

Nuance® Equitrac®

# UX Training

Session 1  
June 15, 2017

# UX Training Intro & Objectives

---

- Who we are (Authentic Insight)
- 5 sessions – Each session 2 hours long. First hour training, second hour Q &A.
- First 2 sessions – focus on Pattern Guide
- Session3: Foundations of User Experience/Information Architecture deep dive
- Session4: Visual Design/Copy (writing)
- Session5: General Best Practices

# Pattern Guide Session 1

---

- What is the Pattern Guide
- How to use the Pattern Guide
- Review and provide rationale for specific Equitrac patterns

# Pattern Guide – What it is...

---

- We designed a set of features, not ALL the features.
- This is about how to leverage those designs
- This is about patterns: navigation patterns, page patterns, interaction patterns & component designs that can be repurposed
- The pattern guide documents the design, it doesn't provide rationale (we'll get into that in these sessions)
- Not the final visual design

# Pattern Guide – Constraints

---

- Bootstrap
- Responsiveness
- Existing code base and technology
- Designs were based on a minimum screen resolution of 1024x768 (tablet device), but assuming the primary user is using a desktop/laptop device

How do I find what I need in the  
Pattern Guide?

*Answer 3 questions first...*

## *Question 1*

How does the user access the feature?  
Where does it “live” in context of the application’s existing navigation model?

*To answer this, we’ll review the application’s navigation model and patterns.*

*(Navigation Section of the Pattern Guide)*

## Question 2

*Now you've determined how the user accesses the feature...*

# What page type/layout is most appropriate?

*To answer this, we'll review the different page types that have been established and when/why each is used.*

*(Page types section of the Pattern Guide)*



### *Question 3 (Next Session)*

*Once the navigation and page type context has been determined (or if your feature is accessed from an existing page)...*

# How do I know which components/interactions are best suited for my new feature?

*To answer this we'll review items and interactions that go a page:*

- Information & Text (communicating to the user)*
- Controls & Widgets (components that make up a page)*
- Tables*
- Stepped Workflow*

# 1. Navigation

---

*Provides answers to:*

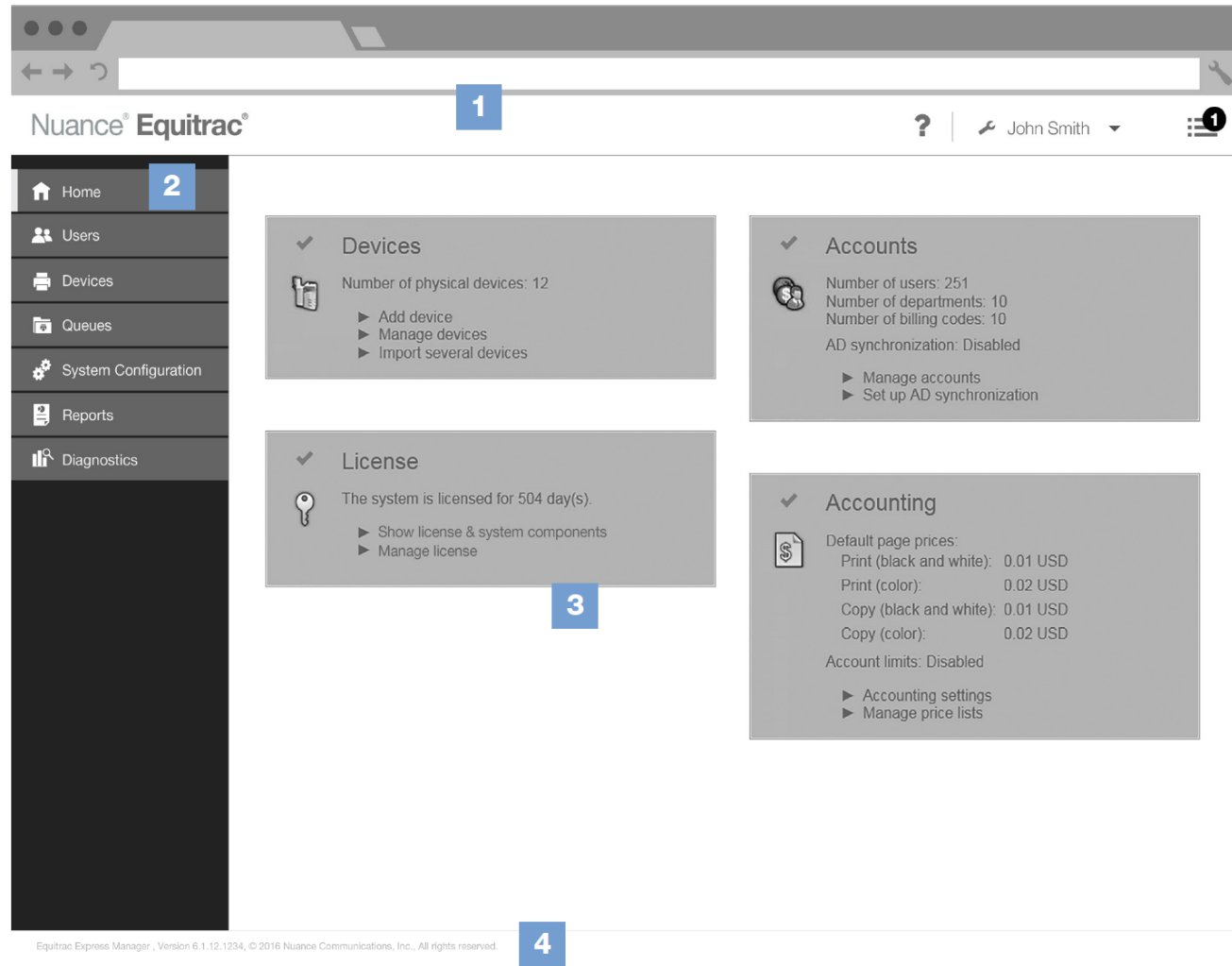
- *How does the user access the feature?*
- *Where does it “live” in context of the application’s existing navigation model?*

# Application Framework (Pattern Guide p 5)

---

*What is a “framework”?*

- Basic UI structure of the web application
- Establishes primary UI areas that are displayed for application pages
- Design focus was on the navigation (sidebar) and content areas for the product features we designed



## Framework

The application is designed for a minimum screen display resolution of 1024x768 pixels (tablet landscape form factor).

The application framework and many of the HTML components (not all) are intended to be responsive, such that when viewed in a smaller, or larger, screen environment the screen layout resizes and controls adapt accordingly.

- 1 Header** - fixed header area displayed on every page of the application.
- 2 Primary Navigation Sidebar Panel** - primary navigation categories and links. Access to primary and secondary navigation items.
- 3 Content Area/Dashboard** - links to frequently accessed application features are displayed on the application's Home page.  
  
Note: the dashboard has not been redesigned as part of this redesign effort.
- 4 Footer** - footer area displayed on every page of the application.

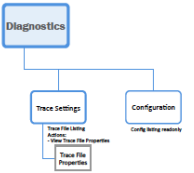
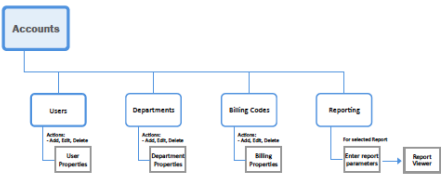
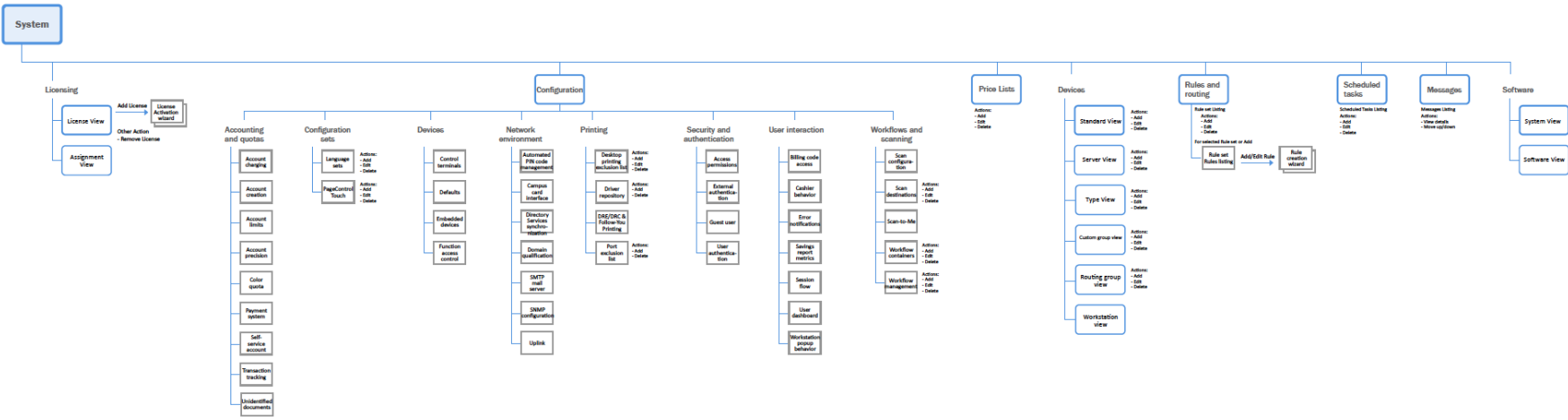
# Application Framework (Pattern Guide p 5)

---

- Need to first have a holistic (general) understanding of the entire application to determine this “structure”
- Use a PRODUCT MAP to gain this understanding (both current and proposed future versions)

# EQUITRAC SYSTEM MANAGER PRODUCT MAP - CURRENT STATE

Iteration 1.0



**LEGEND**

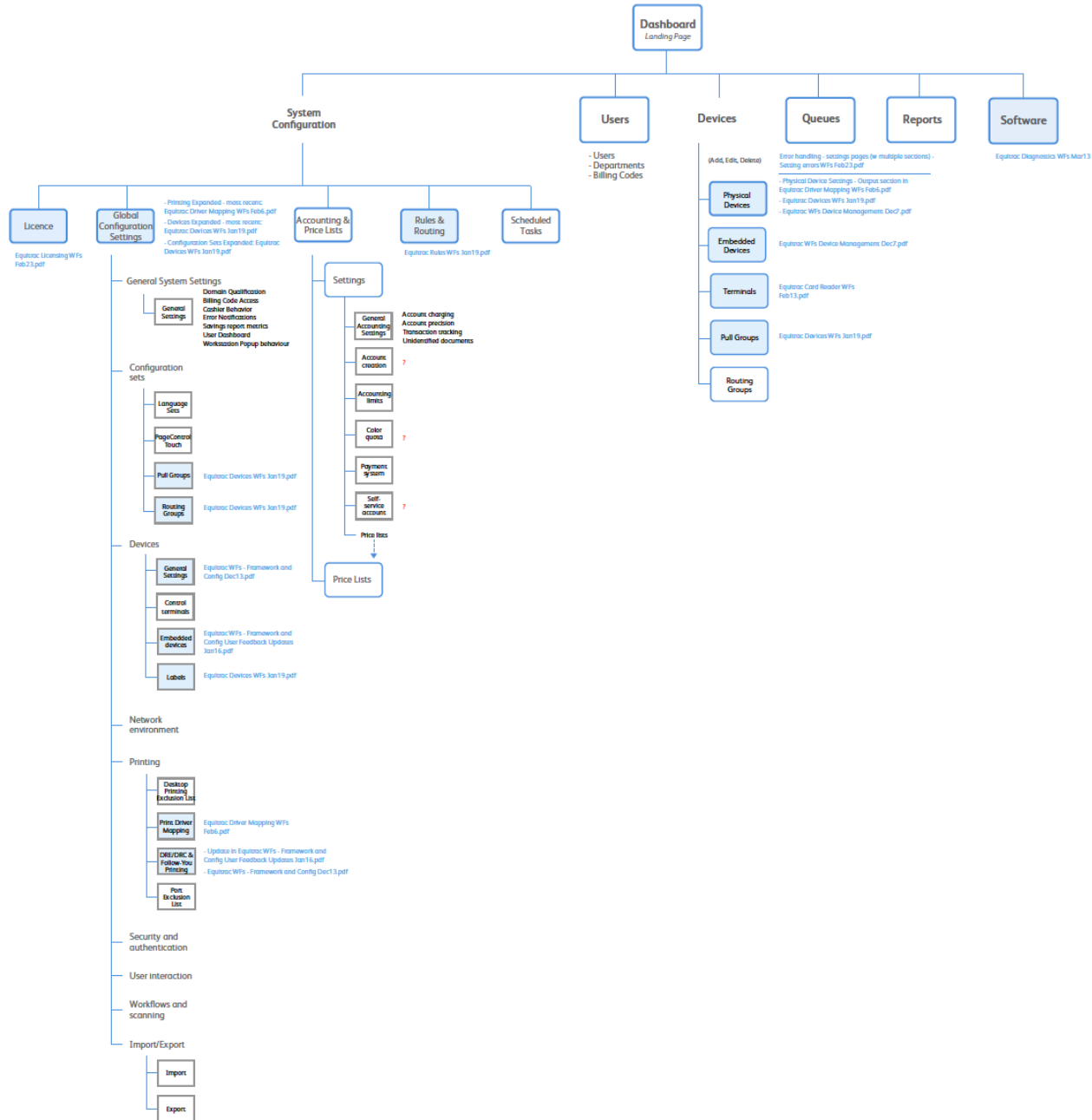
- Navigation Module
- Landing page
- Page
- Dialog window
- Dialog wizard

# EQUITRAC SYSTEM MANAGER PRODUCT MAP - Future State

February 17, 2017

Admin focused (Manage System)

End User focused



# Navigation (Pattern Guide p 7-11)

---

Navigation model consists of:

- Primary navigation (main sections)
- Secondary navigation (subsections)
- Back button
- Page links & buttons



# Navigation (Pattern Guide p 7-11)

---

Initially explored a “top driven” navigation model...

# Initial "top driven" navigation exploration

The image shows a two-step process of navigating through the Equitrac web interface. The top screenshot shows the user clicking on the 'System' menu item in the top navigation bar. A dropdown menu appears, listing 'Licenses', 'Global Configuration Settings', 'Accounting & Price Lists', 'Rules & Routing', and 'Scheduled Tasks'. The bottom screenshot shows the 'Global Configuration Settings' page, which is a grid of expandable configuration sections. A large red 'Rejected' watermark is overlaid on the center of the image.

**Equitrac** | John Smith / Admin

Home | User Management | Device Management | **System** | Reports | Diagnostics

Device Status [Settings]

Server Health [Settings]

**System**

- Licenses
- Global Configuration Settings**
- Accounting & Price Lists
- Rules & Routing
- Scheduled Tasks
- Messages
- Software

### Global Configuration Settings

Accounting & Quotas	Printing
Configuration Sets	Security & Authentication
Devices	User Interaction
Control Terminals      Session timeout after 30 seconds of inactivity.	Workflows & Scanning
Defaults                Media size: Letter, Monochrome settings: Color	
Embedded Devices	
Function Access        Copy access: allowed; fax Access: allowed; scan.	
Network Environment	

# Navigation (Pattern Guide p 7-11)

---

## Findings:

- Secondary navigation had to be vertical due to horizontal real estate constraints
- Switch from horizontal (for primary nav) breaks information architecture
- Then explored vertical side navigation model...

## Secondary Navigation

- 1 **Access to Secondary Navigation** - not all primary navigation sections have secondary navigation (e.g. Devices has primary navigation only).

If secondary navigation exists, then a mouse hover over a primary navigation section displays its selectable secondary navigation items.

The screenshot displays the Nuance Equitrac web application interface. At the top, the browser address bar is visible. Below it, the Nuance Equitrac logo is on the left, and a user profile for John Smith is on the right. A primary navigation menu is located on the left side, listing sections: Home, Users, Devices, Queues, System Configuration, Reports, and Diagnostics. The 'System Configuration' section is currently selected, and its secondary navigation options are displayed in a dark overlay: License, Global Configuration Settings, Accounting & Price Lists, Rules & Routing, and Scheduled Tasks. A blue box with the number '1' highlights the 'License' option. In the main content area, three primary navigation sections are visible: 'Devices', 'Accounts', and 'Accounting'. Each section has a secondary navigation menu. The 'Devices' section shows 'Number of physical devices: 12' and options to 'Add device', 'Manage devices', and 'Manage physical devices'. The 'Accounts' section shows 'Number of users: 251', 'Number of departments: 10', 'Number of billing codes: 10', and 'AD synchronization: Disabled', with options to 'Manage accounts' and 'Set up AD synchronization'. The 'Accounting' section shows 'Default page prices' for print and copy in black and white and color, and 'Account limits: Disabled', with options to 'Accounting settings' and 'Manage price lists'.

## Secondary Navigation Exposed

- 1 **Secondary Navigation** - if a primary navigation section has no secondary navigation, then selecting the primary item will navigate the user directly to the landing page for that primary section.

There is no landing page directly associated with the primary navigation item if it has associated secondary navigation items. If secondary navigation exists, then selecting the primary navigation item will navigate the user directly to the first secondary navigation item and its associated page content.

The screenshot displays the Nuance Equitrac web application interface. At the top, the browser address bar is visible. The application header includes the Nuance Equitrac logo, a help icon, the user name "John Smith", and a notification icon with the number "1".

The left sidebar contains a navigation menu with the following items: Home, Users, Devices, Queues, System Configuration (highlighted with a blue bar and a "1" notification), License (highlighted with a white bar), Global Configuration Settings, Accounting & Price Lists, Rules & Routing, Scheduled Tasks, Reports, and Diagnostics.

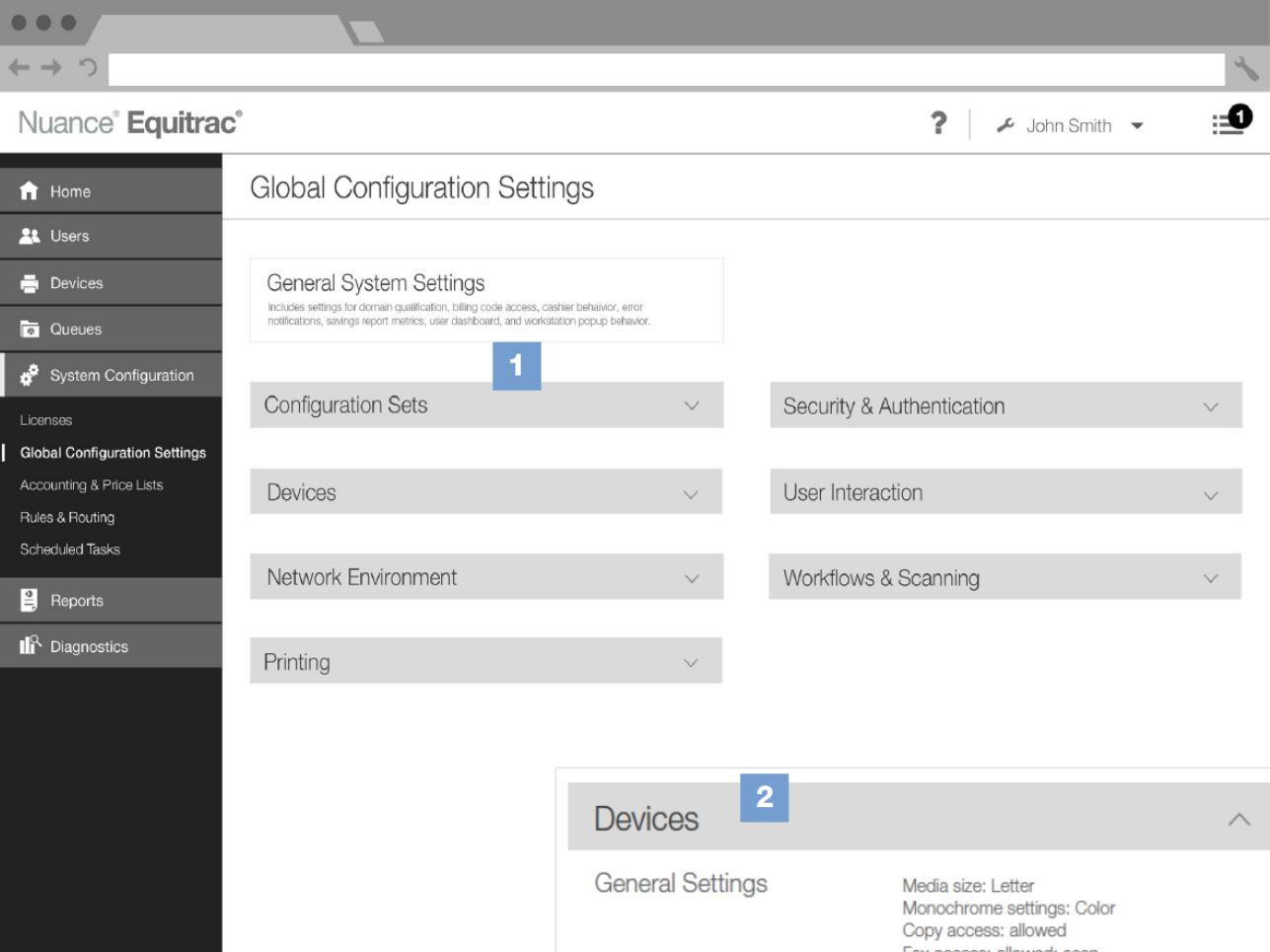
The main content area is titled "License" and includes a "License Manager" button. It displays license details for a customer named "Acme Company, Gainesville, FL".

**License Details:**

- License Key: 7303-0372-8285-9854
- Serial Number: 106
- License Status: Version 6.0.1.2 is activated

**Licensed Equitrac Components - Total 10**

Description	Status/Quantity	Expires	Product Code
Equitrac Component1	Enabled	6/30/2017	component_1
Equitrac Component2	500 Users, 126 available	6/30/2017	component_2
Equitrac Component3	100 Devices, 56 available	6/30/2017	component_3
Equitrac Component4	Enabled	6/30/2017	component_4
Equitrac Component5	Enabled	6/30/2017	component_5
Equitrac Component6	Enabled	6/30/2017	component_6
Equitrac Component7	Enabled	6/30/2017	component_7
Equitrac Component8	Enabled	6/30/2017	component_8
Equitrac Component9	Enabled	6/30/2017	component_9
Equitrac Component10	Enabled	6/30/2017	component_10



## Landing Page with Content Categories Links

- 1 **Landing Page with Links** - the Global Configuration Settings landing page is an example of a landing page that allows users to access a third level of navigation/links in the context of the page content area.
- 2 **Section Headers** - the page has expandable (and then collapsible) content sections. When a section header is expanded its subcategories are displayed. The subcategories link to associated settings sub-pages.

# Navigation (Pattern Guide p 7-11)

---

Sometimes you see the primary/secondary navigation sometimes not. When does it not show?

## Guideline

- After primary or secondary landing pages...when user selects a button or link on the landing page to more "detail" or to perform an action (which is displayed in a new page)



All fields required unless otherwise indicated.

### Defaults

Media Size  ⓘ

Monochrome Settings  ⓘ

Track Twin/Mono Color as Black & White  ⓘ

## Back Button

Only primary and secondary navigation landing pages are displayed in context of the primary navigation sidebar panel.

Pages that are accessed by selecting a link (or action) from a primary or secondary navigation landing page do not display the primary navigation sidebar panel.

- 1 Back Button** - pages that don't display in the context of the primary navigation sidebar panel always have a Back button. The Back button is displayed in the page header (next to the Page Title). Selecting the Back button takes the user back to the page from where the current page was accessed.



# Navigation (Pattern Guide p 7-11)

---

- Back button used after primary or secondary landing pages. It lets the user get back their original context
- Almost always “Back” takes the the user back to the primary navigation context
- Since navigation is not that “deep”, decided that breadcrumbs not necessary

 Print Driver Mapping

1

Manage Drivers

## Printer Manufacturer

Canon  
Dell 8  
Fuji Xerox  
Gestetner  
HP  
Konica Minolta  
Kyocera-Mita  
Lanier  
Lexmark 44

## Xerox

 For Selected Printer(s):  Edit Printer/Driver  Edit Package/Driver  Delete  Add Printer/Driver

<input type="checkbox"/>	Model Name ▾	Environment ▾	OS Version ▾	Package Name ▾	Driver Name ▾
<input type="checkbox"/>	<a href="#">WorkCentre 7535</a>	x64	Windows 7	Xerox7535PCL-Win7-64-bit	Xerox WorkCentre 7535
<input type="checkbox"/>	<a href="#">WorkCentre 7855</a>	x64	Windows 7	Xerox7855PCL6-Win-64-bit	Xerox WorkCentre 7855 PCL6
<input type="checkbox"/>	<a href="#">WorkCentre 7855</a>	x64	Windows 8	Xerox7855PCL6-Win-64-bit	Xerox WorkCentre 7855 PCL6

 Manage Drivers

## Processor

All  
x32  
x64

## All

 For Selected Package(s):  Edit Package  Delete  Use the Windows Utility to add driver packages to the system

<input type="checkbox"/>	Package Name ▾	Processor ▾	Version ▾	Date ▾	Description ▾
<input type="checkbox"/>	<a href="#">Driver Package Name1</a>	x64	1.1	12/21/15	Custom user description of driver package
<input type="checkbox"/>	<a href="#">Driver Package Name2</a>	x32	1.1	03/08/12	Custom user description of driver package
<input type="checkbox"/>	<a href="#">Driver Package Name3</a>	x64	1.1	01/13/14	Custom user description of driver package
<input type="checkbox"/>	<a href="#">Driver Package Name4</a>	x64	1.1	12/21/15	Custom user description of driver package

## Sub-Page Access

- 1 **Sub-Page access** - contextual navigation to a sub-page application feature can be provided by a button in the page header.

A sub-page that is accessed via this means of navigation usually surfaces an application feature that does not warrant a high priority of accessibility. The sub-page may also have multiple points of navigation access in the application.

- 2 **Sub-Page & Back Button** - the sub-page follows the same interaction model of using a Back button to allow the user to navigate back to the previous page display.

# Quick Recap....

- Primary/Secondary Vertical Navigation
- Subsections (secondary nav) have landing pages
- All non-landing pages have Back button
- No breadcrumbs

# Sidebar Navigation (page 12-14)

---

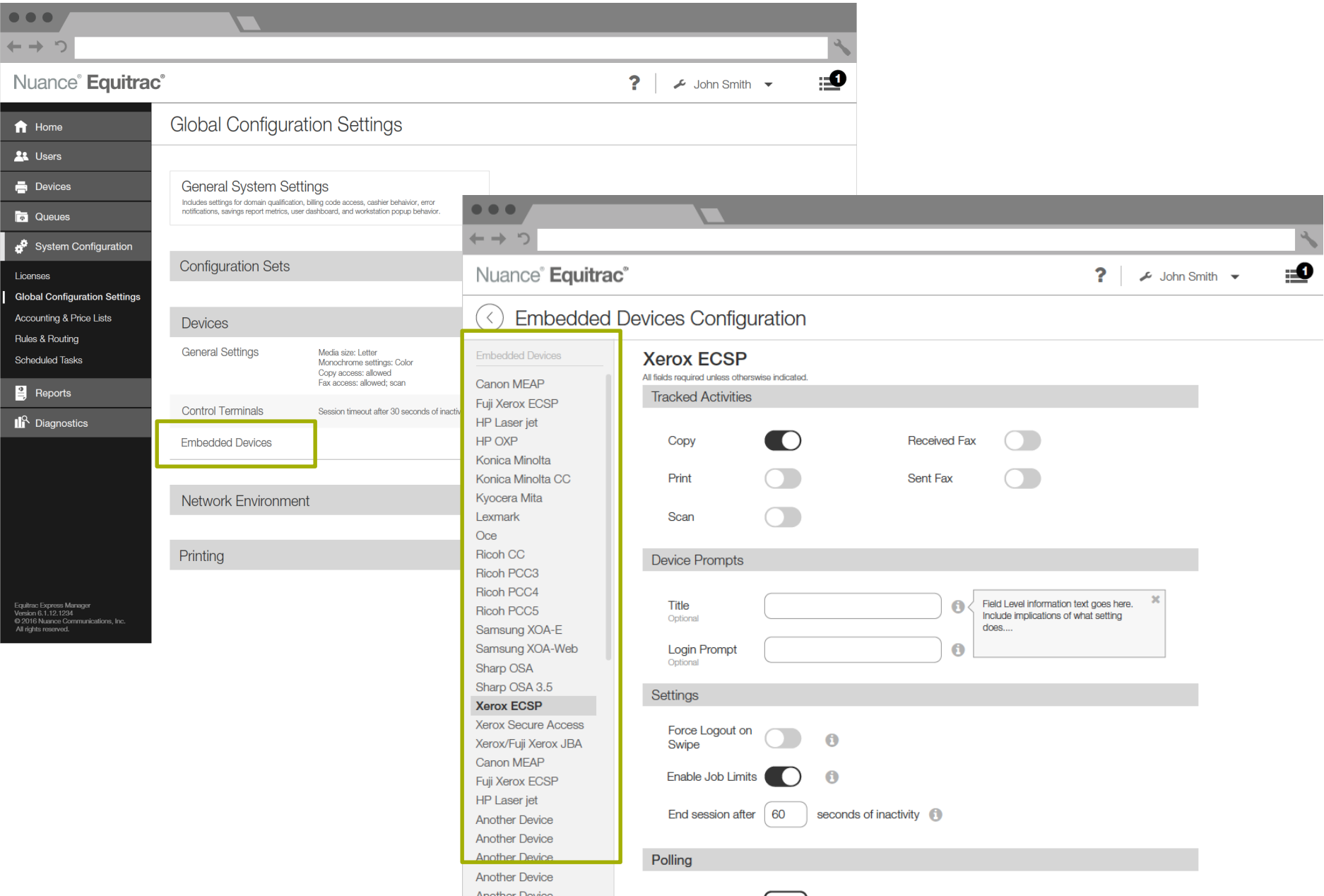
Sometimes...

A sidebar navigation can replace the primary/secondary navigation area.

Example: when drilling down from a landing page...

# Sidebar Navigation for "like-type" Objects

(e.g. Equitrac WFs - Framework and Config Dec13 p4-5)



# Sidebar Navigation (page 12-14)

---

- Replaces the primary/secondary navigation area
- Allows access to sub-navigation or filtering related to a common object
- Back button to get back to original context (with primary navigation)

# Sidebar Navigation (page 12-14)

---

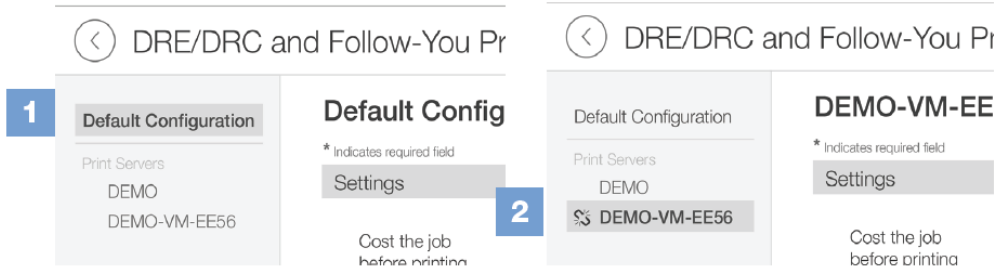
Variations:

- for "like-type" Objects
- for Object Setting Categories
- with Associated Links & Actions
- with Filter categories
- with Search
- With Indicators

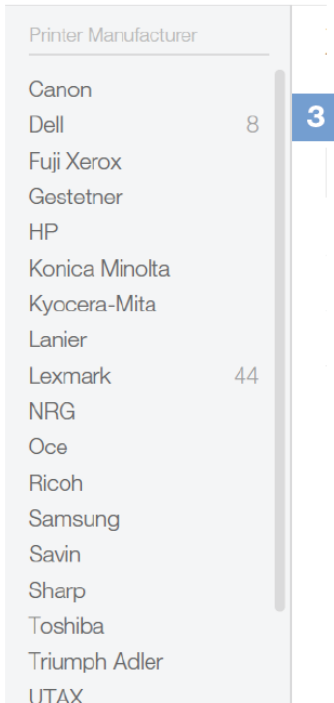




## Sidebar Navigation with Visual Indicator



## Sidebar Navigation with Count



## Sidebar Navigation with Indicators

### Sidebar Navigation with Visual Indicator

- 1 Default Settings** - in this example, having Default Configuration selected displays default configuration settings for all Print Servers (the object type), and selecting any of the Print Servers listed underneath displays configuration settings for the selected print server (a specific object).
- 2 "Unlinked" Icon Indicator** - if a Print Server is no longer "linked" to the default settings then an "unlinked" icon is associated and displayed beside the Print Server name in the sidebar navigation

Also refer to "Sidebar Navigation & Page Form Behavior - Unlinking from Default Settings" on page 21.

### Sidebar Navigation with Count

- 3 Navigation Item with Count** - a sidebar navigation item can have a count associated with it to inform the user how many associated objects are associated with the navigation item.

# Sidebar Quick Recap....

- Sometimes primary navigation area replaced with a sidebar navigation
- Allows for sub-navigation or filtering
- Back button to get back to original context (with primary navigation)

# When you're designing a new feature...

Look at the nav framework and figure out where your feature should live:

- In one of the existing subsections?
- New page?
- New section in existing page?
- Does it need a new subsection?

# Important Considerations

---

## DO NOT MIX NAVIGATION MODELS.

- Do not introduce a breadcrumb
- Do not have a Back button if the primary navigation is displayed

## Navigation is REALLY important.

- Mixing navigation models is what makes users feel “lost” and “confused” and say “I don’t know how to get there, or get back to where I was”.

# 2. Page Types & Layouts

---

*Provides answers to:*

- *Now you've determined how the user accesses your feature, what page type/layout is most appropriate?*

# Landing Pages (Pattern Guide p 16)

---

- Landing Pages provide overview information pertaining to the navigation section they are associated with
- Provides access to further associated navigation and/or actions
- A Landing Page is never directly editable. There is NEVER a SAVE button on the page.

# Primary Navigation Landing Page Example

The screenshot shows a web browser window displaying the Nuance Equitrac interface. The browser's address bar is empty. The page header includes the Nuance Equitrac logo on the left, a help icon, a user profile for John Smith, and a notification icon with the number 1. A dark sidebar on the left contains navigation links: Home, Users, Devices, Queues, System Configuration, Reports, and Diagnostics. The main content area is titled 'Devices' and features a tabbed interface with 'Physical Devices' selected. Below the tabs, there are controls for 'Labels', 'For Selected Device(s)', and 'Select Action'. A '+ Add Physical Device' button is also present. The main area contains a table of physical devices with columns for selection, name, network address, manufacturer/model, color, embedded device status, and location. The table lists 10 devices, with the first three selected. The footer shows 'Showing 1 to 10 of 562 Physical Devices' and a pagination control with page 1 selected and a 'Number of items per page' dropdown set to 10.

Nuance® Equitrac®

John Smith

Home Users Devices Queues System Configuration Reports Diagnostics

## Devices

Physical Devices Embedded Devices Terminals Pull Groups Routing Groups

Labels For Selected Device(s) Select Action + Add Physical Device

<input checked="" type="checkbox"/>	Physical Device Name	Network Address	Manufacturer/Model	Color	Embedded Device	Location
<input type="checkbox"/>	<a href="#">Ricoh Aficio MP C2800</a>	10.17.77.3	Ricoh 4456-sc	No		1st Floor
<input type="checkbox"/>	<a href="#">Xerox WorkCentre 7855</a>	10.17.77.9	Xerox 7855-mmb	Yes	<a href="#">Embedded Device Name</a>	2nd Floor
<input checked="" type="checkbox"/>	<a href="#">Xerox WorkCentre 7970</a>	10.17.77.1	Xerox 7970	Yes	<a href="#">Embedded Device Name</a>	2nd Floor
<input checked="" type="checkbox"/>	<a href="#">Another Physical Device</a>	10.17.77.2	Ricoh 4456-sc	No		1st Floor
<input checked="" type="checkbox"/>	<a href="#">Another Physical Device</a>	10.17.77.4	Xerox 6679-mmb	Yes	<a href="#">Embedded Device Name</a>	2nd Floor
<input type="checkbox"/>	<a href="#">Another Physical Device</a>	10.17.77.5	Xerox 7676	Yes	<a href="#">Embedded Device Name</a>	2nd Floor
<input type="checkbox"/>	<a href="#">Another Physical Device</a>	10.17.77.6	Ricoh 4456-sc	No		3rd Floor
<input type="checkbox"/>	<a href="#">Another Physical Device</a>	10.17.77.7	Xerox 6679-mmb	Yes	<a href="#">Embedded Device Name</a>	3rd Floor
<input type="checkbox"/>	<a href="#">Another Physical Device</a>	10.17.77.8	Xerox 7676	Yes	<a href="#">Embedded Device Name</a>	1st Floor
<input type="checkbox"/>	<a href="#">Another Physical Device</a>	10.17.78.3	Ricoh 4456-sc	No		2nd Floor

Showing 1 to 10 of 562 Physical Devices

« 1 2 3 4 5 »

Number of items per page 10

# Primary Navigation Landing Page Example

The screenshot displays the Nuance Equitrac software interface. At the top, the browser address bar is visible. The page header includes the Nuance Equitrac logo on the left, a help icon, a user profile for John Smith, and a notification icon with a '1'. A primary navigation sidebar on the left contains menu items: Home, Users, Devices, Queues, System Configuration, Reports, and Software (which is currently selected). The main content area is titled 'Software' and features a 'Configure Components' button. Below the title, there are filters for 'Show by' (set to System), 'For Selected System(s)' (set to Select Action), and a 'System Search' input field. A table lists various systems with their names and the number of components. The table has columns for 'System Name' and '# of Components'. The systems listed are: WAT-ARUNCHEBIUM (6), WAT-DMACDONALD2 (7), WAT-EQPRINTSRV (8), WAT-FKQLNICK3 (6), WAT-GJONESL (6), WAT-STUNNEY (5), WIN2008-R2-V2 (6), and several instances of 'Another System' with component counts of 7, 8, 6, 6, and 5. At the bottom, a pagination bar shows 'Showing 1 to 15 of 10,459 Systems' and a page navigation control with '1' selected. A 'Number of items per page' dropdown is set to '15'.

Nuance® Equitrac®

John Smith

1

Home

Users

Devices

Queues

System Configuration

Reports

Software

## Software

Configure Components

Show by: System For Selected System(s): Select Action System Search

System Name	# of Components
WAT-ARUNCHEBIUM	6
WAT-DMACDONALD2	7
WAT-EQPRINTSRV	8
WAT-FKQLNICK3	6
WAT-GJONESL	6
WAT-STUNNEY	5
WIN2008-R2-V2	6
Another System	7
Another System	8
Another System	6
Another System	6
Another System	5

Showing 1 to 15 of 10,459 Systems

1 2 3 4 5

Number of items per page: 15



# Primary Nav Landing Page (Pattern Guide p 16)

---

- No secondary navigation available/exposed in the navigation sidebar panel.
- Primary Nav selected item is in a selected/highlighted state

# Secondary Navigation Landing Page Example

The screenshot displays the Nuance Equitrac web application interface. At the top, there is a browser window with navigation arrows and a search bar. Below the browser, the Nuance Equitrac logo is on the left, and a user profile for John Smith is on the right. A dark sidebar on the left contains a secondary navigation menu with items: Home, Users, Devices, Queues, System Configuration, Licenses, Global Configuration Settings (highlighted), Accounting & Price Lists, Rules & Routing, Scheduled Tasks, Reports, and Diagnostics. The main content area is titled "Global Configuration Settings" and features a "General System Settings" box with a description. Below this are several expandable configuration sections: Configuration Sets, Security & Authentication, Devices (expanded to show General Settings, Control Terminals, and Embedded Devices), User Interaction, Workflows & Scanning, Network Environment, and Printing. The footer contains version and copyright information.

Nuance® Equitrac®

John Smith

## Global Configuration Settings

**General System Settings**  
Includes settings for domain qualification, billing code access, cashier behavior, error notifications, savings report metrics, user dashboard, and workstation popup behavior.

Configuration Sets

Security & Authentication

Devices

General Settings  
Media size: Letter  
Monochrome settings: Color  
Copy access: allowed  
Fax access: allowed; scan

Control Terminals  
Session timeout after 30 seconds of inactivity

Embedded Devices

Network Environment

Printing

User Interaction

Workflows & Scanning

Equitrac Express Manager  
Version 6.1.12.1234  
© 2016 Nuance Communications, Inc.  
All rights reserved.

# Secondary Navigation Landing Page Example

The screenshot shows a web browser window displaying the Nuance Equitrac interface. The browser's address bar is empty. The page header includes the Nuance Equitrac logo on the left, a help icon, a user profile for John Smith, and a notification icon with the number 1. A secondary navigation bar on the left contains menu items: Home, Users, Devices, Queues, System Configuration, License (highlighted), Global Configuration Settings, Accounting & Price Lists, Rules & Routing, Scheduled Tasks, Reports, and Diagnostics. The main content area is titled 'License' and includes a 'License Manager' button. It displays license details: License Key 7303-0372-8285-9854, Serial Number 106, License Status Version 6.0.1.2 is activated, Customer Acme Company Gainesville, FL. Below this is a table titled 'Licensed Equitrac Components - Total 10' with columns for Description, Status/Quantity, Expires, and Product Code. The table lists 10 components, all with an 'Enabled' status and an expiration date of 6/30/2017. The footer contains version and copyright information.

Nuance® Equitrac® ? | John Smith 1

Home Users Devices Queues System Configuration **License** Reports Diagnostics

Global Configuration Settings Accounting & Price Lists Rules & Routing Scheduled Tasks

## License

License Manager

License Key **7303-0372-8285-9854** Customer **Acme Company**  
Serial Number **106** **Gainesville, FL**  
License Status **Version 6.0.1.2 is activated**

### Licensed Equitrac Components - Total 10

Description	Status/Quantity	Expires	Product Code
Equitrac Component1	Enabled	6/30/2017	component_1
Equitrac Component2	500 Users, 126 available	6/30/2017	component_2
Equitrac Component3	100 Devices, 56 available	6/30/2017	component_3
Equitrac Component4	Enabled	6/30/2017	component_4
Equitrac Component5	Enabled	6/30/2017	component_5
Equitrac Component6	Enabled	6/30/2017	component_6
Equitrac Component7	Enabled	6/30/2017	component_7
Equitrac Component8	Enabled	6/30/2017	component_8
Equitrac Component9	Enabled	6/30/2017	component_9
Equitrac Component10	Enabled	6/30/2017	component_10

Equitrac Express Manager  
Version 6.1.12.1234  
© 2016 Nuance Communications, Inc.  
All rights reserved.

# Secondary Nav Landing Page (Pattern Guide p 16)

---

- The secondary navigation section is in a selected state in the navigation sidebar panel
- Primary Nav item is also in a selected state

# Manage Listing Page (Pattern Guide p 17)

---

Provides the ability to manage values associated with a specific field type



Labels 1

Manage your Device Labels below.

Device Labels are used to lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore. magna.

Labels:   2

<u>Label1</u>		
<u>Label2</u>		
<u>Label3</u>		
<u>Label4</u>		
<u>Label5</u>		
<u>Label6</u>		
<u>Label7</u>		
<u>Label8</u>		
<u>Label9</u>		
<u>Label10</u>		

## "Manage" Listing Page Display

- 1 Full Page Display with Back Button - the page is not displayed in context of the navigation sidebar panel.
- 2 "Manage" Listing - this table display is used in the context of managing labels, pull groups and routing groups.

Also refer to "'Manage" Listing" on page 79.

# Accessing "Manage Labels"

The screenshot shows the Nuance Equitrac web interface. The top navigation bar includes the logo, a help icon, the user name 'John Smith', and a notification icon with a '1'. The left sidebar contains a menu with items: Home, Users, Devices, Queues, System Configuration, Licenses, Global Configuration Settings (highlighted), Accounting & Price Lists, Rules & Routing, Scheduled Tasks, Reports, and Diagnostics. The main content area is titled 'Global Configuration Settings' and contains several expandable sections: Configuration Sets, Security & Authentication, Devices, User Interaction, Workflows & Scanning, Network Environment, and Printing. Under the 'Devices' section, there are sub-sections for General Settings, Control Terminals, and Embedded Devices. The 'Labels' option under 'Embedded Devices' is highlighted with a yellow border. The description for 'Labels' is 'Manage Device Labels for custom views of your devices'.

# Accessing "Manage Labels"

The screenshot shows the Nuance Equitrac web interface. On the left is a navigation sidebar with options: Home, Users, Devices, Queues, System Configuration, Reports, and Diagnostics. The main content area is titled 'Devices' and has tabs for Physical Devices, Embedded Devices, Terminals, Pull Groups, and Routing Groups. The 'Physical Devices' tab is active. Below the tabs, there is a 'Labels' dropdown menu with 'For Selected Device(s)' and a 'Select Action' dropdown. A '+ Add Physical Device' button is also present. A search bar contains 'Label1', 'Label4', and 'Label7'. To the right of the search bar, there are two buttons: 'Clear All' and 'Manage Labels', which is highlighted with a yellow box. Below this is a table of physical devices with columns for Physical Device Name, Network Address, Manufacturer/Model, Color, Embedded Device, and Location. The table lists several devices, including Ricoh Aficio MP C2800, Xerox WorkCentre 7855, and Xerox WorkCentre 7970. At the bottom, there is a pagination bar showing 'Showing 1 to 10 of 562 Physical Devices' and a 'Number of items per page' dropdown set to 10.



# Accessing "Manage Labels"

Nuance® Equitrac®

John Smith

## Xerox WorkCenter 7970

Settings

- General
- Pricing
- Output
- Advanced

Embedded Device

- Embedded Device Name

External Print Queue Device

- External Print Queue Device Name

Managed Print Queue(s)

- Print Queue1 Name
- Print Queue2 Name
- + Managed Print Queue

+ Control Terminal

+ Nuance Card Reader

### General Settings

\* indicates required field

Definition

Name \* Xerox WorkCenter 7970

Hostname/IP Address \* 10.17.77.1

Description

Manufacturer Xerox

Model Xerox 7970

Monochrome Settings Monochrome

Location 2nd Floor

SNMP Configuration Default [Display Default Value]

Type: Physical Device

Hardware Address: 9C:93:4E:33:35:56

### Labels

Labels: Label4

- Label1
- Label2
- Label3
- Label5
- Label6
- Label7
- Label8
- Label9

Use Labels to create custom lorem ipsum  
et, sed diam nonummy nibh.  
[Manage your Labels >](#)

Release Document

# Manage Listing Page (Pattern Guide p 17)

---

- Used for adding, editing and deleting Labels, Pull Groups & Routing Groups
- A Manage Listing Page can include the ability to directly ADD a value. There is NEVER a SAVE button on the page

# Back Button

---

- Back button takes user back to the previous page (where "Manage" was initiated)
- It is EXPERIENTIAL (vs structural)

# Page Forms – Add/Edit (Pattern Guide p 18)

---

Full page display for adding or editing an object (or multiple objects)

Used a lot!

## Page Form Display - Add/Edit

1 Full Page Display with Back Button - the page is not displayed in context of the navigation sidebar panel.

2 Navigation Categories (optional) - if the form warrants being divided into categories then category side navigation can be used.

Note: Use the Advanced category for form fields/settings that an administrator does not frequently access.

3 Required Fields - required fields are indicated with a "\*". Text at the top of the page states "\* Indicates required field".

Note: Some Wireframes shown in the Pattern Guide reflect an out-of-date design ("All fields required unless otherwise indicated" was updated).

Wireframes do not reflect all actual required form fields (those shown are for illustrative purpose).

4 Page Sections - a setting category page can be divided into sections.

5 Save - for the "Add" new object scenario, the Save button is in a disabled state until all the required fields on the page are specified.

For an object Update /Edit scenario the Save button is in a disabled state until user updates a field.

6 Cancel - returns the user to previous page they were on (same navigation as the Back button).

Also refer to: "Form Button Placement Example - Save Model" on page 44, and "Form Save Model" on page 54.

Note: The form field layout reflected in the wireframe designs does not reflect the final design delivered in the responsive HTML form component.

Nua **1** Equitrac®

John Smith

Add Physical Device

Settings

**General**

Pricing

Output

Advanced

**2**

### General Settings

All fields required unless otherwise indicated.

Definition

Name  ⓘ

Hostname/IP Address  ⓘ

Description  ⓘ

Options

Manufacturer  ⓘ

Model  ⓘ

Monochrome Settings  ⓘ

Location  ⓘ

SNMP Configuration  ⓘ

Type: Physical Device

Hardware Address:

### Release Documents Behavior

Release documents at assigned control terminal ⓘ

Release documents from pull group ⓘ

### Settings

Rule Set  ⓘ

Options

Tracking Behavior  ⓘ ⓘ Display message here about possibility of double transactions...(depends on selection)

DME Server  ⓘ

Options

Secure Printing Default  ⓘ

**3**

Name \*

Hostname/IP Address \*

Description

**4**

**5** Save Cancel

# Page Forms – Add/Edit (Pattern Guide p 18)

---

- You might need Sidebar navigation for setting categories
- Always has a Back button
- Always indicate required fields
- Always has a SAVE button in consistent location
- Save button highlighted (Primary action)

Note: For small number of properties a modal window may be a better choice (e.g. editing an object in the Manage List")

•

# Accessing "Add/Edit Page Form"

Nuance® Equitrac®

John Smith

Home  
Users  
Devices  
Queues  
System Configuration  
Reports  
Diagnostics

## Devices

Physical Devices | Embedded Devices | Terminals | Pull Groups | Routing Groups

Labels | For Selected Device(s) | Select Action | **+ Add Physical Device**

<input type="checkbox"/>	Physical Device Name	Network Address	Manufacturer/Model	Color	Embedded Device	Location
<input type="checkbox"/>	<a href="#">Ricoh Aficio MP C2800</a>	10.17.77.3	Ricoh 4456-sc	No		1st Floor
<input type="checkbox"/>	<a href="#">Xerox WorkCentre 7855</a>	10.17.77.9	Xerox 7855-mmb	Yes	<a href="#">Embedded Device Name</a>	2nd Floor
<input type="checkbox"/>	<a href="#">Xerox WorkCentre 7970</a>	10.17.77.1	Xerox 7970	Yes	<a href="#">Embedded Device Name</a>	2nd Floor

For this Device | Select Action

### Associated Devices, Queues & Groups

Embedded Device: **Embedded Device Name**  
Queues: **Queue1, Queue2**  
Pull Group(s): **Pull Group1, Pull Group3**  
Routing Group: **Routing Group1**

<input type="checkbox"/>	<a href="#">Ricoh Aficio MP C2800</a>	10.17.77.3	Ricoh 4456-sc	No		1st Floor
<input type="checkbox"/>	<a href="#">Xerox WorkCentre 7855</a>	10.17.77.9	Xerox 7855-mmb	Yes	<a href="#">Embedded Device Name</a>	2nd Floor
<input type="checkbox"/>	<a href="#">Xerox WorkCentre 7970</a>	10.17.77.1	Xerox 7970	Yes	<a href="#">Embedded Device Name</a>	2nd Floor
<input type="checkbox"/>	<a href="#">Another Physical Device</a>	10.17.77.2	Ricoh 4456-sc	No		1st Floor

Showing 1 to 10 of 562 Physical Devices

Number of items per page: 10

# "Edit All" Variation

The screenshot displays the Nuance Equitrac web interface. The left sidebar contains navigation links: Home, Users, Devices, Queues, System Configuration, Reports, and Diagnostics. The main content area is titled 'Devices' and features tabs for Physical Devices, Embedded Devices, Terminals, Pull Groups, and Routing Groups. A table lists physical devices with columns for Physical Device Name, IP Address, Manufacturer/Model, Color, Embedded Device, and Location. A dropdown menu is open over the table, showing various actions for selected devices. The 'Edit All' option is highlighted with a yellow box.

Physical Device Name	IP Address	Manufacturer/Model	Color	Embedded Device	Location
<input type="checkbox"/> Ricoh Aficio MP C2800			No		1st Floor
<input type="checkbox"/> Xerox WorkCentre 7855			Yes	Embedded Device Name	2nd Floor
<input checked="" type="checkbox"/> Xerox WorkCentre 7970			Yes	Embedded Device Name	2nd Floor
<input checked="" type="checkbox"/> Another Physical Device			No		1st Floor
<input checked="" type="checkbox"/> Another Physical Device			Yes	Embedded Device Name	2nd Floor
<input type="checkbox"/> Another Physical Device			Yes	Embedded Device Name	2nd Floor
<input type="checkbox"/> Another Physical Device			No		3rd Floor
<input type="checkbox"/> Another Physical Device	10.17.77.7	Xerox 6679-mmb	Yes	Embedded Device Name	3rd Floor
<input type="checkbox"/> Another Physical Device	10.17.77.8	Xerox 7676	Yes	Embedded Device Name	1st Floor
<input type="checkbox"/> Another Physical Device	10.17.78.3	Ricoh 4456-sc	No		2nd Floor

Showing 1 to 10 of 562 Physical Devices

« 1 2 3 4 5 »

Number of items per page 10



Nuance® Equitrac®

John Smith

1

← Edit All 3 Selected Physical Devices

Settings

- General
- Pricing
- Output
- Advanced

### General Settings

\* Indicates required field

#### Definition

Monochrome Settings: Monochrome

Location: Select

SNMP Configuration: Default [Display Default Value]

#### Labels

Labels: Select

#### Release Documents Behavior

Release documents at assigned control terminal

Release documents from pull group

#### Settings

Rule Set: Select

Tracking Behavior: Track and record print transac...

Secure Printing Default: System default

Routing Group: Select

Delete Devices Save Cancel

## Page Form Display - Multiple Selected Items Edit All

A page form is used when a user selects to edit multiple objects.

The form display has the same properties as the previously documented Page Form Display - Add/Edit, with the addition of the below:

- Title with Number of Items** - in scenarios where a user has previously selected multiple items on the "parent" page, and chooses to edit all their common properties, the number of previously selected items will be indicated on the Edit page. The page will display only the properties that are common to all of the selected items (rather than a modal window for a single edit action).

Also refer to: "Form Button Placement Example - Save Model" on page 44 and "Form Save Model" on page 54.

# Page Forms – Add/Edit Recap

---

- Can access from a number of different places
- Back button is experiential
- “Edit All” – only common property fields/sections are displayed



# Page Forms – Edit With Apply Button

(Pattern Guide p 20)

---

- ALWAYS displayed in context of Sidebar nav that's used to select "like-type" objects
- Full page form display for editing a selected object

## WARNING:

*Looks very similar to previous Page Form (Add/Edit), but behaves differently*

## Form Save using the Apply Button

**1 Apply Button** - the Apply button is used to save form data only when sidebar navigation is used to navigate to and display distinct objects (not a single object's setting subsections). Refer to "Sidebar Navigation for "like-type" Objects" on page 12.

Selecting Apply keeps the user in the context of the page. If the save was successful then display a successful save notification toast message. Refer to "Notifications - Alert/Toast" on page 34.

If the user makes any changes to the form, then attempts to navigate to a different item in the sidebar navigation, a modal confirmation window will appear asking the user if they wish to apply the changes. Refer to "Confirmation Modal Windows" on page 64.

**2 Reset to Last Saved Settings Button** - this secondary button is enabled if the user makes any changes to the object's settings. When selected, it reverts the settings displayed on the page back to the "last saved" values.

Also refer to "Form Button Placement Example - Apply Model" on page 44.

Note: there is no Cancel button available when the "Apply" save model is used.

The screenshot shows the Nuance Equitrac Embedded Devices Configuration page. The page title is "Embedded Devices Configuration". The sidebar on the left lists various device models, with "Xerox ECSP" selected. The main content area is titled "Xerox ECSP" and includes a note: "\* Indicates required field".

The settings are organized into sections:

- Tracked Activities:** Includes toggle switches for Copy (checked), Received Fax, Print, Sent Fax, and Scan.
- Device Prompts:** Includes input fields for Title and Login Prompt.
- Settings:** Includes toggle switches for Force Logout on Swipe and Enable Job Limits. It also has a text input for "End session after" set to 60 seconds of inactivity.
- Polling:** Includes a text input for "Interval" set to 2.5 seconds and a text input for "Polling Threads".
- External Application:** Includes dropdown menus for "Name" (set to None) and "Services Home Container" (set to None).

At the bottom of the page, there are two buttons: "Reset to Last Saved Settings" (labeled with a blue '2') and "Apply" (labeled with a blue '1').

# Page Forms – Edit With Apply Button

(Pattern Guide p 20)

---

- ALWAYS used in context of Sidebar nav that's used to select "like-type" objects
- ALWAYS has an APPLY button
- "Reset to last saved settings" behaves like "Cancel"
- Selecting APPLY (or Reset) keeps user in same context
  - so user can select another object

# Which One To Use?

---

Use Edit with Apply when:

- No Landing Page or table listing to initially select object
- User task is configuring multiple objects (or initial set up)

Use Add/Edit when:

- There is a Landing Page or table listing to initially select object
- User task is adding or editing a single object

# Variation: Page Form Apply (Pattern Guide p 21)

---

Unlink objects from their default settings

< DRE/DRC and Follow-You Printing

Default Configuration

Print Servers

DEMO

DEMO-VM-EE56

### Default Configuration

\* Indicates required field

#### Settings

- Cost the job before printing  ⓘ
- Released document name  ⓘ
- Release key jobs  ⓘ
- Reprice after release  ⓘ
- Only print released job while user is logged into device  ⓘ
- Hide document name in windows printer window  ⓘ

#### Space Management

- Job expiry time  hour(s) ⓘ
- Minimum disk space  MB ⓘ
- Print distribution job expiry time  hour(s) ⓘ

#### Follow-You Defaults

- Secure printing default  ⓘ

#### Other

- Retrieve username from P.J.L. setting  ⓘ
- Number of ports per I-Queue  ⓘ

Reset to Last Saved Settings

Apply



< DRE/DRC and Follow-You Printing

Default Configuration

Print Servers

DEMO

DEMO-VM-EE56

### DEMO-VM-EE56

\* Indicates required field

#### Settings

Default Configuration Applied  
Customize Configuration

- Cost the job before printing
- Released document name
- Release key jobs
- Reprice after release
- Only print released job while user is logged into device
- Hide document name in windows printer window

#### Space Management

- Job expiry time  hour(s)
- Minimum disk space  MB
- Print distribution job expiry time  hour(s)

#### Follow-You Defaults

- Secure printing default

#### Other

- Retrieve username from P.J.L. setting
- Number of ports per I-Queue

Apply

< DRE/DRC and Follow-You Printing

Default Configuration

Print Servers

DEMO

DEMO-VM-EE56

### DEMO-VM-EE56

Configuration not linked to Default Configuration

Customize Configuration

\* Indicates required field

#### Settings

- Cost the job before printing
- Released document name
- Release key jobs
- Reprice after release
- Only print released job while user is logged into device
- Hide document name in windows printer window

#### Space Management

- Job expiry time  hour(s)
- Minimum disk space  MB
- Print distribution job expiry time  hour(s)

#### Follow-You Defaults

- Secure printing default

#### Other

- Retrieve username from P.JL setting
- Number of ports per I-Queue

Reset to Last Saved Settings

Apply

# Page Form Variation - Unlinking Object from Default Settings

(Pattern Guide p 21)

---

- Sidebar Navigation variation for unlinking objects from their default settings
- Toggle used to make object settings editable
- User is informed of object state when not using default settings – in sidebar nav with “unlinked” icon and with on page text

# Other Page Forms Variations (Pattern Guide p 22-23)

---

- With dynamic information displayed
- With initial selector to drive content display

## Rule Set1 - New Rule

\* Indicates required field

Name \*

Type \* Apply this rule to...

Apply this rule when a user prints a document through the print server and workstation direct IP printing

1

Action \*

Allow this job to complete

Condition(s)

## Form with Dynamic Information Displayed

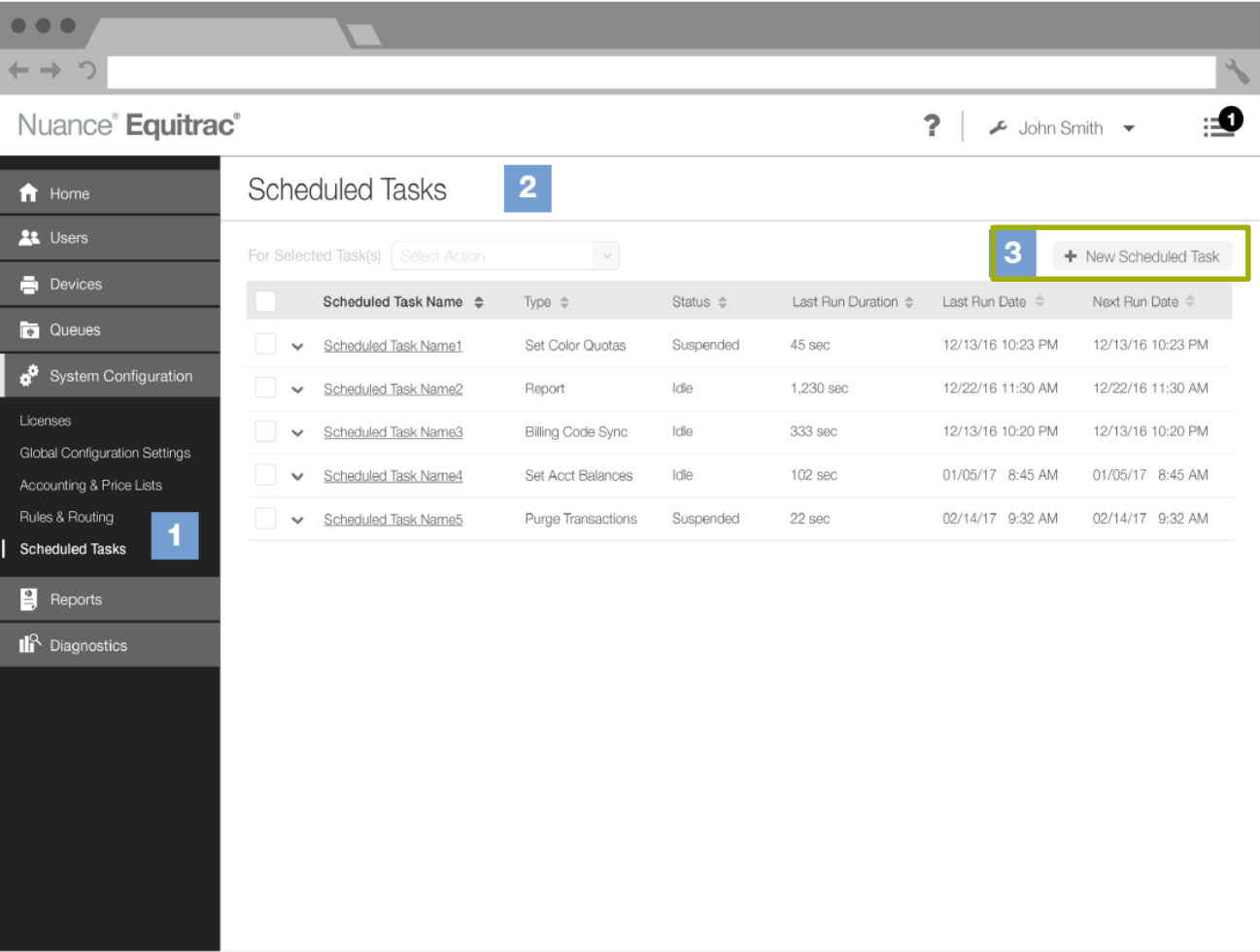
1 **Dynamic Detail Information** - informational text can be displayed directly on the page and associated with form field inputs. The associated field detail information is persistent once a field value is specified (it doesn't disappear when another field is in focus).

Text areas pertain to specific field inputs/values and assist the user in understanding the entire definition of an object.

Also refer to "Dynamic Detail Information" on page 38.

# Adding a New Scheduled Task

## Scheduled Tasks Landing Page



1 **Navigation** - the user accesses Scheduled Tasks by selecting the secondary navigation item associated with System Configuration primary navigation.

2 **Scheduled Tasks Landing Page** - the landing page displays a table listing of existing Scheduled Tasks.

3 **New Scheduled Task** - the user can create a new Scheduled Task.

Refer to "New Scheduled Task" on page 7.

## < New Scheduled Task

Select Scheduled Task Type

New Scheduled Task Type ▾

1

Report  
Billing Code Synchronization  
Set Color Quotas  
Set Account Balances  
Purge Transactions  
Arbitrary Command

## < New Scheduled Task

Select Scheduled Task Type

Report ▾

2

### Scheduled Report

\* Indicates required field

Name \*

Description \*

Suspended

Run if Missed

Report Type \*

Select a report type from the grouped listing below.

▾ Accounts

▾ Analysis

▾ Detailed Activity

▾ Summary Activity

▾ Total Activity

## Initial Selector to Drive Form Content

- 1 **Drop-down selection** - form content is initially not displayed and is determined based on an input/selection.
- 2 **Form Content** - form content only appears after a Type selection is made.

# Today's Focus (Structure)

---

The CONTEXT of the application "features"

Where things "live" & getting the user to where they need to go

- Navigation (primary, secondary, page level navigation)
- Page types



# Next Session

---

## *Question 3*

*Once the navigation and page type context has been determined (or if your feature is accessed from an existing page)...*

## How do I know which components/interactions are best suited for my new feature?

*To answer this we'll review items and interactions that go a page:*

- Information & Text (communicating to the user)*
- Controls & Widgets (components that make up a page)*
- Tables*
- Stepped Workflow*