

BLOOMBERG UX – INTERACTION DESIGN EXERCISE

Purpose

We want to see if your problem-solving and interaction design skills as well as communication style are a good fit for Bloomberg. To do this, we will ask you to design a part of a common financial application. This will **not** require deep knowledge of the finance domain. We will then review your design solution and potentially have you present it either remotely or in-person.

Context

A “**Monitor**” is an application on the Bloomberg Terminal that allows users to track the performance of any list of securities. The securities are laid out as rows and users pick which columns of data to see on each security. See the image on the right. Each of these columns is known as a “**field**”. In this example, you can see “Curr Px” (current price), “% on day” (change in price since market open as %), and so on. **Tens of thousands** of these *fields* are available to our users. More examples of *fields* include moving averages, various flavors of trading volume, high/low/open/close/bid/ask prices, etc.

Ticker	Curr Px	% on day	Chg/D	Volume	Chg/3M	Chg/1Yr
- INDU	15884.44	+52%	+82.65	18,917,177	+4%	+13.4%
AXP UN	188.50	+18%	+1.16	255,348	+8.9%	+43.0%
BA UN	128.29	+89%	+1.13	504,243	-3.4%	+68.7%
CAT UN	94.75	+26%	+0.25	272,218	+12.5%	-2.0%
CSCO UW d	22.82	-0.4%	-0.01	2,521,921	-2.7%	+7.3%
CVX UN	112.92	+1.10%	+1.23	353,117	-7.3%	-3.0%
DD UN	63.77	+50%	+0.32	149,724	+2.4%	+33.2%
DIS UN	77.63	+74%	+0.57	558,990	+13.5%	+41.6%
GE UN	25.22	+68%	+0.17	1,692,827	-6.6%	+12.4%
GS UN	161.39	+24%	+0.39	148,812	-1.6%	+5.9%
HD UN	76.50	+12%	+0.09	195,329	+1.7%	+15.4%
IBM UN	179.30	+1.22%	+2.16	211,000	-2.7%	-11.1%
INTC UW d	24.47	+74%	+0.18	1,244,655	+5%	+15.5%
JNJ UN	91.91	+92%	+0.84	430,605	-3.1%	+21.2%
JPM UN	57.03	+51%	+0.29	627,225	+4.9%	+16.6%

A sample Monitor with securities (rows) and fields (columns)

The *Monitor* enables users to choose any securities and any *fields* they are interested in and display this information on their desktop consistently. To stay up to date, most Bloomberg customers use multiple computer displays and place multiple *Monitors* as well as other Bloomberg components on their desktop. Please see the file “Sample Bloomberg View with Monitor.png” as an example of a single computer display with a single *Monitor* amongst other components.

Design Goals

Traders are some of the most information-hungry of financial users. They track hundreds or thousands of securities at a time and so need help to draw their attention to securities when certain data events happen. We call this concept “**alerting**”. For this target audience, we want you to design the experience of creating such an *alert*, where the trader will specify the security, field, and other parameters as appropriate. Your design should address the following use-cases (Bloomberg-provided fields are in **bold**):

1. Creating a “*field-value*” alert for a security: compares a given *field* to a constant value that the trader picks. E.g., Apple’s **Last Price** exceeds 600 or IBM’s **Last Price** moves by 10% in either direction.
2. Creating a “*field-field*” alert for a security: compares a given *field* to another *field*, e.g., S&P500’s **Last Price** falls below S&P500’s **52-week Low Price**.

Deliverables

Please provide a storyboard or wireframes that would allow you to communicate your design concepts to a set of stakeholders, like product managers and domain experts. Sketch on paper or use a digital tool such as OmniGraffle, Illustrator, Visio etc., as you wish. Color is not necessary; use it only if it is essential to communicate an aspect of your design. Feel free to include sketches to clarify conceptual ideas. We are interested in the design activities leading up to your design solution, so please be sure to capture your design process.