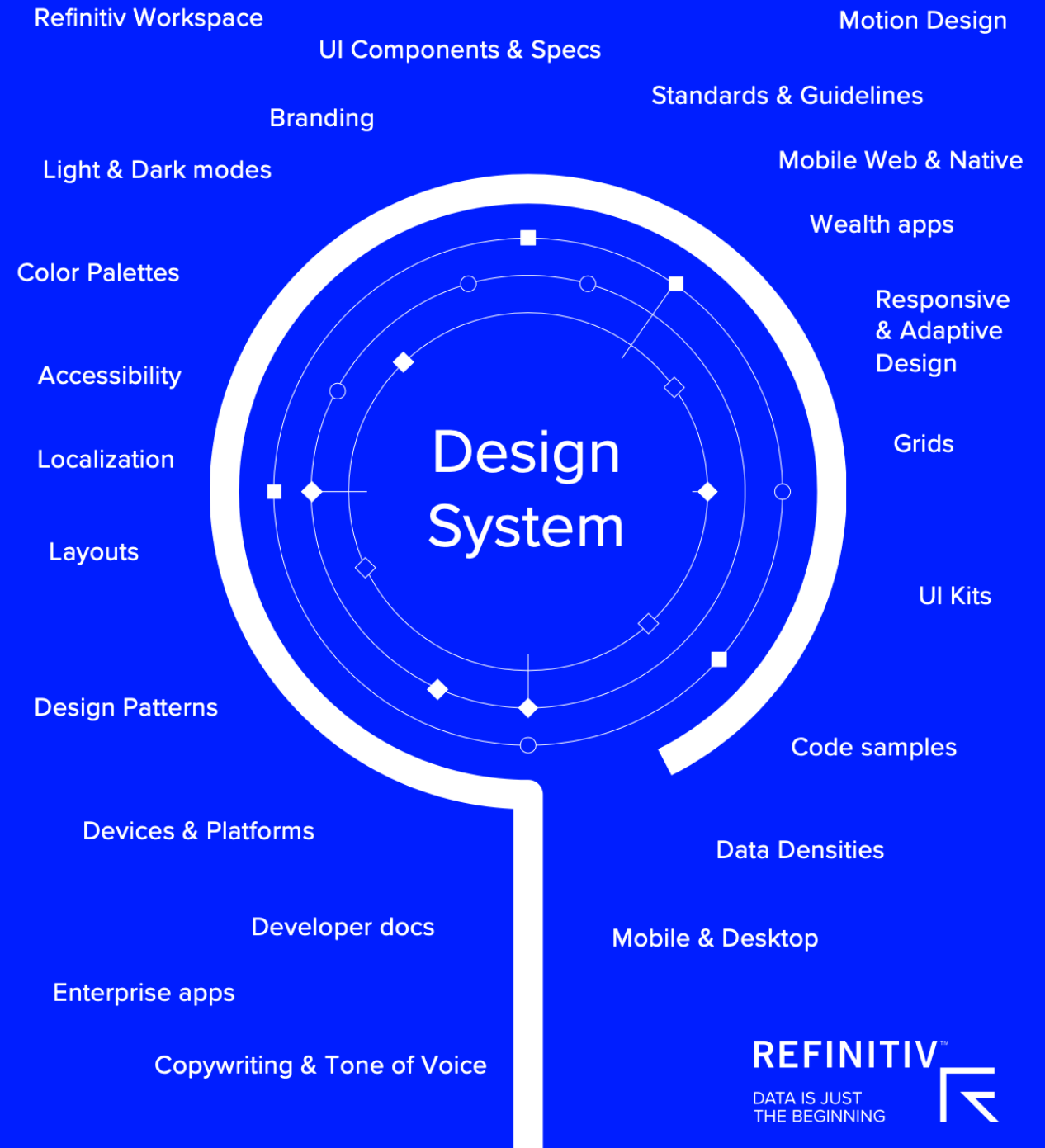


Halo Design System

Spotlight Session

The Financial and Risk business of Thomson Reuters is now Refinitiv.



Agenda

Introduction to Halo, challenges, current status Yooch (5-10 mins)

Grids & Typography Abhi (5-10 mins)

Visual Designs – Dark Mode, Compact Density – A Closer Look John (5-10 mins)

Examples of Interaction & Pattern Design Work Maxwell (5-10 mins)

Motion Design Work Summary & Adoption across Platforms & Devices Antony (5-10 mins)

App Audit – Common Layouts & Patterns across widely used Apps Pierre-Emmanuel (5-10 mins)

Team

Core

Yooch Wan UX Lead, Documentation Platform & Content, Design Standards, Interaction Design

Pierre-Emmanuel V. Product Manager, App Strategy & Developer Experience

Steve G. Branding & Visual Design Lead

John W. Senior Visual Designer – Halo Visual Theme Lead

Trem C. Lead Software Engineer - Element Library Developer

Floaters

Abhi D. Senior UX Designer - Grids & Typography Standards, Icons

Lawrence M. Senior UX Designer - Icons

Mike A. Senior UX Designer - Interaction Design Patterns, Mobile

Maxwell Y. Senior UX Designer - Interaction Design Patterns

Quick Intro to Halo

- One design system to cover standards and guidelines for our digital product properties
 - Workspace
 - Wealth apps (to be migrated into Workspace)
 - Enterprise (internal) apps e.g. Project Revelation
- UI offers:
 - Dark and Light modes
 - Three data densities
 - Compact (default for Workspace),
 - Ultra-Compact (typically for data-tables, blotters, where squeezing in a few more rows of data into view is important)
 - Expanded (typically used for large bodies of text, such as news or messaging, or within Wealth and Enterprise apps where users prefer a less data dense display)
- Responsive Design built-in from the start - Eikon/Workspace no longer desktop exclusive

Quick Intro contd.

- Standards need to cover
 - Desktop Native,
 - Desktop Web,
 - Mobile Web,
 - Mobile Native
- New formalised standards
 - Animation / Motion
 - Accessibility - need to meet WCAG2.0 AA conformance level
 - Content and writing style guides to cover new channels - chatbots, blogs, correspondence via messaging etc...
- Provide UI kits
 - Access to Figma files (view-only)
 - Axure UI widget library to build rich interactive prototypes
 - HTML UI Kit?

Problems

- Current UX / UI documentation spread over various locations
old intranet (The Hub), previous team server (Frux), Element Library, Eikon's Web UI Gallery
 - We're also losing access to The Hub, all content will be lost if not archived / ported to Connectiv.
- Duplication of content, out of sync and out of date, no single source of truth
- Legacy content not removed, cause for further confusion
- Increased digital product portfolio
Historically our team only set the design standards around the Eikon product portfolio
Now, we also own Wealth and Enterprise (internal) apps
- Existing standards possibly outdated – was desktop centric, now need to take into account of multiple platforms and screen sizes – responsive & adaptive design, mobile-first approach

Research

- Reviewed dozens of design systems – major brands
(Abhi did a presentation awhile ago of our findings)
- Researched and tested various documentation platforms
ZeroHeight, StoryBook, mkDocs, Pandora, and many more...
- Reached out to the Forge design system team
 - Their use of StoryBook(?), challenges in creating a design system (maintenance and governance)

Project Plan

Already shown by Steve yesterday

Challenges

in no particular order

- Toolset for visual design changed mid-way from Sketch and Zeplin to Figma, meaning everything had to be ported over, and also learning Figma on-the-go - requiring additional time
- Documentation Platform - what product to use?
 - In-house vs. Third-Party
 - Local Install vs Cloud-hosted
 - Balance between ease-of-use but basic presentation of information vs. A platform offering all the bells and whistles but more difficult to use and maintain
- People re-assigned to other projects or were already a shared resource across multiple projects, resulting in longer time required to complete certain tasks

Challenges contd.

- Lack of another Visual Designer to assist John and provide a sanity check on his design thinking and approach to producing the assets in a new tool (Figma)
- Continual changes to the visual designs means any content inputted into the documentation platform is already outdated and needs to be re-done (e.g. Colour palette) - more of a comment about prematurely entering content rather than a criticism of the continual changes
- Work on the Framework (e.g. Windows Management) appears to be constantly in-flux - can't document anything until it's finalised.

Challenges contd.

- New approach to icons - Previously PNGs, now scalable vectors (SVGs), experimentation required to optimise the format
- Colour palettes established for Dark Mode may not work for Light Mode, so dedicated colour palettes for Light Mode may be required
- The patterns established for each UI component needs to be re-visited to ensure they are still relevant, and fit-for-purpose in the new world - this is a massive undertaking and in my view requires more resources

Challenges contd.

- Working in silos, needs better co-ordination and more regular communication between work streams within UX
 - Same topics being discussed across work streams, duplicating effort

Quick Tour of the Design System

Unanswered Questions

- Settled on choice of documentation platform? mkDocs or Pandora or explore something else to allow easier user contribution and content authoring?
- Hosting and domain name - designsystem.int.refinitiv.com? halo.int.refinitiv.com? Something else?
- Internal access only or publicly accessible?
- Does the Expanded data density only refer to white-space (margins/padding) or does it also refer to the increased size of UI components for touch devices, and enterprise apps which require larger UI controls generally?

Grids & Typography

Abhi. 5-10 mins

Visual Designs

Dark Mode, Compact theme.

A Closer Look

John. 5-10 mins

Interaction & Pattern Design Work

Example(s)

Maxwell. 5-10 mins

Motion Design Summary

Adoption across platforms and devices

Antony. 5-10 mins

App Audit

Finding common layouts and patterns across widely used apps

Pierre-Emmanuel. 5-10 mins

Any more questions?

Thank you.