Identify the problems or issues that the user faces in a way that shows the impact the solution will have on the user.

BENEFITS PORTALS DESIGN PRINCIPLES

4

SMALL THINGS MATTER

Pay absolute attention to detail:

- What are the form defaults?
- What does color usage convey?
- Is the labelling clear and concise?

The aggregation of minor items collectively enhance or degrade the overall experience.

No aspect of the design should be arbitrary or left to chance.

5

FACTS – INSIGHTS - ACTIONS

Present the user with the Facts that are recorded in the system.

Augment those Facts with additional Insight gleaned from data or usage.

Give the user a clear path to their ultimate benefit by providing the Actions available to act on the Insights provided.

6

DESIGN MOBILE FIRST, BUT NOT MOBILE ONLY

Design for the smallest screen first. This will sharpen the focus and limit noise.

As screen sizes expand in real estate, take advantage of that real estate by optimizing the layout, structure, content and experience where appropriate to best support primary goals.

BENEFITS PORTALS DESIGN PRINCIPLES

7

BALANCE INNOVATION WITH REUSABILITY

Know when to get creative with new patterns and when to use existing, commonly-accepted design patterns.

Good designers must navigate the fine line between using accepted patterns and innovating.

Re-use proven solutions to baseline issues and focus design energy on the new problems.

8

CONVERSATION – NOT INTERROGATION

Collecting data should be done in a conversational manner.

Limit the number of questions. Examine each question you want to ask and be critical as to whether you actually need it.

How you ask the question is vital in determining whether the user chooses to respond.

9

TESTING & EMPIRICAL MEASUREMENT

Remember that the user is not like you!

Start each project by understanding the opportunities for solutions to emotional issues encountered by users at various points throughout their journeys.

Conduct user interviews.

Set up frequent user testing sessions.

Institute A/B testing on key areas in the design to better understand actual performance.

BENEFITS PORTAL

TACTICAL DESIGN TENETS



SCROLLING

Scrolling in and of itself is neither good nor bad. Is often faster than paging.

If the content is usable and on point, users will not have an issue scrolling to consume it.

Users can scan a page quicker than a browser can load it.



PROVIDE USER FEEDBACK

Highlight the change when a page doesn't refresh, but something happens.

Provide positive and negative feedback immediately when an action has been attempted.

Let the user know how many steps are remaining.



SEPARATE VIEWS FOR EDIT AND DISPLAY

When presenting data, keep the user's mind set front and center. Is the user expecting to read/scan data or are they expecting to edit it?

Don't provide a single view that mixes both mind sets.



PERFORMANCE IMPACTS DESIGN

Nobody likes to wait — so be aware of the cost of each design element and data set.

Organize content in way that doesn't overload the screen.

BENEFITS PORTAL

TACTICAL DESIGN TENETS (CONTINUED)



PREVENT ERRORS

Presenting immediate feedback to the user in the case of an error is important, but it is more important to prevent the error from happening in the first place.

Thoughtful attention to detail with regard to form design can prevent errors from occurring.

Use appropriate default options where possible.



MINIMIZE CONTENT AS EXPLANATION

If the answer to a design challenge is to "add more text", the design has failed the Simplicity principle.

Designs should be intuitive enough on their own to not have to rely on additional explanatory text.

When text is needed, use good web writing principles as described below.



CONTENT IS DESIGN TOO

Clear language is vital for users to find their way through the site/product in order to capture their goals.

Avoid internal jargon and acronyms. Use plain, everyday words and phrases.

Keep labels concise. Avoid repetitive words or phrases — like "Your Benefits" and "Your Dependents" and "Your Investments" — that require the user to parse through just to identify the differentiators.

Be consistent with regard to labels and language. When things don't match up, the experience can feel disjointed and confusing.

Use active voice

Employ page headers and subheaders to assist with scanability



UNDERSTAND THE COST OF AN ACTION

Make sure to provide ways to undo mistakes users might make.

In order to be most efficient, weigh the cost of an unintended action against the need to "pre-confirm" the action.

For example, when the cost of the action is high — like for a user who is about to cancel a benefits enrollment after they have already entered a lot of data - provide a "pre-confirmation" warning explaining that all the data the user entered will be deleted if they continue.

In a scenario where the cost is much less — like when a user is going to delete an old email address — that same "pre-confirmation" warning would add unnecessary time to complete the action and would cause friction.

BENEFITS PORTALS

MOBILE DESIGN TENETS



RESPONSIVE ACROSS DEVICES

Responsive design is only half the battle — optimize the experiences for each device.

The User Experience must be "responsive" across devices — not just the code.



PROVIDE DISCRETE STEPS

Users on mobile devices are more task oriented and have less time.

Break the tasks into smaller chunks of "completeable" steps.



AUTHENTIC INTEGRITY WITH DESKTOP

Mobile, tablet and desktop experiences don't need to be identical, but they should be aligned.

Re-use key ingredients and patterns across devices — where applicable — in order to create an authentic similarity.



DIFFERENT NAVIGATIONAL MODELS

One single, responsive navigational model across devices might be cool from a development and design standpoint, but the user doesn't care about that.

Optimize the navigational model to the device.



SINGLE COLUMN DISPLAY

Multi-column data grids don't work well on smaller screens.

Think about converting to stacked lists for mobile devices.



LESS TEXT/SHORTER LABEL

Keep the text to a minimum on desktop pays off for mobile as well, since there is less screen real estate.

The superfluous labels of ownership like "My X" and "Your X" really get in the way for mobile design..



SCROLLABLE SCREENS NOT AN ISSUE

As with desktop, the amount of scrolling in and of itself is not a bad thing.

Loading smaller chunks of data via "infinite scrolling" is a better user experience on mobile than forcing the user to page through data.



CONTROLS SHOULD LOOK TAPPABLE

Tappable items should have the appropriate visual affordance.

Think about expanding the active area to account for the smaller screen size.

VISUAL ASSETS FOR BENEFITS PORTALS



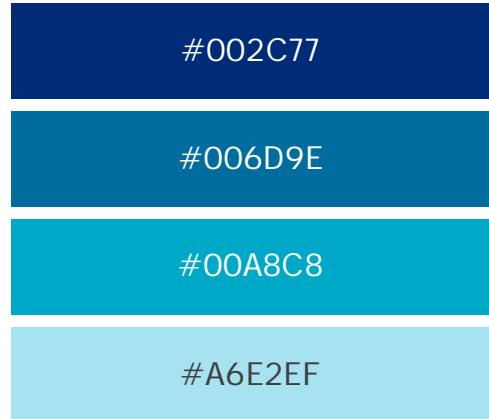
BENEFITS PORTALS

OVERALL COLOR PALETTE

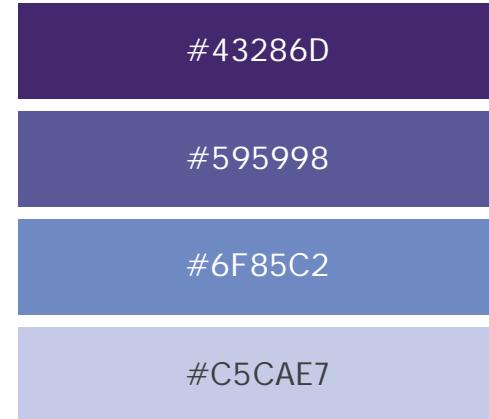
ONYX



SAPPHIRE



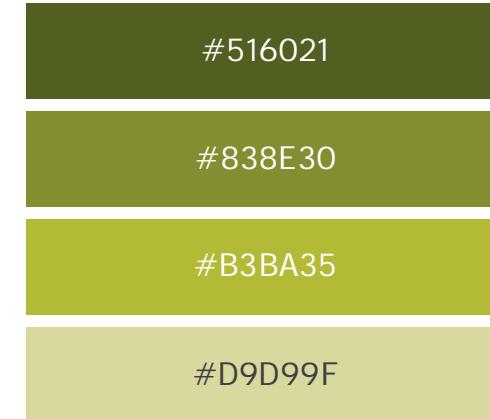
IOLITE



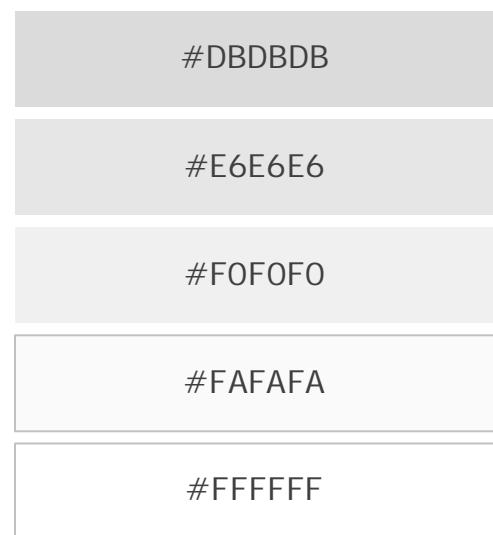
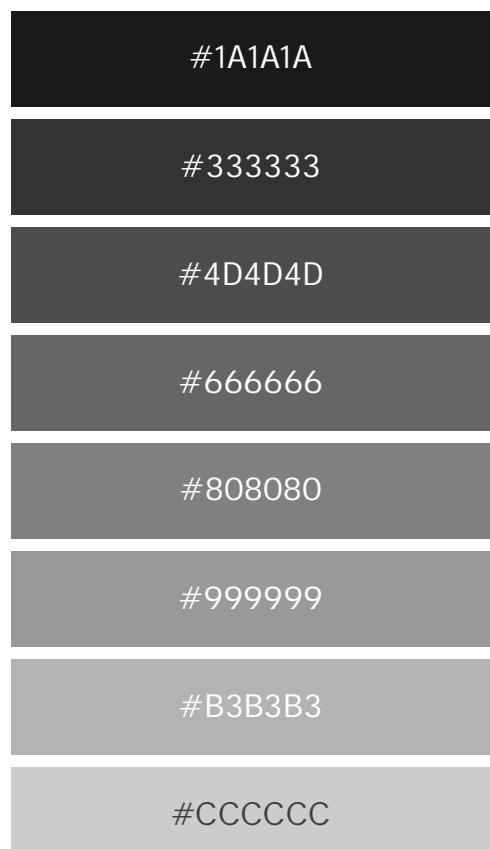
GARNET



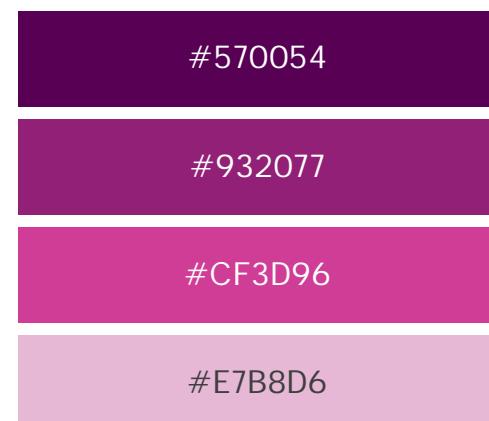
PERIDOT



ONYX EXTENDED



AMETHYST



CITRINE



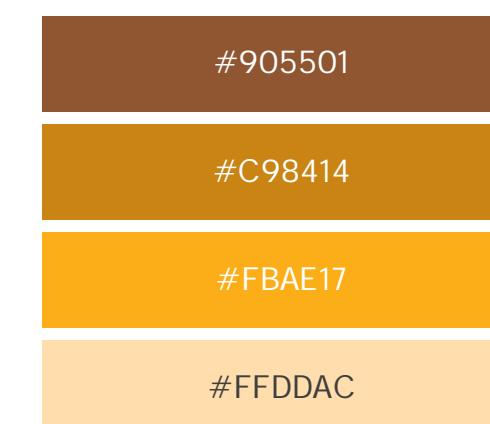
EMERALD



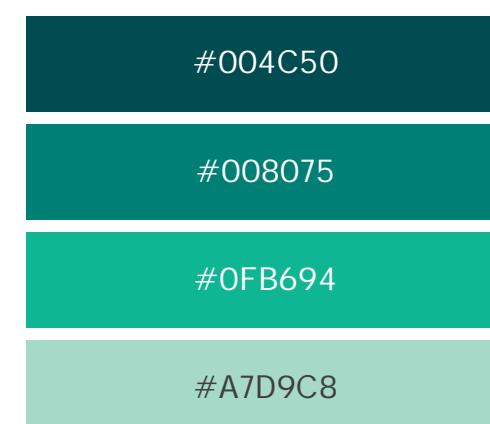
RUBY



TOPAZ



TURQUOISE



BENEFITS PORTALS

PRIMARY COLOR PALETTE

DETAILS

These are the primary colors that should be used with all Employee Portals. They serve as core elements of the design.

The Base & Gray colors should be used for the common black, white and gray color schemes.

The Sapphire family comprises the core branding colors for all Mercer Employee Portals.

The System colors are core colors that represent the Positive, Negative and Attention colors used in messaging to the user.

Each employee portal can be augmented with any of the colors from the overall color palette

ONYX

#000000
#FFFFFF
#404040
#808080
#BFBFBF
#DBDBDB
#E6E6E6

SAPPHIRE

#002C77
#006D9E
#00A8C8
#A6E2EF

SYSTEM

#72BE44
#FCC770
#EF4E45
#A6E2EF

BENEFITS PORTALS

CORE SET OF CHART COLORS

DETAILS

This core set of colors should be used as the primary color wheel for charts.

The full range of colors (on the next page) should only be used when you need to extend the color palette beyond these core 10 colors.

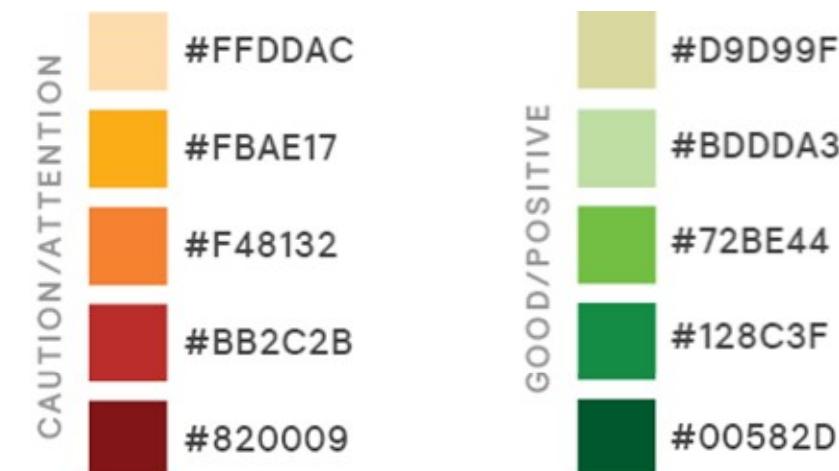


MERCER SPECIFIC COLOR



This color in the blue Sapphire family should only be used to communicate Mercer-specific insight or recommendations.

MERCER SPECIFIC COLOR



This family of colors should be reserved specifically to communicate Positive, Negative and Attention/Caution.

BENEFITS PORTALS

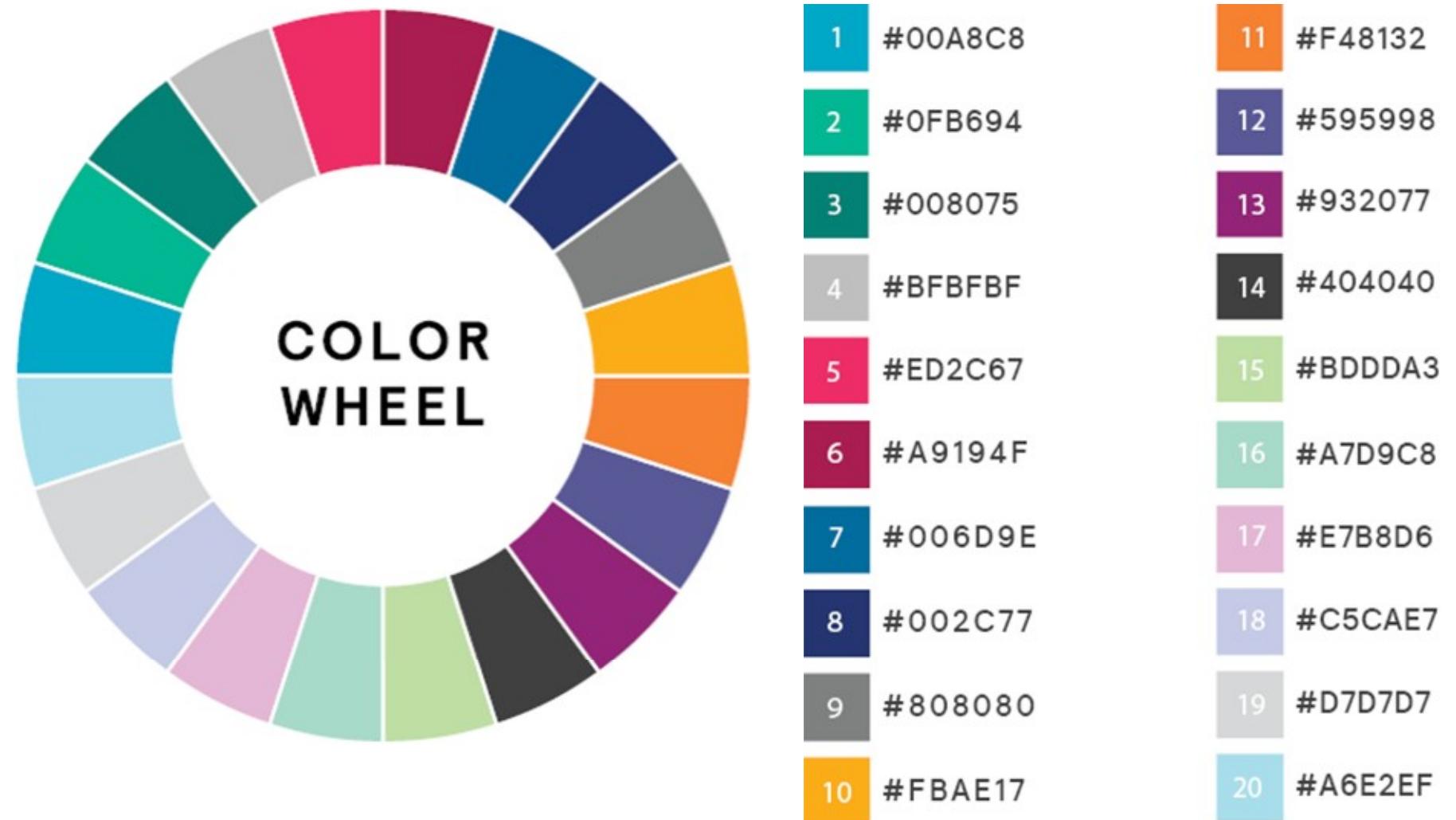
FULL RANGE OF CHART COLORS

DETAILS

The colors presented here represent the full range of colors that are available to be used for all graphs and charts.

The colors are listed in descending order based on recommended priority.

You should use these colors when you want to represent data with a variety of colors



BENEFITS PORTALS

CHART COLORS: MONOCHROMATIC FAMILIES

DETAILS

These families of colors are intended to be used when you want to present data in a monochromatic fashion.

One way to use one of these families is when you want to convey related data in a visual manner. For example, maybe you want to create a graph that shows three levels of insurance coverage for a user.

CITRINE & GARNET



EMERALD & TURQUOISE



SAPPHIRE & IOLITE



RUBY & AMETHYST



#F48132	#BB2C2B
#C55F24	#EF4E45
#8D380A	#F9BEAD
#820009	#FCCFAB

#72BE44	#008075
#128C3F	#0FB694
#00582D	#A7D9C8
#004C50	#BDDDA3

#00A8C8	#595998
#006D9E	#6F85C2
#002C77	#C5CAE7
#43286D	#A6E2EF

#ED2C67	#932077
#A9194F	#CF3D96
#690031	#E7B8D6
#570054	#F7B6BB

BENEFITS PORTALS

CHART EXAMPLES

DONUT CHART

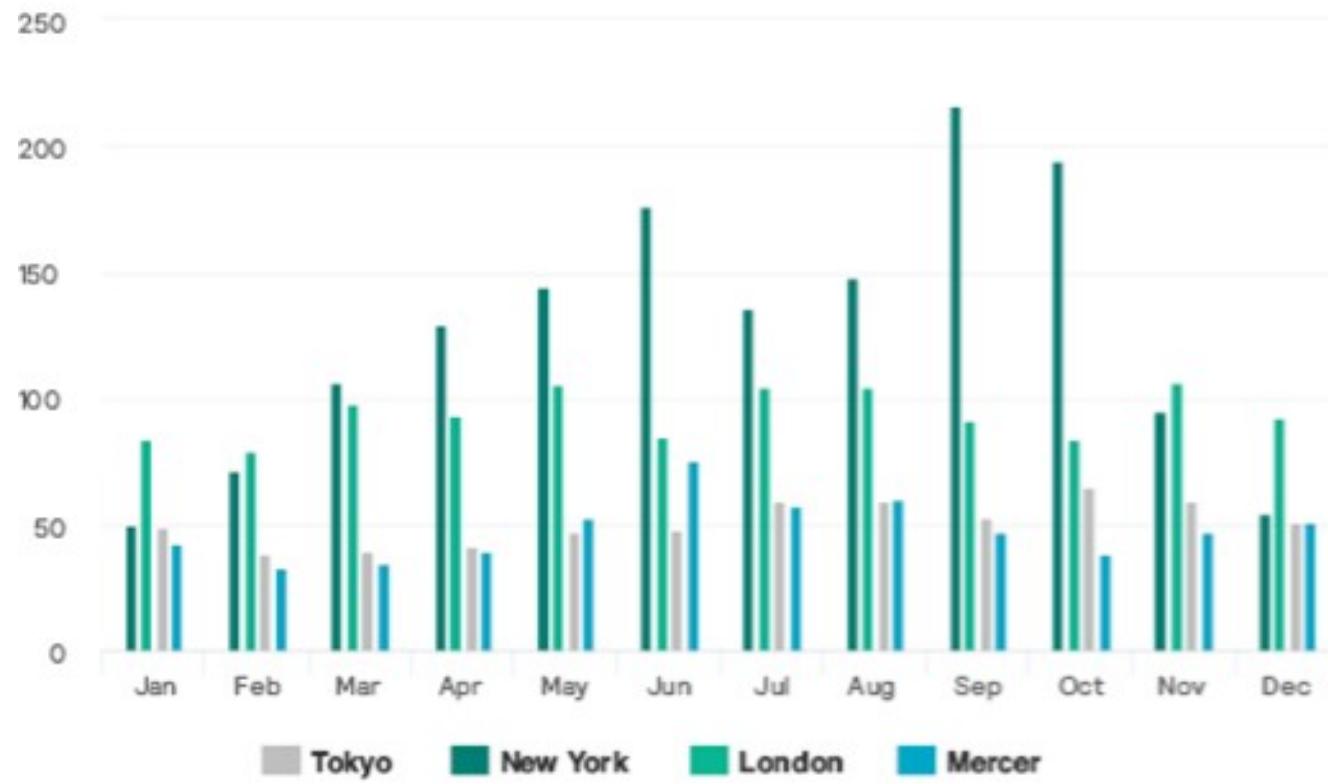


SEMI CIRCLE DONUT

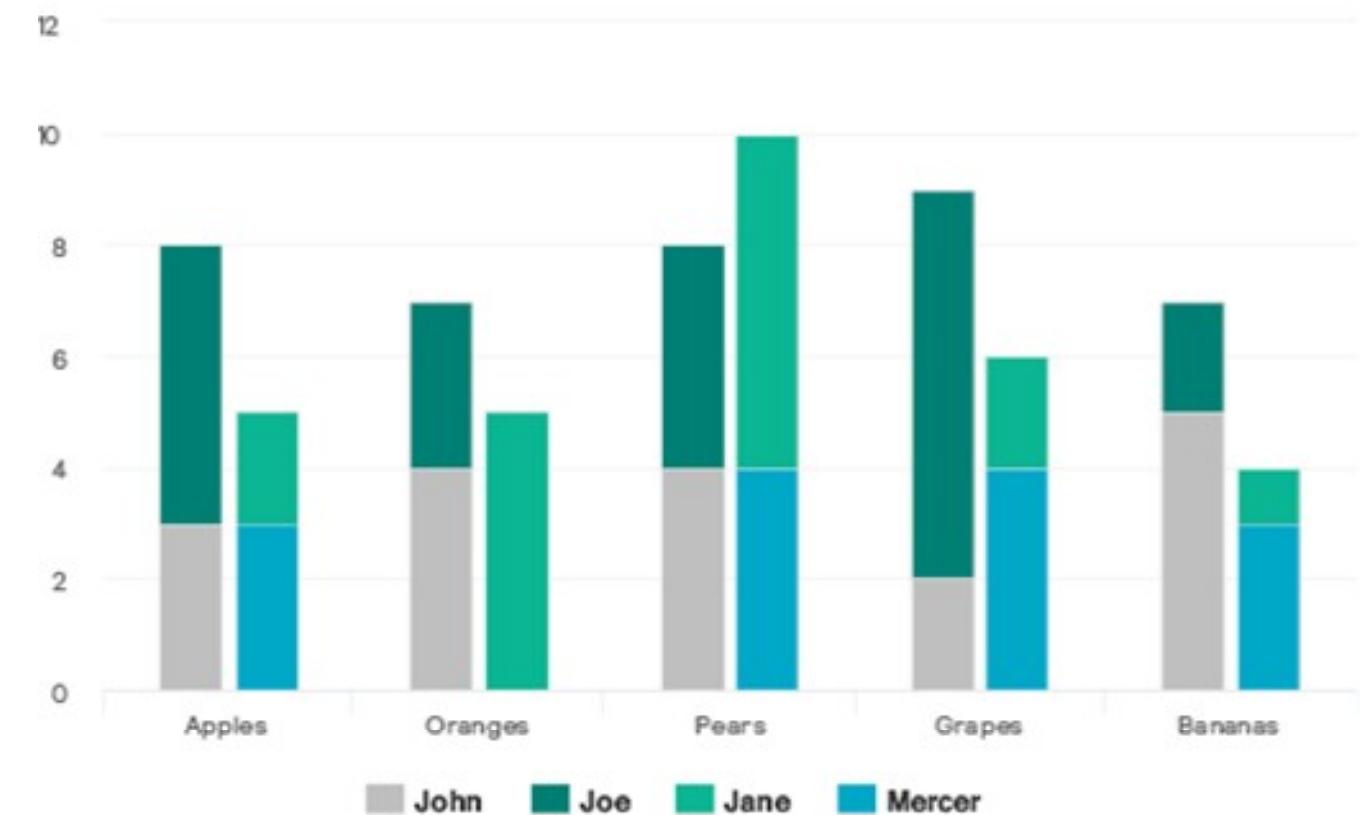


BENEFITS PORTALS CHART EXAMPLES - CONT

BASIC COLUMN



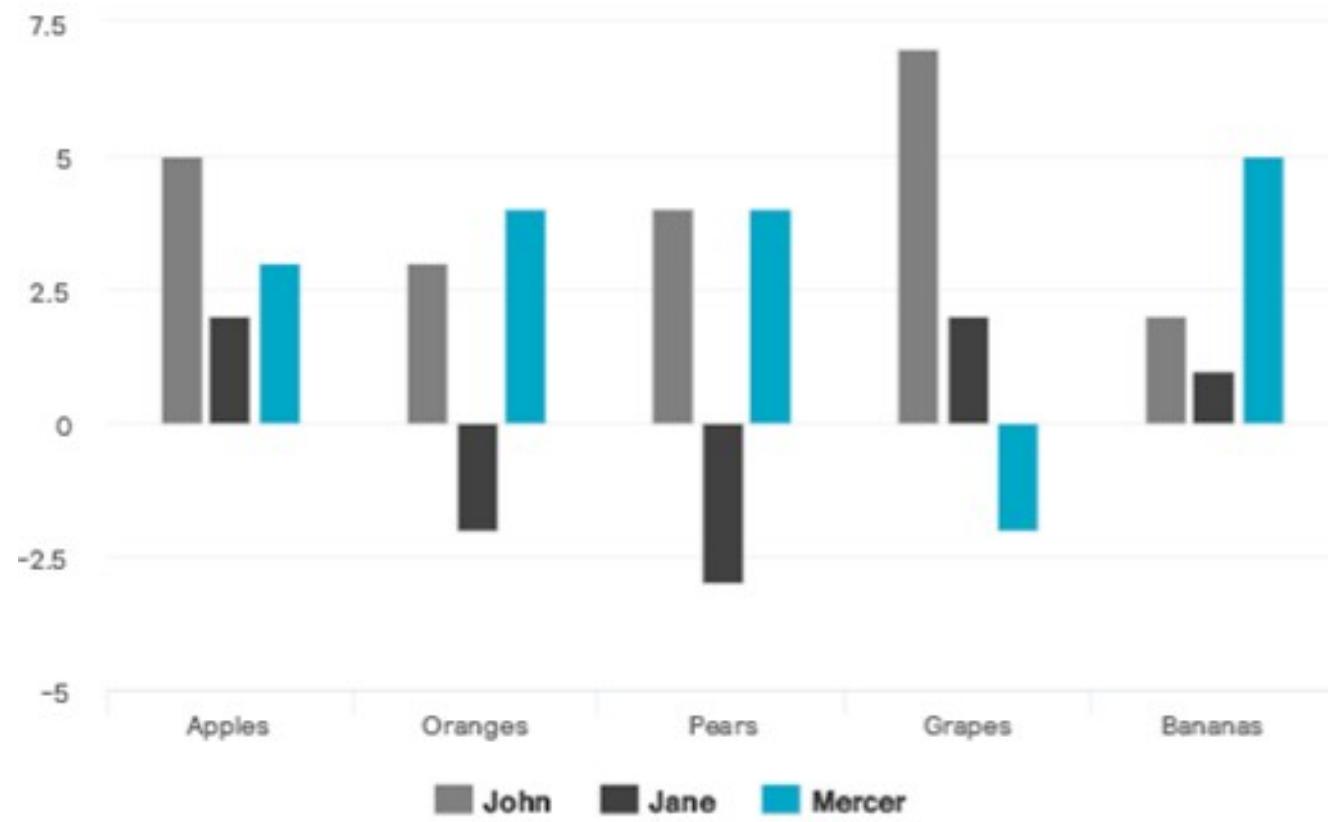
STACKED AND GROUPED COLUMN



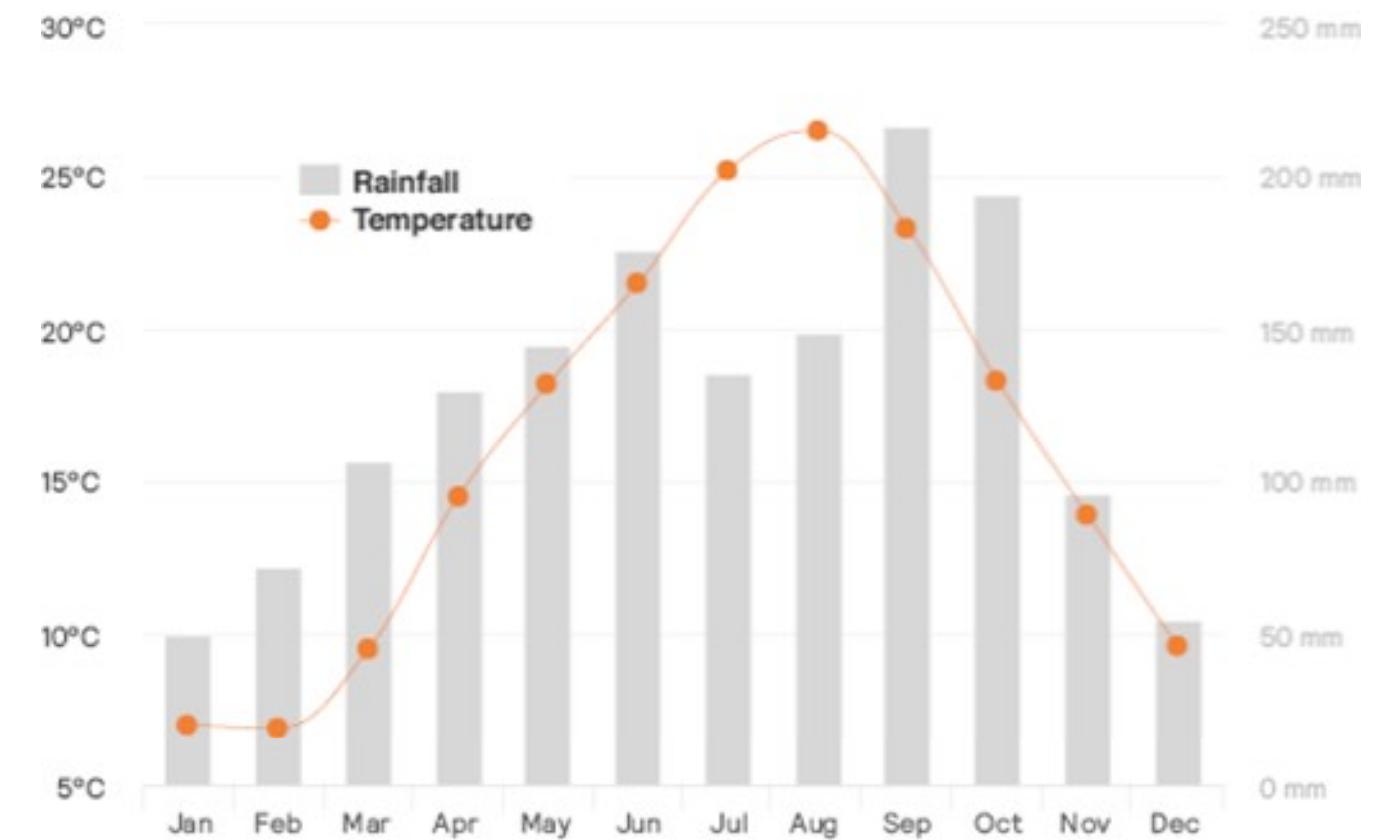
BENEFITS PORTALS

CHART EXAMPLES - CONT

COLUMN WITH NEGATIVE VALUES

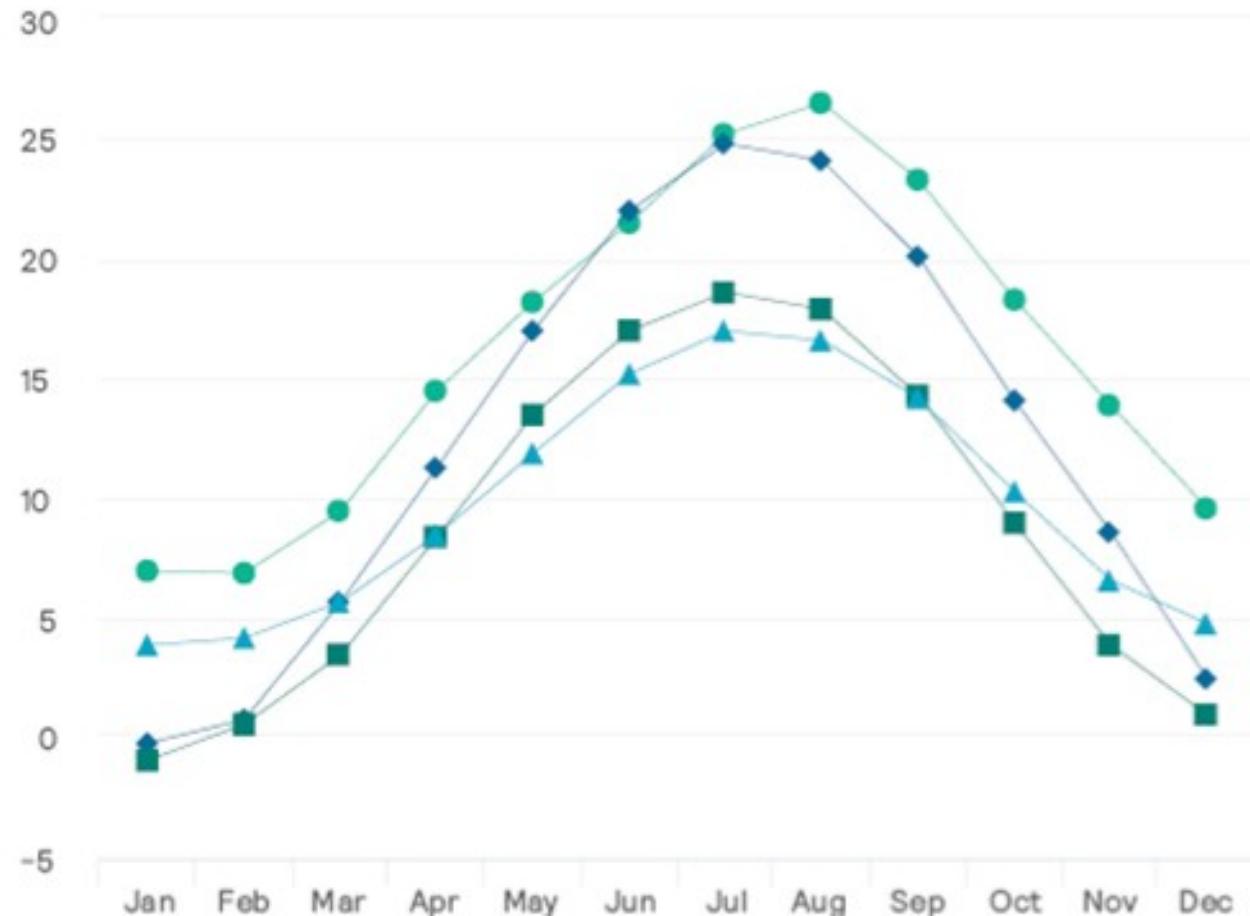


DUAL AXIS, LINE AND COLUMN

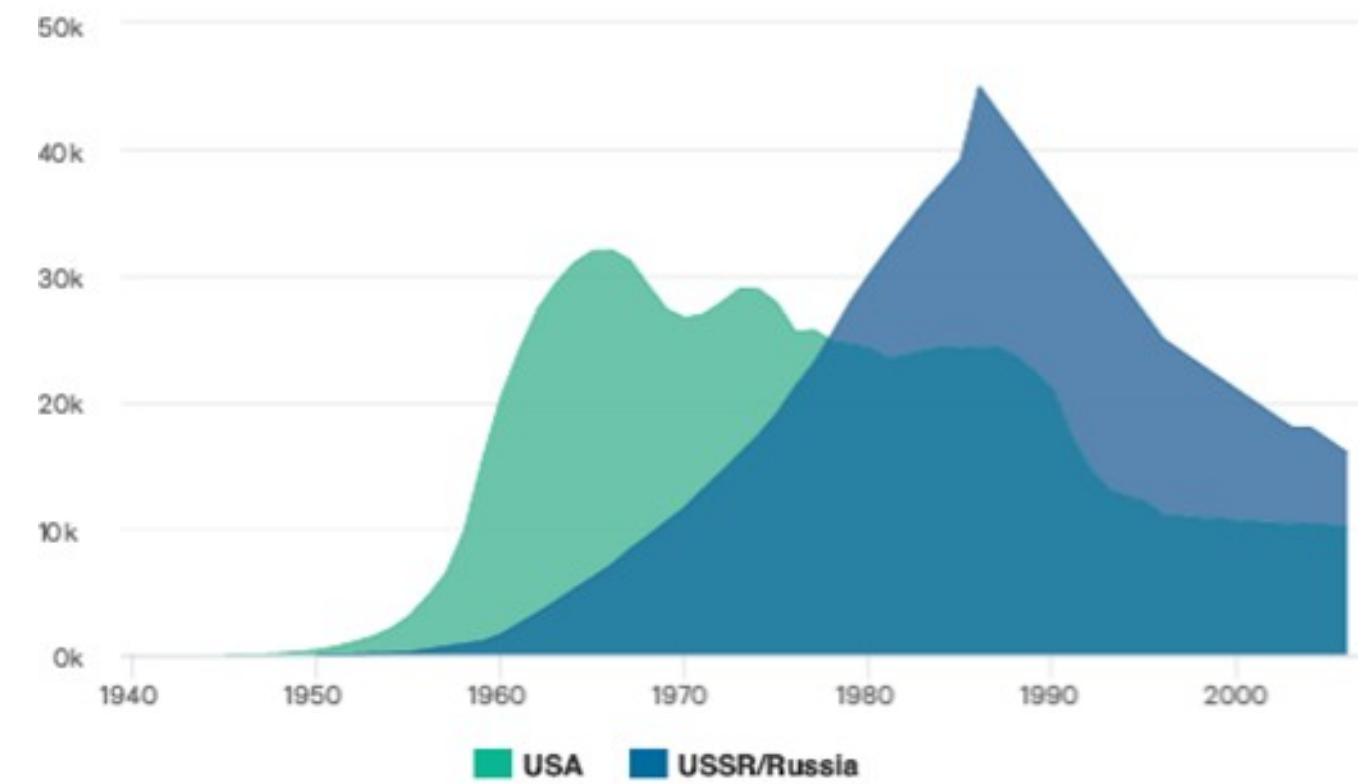


BENEFITS PORTALS CHART EXAMPLES - CONT

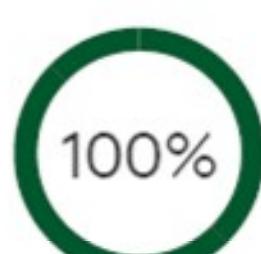
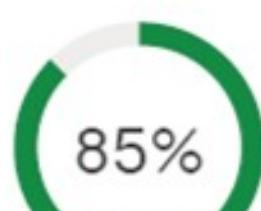
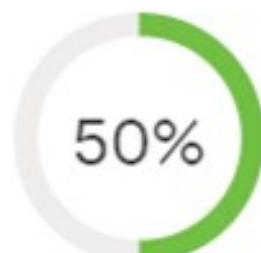
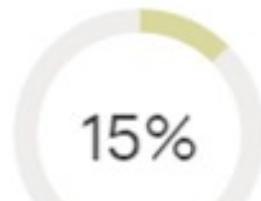
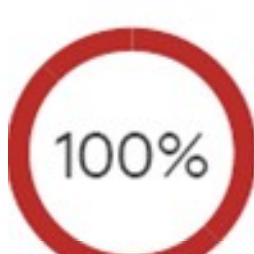
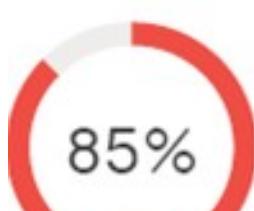
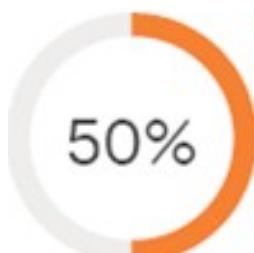
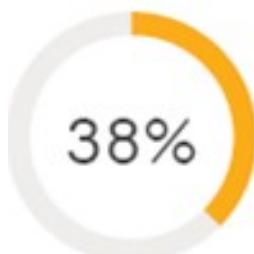
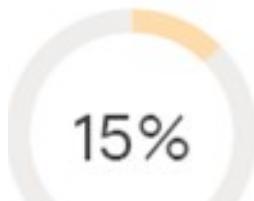
BASIC LINE



BASIC AREA



BENEFITS PORTALS CHART EXAMPLES - CONT



BENEFITS PORTALS

PROXIMA NOVA FONT FAMILY

OVERVIEW

Mercer Benefits Portals will use the Proxima Nova font family. Proxima Nova is a modern typeface with a geometric appearance that has become one of the most popular web fonts within the past few years.

PROXIMA NOVA REGULAR

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z
a b c d e f g h i j k l m n o p q r s t u v w x y z
0 1 2 3 4 5 6 7 8 9 ! @ # \$ % ^ & * (-)

PROXIMA NOVA SEMIBOLD

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z
a b c d e f g h i j k l m n o p q r s t u v w x y z
0 1 2 3 4 5 6 7 8 9 ! @ # \$ % ^ & * (-)

PROXIMA NOVA BOLD

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z
a b c d e f g h i j k l m n o p q r s t u v w x y z
0 1 2 3 4 5 6 7 8 9 ! @ # \$ % ^ & * (-)

PROXIMA NOVA REGULAR ITALIC

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z
a b c d e f g h i j k l m n o p q r s t u v w x y z
0 1 2 3 4 5 6 7 8 9 ! @ # \$ % ^ & * (-)

PROXIMA NOVA THIN

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z
a b c d e f g h i j k l m n o p q r s t u v w x y z
0 1 2 3 4 5 6 7 8 9 ! @ # \$ % ^ & * (-)

BENEFITS PORTALS

TYPOGRAPHICAL HIERARCHY - HEADERS

OVERVIEW

We have listed the core typographical hierarchy that serves as the core of the typography for all Benefits Portals.

This list is not meant to be exhaustive; you should feel free to augment this list as necessary as long as the additions fit into this overall core structure.

EXAMPLE

H1 HEADER

Lorem ipsum dolor sit amet, consectetur adipisicing elit.
Ordered list item one. Lorem ipsum dolor sit amet,
consectetur adipisicing elit.

H2 HEADER

Lorem ipsum dolor sit amet, consectetur adipisicing elit.
Ordered list item one. Lorem ipsum dolor sit amet,
consectetur adipisicing elit.

H3 HEADER

Lorem ipsum dolor sit amet, consectetur adipisicing elit.
Ordered list item one. Lorem ipsum dolor sit amet,
consectetur adipisicing elit.

H4 HEADER

Lorem ipsum dolor sit amet, consectetur adipisicing elit.
Ordered list item one. Lorem ipsum dolor sit amet,
consectetur adipisicing elit.

H5 HEADER

Lorem ipsum dolor sit amet, consectetur adipisicing elit.
Ordered list item one. Lorem ipsum dolor sit amet,
consectetur adipisicing elit.

H6 HEADER

Lorem ipsum dolor sit amet, consectetur adipisicing elit.
Ordered list item one. Lorem ipsum dolor sit amet,
consectetur adipisicing elit.

ATTRIBUTES

USAGE:	Page Title
FONT:	Proxima Nova Semibold *UPPERCASE
SIZE:	38px
LETTER SPACING:	0.215em
CHARACTER TRACKING IN PS:	180
DECORATION:	None
COLOR DEFAULT:	#000000 / Black
USAGE:	Header / Titles
FONT:	Proxima Nova Regular *UPPERCASE
SIZE:	32px
LETTER SPACING:	0.185em
CHARACTER TRACKING IN PS:	170
DECORATION:	None
COLOR DEFAULT:	#000000 / Black
USAGE:	Header / Titles
FONT:	Proxima Nova Regular *UPPERCASE
SIZE:	26px
LETTER SPACING:	0.170em
CHARACTER TRACKING IN PS:	160
DECORATION:	None
COLOR DEFAULT:	#000000 / Black
USAGE:	Sub-Header
FONT:	Proxima Nova Semibold *UPPERCASE
SIZE:	22px
LETTER SPACING:	0.170em
CHARACTER TRACKING IN PS:	180
DECORATION:	None
COLOR DEFAULT:	#000000 / Black
USAGE:	Sub-Header
FONT:	Proxima Nova Regular *UPPERCASE
SIZE:	18px
LETTER SPACING:	0.185em
CHARACTER TRACKING IN PS:	180
DECORATION:	None
COLOR DEFAULT:	#000000 / Black
USAGE:	Sub-Header
FONT:	Proxima Nova Semibold *UPPERCASE
SIZE:	14px
LETTER SPACING:	0.190em
CHARACTER TRACKING IN PS:	180
DECORATION:	None
COLOR DEFAULT:	#000000 / Black

BENEFITS PORTALS

TYPOGRAPHICAL HIERARCHY – ADDITIONAL CORE ELEMENTS

DETAILS

This page presents some additional examples of the core typographical hierarchy for all Benefits Portals.

- Body Content – used as the base font for all body content.
- Body Content Links – used for all links within the body content.
- Messaging Content – used for all content included in Messaging Containers.
- Block Quote – some page templates will incorporate pull quotes in the middle of two blocks of content. This style can be used in that case.
- Tiny Text – This style is used for any tooltip information or footnotes on the page.
- Copyright – this lighter style should be used when copyright information needs to be displayed.

Typically this is used in the footer of the site.

ATTRIBUTES

Base Font

USAGE: Body Content
FONT: Proxima Nova Regular
SIZE: 16px
LETTER SPACING: 1.32em
CHARACTER TRACKING IN PS: 180
DECORATION: None
COLOR DEFAULT: #404040 / Dark Gray

Default Link

USAGE: Body Content Links
FONT: Proxima Nova Regular
SIZE: 16px
LETTER SPACING: 1.32em
DECORATION: Underline on Hover Only
COLOR DEFAULT: #006D9E / Blue Sapphire Dark

Messaging Content

USAGE: Attention Containers Messages
FONT: Proxima Nova Regular
SIZE: 14px
LETTER SPACING: 1.45em
DECORATION: None
COLOR DEFAULT: #000000 / Black (or as defined)

Block Quote

USAGE: Pull Quotes
FONT: Proxima Nova Thin
FONT WEIGHT: 600
SIZE: 22px
LINE-HEIGHT: 1.32em
DECORATION: None
COLOR DEFAULT: #00A8C8 / Blue Sapphire Mid

Tiny Text

USAGE: Footnotes and Tooltips
FONT: Proxima Nova Regular
SIZE: 12px
LINE HEIGHT: 1.45
DECORATION: None
COLOR DEFAULT: #808080 / Gray

COPYRIGHT

USAGE: Copyright Information
FONT: Proxima Nova Regular *UPPERCASE
SIZE: 12px
LETTER SPACING: 0.215em
CHARACTER TRACKING IN PS: 180
DECORATION: None
COLOR DEFAULT: #808080 / Gray

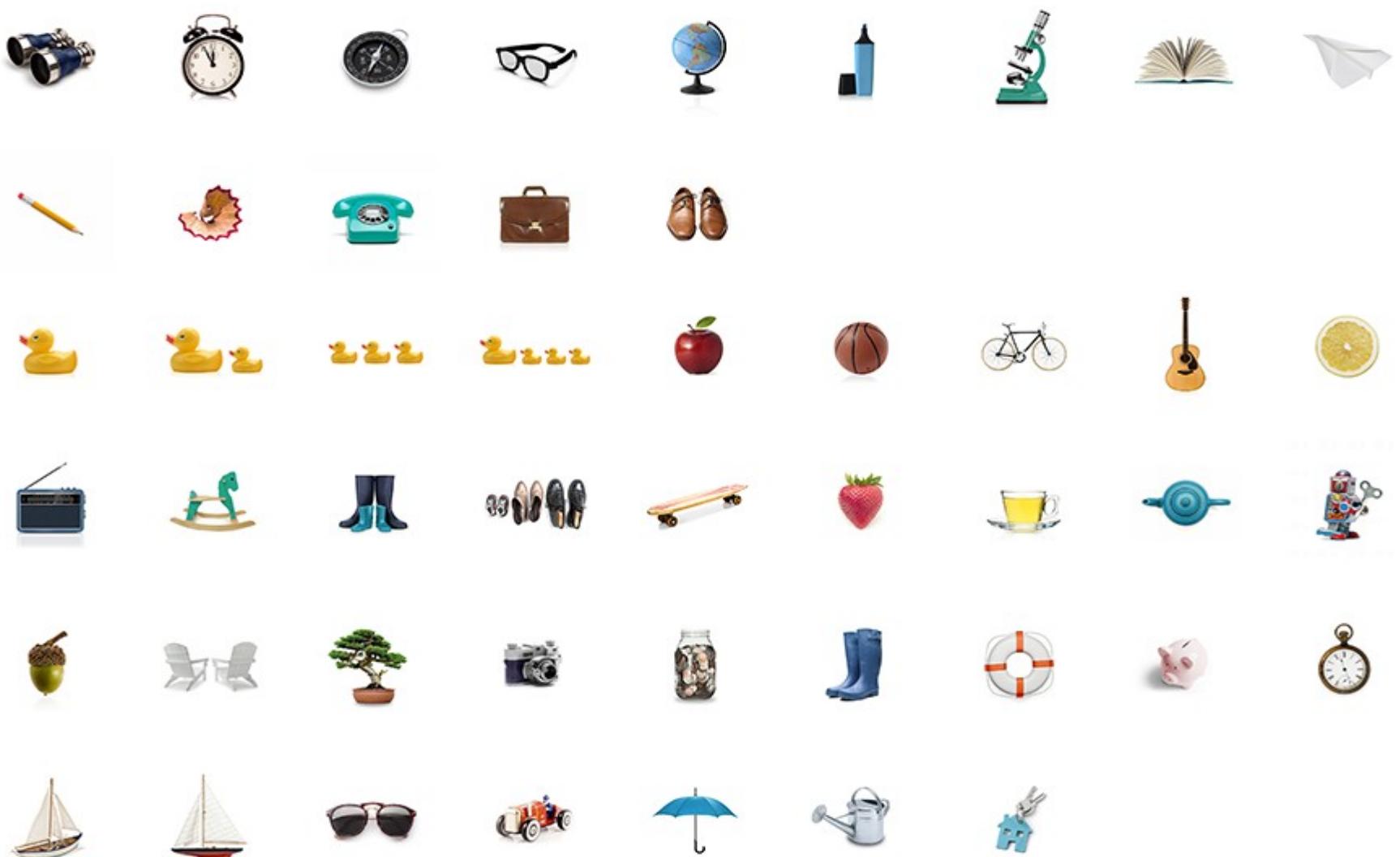
BENEFITS PORTALS

PHOTO ICONS

OVERVIEW

Photo Icons are one option we have to display certain sections of an application. Perhaps there are 8 benefits that need some differentiation. Photo Icons are a perfect way to give each benefit their own unique flavor and are easily discernible.

EXAMPLES



BENEFITS PORTALS

VECTOR ICONS

OVERVIEW

Mercer has adopted a clean vector graphic look and feel for displaying themes or concepts to their users. Vector graphics can be resized easily without losing any image quality, so this set of colorful images is extremely versatile.

CAREER



HEALTH



WEALTH



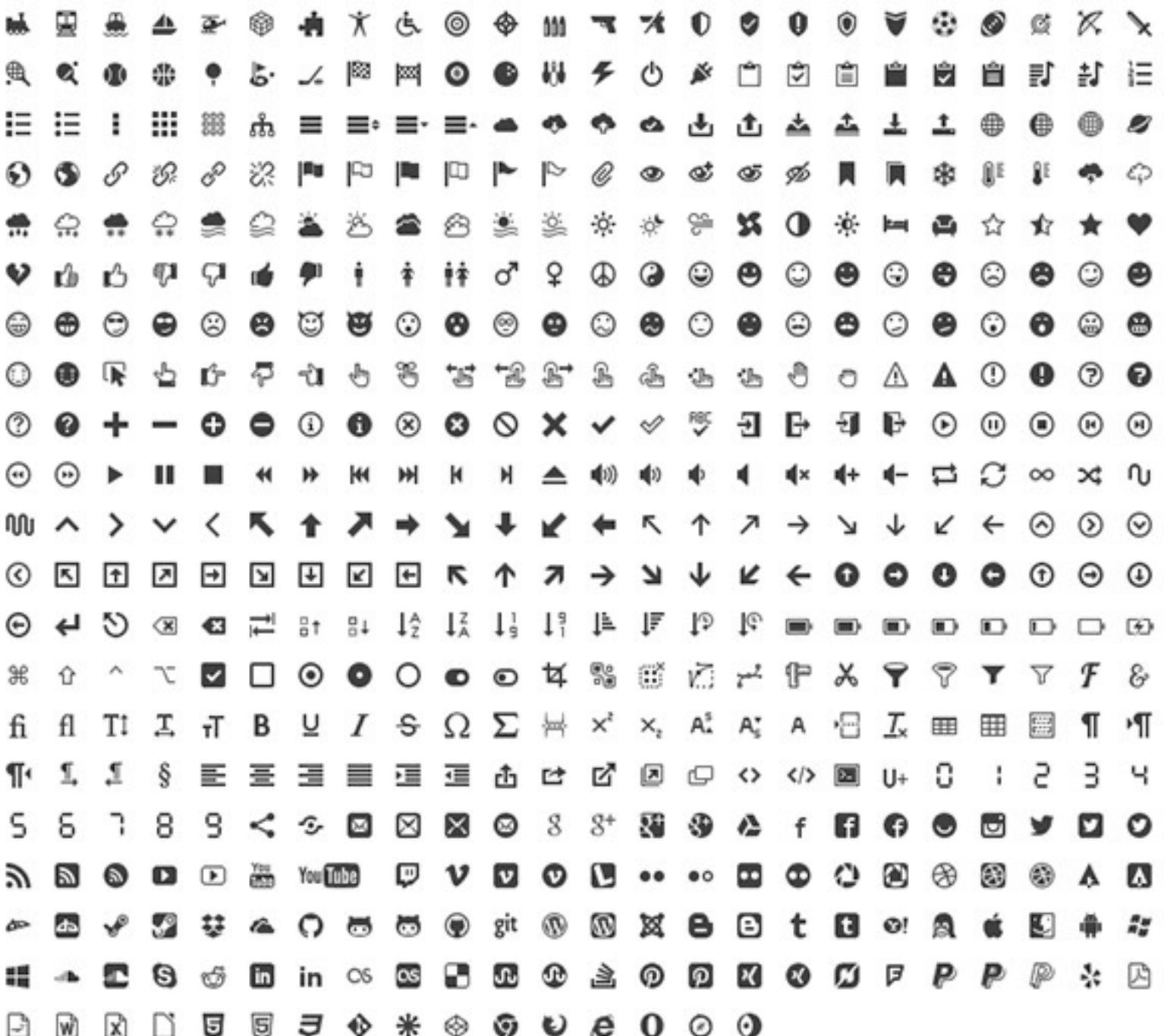
BENEFITS PORTALS

ICO MOON ICON FONT

OVERVIEW

Our icons use an icon Web font based primarily on the IcoMoon library. The icons available in IcoMoon have been narrowed to this core set. These should cover most icon needs, but if you can't find something to meet your specific needs, you can access the additional set to see a complete list of available icons. We continually add new icons to the core set from the additional set as they are required.

EXAMPLES



BENEFITS PORTALS PEOPLE IMAGES

OVERVIEW

Mercer has an extremely close integration with the way that people live their lives. When images are being selected for an application or design, Mercer prefers to use those that highlight the humanistic connection we have with our clients

The full set of People Images can be downloaded from the following url:

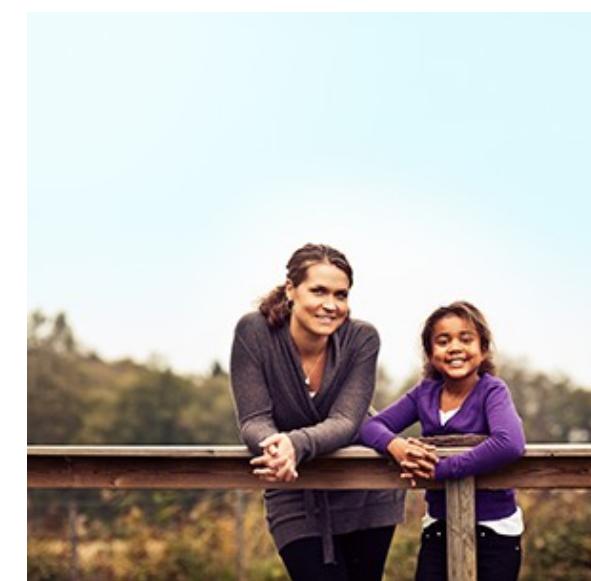
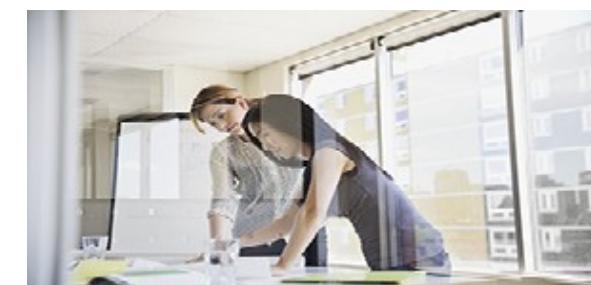
uxui.mercer.com/uxui-documents/ux-playbooks/people-images.zip

EXAMPLES



BENEFITS PORTALS PEOPLE IMAGES – PAGE 2

MORE EXAMPLES



BENEFITS PORTALS PEOPLE IMAGES – PAGE 3

MORE EXAMPLES



COMPONENTS FOR BENEFITS PORTALS



HEADER NAVIGATION OVERVIEW

DETAILS

The Header Navigation for Benefits Portals is designed to be clean and simple. We are purposefully avoiding complex navigation, multiple layers of navigation and a wide range of navigation options that are always displayed on the screen.

The intent is to simplify the navigation by collapsing it into the Menu icon. This ensures that all of the navigation options are accessible from every page, but more screen real estate can be dedicated to the page level content.

The Header Navigation consists of

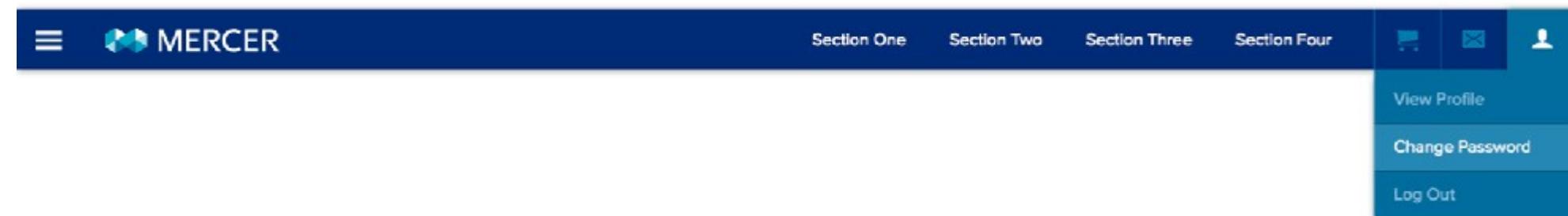
- Menu Icon
- Mercer product name
- User profile

Additional icons can be displayed next to the profile icon. Some examples include Shopping Cart, Documents, Messages, etc.

BASE DESKTOP HEADER NAVIGATION



DESKTOP NAV: ICONS WITH DROPODOWN



DESKTOP NAV: MEGA MENU



DESKTOP NAV: USER ICON ONLY

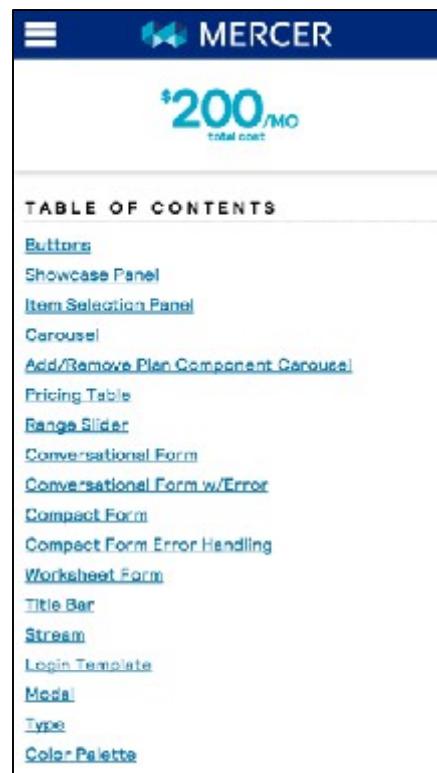


OFF CANVAS MENU OVERVIEW

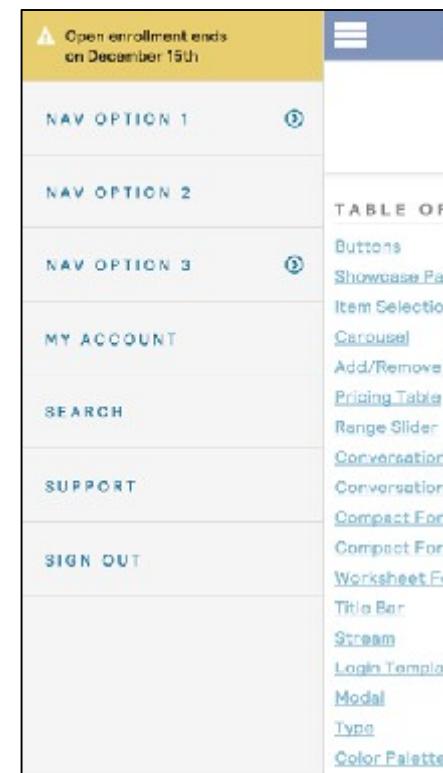
OVERVIEW

- The Off-Canvas Menu is the default navigation used for mobile responsive versions.
- When the Menu icon in the upper left is tapped, the menu navigation slides out from the left, pushing the original screen content off the screen to the right.
- The Menu supports an optional Message Area that can be used to display any specific message
- When tapped, the top level menu items are displayed.
- Any top level items that have second level items will be denoted with the “arrow” icon
- Second Level menu items are displayed when the top level item is tapped. These items animate out and the screen real estate is dedicated to those second level items. The user can tap “Back” to return to the main menu.

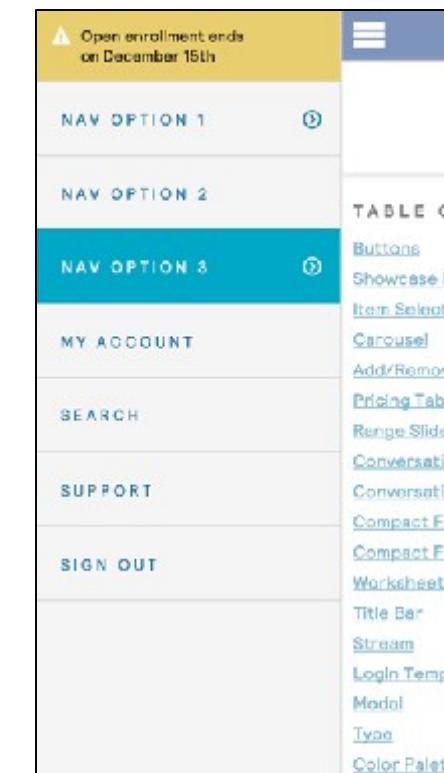
DEFAULT



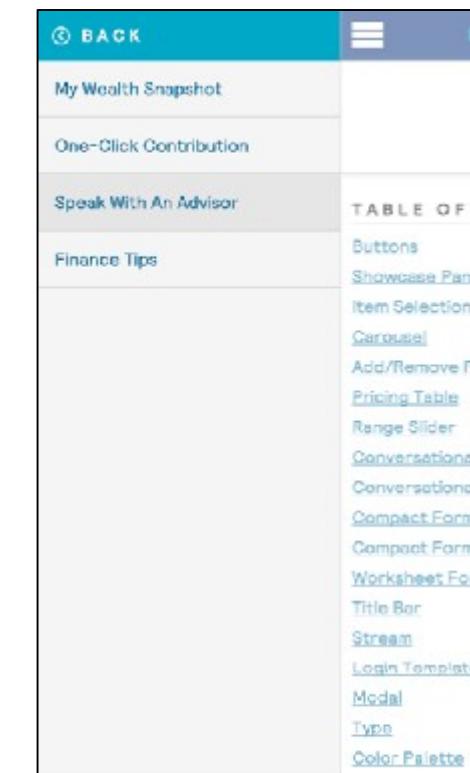
ACTIVE



HOVER



SECOND LEVEL



THIN FOOTER OVERVIEW

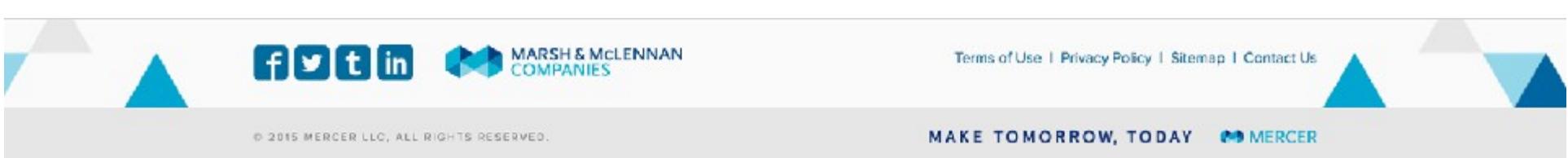
OVERVIEW

- The Thin Footer is a slightly shorter version of the Fat Footer
- The Thin Footer is best utilized if the footer does not contain many links
- The Thin Footer comes in three variations – the dark thin footer, the light thin footer and the mobile thin footer

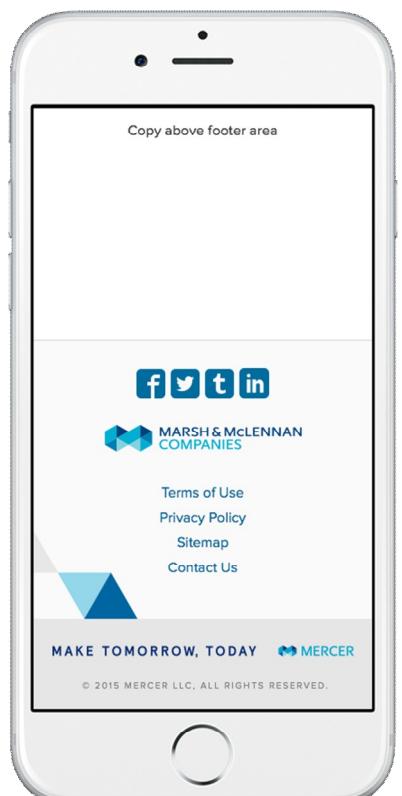
DARK THIN FOOTER



LIGHT THIN FOOTER



MOBILE THIN FOOTER



FAT FOOTER OVERVIEW

OVERVIEW

- There are two default options for footers for Employee Portals: Fat Footer and Thin Footer
- The Fat Footer is an optional footer container that appears consistently at the bottom of every page. It serves as a secondary navigational element that exposes a deeper level of the site hierarchy to the user.
- The Fat Footer should be used when it is important to expose users to a deeper level of the site structure. This will provide users with a more detailed view of commonly-accessed areas of the site in a secondary manner.

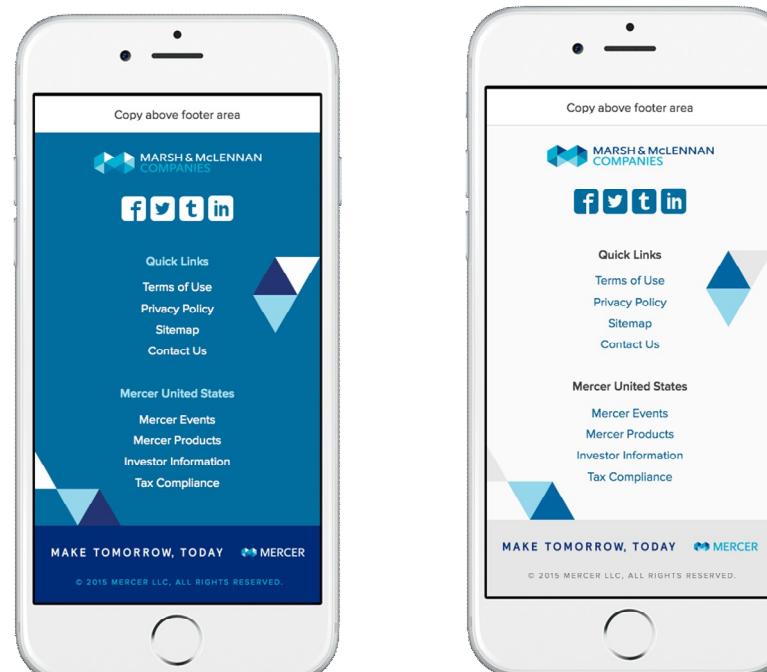
DARK FAT FOOTER



LIGHT FAT FOOTER



MOBILE FAT FOOTER (DARK & LIGHT)

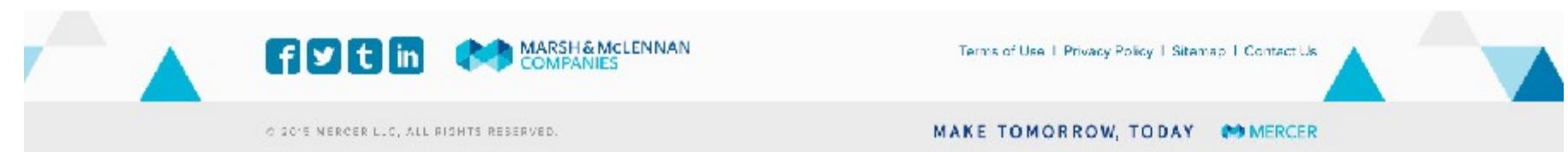


GENERIC STEPPER OVERVIEW

OVERVIEW

- The Generic Stepper allows the user to switch back and forth between pages of any linear process on a website
- The Generic Stepper typically appears on the top of the page.
- The Generic Stepper will procedurally move a user from one step to the next until the process is complete. By clicking on previous steps, the user can return to prior entries to revise them.

The screenshot shows a survey titled "HEALTH RATE YOURSELF" with three rating scales. At the top right, there is a navigation bar with a menu icon, the "MERCER" logo, and a user profile icon. Below the title, a message reads: "Let's get started Peter. Move the sliders below to give us some information on your mood and fitness levels." The first section asks "How would you rate your fitness?" with a star icon, showing a slider at the "Very Fit" end. The second section asks "How would you describe your general mood?" with a smiley face icon, showing a slider at the "Elated" end. The third section asks "How likely are you to improve your health?" with a thumbs-up icon, showing a slider at the "Will Probably Act" end. A red box highlights the top navigation bar. A "Continue" button is located at the bottom right.



MODAL WINDOW OVERVIEW

OVERVIEW

- Modal Windows will open up as a small overlay on top of the content
- Modal Windows can be closed by clicking the "X" in the upper right-hand corner
- Modal Windows can scroll if need be
- Modal Windows can include Buttons and Forms along with many other content types
- Modal Windows will take up 100% of the mobile screen window

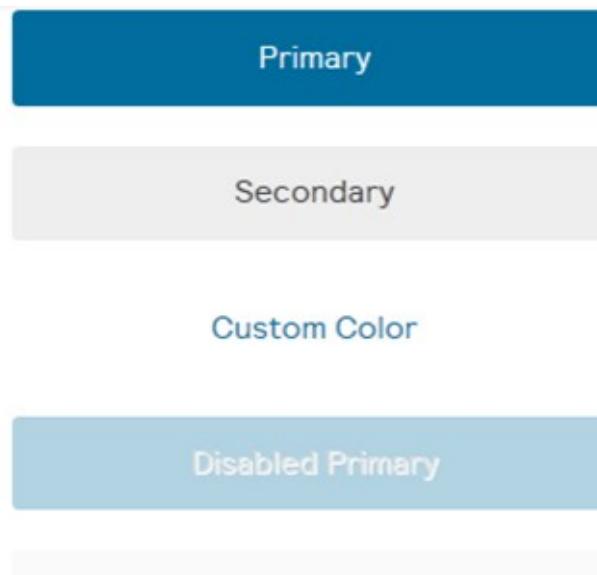


BUTTONS OVERVIEW

OVERVIEW

- There are two button types: Primary and Secondary
- Primary buttons are used for Primary actions. The default color is #006D9E. The color can be edited to any color in the Color Palette, but the Primary button should be darker
- Secondary buttons are used for Secondary actions, such as "Cancel". The default color is #EEEEEE.
- Buttons should have a minimum size of 100px in order to provide enough weight for buttons with short labels.
- Buttons on mobile can either be presented side by side or stacked.

PRIMARY & SECONDARY



OPTIONAL ICONS



MINIMUM WIDTH

Each button has a minimum width of 130 pixels. This ensures consistency even in cases where the label text is short.



MAXIMUM WIDTH

The buttons are content aware, and the maximum width of the button should be dynamic based on the label text.



SHOWCASE PANEL OVERVIEW

OVERVIEW

- The Showcase Panel offers the ability to showcase data or icons in a prominent way.
- There are four possible classes that can be used for the showcase panel
- Baseline – has a white background
- Positive – has a green background
- Negative – has a red background
- Attention – has a dark yellow background
- Each panel can support 1 to 4 columns. The columns can support any combination of text, numbers or icons.
- The panel has an optional class that – when applied – will attach the panel to the bottom of the Header Navigation. When this class is attached, the page content will scroll underneath the panel, and the panel will always display.

EXAMPLES



ATTACHED TO HEADER

A screenshot of a web page featuring a Showcase Panel attached to the top header. The header includes the MERCER logo and a navigation menu. Below the header, the Showcase Panel displays the text '\$200/MO total cost'.

TABLE OF CONTENTS

- [Buttons](#)
- [Showcase Panel](#)
- [Item Selection Panel](#)
- [Carousel](#)
- [Add/Remove Plan Component Carousel](#)
- [Pricing Table](#)
- [Range Slider](#)
- [Conversational Form](#)
- [Compact Form](#)
- [Compact Form Error Handling](#)
- [Worksheet Form](#)
- [Title Bar](#)
- [Stream](#)
- [Login Template](#)
- [Modal](#)
- [Type](#)
- [Color Palette](#)

ITEM SELECTION PANEL OVERVIEW

OVERVIEW

- The Item Showcase Panel utilizes icons to communicate navigation items
- Item Showcase Panels can use Vector Icons or Photo Image Icons
- When selected, Vector icons will have a color change within the circle icon, changing the background behind the icon to a blue color
- When selected, Photo icons will have a blue stroke appear around the perimeter of the icon
- Icons in this set can be set to be single-select icons or multi-select icons

VECTOR ICONS (UNSELECTED)



VECTOR ICONS (SELECTED)



PHOTO IMAGE ICONS (UNSELECTED)



PHOTO IMAGE ICONS (SELECTED)



MESSAGE CONTAINERS OVERVIEW

DETAILS

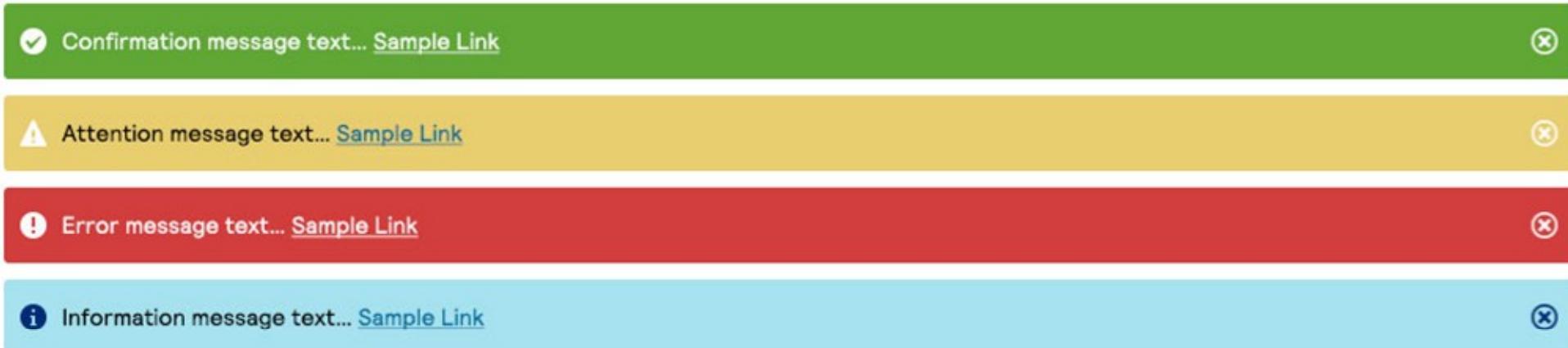
There are four types of message containers

- Confirmation – used when the user has successfully completed an action or when you want to convey a positive message.
- Attention – used to alert the user to an important message.
- Error – informs the user when an error has occurred, or when you want to convey a negative message.
- Information – used generically to provide a highlight to some basic information.

Each container consists of the following elements

- Icon – each message type is prefaced with an icon related to that message.
- Content – can support any type of internal content.
- Close Icon – closes the message container via a fade animation and slides the rest of the page content up the page.

EXAMPLES



PRICING TABLE OVERVIEW

DETAILS

The Pricing Table is used to display static data back to the user in a table format.

It is primarily used to convey data about benefits back to the user, covering things like benefit type, benefit category, cost, time duration, sub-total costs and total costs.

EXAMPLES

Blue Cross of Massachusetts	\$140.00
Atena of Rhode Island	\$140.00
TOTAL	\$189.65

Blue Cross of Massachusetts	\$140.00 monthly
Blue Cross of Massachusetts	\$140.00 monthly
TOTAL	\$189.65

HEALTH	Blue Cross of Massachusetts	\$140.00
HEALTH	Blue Cross of Massachusetts	\$140.00
TOTAL	\$189.65	

HEALTH	Blue Cross of Massachusetts	\$140.00 monthly
HEALTH	Blue Cross of Massachusetts	\$140.00 monthly
TOTAL	\$189.65	

HEALTH	Blue Cross of Massachusetts	\$140.00 monthly
HEALTH	Blue Cross of Massachusetts	\$140.00 monthly
RETIREMENT CONTRIBUTION		\$12.00
OTHER INVESTMENTS		\$255.25
TOTAL		\$189.65

RANGE SLIDER OVERVIEW

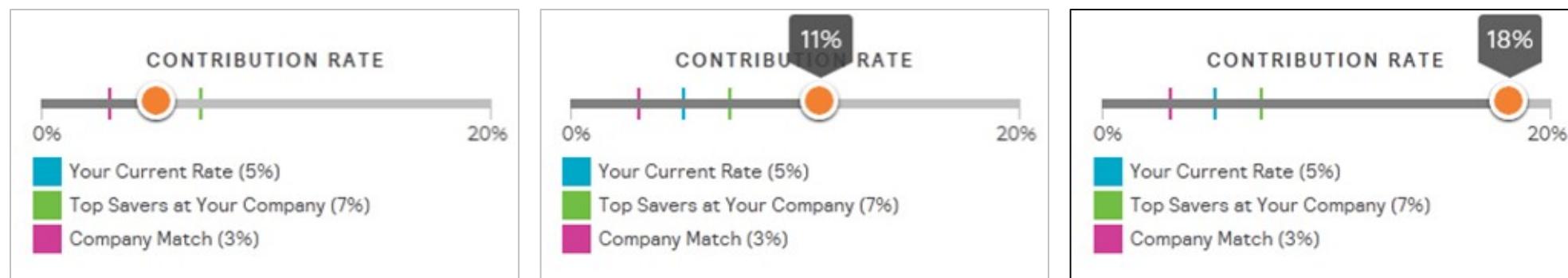
DETAILS

The Range Slider allows users to interact with the product in a dynamic fashion.

Some of the items included in the Range Slider are:

- Title
- End Points – can be numeric or alpha.
- Ticks – optional tick marks used to denote specific choices.
- Slider Control – the orange ball that allows the user to slide from one value to another.
- Key – optional key control that ties into the Ticks to allow the user to easily understand the meaning of the Ticks
- Current Value – an animated hover control that displays as the user interacts with the Slider Control. It displays the currently selected value to the user.

EXAMPLES



COMPACT FORMS OVERVIEW

OVERVIEW

The Compact Forms contain internal field labels in order to conserve space.

The internal field labels are presented in a lighter gray in order to differentiate themselves from completed data. The internal field labels are hidden from display as soon as the mouse enters the field.

Compact Forms used standard inline, field specific error messages that display immediately below the field where the error occurs.

Once data has been entered into a form field, that data is presented in a darker font in order to differentiate it from internal field labels.

INTERNAL LABELS

A screenshot of a compact login form. It features two input fields: 'Email Address' and 'Password', both with light gray placeholder text. Below the fields is a large blue 'Log In' button with a white arrow icon. The entire form is contained within a thin black border.

ERROR MESSAGE

A screenshot of a compact login form. The 'Email Address' field is highlighted with a red border and contains the text 'This Field Is Required.' in red. Below the field is a small gray placeholder '...'. A blue 'Log In' button with a white arrow icon is positioned at the bottom.

COMPLETED FIELD

A screenshot of a compact login form. The 'Email Address' field now contains the dark gray text 'arquimedez-pozo@yahoo.com'. The 'Password' field contains a series of five dark gray dots ('.....'). A blue 'Log In' button with a white arrow icon is at the bottom.

CONVERSATIONAL FORMS OVERVIEW

OVERVIEW

Conversational forms are used as a non-traditional way of collecting data from a user.

These forms build dynamically based on the answer from the previous question.

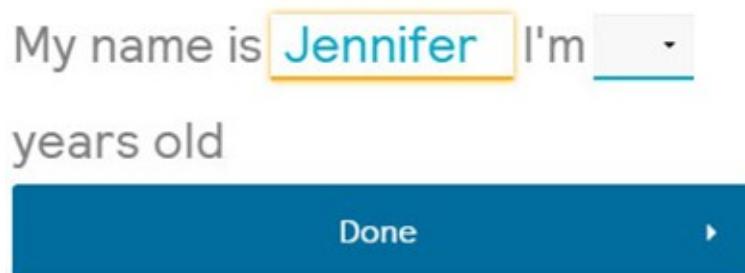
Conversational Forms can build on each previous question by continuing to display the previous answers to the user as more questions get asked.

Be careful not to build these is a way where too much data is displayed on a single screen. Ideally you should shoot for shorter questions, and then have the questions animate from screen to screen.

EXAMPLES

My name is Jennifer I'm -
years old

Done ▶



My name is Jennifer I'm 22 -
years old and married - I
have 2 kids, and live in
02091.

Done ▶



WORKSHEET FORMS OVERVIEW

OVERVIEW

Worksheet Forms allow a user to input and tally numeric values for comparison or analysis.

Worksheet Forms are a good solution for determining monthly expenses and determining financial shortages or gains.

Worksheet Forms work well for users attempting to budget their finances or save money for retirement.

EXAMPLES

A screenshot of a worksheet form interface. It features three input fields, each preceded by a dollar sign (\$). The first field is labeled "for rent/ mortgage", the second "for utilities", and the third "for transportation". Below these fields is a large blue button with the text "Done" and a right-pointing arrow. The entire interface is contained within a white rectangular box with a thin gray border.

A screenshot of a worksheet form interface, identical in layout to the one on the left. However, the input fields now contain numerical values: "\$1200" in the first field, "\$845" in the second, and "\$250" in the third. The "Done" button at the bottom remains the same. The entire interface is contained within a white rectangular box with a thin gray border.

TITLE BAR OVERVIEW

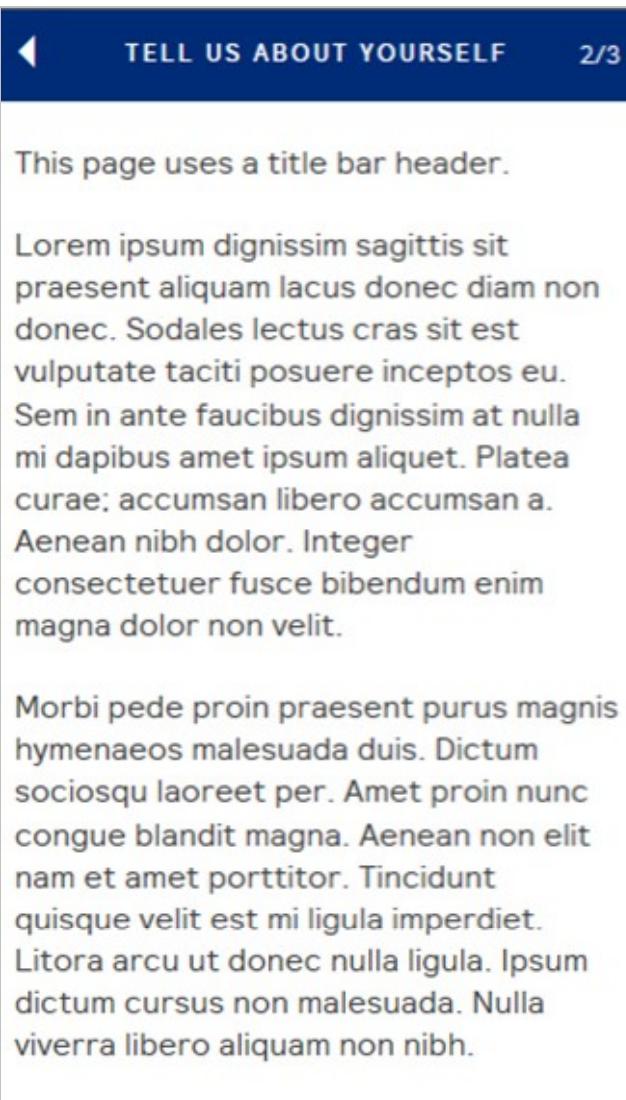
OVERVIEW

The Title Bar displays information for the user in a streamlined manner at the top of the window.

The Title Bar can include very limited navigation for the user.

The Title Bar can be used to notify the user what step in a process they are currently on and help them navigate through that process.

EXAMPLES



A screenshot of a mobile application's title bar. The bar is dark blue with white text. On the left is a back arrow icon. In the center, it says "TELL US ABOUT YOURSELF". On the right, it shows "2/3". Below the title bar is a white content area. At the top of this area, there is a small amount of text: "This page uses a title bar header." followed by a large amount of placeholder text ("Lorem ipsum...") designed to look like a form field. At the bottom of the content area, there is another section of placeholder text.

This page uses a title bar header.

Placeholder text (Lorem ipsum):

Placeholder text (Morbi pede proin praesent purus magnis):

STREAM OVERVIEW

OVERVIEW

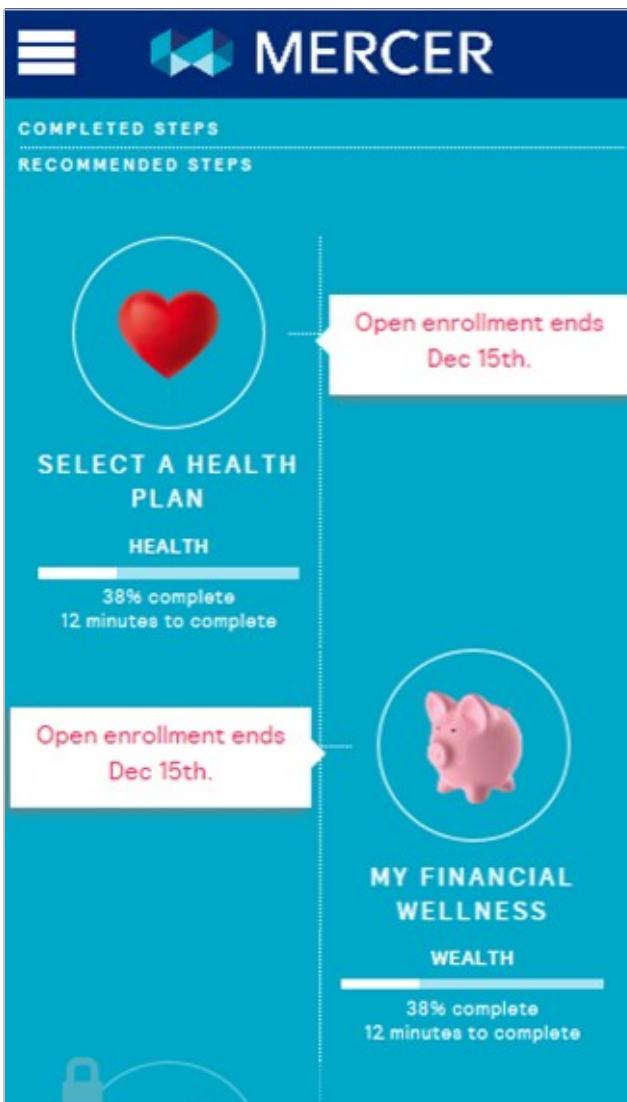
The Stream is an interface that tracks events and completion of duties a user may have within an application.

Percentage progress bars are included to tell the user how far they have to go before completing a task.

Dates for completion can also be included to give the user an idea of when a task should be completed.

Several tasks can be ongoing within a Stream at the same time.

EXAMPLE



TEMPLATES FOR BENEFITS PORTALS



LOG IN TEMPLATE OVERVIEW

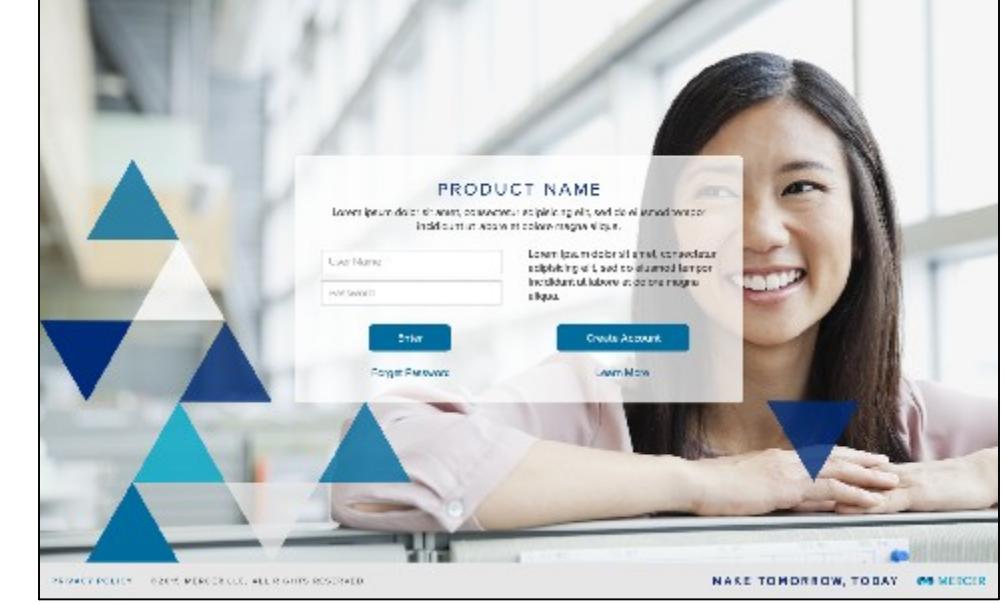
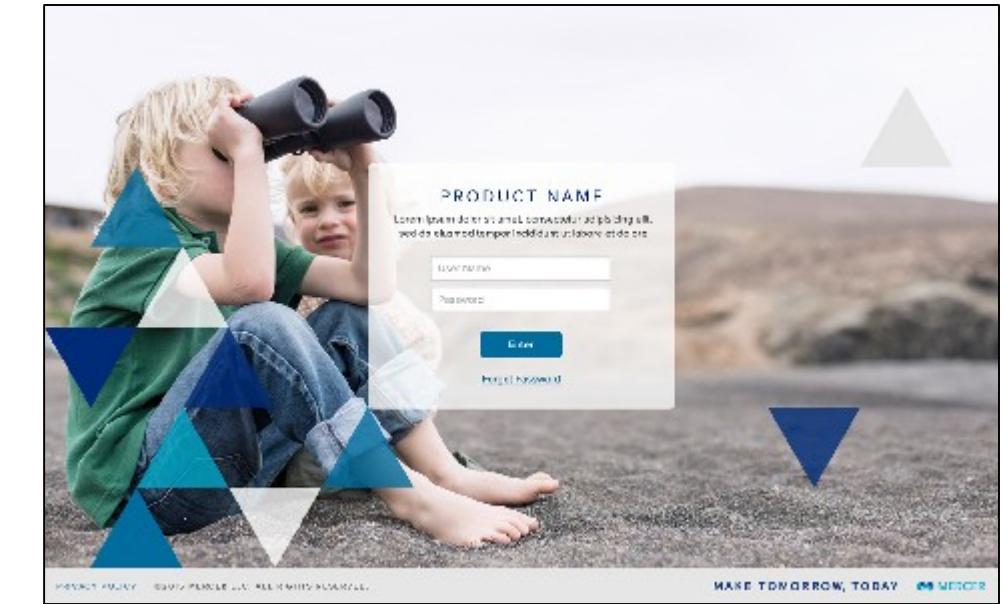
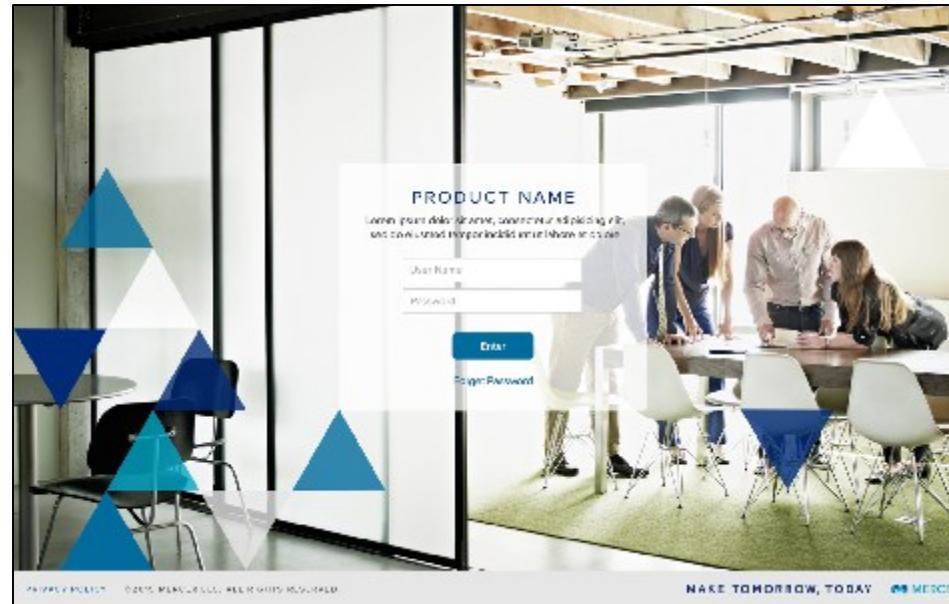
OVERVIEW

the Log In page serves as the entry point into the product, and as such it provides an opportunity to set the visual tone for the rest of the application.

The main concept behind the Benefits Portal login page is the use of a large branding image (large in terms of dimension, not file size) as the background.

The background images used in the examples shown on the right are for illustrative purposes only; the background image will be determined on a project-by-project basis.

EXAMPLES



DASHBOARDS OVERVIEW

UK HARMONISE

MERCER

GOOD MORNING PETER

SUGGESTED FOR YOU

- GOALS**
- COMPLETE YOUR FINANCES** 38% 12 minutes to complete **FINISH LATER**
- INCREASE YOUR CONTRIBUTION** 38% 12 minutes to complete **FINISH LATER**
- IMPROVE YOUR PROTECTION** 58% 12 minutes to complete **FINISH LATER**
- YOUR HEALTH PROFILE**

YOUR PENSION £28,500

YOUR PROTECTION £650,000

YOUR HEALTH £650,000

YOUR FINANCES £650,000

Well done! You've taken a step to ensuring your family are well protected, that must feel great!

Account Balance \$120,000
Your goal \$800,000
Experts say \$1,000,000

Looks like you are on track!

Nobis Opto Singularis

Current strategy Moderate
People like you Growth
Your Risk Profile High Growth

People like you have a higher cover and more cover means more security.

Nobis Opto Singularis

Current strategy Moderate
People like you Growth
Your Risk Profile High Growth

Looks like you are on track!

Nobis Opto Singularis

View Recent Activity

Nobis Opto Singularis

AUSTRALIA SUPER

MERCER

GOOD MORNING RICHARD

YOUR ACTIVITY

- FINISH YOUR PROFILE** 38% 12 minutes to complete
- INCREASE YOUR COVER** 38% 12 minutes to complete
- ROLL OVER YOUR SUPER** 38% 12 minutes to complete
- YOUR PENSION** 38% 12 minutes to complete
- YOUR HEALTH COVER**

ACCOUNT BALANCE \$120,000

INVESTMENT Moderate

INSURANCE \$650,000

Account Balance \$120,000
Your Retirement Goal \$800,000
Experts Say \$1,000,000

Last contribution was 1 week ago - \$1350

Contribute To Super

Review Your Strategy

Review Insurance

CAMPAIN TO GO HERE

CAMPAIN TO GO HERE

CAMPAIN TO GO HERE

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