

UX CASE STUDY · 2019-2026

8 years as the only designer of an enterprise planning platform

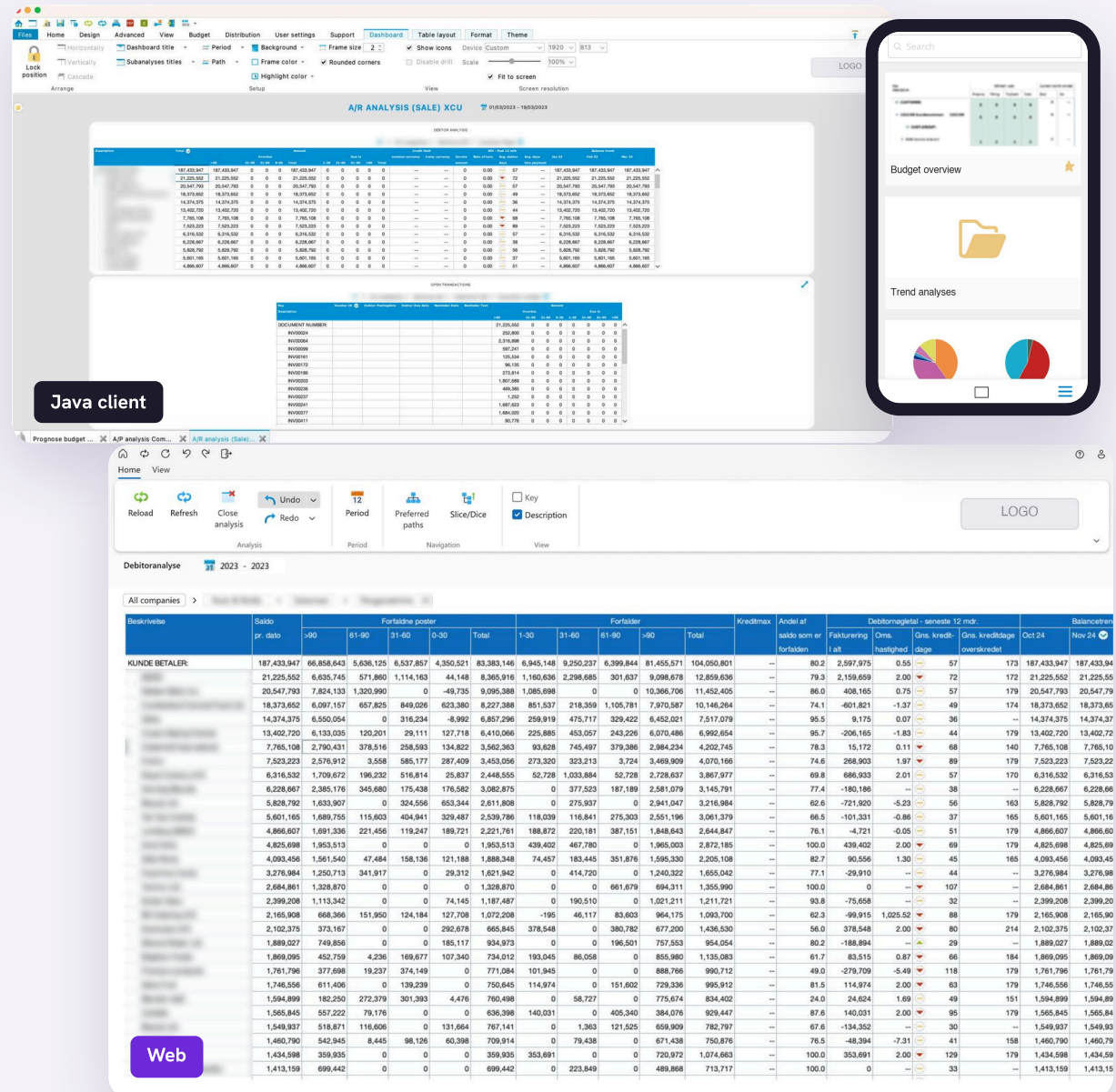
Bringing a budgeting and business intelligence product from a long-lived Java desktop client to the web, building two design systems, and keeping the product coherent while everyone had an opinion about the UI.

ROLE
Sole product designer

YEARS
2019-2026

TEAM
Java and web
developers

PLATFORMS
Desktop, web, mobile



The case in one page

The problem

A product with more than 35 years of history and a Java desktop client at its core. A web client whose tables could barely be used, three clients that each worked differently, and components that looked and behaved differently on almost every screen.

My role

The only designer for 8 years, without a product manager or design lead: research, information architecture, UI, design systems, UI writing, specifications and design QA.

What I did

Redesigned the web client, designed the first mobile app, pushed for a real grid library, wrote the rules the team builds with, and tested with users.

The result

One consistent product family on Microsoft Fluent UI 2, and a design process the whole company follows.

8

years as the only designer

3

platforms: desktop, web, mobile

100+

screens in one web architecture

1,146

new icons, light and dark

2

design systems

~530

unused icon files found by audit

A desktop product on its way to the web

The product is an enterprise financial planning and analysis platform for mid-sized companies: budgeting, forecasting, consolidation, analysis of actual figures, dashboards and scheduled reports in one application.

It has been developed for more than 35 years. Its core is a Java desktop client that customers still use every day. The company is bringing it to the web: the web client must offer the same functionality in the browser and on a tablet, while a separate mobile app covers phones.

The grid that made the web usable

When I started, the web client's tables were rendered by the Java back end: people could look at figures but hardly work with them. I proposed replacing them with a JavaScript grid library, listed what it had to support (Excel-like editing, frozen columns, keyboard navigation, copy and paste with Excel), and the developers chose and integrated one.

Who uses it

Controllers and analysts

Build analyses and forecasts. Power users of Excel.

Budget owners

Type their figures into large grids once or twice a year.

Management

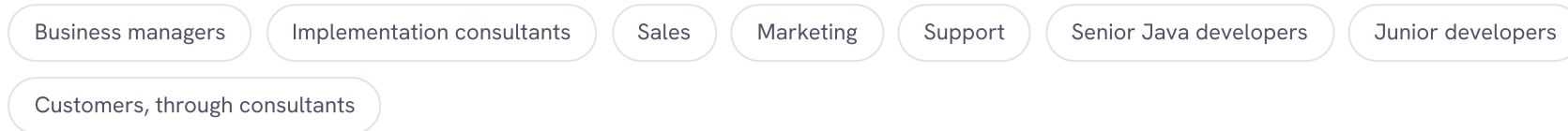
Reads KPIs and drills down when a number looks wrong.

Administrators

Configure dimensions, models, permissions and jobs.

One designer, many opinions

I worked directly with the Java and web development teams. Requirements and feedback came from everyone who touched the product, often contradicting each other, and many arrived as finished solutions ("add a button here") instead of problems.



My job became turning those opinions into decisions the team could agree on and build. These methods worked:

Evidence over opinion

Usability tests moved the talk from "I think" to "five of five people missed this".

Options with trade-offs

Two or three variants with pros, cons and development cost.

Principles that settle debates

"Familiarity over novelty" and "data first" gave everyone the same yardstick.

Specs developers can build

Problem, expected behaviour, numbered acceptance criteria, implementation notes.

A shared vocabulary

A design system, a tooltip style guide and a shortcut specification.

Compromise, written down

The smallest fix that solves the user's problem, and a note of what was left.

8 years, 6 stages

2019

Audit of the legacy product

Desktop, web and mobile clients compared side by side; how Excel, Google Sheets, Power BI and Tableau solve the same tasks. A market analysis of nine competitors followed in 2021.

2019–2020

First mobile app and design system

No mobile version existed. Designed the app from scratch: navigation, biometric sign-in, touch period picker, drill-down, analyses as cards. A Figma component library and the first components in Storybook.

2022

First usability testing

Moderated sessions on drill-down and period selection across the Java, web and mobile clients.

2022–2023

Information architecture

One map of more than 100 web screens. Menu, quick menu and ribbon compared; the ribbon won because it matches Microsoft 365.

2024–2025

Web 2.0 on Fluent UI 2

The grid library in place, then home, grid, budget entry, setup tables, job queue, distribution and charts redesigned module by module.

2025–2026

Systematising quality

Expert reviews, usability testing by user role, a UI-text style guide, an icon audit, and a design system written for AI-assisted development.

Who we design for, and how I test



The executive

Wants dashboards, KPIs, reports by email, drill-down on mobile.

Hates screens that need training first.



Sales and marketing

Wants a clean layout, ready dashboards, segments and filters.

Hates inconsistent screens, too much data at once.



Senior consultant

Wants speed with large datasets and keyboard shortcuts.

Hates features that don't match what customers do.



Support specialist

Wants clear messages and consistent behaviour.

Hates errors that don't say what went wrong.

Usability testing, twice

2022: drill-down and period selection across three clients with five participants, consultants as expert users and sales staff as occasional users.

2026: goal-based scenarios for budget owners and administrators, with separate run sheets for executive, operations and marketing roles. I measured whether people finished each task, how long it took, where they made mistakes, and how easy each task felt.

Expert reviews before release

Before a new module reaches customers, I check it against ten basic usability principles, score each from 0 to 4 and sort problems from critical to minor.

18

of 40 for the first build of the new waterfall chart, with 12 problems found. The most serious: the chart showed the opposite of the table next to it.

Competitive analysis

The market, 2021

Nine budgeting products in the same market, compared on eight criteria. They fell into three groups:

Excel add-ons

Budgeting stays in spreadsheets, reporting in Power BI.

Tools with their own client

Automate the budget process in one front end. Our product.

Large FP&A suites

BI, budgeting and consolidation in one cloud product, often with AI.

Finding: every product promises to "automate the budget and get rid of spreadsheets". What separates them is cloud delivery, AI forecasting and how it feels to use, so a familiar Microsoft 365-like interface became a real argument.

UX benchmark, 2022

How six products people already use solve the same problems, on desktop, tablet and phone.

Problem	Power BI	Excel	Tableau	Qlik	Topdesk	Salesforce	What we took
Notifications, errors, progress							Toasts with texts that name the problem and the fix
Many reports open at once							Analyses as tabs inside the app, not browser windows
Sign-in and two-factor							One sign-in card, single sign-on by the server
Biometrics on mobile							Touch ID and Face ID in the mobile app
Ribbon and sheets on a phone							A separate mobile app, not a shrunk ribbon
Tablet, side by side							Web client with touch-sized rows and controls
Undo and redo							Ctrl+Z and Ctrl+Y as in Microsoft 365

PART 2

Before and after, screen by screen

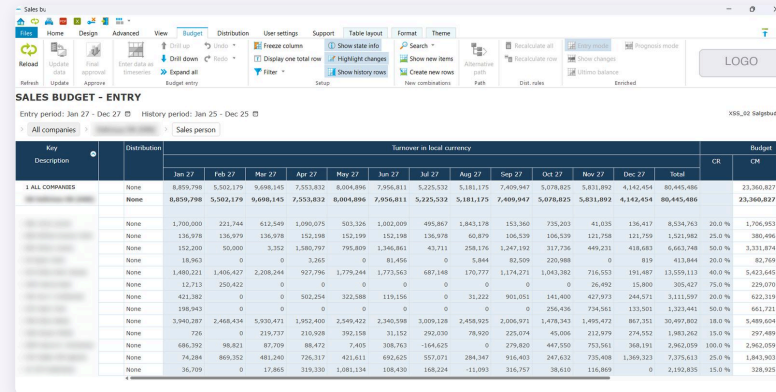
Eleven parts of the product: what was wrong, what changed, and why.

Budget entry

Budget owners enter figures once or twice a year, many of them on the desktop client for years.

BEFORE

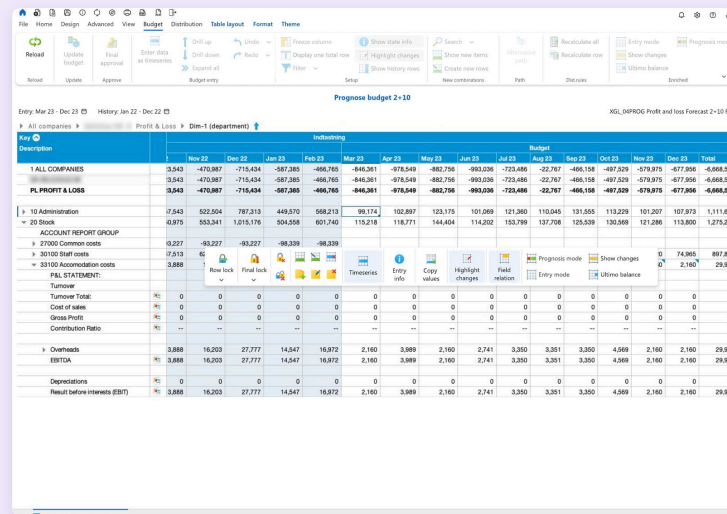
- A wide ribbon full of greyed-out buttons
- No clear difference between totals, groups and accounts
- A dense right-click bar of unlabeled icons



AFTER · WEB

AFTER

- Same ribbon groups, rebuilt in Fluent UI 2
- Clear levels and visibly unavailable actions
- Right-click quick bar with clear groups, lock options and tooltips



BEFORE · RIGHT-CLICK BAR

Key Description	Turnover in local currency	CR	Distribution	Turnover	Cost	CM	CR	Budget	Cost
SALES PERSON IN BUDGET:	69,365,130		None	20,285,149	18,428,841	1,856,308	9.2 %	3,508,430	65,856,700
Selected									
7,884,639		None	1,823,136	1,505,991	227,145	12.5 %	578,377	7,306,262	
Selected Total:									361
empty									
Others	50,930,344	--		16,483,280	14,955,756	1,527,524	9.3 %	2,644,005	48,286,339

AFTER · RIGHT-CLICK BAR

Key Description	Actual	Depreciation	Actual
ALL COMPANIES	21,037,033	670	21,037,033
100	33	670	33
200	11,600,000	0	11,600,000
300	2,420,000	0	2,420,000
400	2,100,000	0	2,100,000
500	860,000	0	860,000

Quick bar kept

Actions stay beside the cell, as on desktop.

Same names

Trained users find everything.

Home and navigation

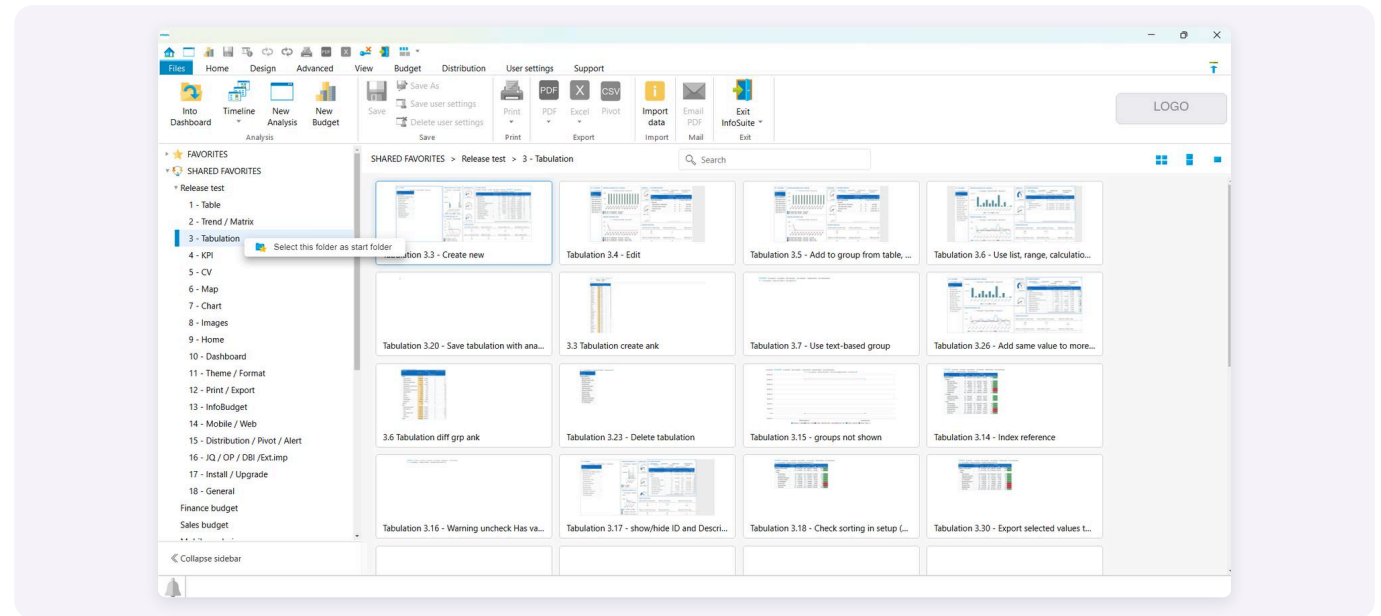
The first screen people see every day.

BEFORE

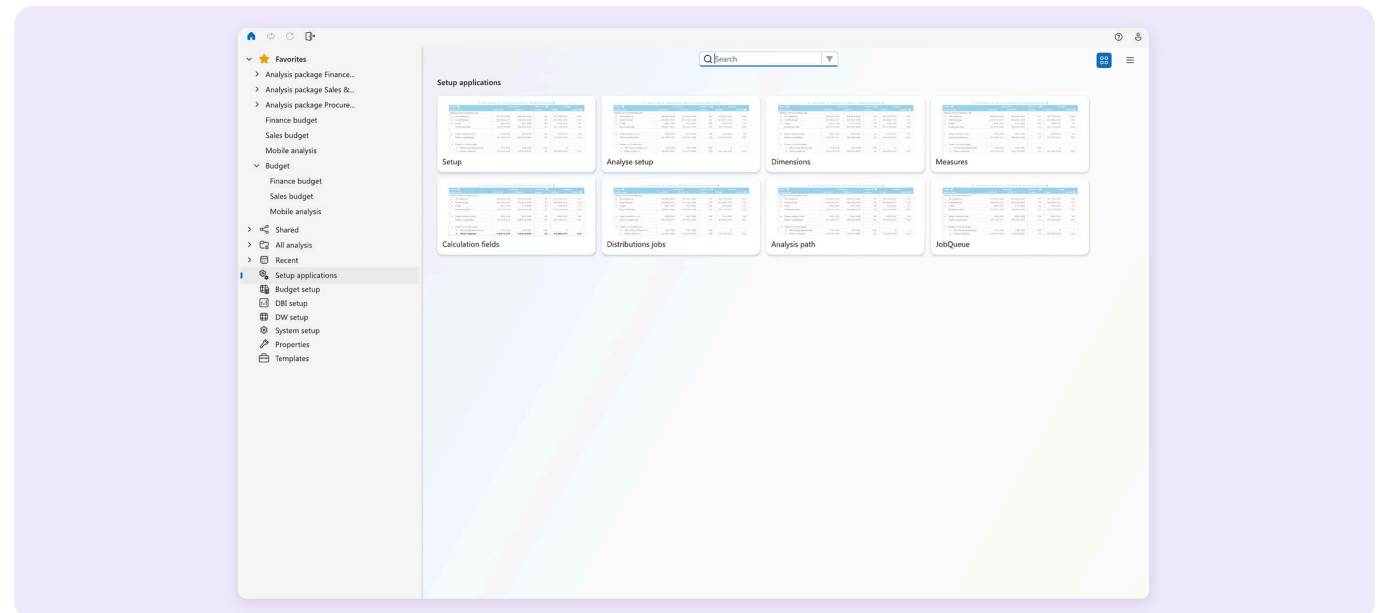
- No hover, selected, loading or empty states
- A menu that could not collapse
- A long folder tree

AFTER

- Favourites, shared, all and recent analyses in one sidebar
- Search on top, setup applications as cards
- A sidebar that collapses to give the grid full width



AFTER · WEB



Feedback everywhere

Hover, focus, selected and loading states.

Recognition over recall

Every area visible in the sidebar.

Sign-in

One screen, used by every user, every day.

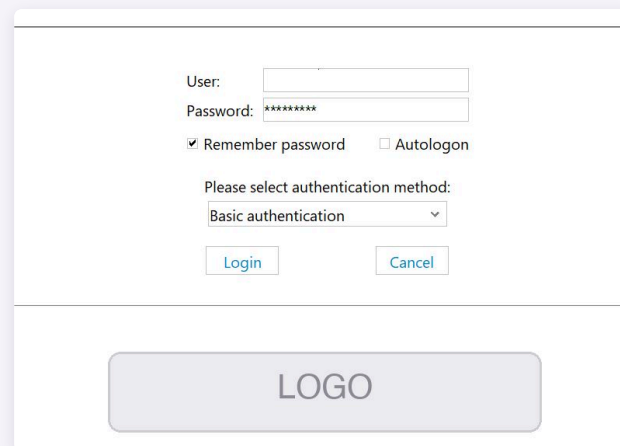
BEFORE

- Fields floating on an empty window
- An authentication-method dropdown and two checkboxes
- Login and Cancel with equal weight

AFTER

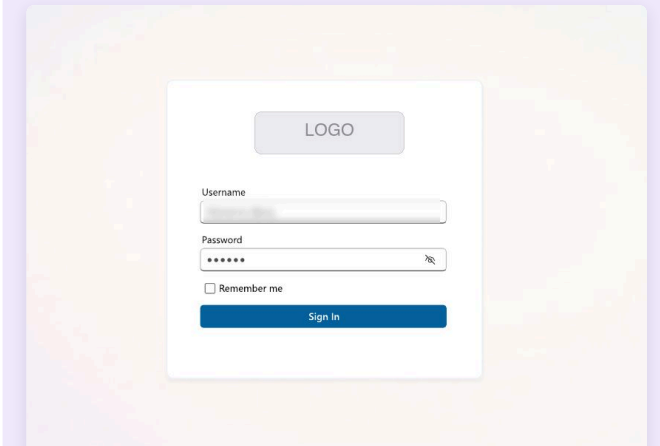
- One card with labelled fields and a show-password toggle
- One primary button
- Single sign-on handled by the server

BEFORE



The 'BEFORE' state shows a sign-in form with a light gray background. At the bottom is a large, rounded rectangular box containing the word 'LOGO'. Above this, the form is divided into two sections. The top section contains labels 'User:' and 'Password:' followed by input fields. Below the password field are two checkboxes: 'Remember password' (checked) and 'Autologon' (unchecked). Below these is a label 'Please select authentication method:' followed by a dropdown menu showing 'Basic authentication'. At the bottom of this section are two buttons: 'Login' and 'Cancel'. The bottom section of the form is empty.

AFTER



The 'AFTER' state shows a sign-in form with a light purple background. At the top is a rounded rectangular box containing the word 'LOGO'. Below this is a white card with a rounded rectangle border. Inside the card, the label 'Username' is above an input field. Below that, the label 'Password' is above an input field with a show-password toggle icon on the right. Below the password field is a checkbox labeled 'Remember me'. At the bottom of the card is a large, dark blue button labeled 'Sign In'.

One primary action

Sign in is the only strong button.

Same everywhere

Desktop, web and mobile share it.

Moving through the data

Analysts move by path (company, salesperson, customer) or slice the data.

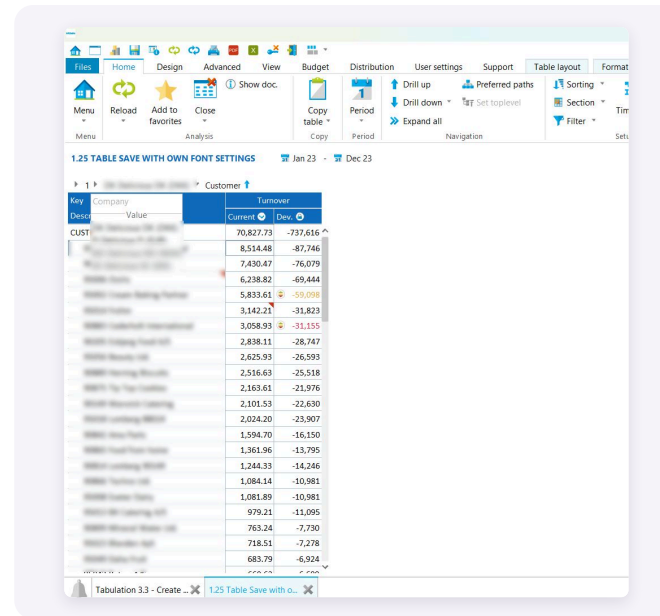
BEFORE

- Path values as a bare list without search
- Slice/Dice as grey boxes with tiny icon buttons

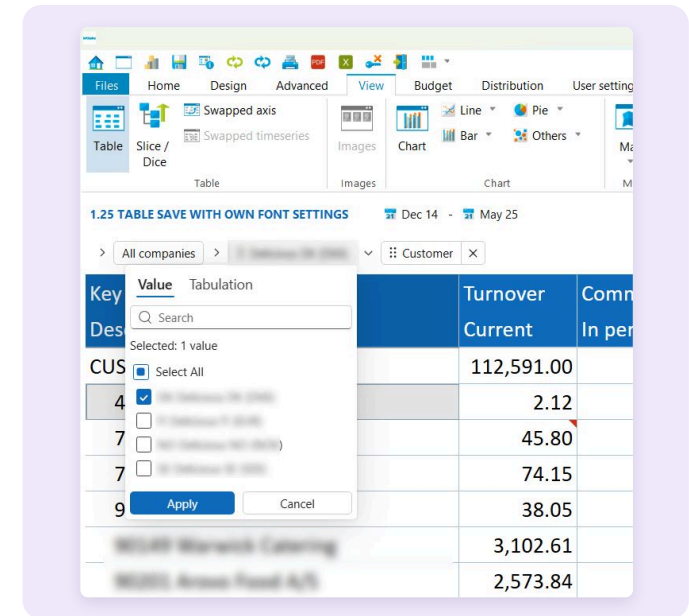
AFTER

- One picker for path, slice and filter
- Search, Value and Tabulation tabs, selection count, Apply

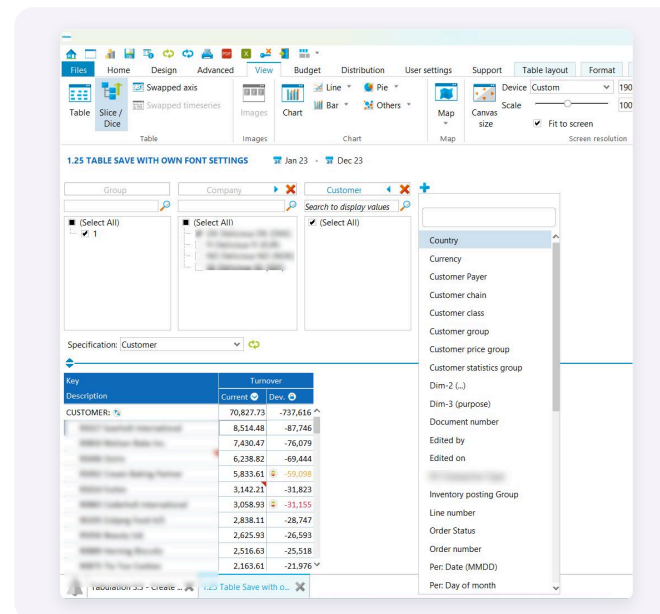
BEFORE · PATH VALUE



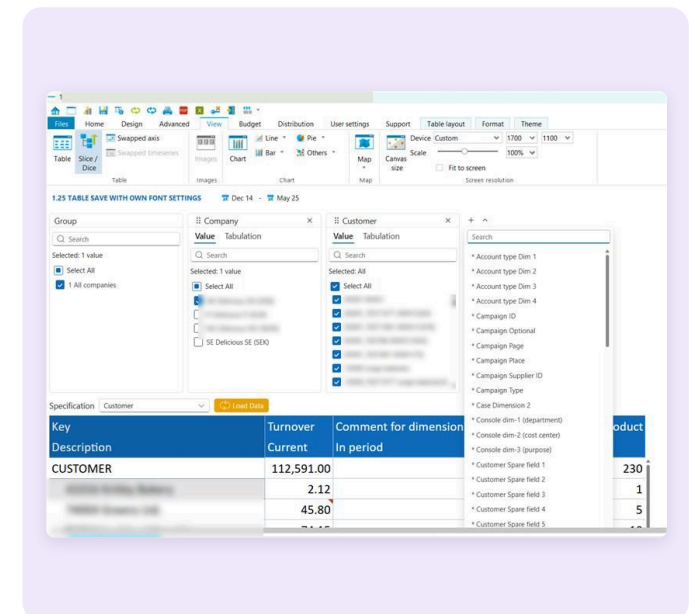
AFTER · PATH VALUE



BEFORE · SLICE AND DICE



AFTER · SLICE AND DICE



One picker everywhere

Same search, tabs and selection.

Search first

Long lists are filtered, not scrolled.

Setup tables for administrators

Administrators manage dimensions, measures, jobs and imports here.

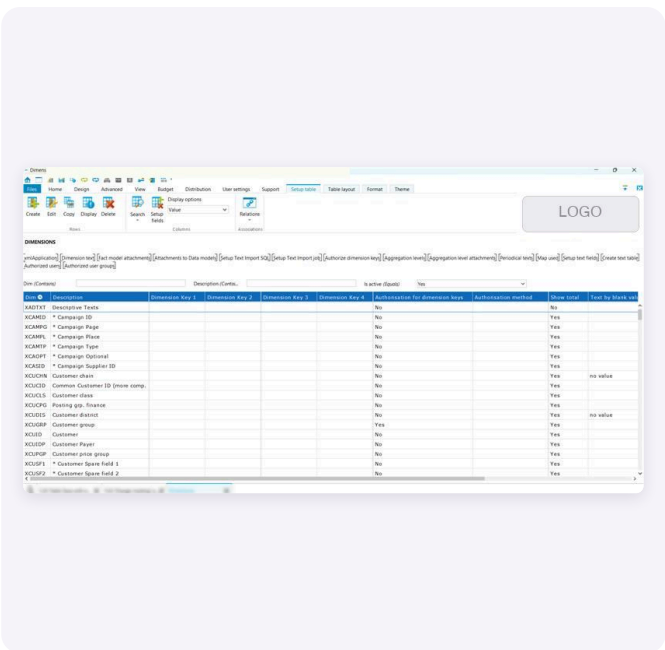
BEFORE

- Related tables as a row of bracketed links
- A right-click menu of more than twenty items
- OK and Cancel as small links, five tabs

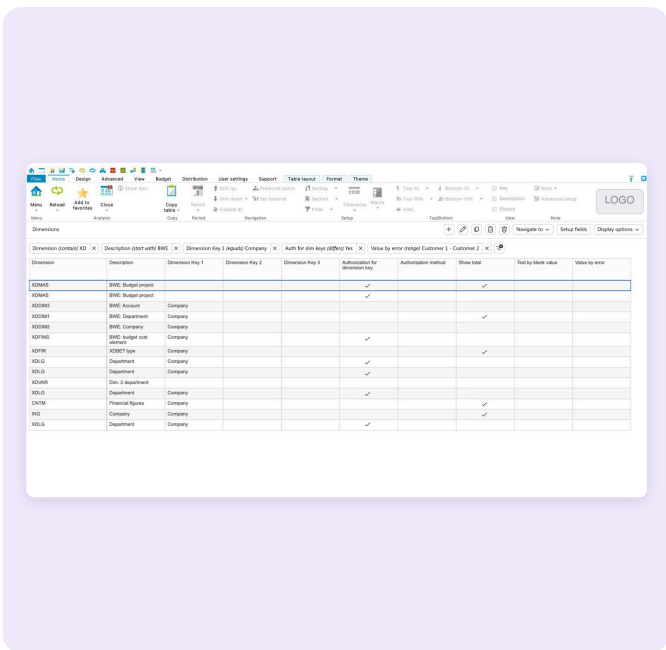
AFTER

- Filters as removable chips
- Toolbar actions and one Navigate to menu
- An edit panel with sections beside the list

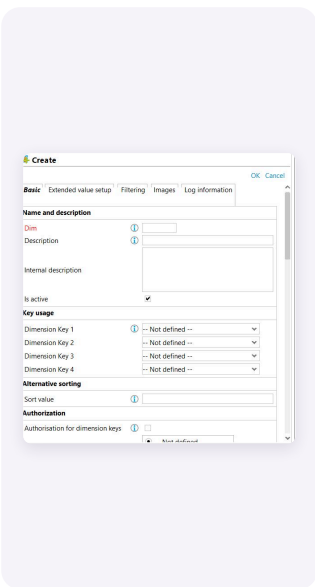
BEFORE · DIMENSIONS TABLE



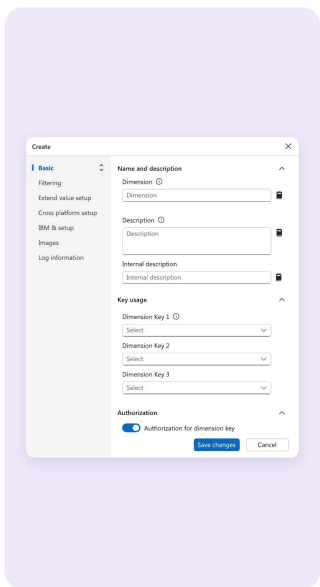
AFTER · DIMENSIONS TABLE



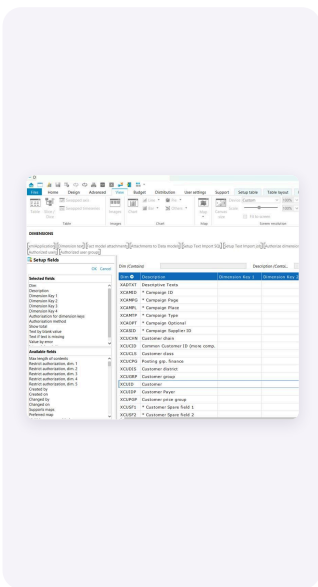
BEFORE · CREATE



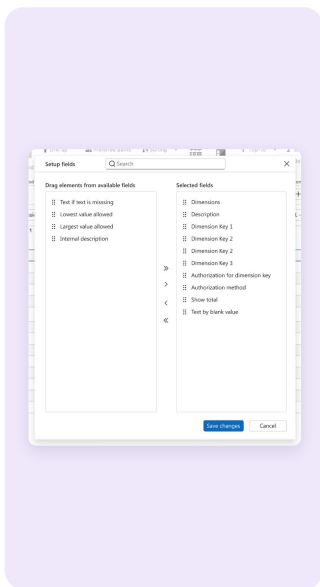
AFTER · CREATE



BEFORE · SETUP FIELDS



AFTER · SETUP FIELDS



Learn once

Every setup table works the same way.

Visible filters

Each filter is a chip with its rule.

Dark theme, new

Many analysts work in a dark environment all day. The product had no dark theme.

BEFORE

- No dark theme for the application
- Only a dark colour scheme for tables

AFTER

- A full dark theme for the whole application, built on Fluent UI 2
- Checked contrast and the same colour meanings as the light theme

The screenshot displays the application interface in a dark theme. The top navigation bar includes tabs for File, Home, Design, Advanced, View, Budget, Distribution, Table layout, Format, and Theme. The 'Budget' tab is active, showing a table with columns for Key / Description, History 2025 (DKK), Budget Q1 2026 (DKK), and Budget Q2 2026. The table lists various financial items such as ALL COMPANIES, Administration, Sales, and Stock, with corresponding numerical values. The sidebar on the left shows a tree view of the application structure, including Analysis package Finance, Sales & Marketing, and Procurement, as well as Budget, Shared, All analysis, and Recent sections. The bottom status bar indicates '3 unsaved changes' and '1 invalid'.

Key / Description	Oct 25	Nov 25	Dec 25	Jan 26	Feb 26	Mar 26	Q1	Apr 26	May 26
1 ALL COMPANIES	81,297	148,666	180,835	-178,872	-38,131	-42,823	-259,826	-22,573	17,354
PL PROFIT & LOSS	81,297	148,666	180,835	-178,872	-38,131	-42,823	-259,826	-22,573	17,354
> 10 Administration	-516,576	-536,067	-603,428	-563,601	-544,018	-562,543	-1,670,162	-555,632	-548,653
> 20 Sales	1,023,265	1,101,262	1,233,830	836,047	866,951	968,398	2,671,396	987,461	1,010,854
ACCOUNT REPORT GROUP									
01100 Turnover domestic	2,509,836	2,582,310	2,966,030	2,064,128	2,114,919	2,384,901	6,563,948	2,474,332	2,558,762
01200 Turnover export	1,169,328	1,248,255	1,373,110	944,067	986,779	1,141,526	3,072,372	1,163,250	1,214,028
01900 Discounts granted	-73,621	-77,303	-86,710	-61,424	-62,602	-72,479	-196,505	-71,768	-76,976
02100 Cost of sales	-2,176,170	-2,245,982	-2,548,712	-1,708,317	-1,761,504	-2,059,047	-5,528,868	-2,156,196	-2,256,380
30100 Staff costs	-311,311	-306,018	-357,040	-324,611	-330,960	-331,827	-987,398	-327,790	-328,136
37000 Marketing	-94,797	-100,000	-112,848	-77,796	-79,681	-94,676	-252,153	-94,367	-100,444
> 30 Stock	-425,392	-416,529	-449,567	-451,318	-361,064	-448,678	-1,261,060	-454,402	-444,847
ACCOUNT REPORT GROUP									
27000 Common costs	-86,579	-86,424	-88,729	-95,180	-91,551	-91,551	-186,731	-92,608	-90,888
30100 Staff costs	-209,938	-201,690	-233,748	-220,888	-224,090	-222,603	-667,581	-224,505	-215,656
33100 Accommodation costs	-61,926	-59,573	-60,022	-64,087	-65,574	-63,800	-193,461	-63,892	-65,017
51000 Depreciations	-66,949	-68,840	-67,068	-71,163	-71,400	-70,724	-213,287	-73,397	-73,286

A whole theme

Ribbon, panels, dialogs and grid switch together.

Quiet surfaces

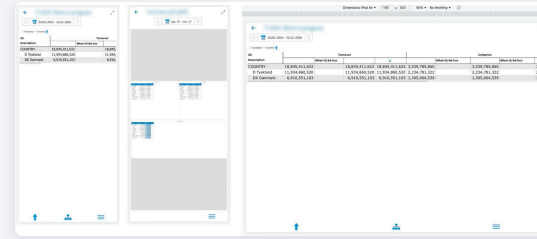
Only status and selection use strong colour.

Mobile app, from nothing

Managers want to check a figure on the way to a meeting.

BEFORE

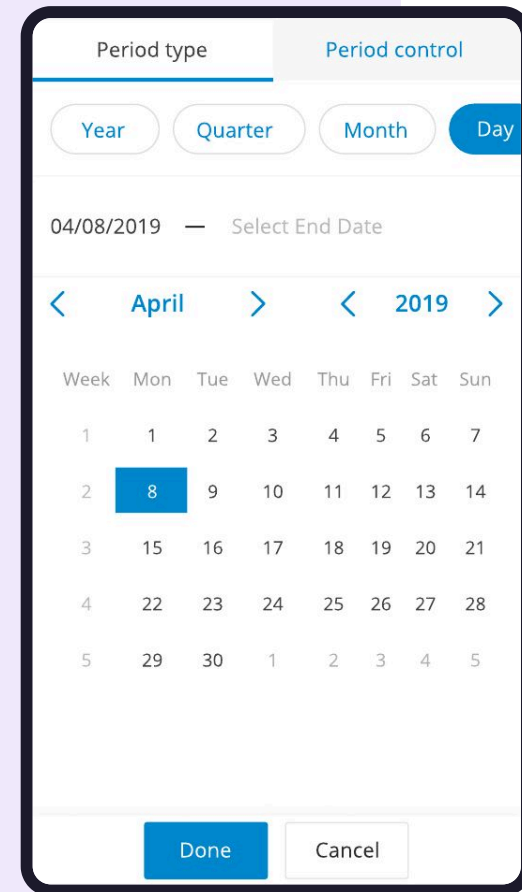
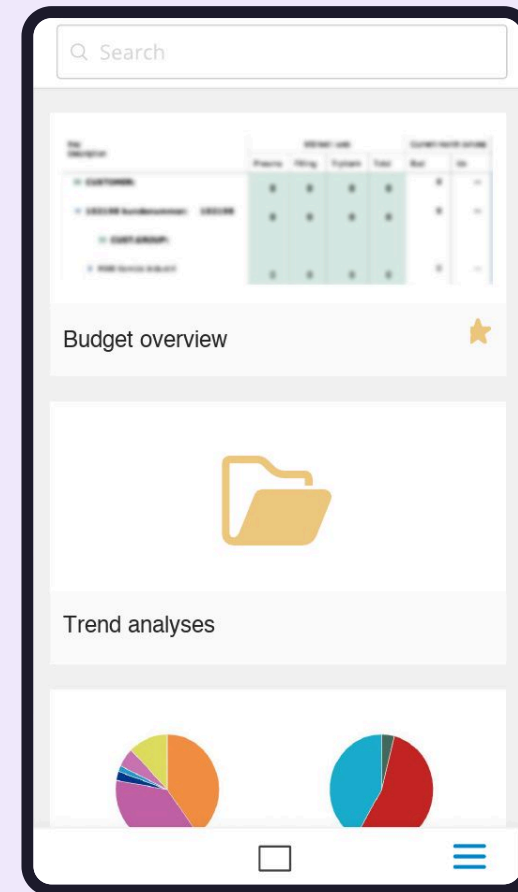
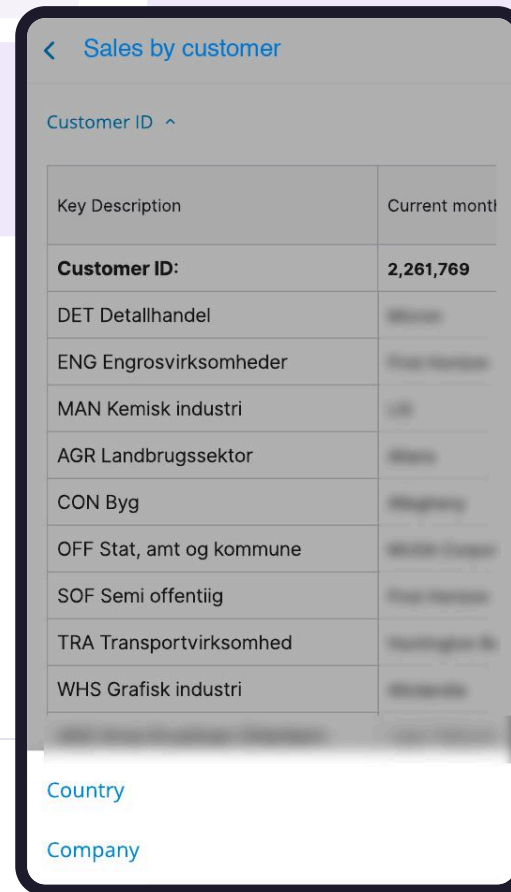
- No mobile version at all
- The desktop application opened as it was, with no mobile navigation



AFTER · MOBILE APP

AFTER

- A mobile app designed from scratch
- Drill-down as a sheet, analyses as cards, period in two taps



Thumb reach

Dimensions open from the bottom.

Period in two taps

Type first, then a calendar.

Budget entry, step by step

Around the grid: choose the work area, switch path, write notes.

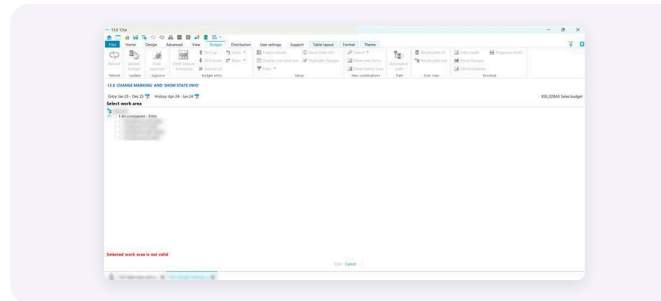
BEFORE

- A different kind of window for every step
- An error shown before the user did anything

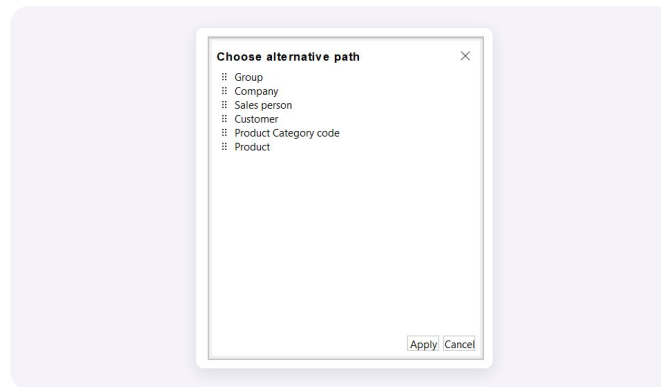
AFTER

- Fluent dialogs for quick choices, a side panel for editing
- One primary button in every step

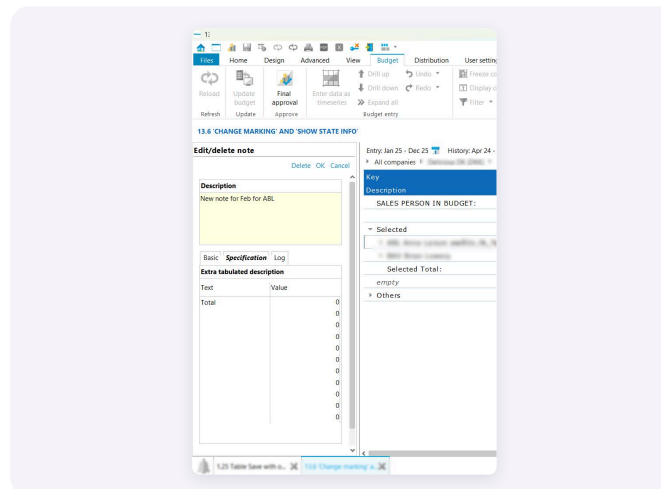
BEFORE · WORK AREA



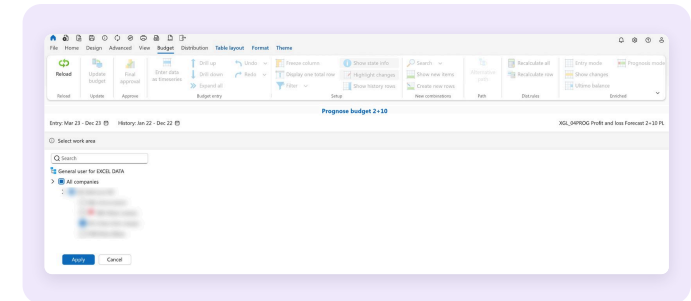
BEFORE · ALTERNATIVE PATH



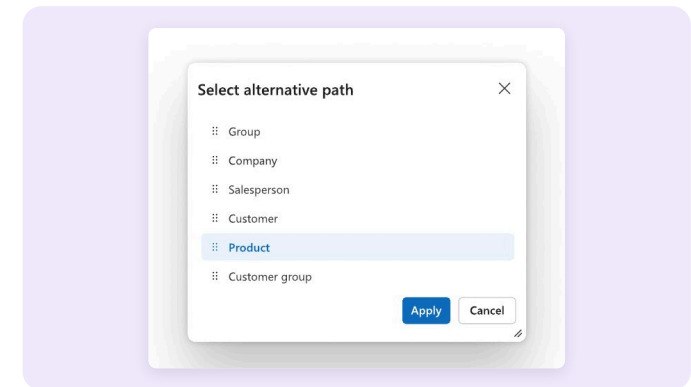
BEFORE · CELL NOTE



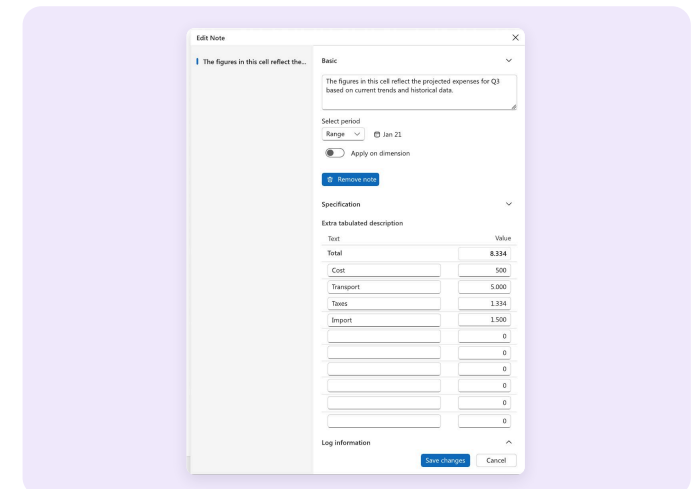
AFTER · WORK AREA



AFTER · ALTERNATIVE PATH



AFTER · CELL NOTE



Neutral start

No error before the first click.

Notes with context

All notes on a cell in one panel.

Tabulation definition

Tabulations group values into sets, such as A, B and C customers.

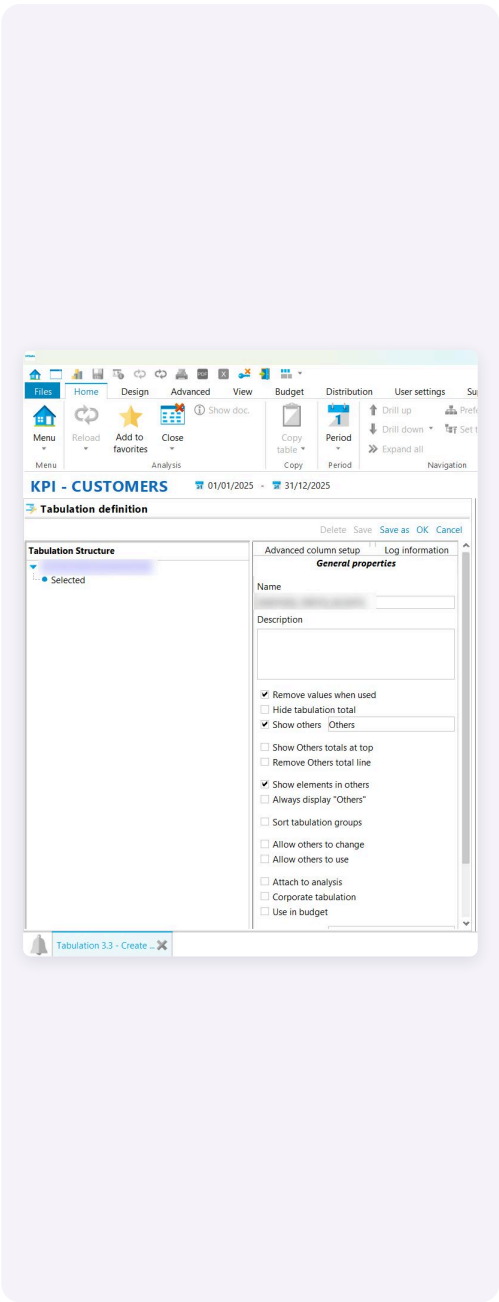
BEFORE

- A full-screen form with a tree and five text links
- A long column of checkboxes

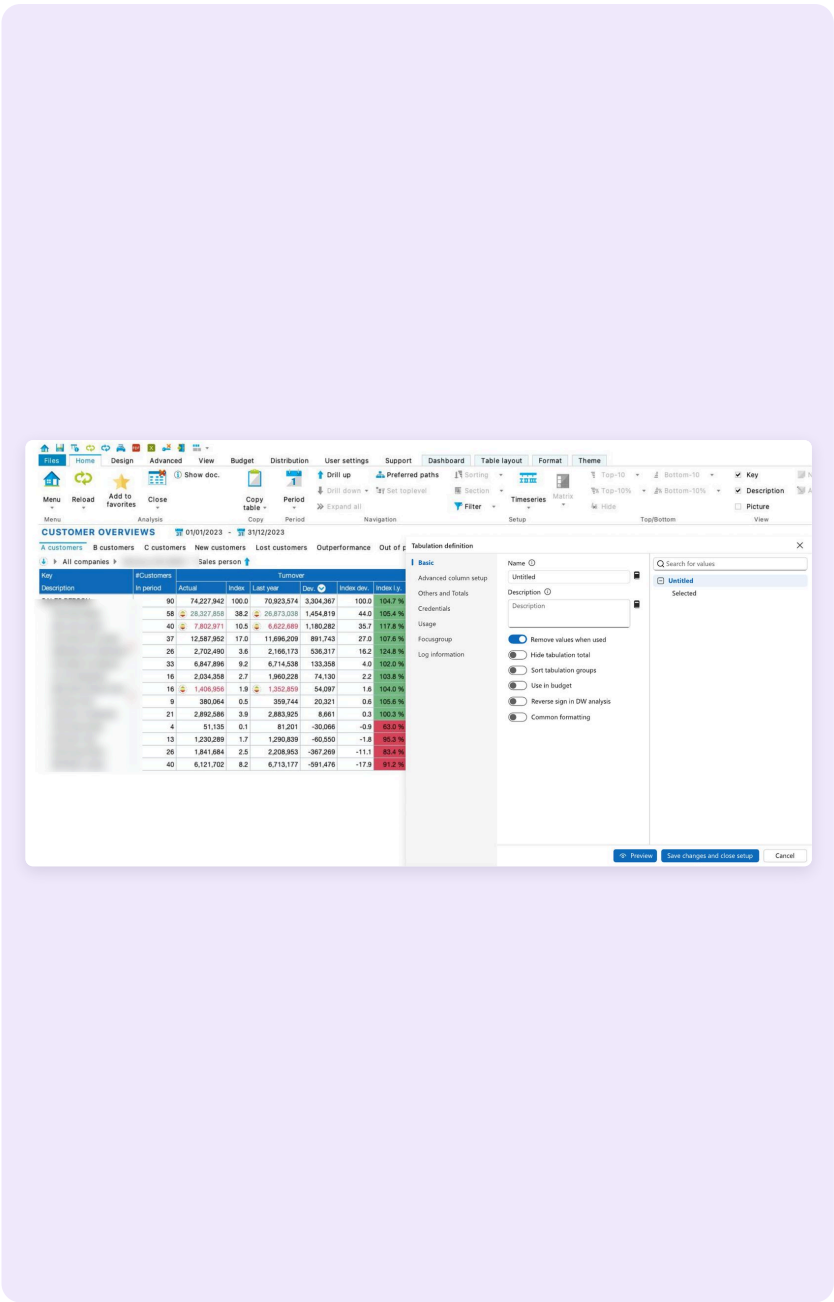
AFTER

- A side panel next to the live analysis
- Sections, switches and a Preview before saving

BEFORE



AFTER



Context kept

The analysis stays visible.

Preview before save

See the grouping, then commit.

Table formatting ribbon

Settings that change how every table looks.

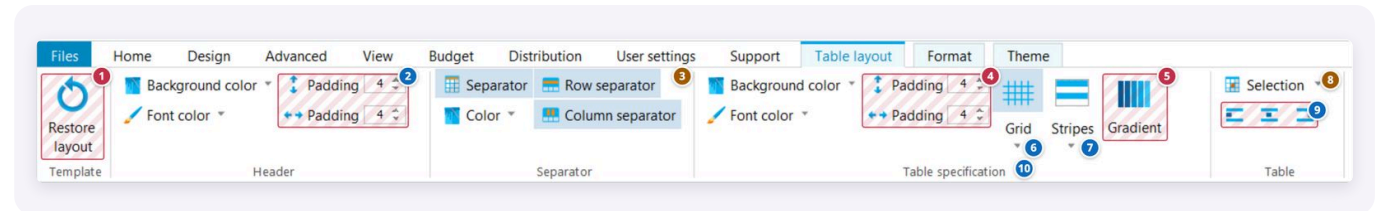
BEFORE

- Settings spread over two tabs
- Styling for every column and element, which almost nobody used

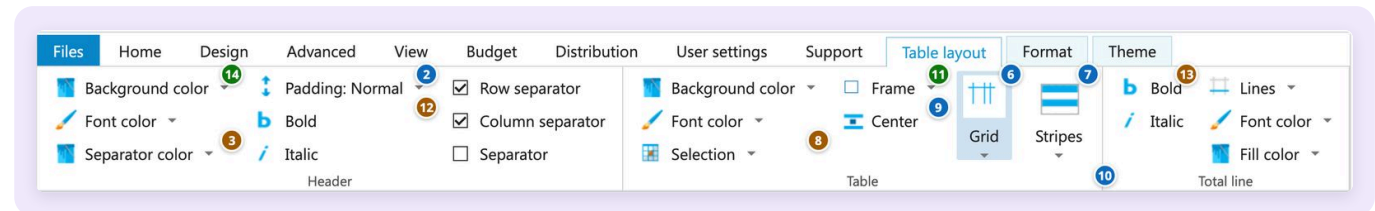
AFTER

- What people use, in three groups that read like the table
- Same icons, so nothing had to be relearned

BEFORE



AFTER



5 groups to 3

Header, table, total line.

22 controls removed

For data warehouse tables.

Waterfall chart, a new feature

The product had no waterfall chart. I reviewed the first build before release.

BEFORE

- Revenue drawn as a decrease
- Unreadable with many accounts
- Errors that named no field

AFTER

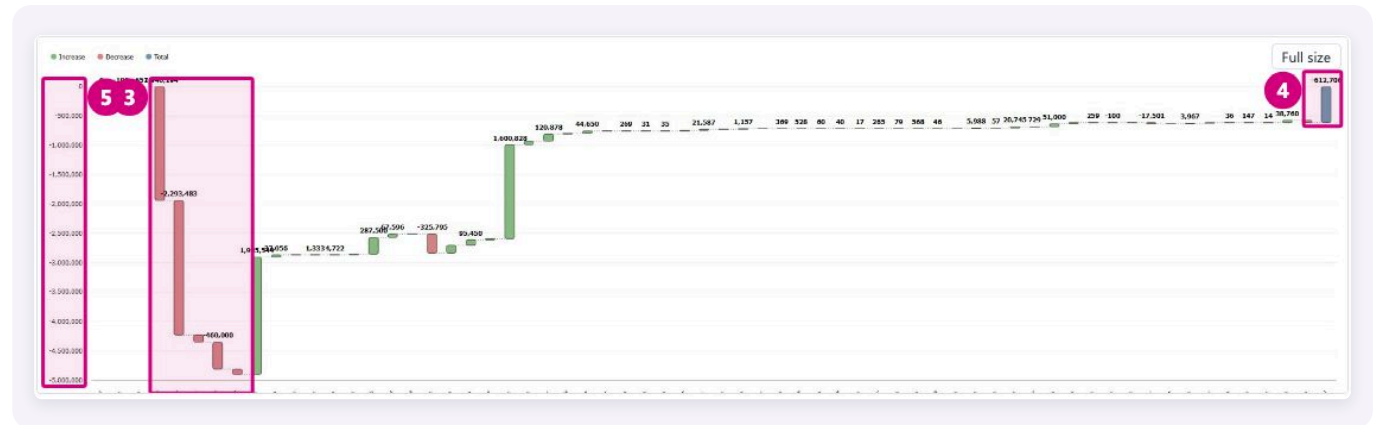
- Sign and colour follow business meaning
- A corrected chart and a stepped edit panel

Matches the grid

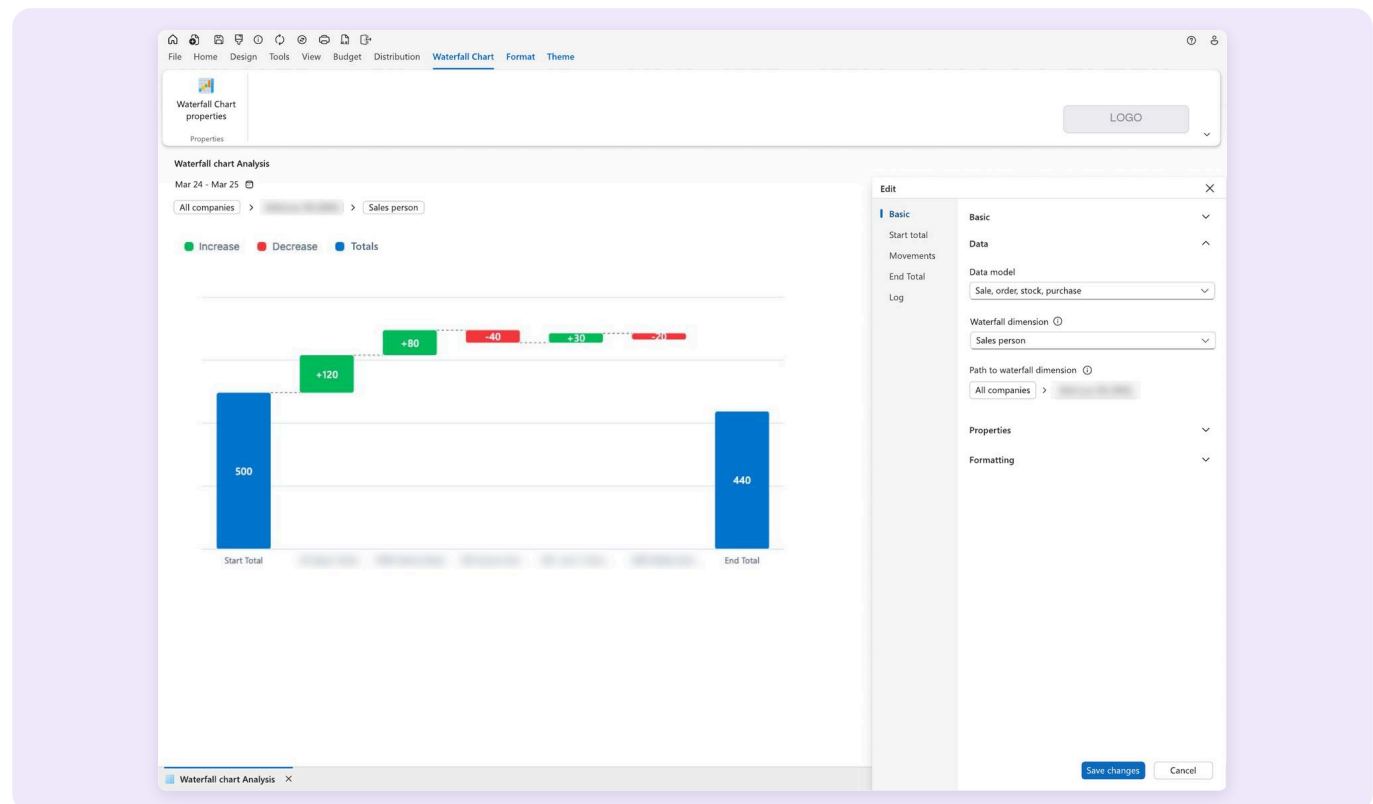
More revenue is an increase.

Guided setup

Edit steps mirror the chart.



REDESIGN



Rules that outlive the designer

The second design system is built on Microsoft Fluent UI 2 and records only what the product adds, so developers actually read it: grids, charts, responsive tiers from tablet to wide desktop, both themes, readable contrast and keyboard behaviour.

Consistency first

The same control looks and works the same everywhere.

Familiarity over novelty

Behave like Microsoft 365, Excel and Power BI.

Data first

Dense, readable figures before whitespace.

Keyboard-first speed

Shortcuts that don't clash with the browser.

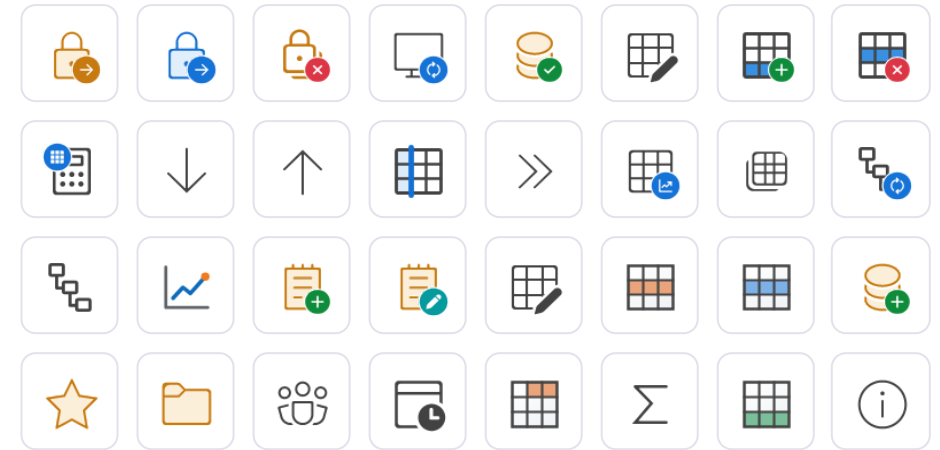
Governed numbers

Every change to a plan is visible.

One product across devices

Web matches desktop; phones get an app.

Keeping a large icon set healthy



1,146 new icons, each in a light and a dark variant. With that many, the other half of the work is checking them: how they look in both themes, whether any are broken, missing or duplicated. An audit found about 530 icon files nothing used.

One component, one behaviour

The biggest problem was not one screen but how differently everything worked: every team and every year had added its own version of the same control.

BEFORE	AFTER
OK and Cancel as links on one screen, buttons on the next	One primary button per area, always in the same place
Dialogs, side forms and full-screen windows for the same task	Dialogs for quick choices, a side panel for editing
Tabs in one editor, stacked boxes in another	Sections with the same layout in every editor
Toggles, checkboxes and dropdowns for the same on/off setting	One control type per kind of setting
Lists with search, lists without search	One picker with search for paths, slices and filters

Keyboard shortcuts for the browser

Many desktop shortcuts are reserved by the browser. I reviewed the whole scheme for desktop, web and touch, moved conflicting shortcuts, proposed new ones where gaps existed, and put the shortcut into every tooltip.

UI writing

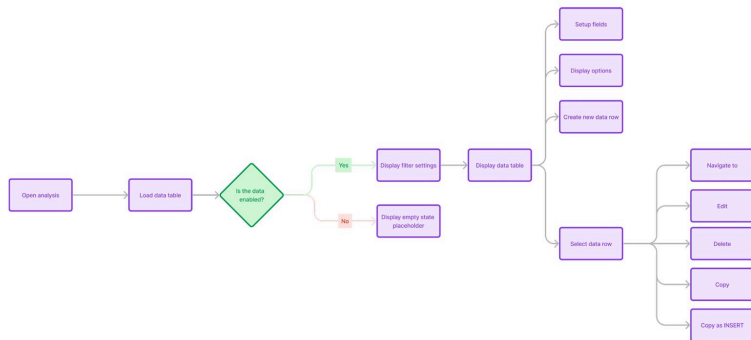
17 of 20 quick-bar tooltips just repeated the button name. I wrote a tooltip style guide and rewrote the texts for 36 status icons.

Temporary locked budget entry

Temporary lock on row
The value on this row is held while the rows below are changed. Any user can remove the lock.

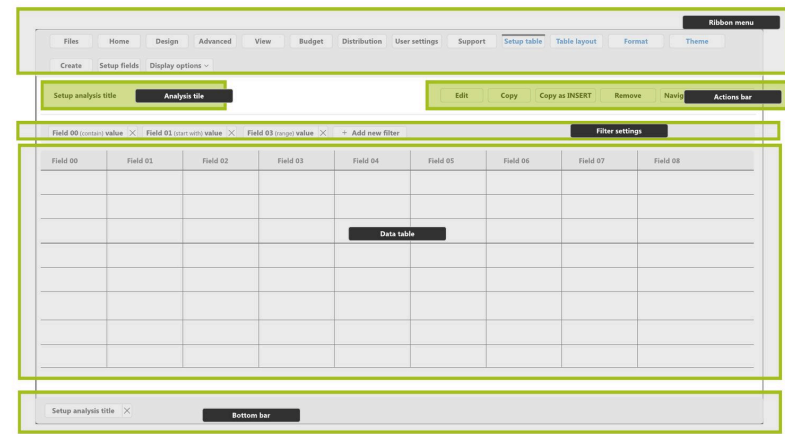
From flow to specification

USER FLOW



Every module starts with a user flow and an annotated layout, then goes to development as a specification: problem, scope, expected behaviour, numbered acceptance criteria covering keyboard, screen readers, touch and both themes. Before a release I test the build myself and report what does not match the design.

ANNOTATED LAYOUT



AI in my work, since 2026. I use Claude and ChatGPT every day: Figma exports into documentation and UX reviews, checking UI texts, and clickable React prototypes developers can try before writing production code.

Figma

Fluent UI 2

Claude

ChatGPT

React prototypes

Storybook

YouTrack

RESULTS

What changed

For the product

- Interactive, Excel-like grids in the browser instead of static server-rendered tables
- One consistent interface instead of three clients that each worked differently
- A first mobile app, designed from scratch
- Light and dark themes with readable contrast

For the team

- A design process the whole company knows, from research to review
- Specifications with acceptance criteria instead of screenshots in chat
- Usability testing and design QA as regular steps

My job was to turn many opinions into clear decisions the team could build.

Write it down. A rule in one person's head gets argued every sprint.

Pick the battles. Hold firm where users would be hurt, like a chart with the wrong sign; accept a smaller fix where the cost is mostly visual.

Familiar beats clever. Experts judge a new interface by how little they have to relearn.

Confidentiality: the product, company, customers and colleagues are not named. Logos are replaced, and names and client data in screenshots are blurred.