Nuance® Equitrac®

UX Training

Session 1
June 15, 2017

authentic insight

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 rational 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

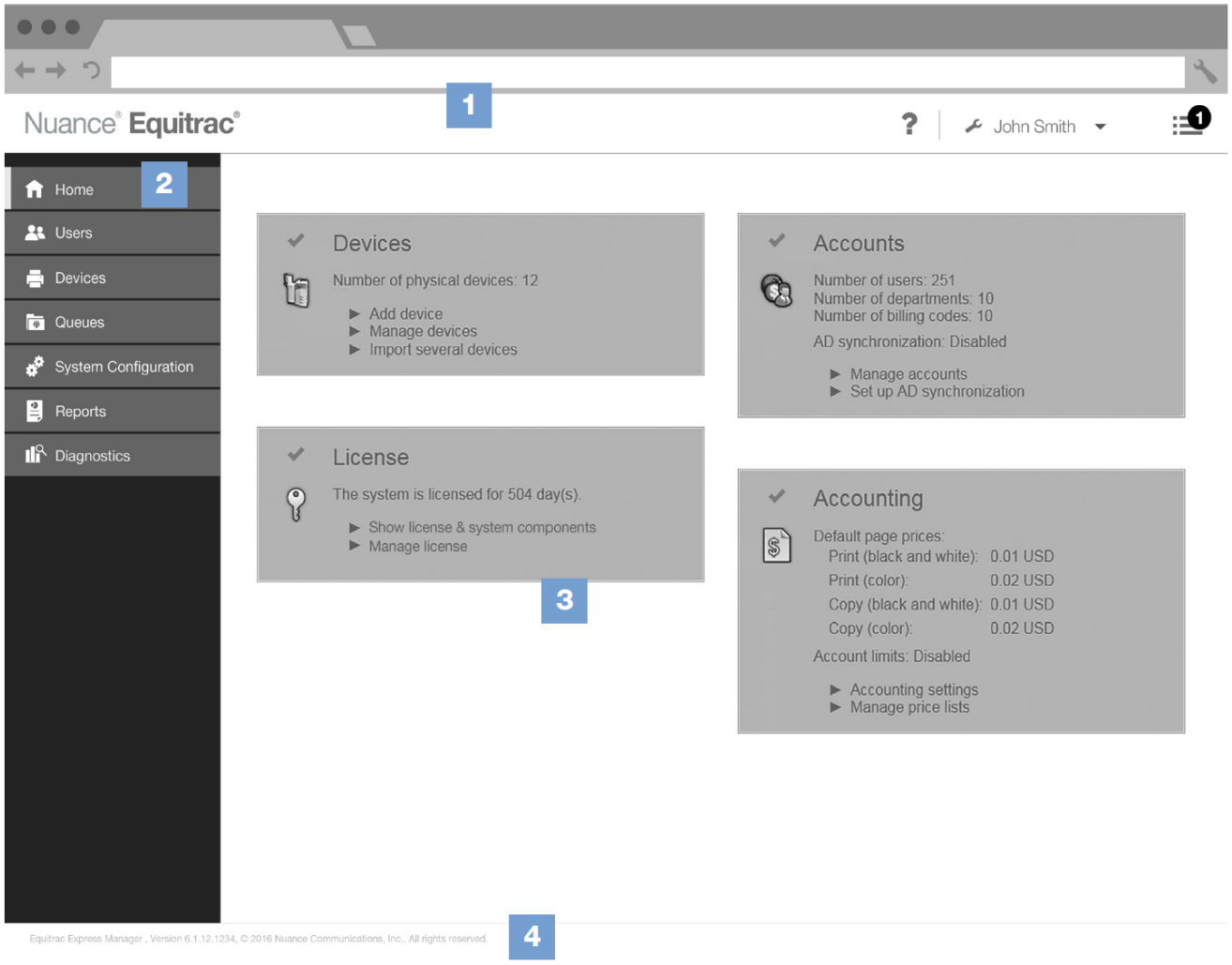
Provides answers to:

- *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.

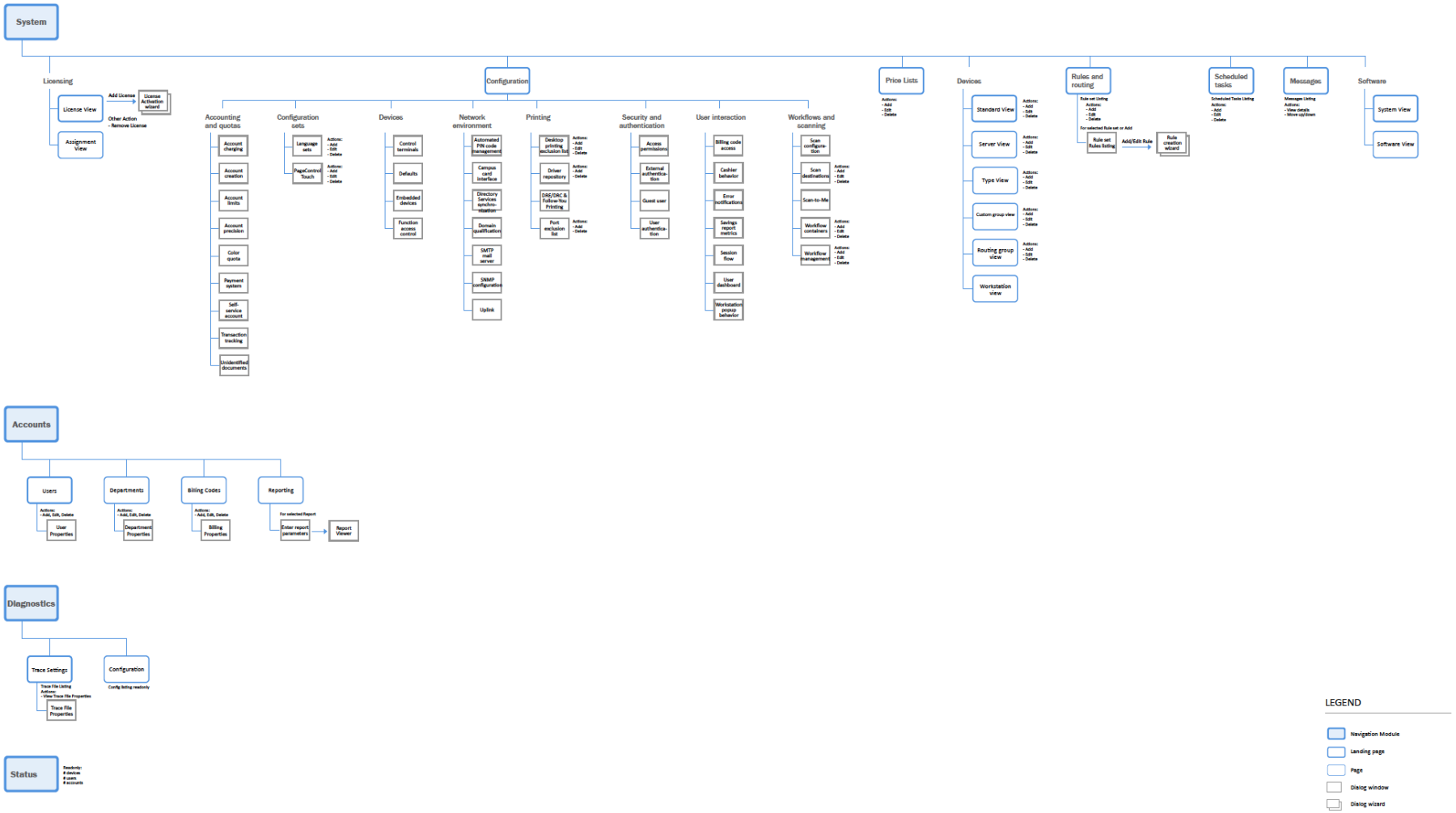
Application Framework (Pattern Guide p 5)

- 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)

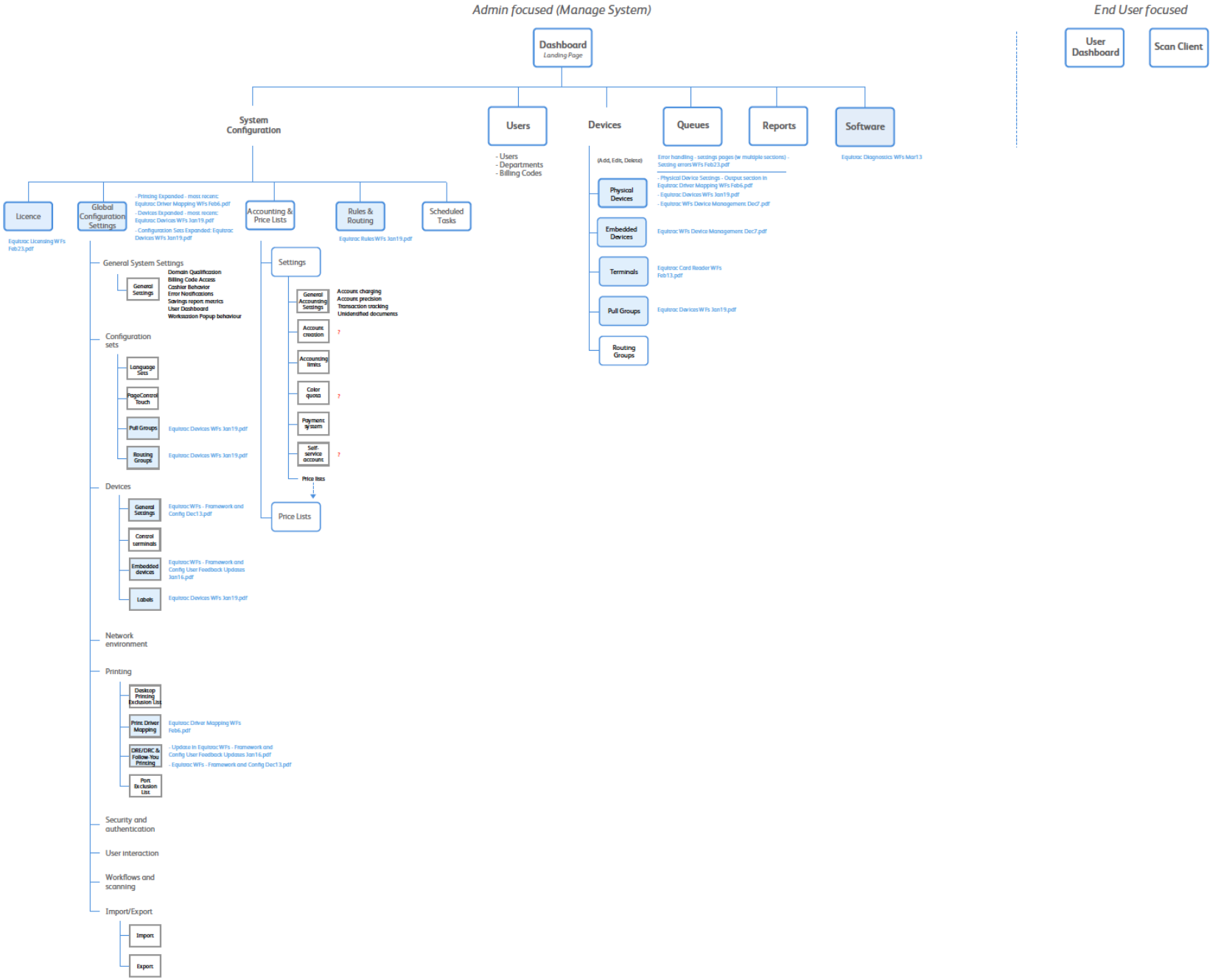
EQUITRAC SYSTEM MANAGER PRODUCT MAP - CURRENT STATE

Iteration 1.0



EQUITRAC SYSTEM MANAGER PRODUCT MAP - Future State

February 17, 2017



Navigation (Pattern Guide p 7-11)

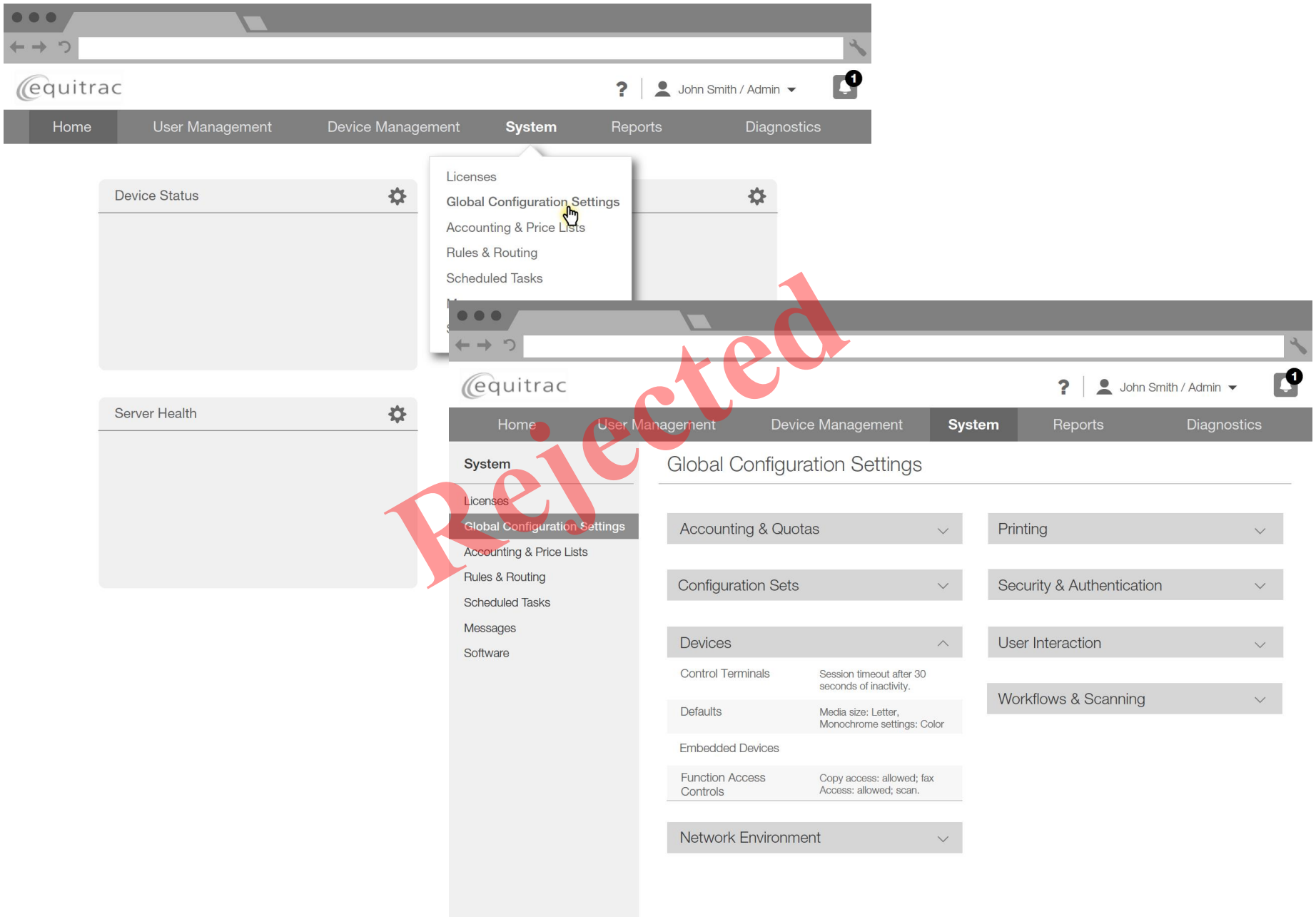
Navigation model consists of:

- 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…

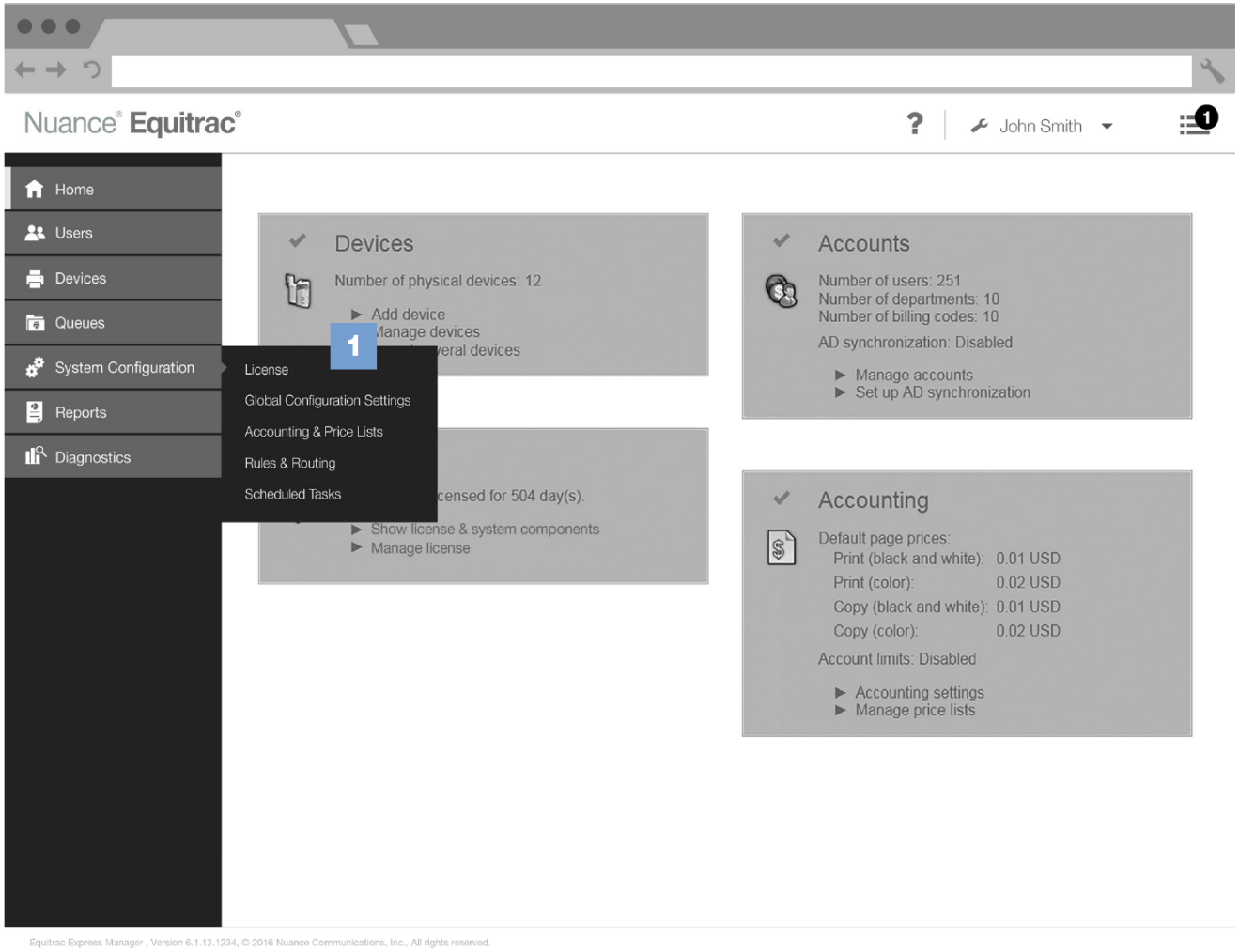
Initial “top driven” navigation exploration



Navigation (Pattern Guide p 7-11)

Findings:

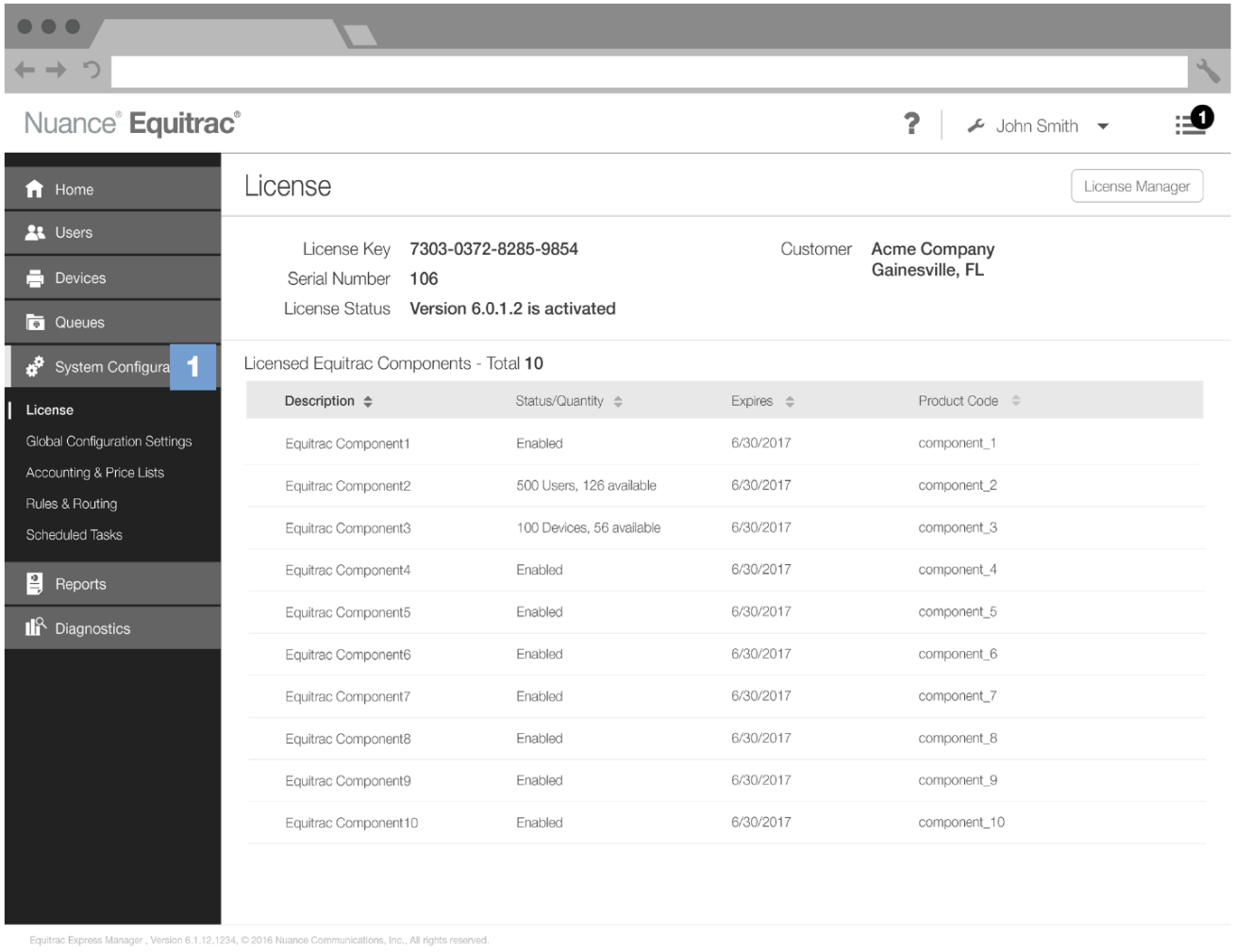
- Secondary navigation had to be vertical due to horizontal real estate constraints
- Switch from horizontal (for primary nav) breaks information architecture
- Then explored vertical side navigation model…



Secondary Navigation

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

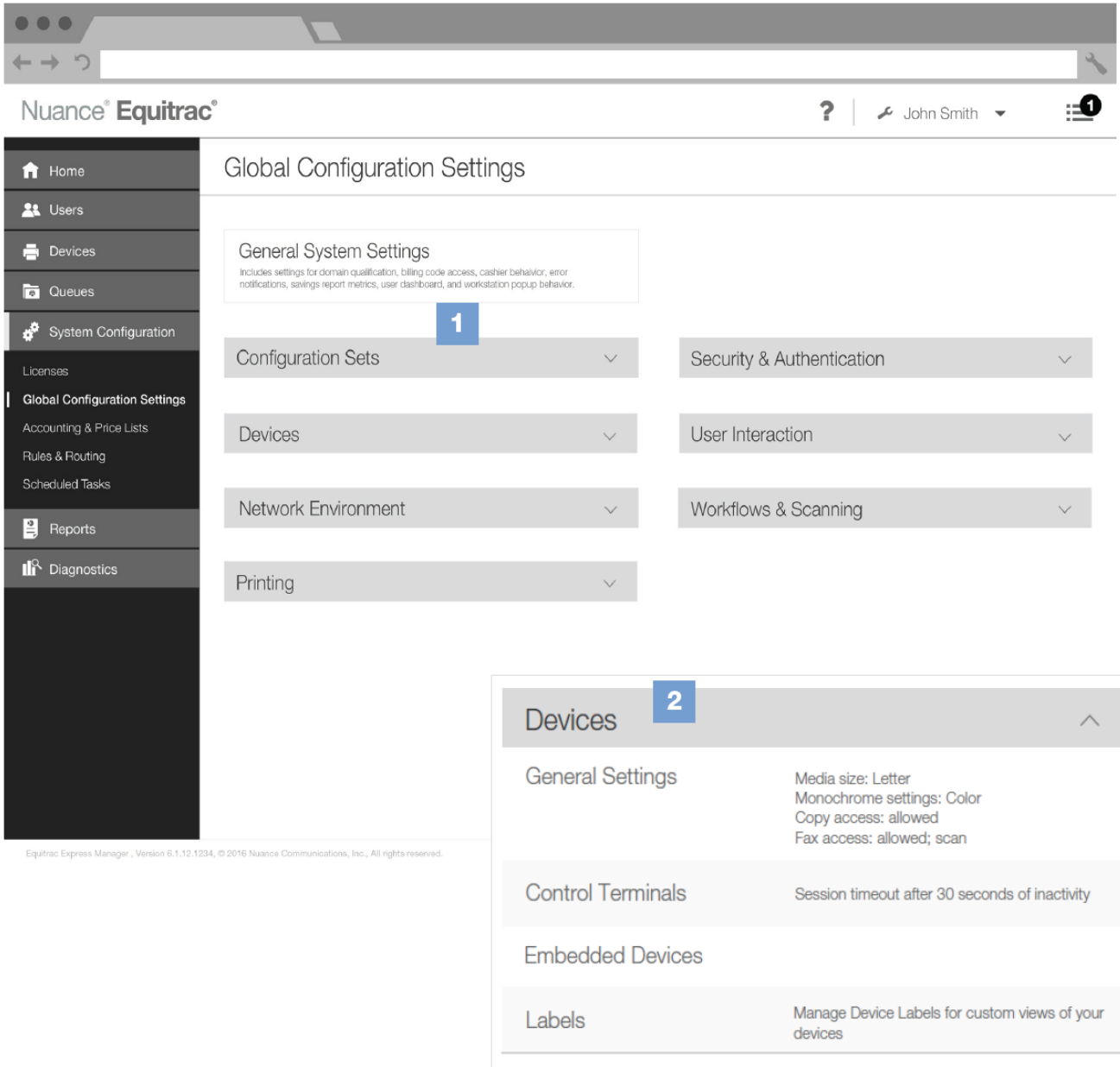
If secondary navigation exists, then a mouse hover over a primary navigation section displays its selectable secondary navigation items.



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.



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.

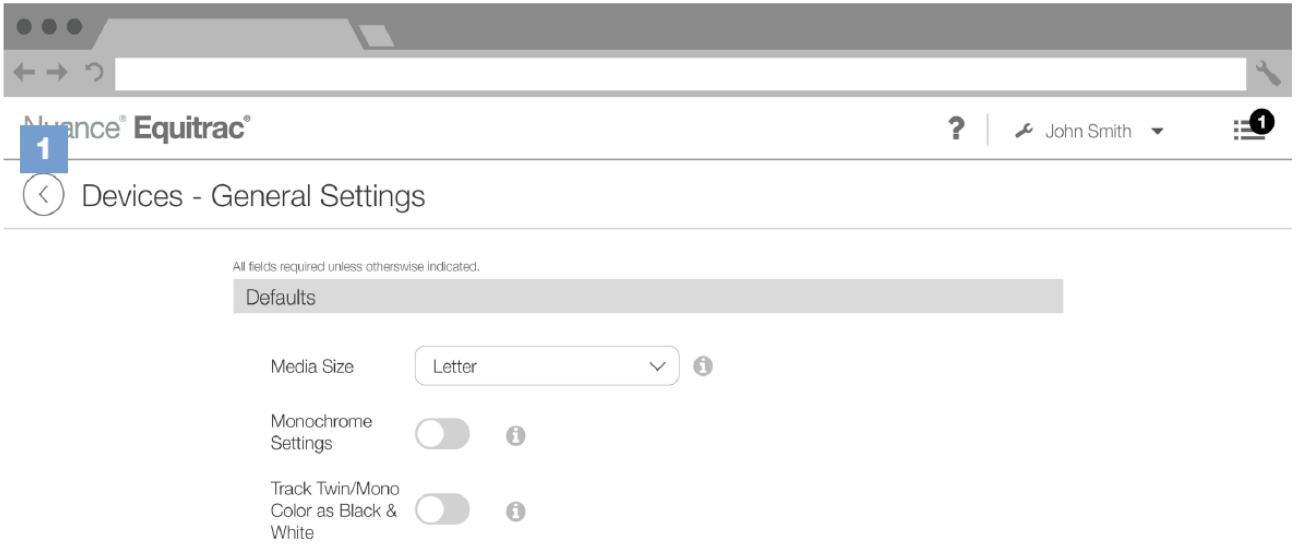
2 **Section Headers** - the page has expandable (and then collapsible) content sections. When a section header is expanded its subcategories are displayed. The subcategories link to associated settings sub-pages.

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)



Back Button

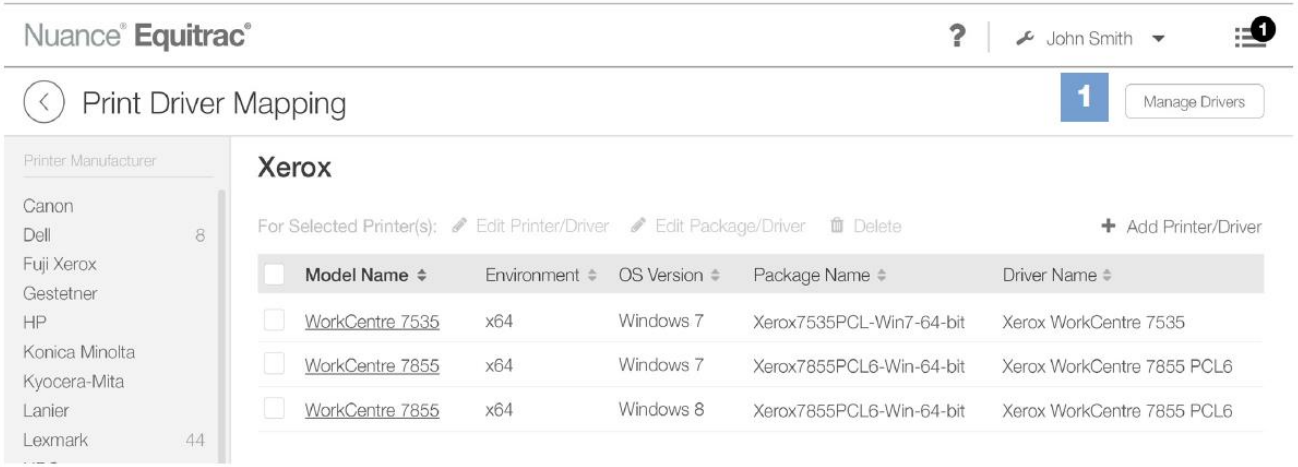
Only primary and secondary navigation landing pages are displayed in context of the primary navigation sidebar panel.

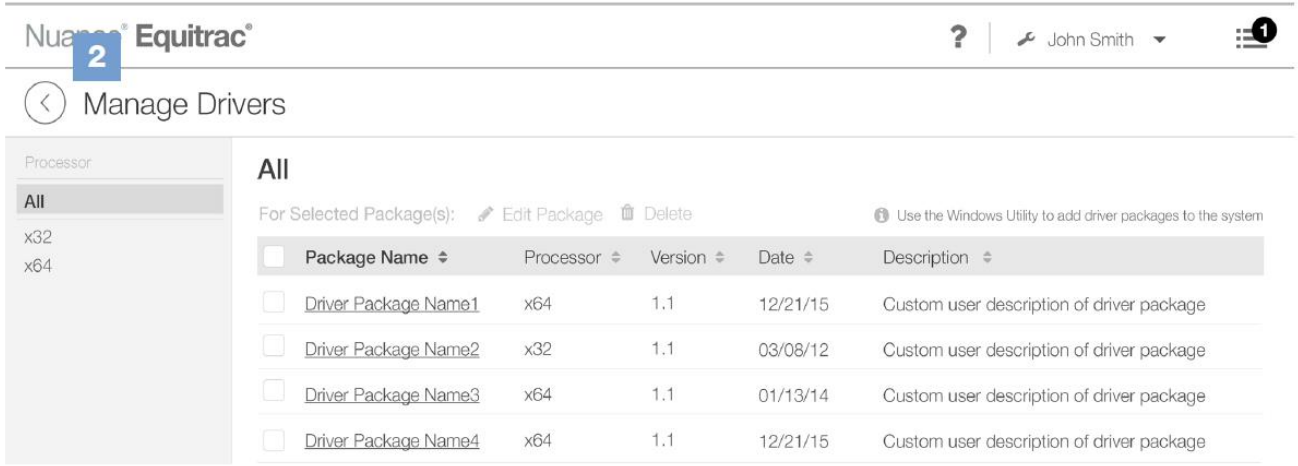
Pages that are accessed by selecting a link (or action) from a primary or secondary navigation landing page do not display the primary navigation sidebar panel.

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





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)

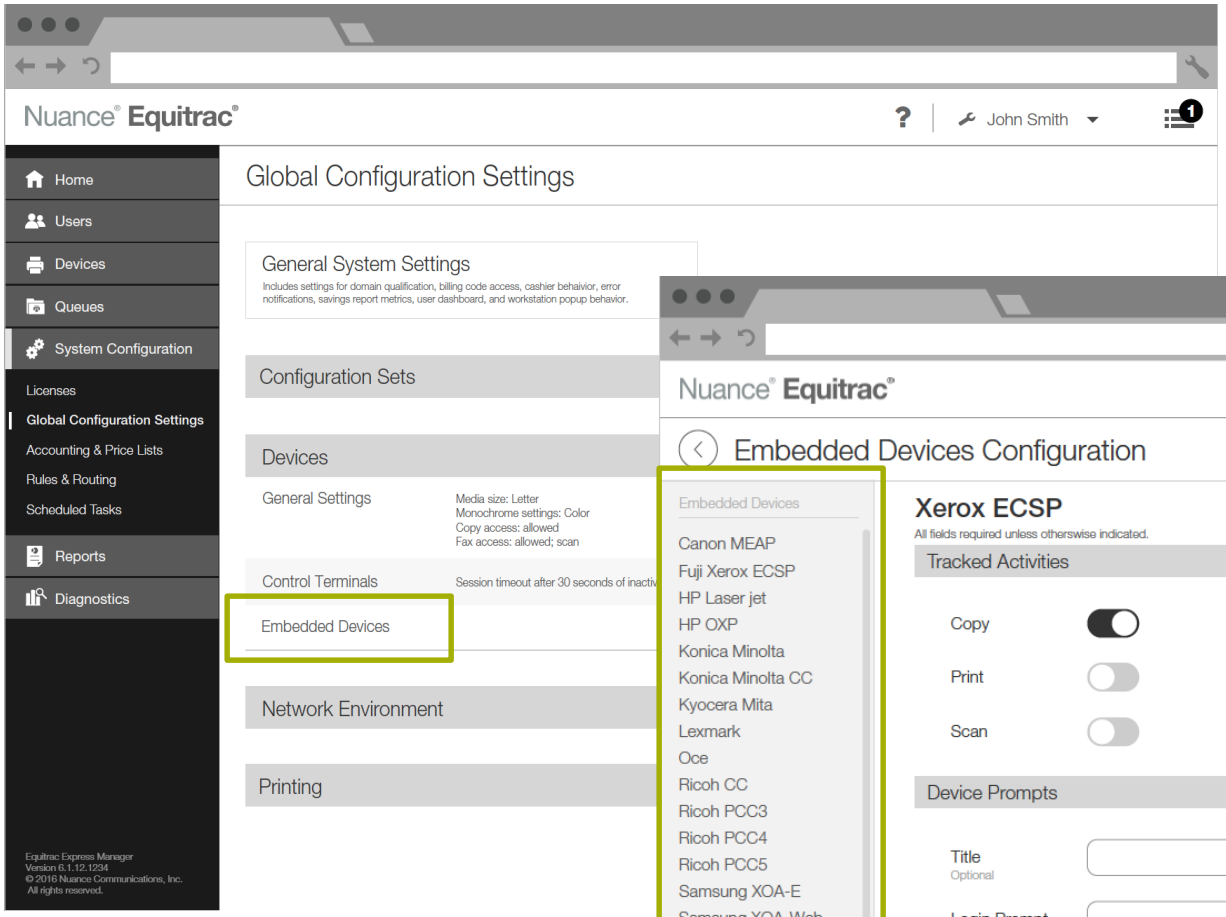
Sometimes…

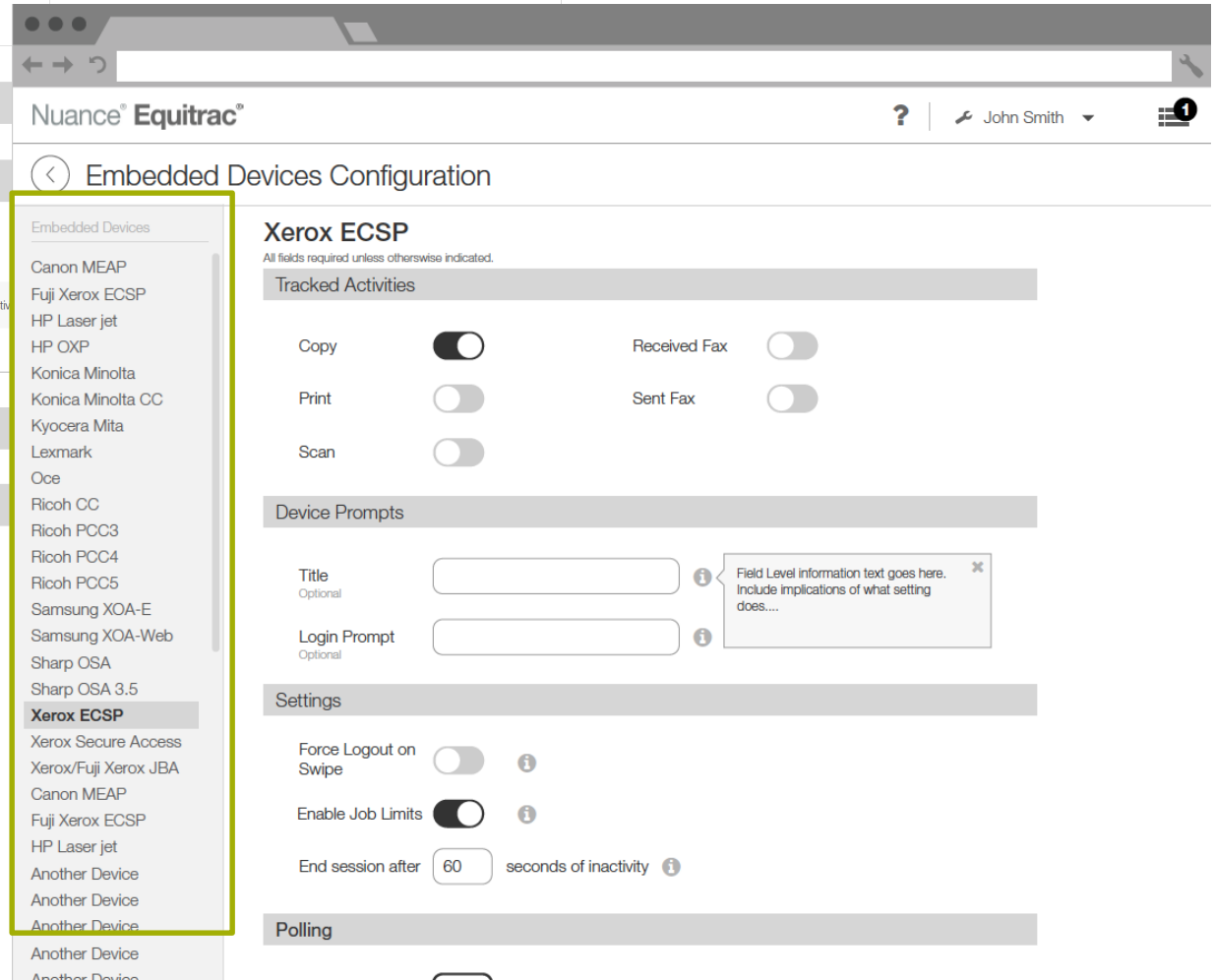
A sidebar navigation can replace the primary/secondary navigation area.

Example: when drilling down from a landing page…

Sidebar Navigation for "like-type" Objects

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





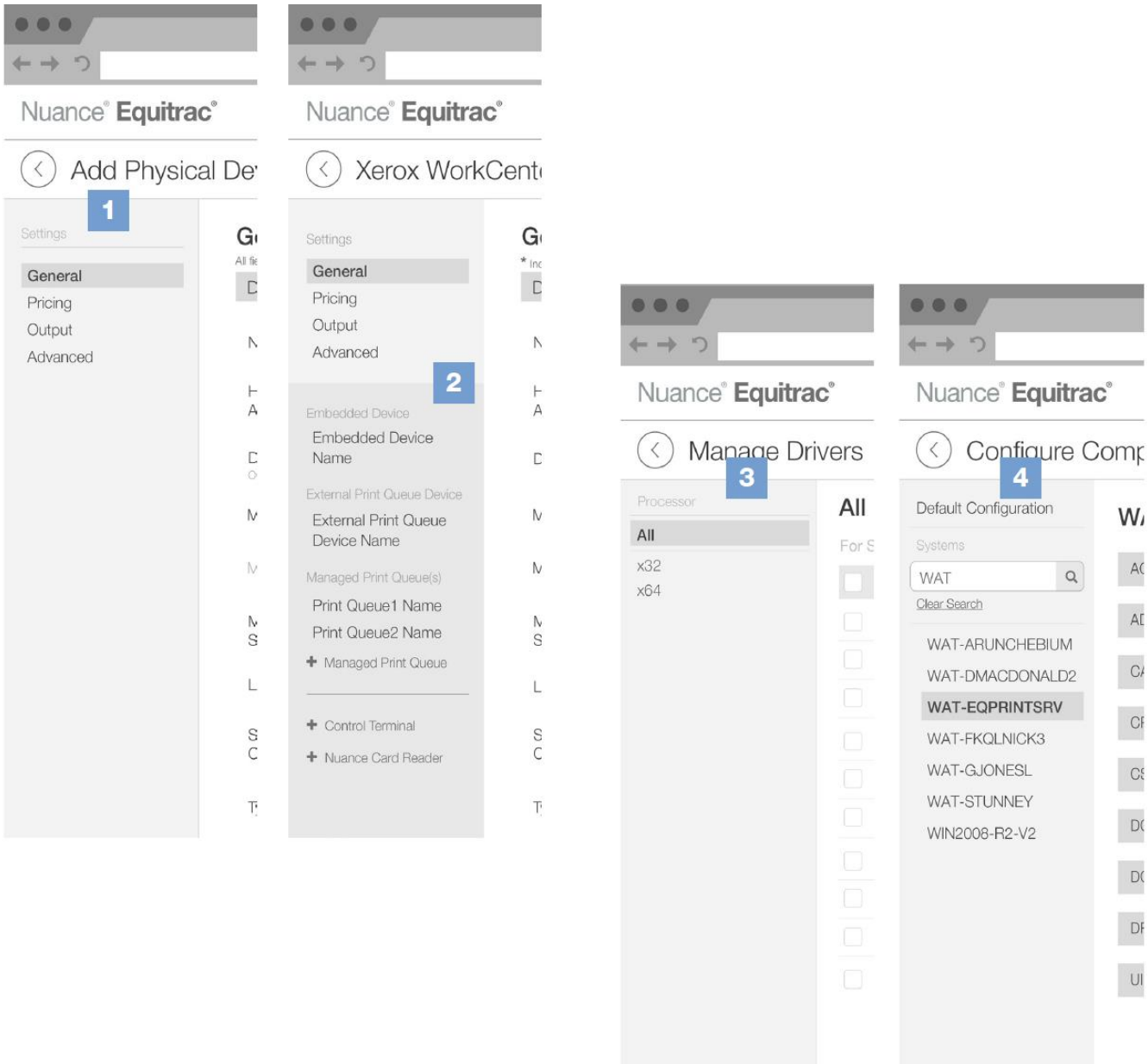
Sidebar Navigation (page 12-14)

- 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 Variations

Other Sidebar Navigation Examples:

1. **Sidebar Navigation for Object Setting Categories** - object settings can be categorized into sections that are accessed via the sidebar navigation. In this case, the user can navigate between an object's setting categories in the sidebar navigation without being forced to save setting updates. A Save button applies to the entire object settings - all setting categories.

   Also refer to "Form Save Model" on page 54.

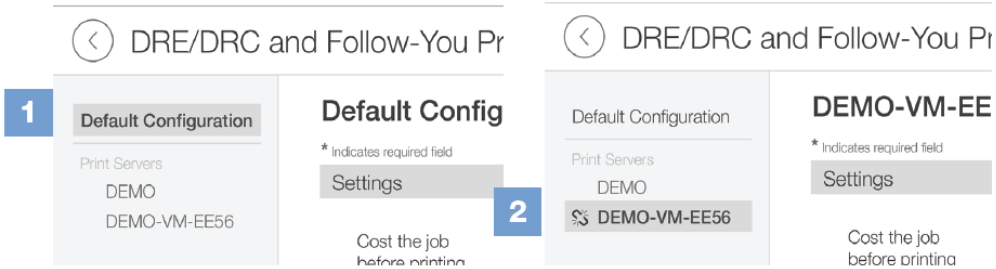
2. **Sidebar Navigation with Associated Links & Actions** - the sidebar navigation panel can provide navigation access to associated objects and actions.

3. **Sidebar Navigation with Filter categories** - sidebar navigation can be used to enable the user to access predefined filter categories.

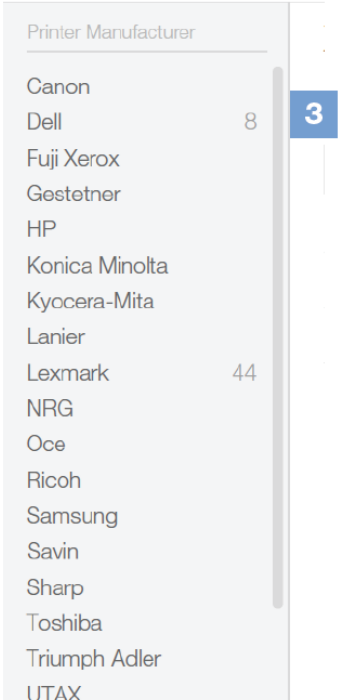
4. **Sidebar Navigation with Search** - a search control can also be used in the sidebar navigation area. In this example, Default Configuration displays default configuration settings, and selecting any of the Systems underneath displays settings for the selected system. The user has the option to search for a system.

   Also refer to "Search" on page 77.

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

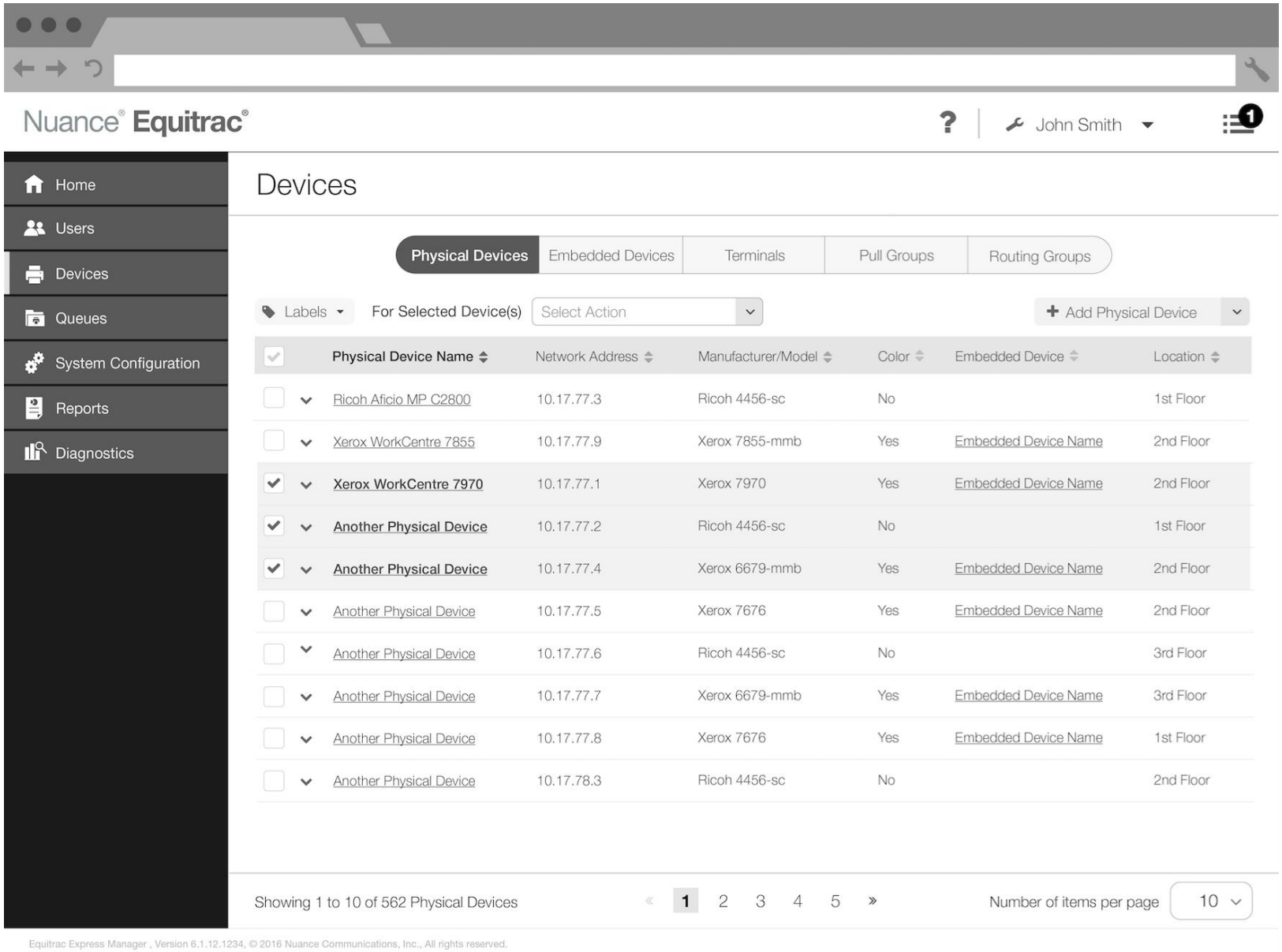
Provides answers to:

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

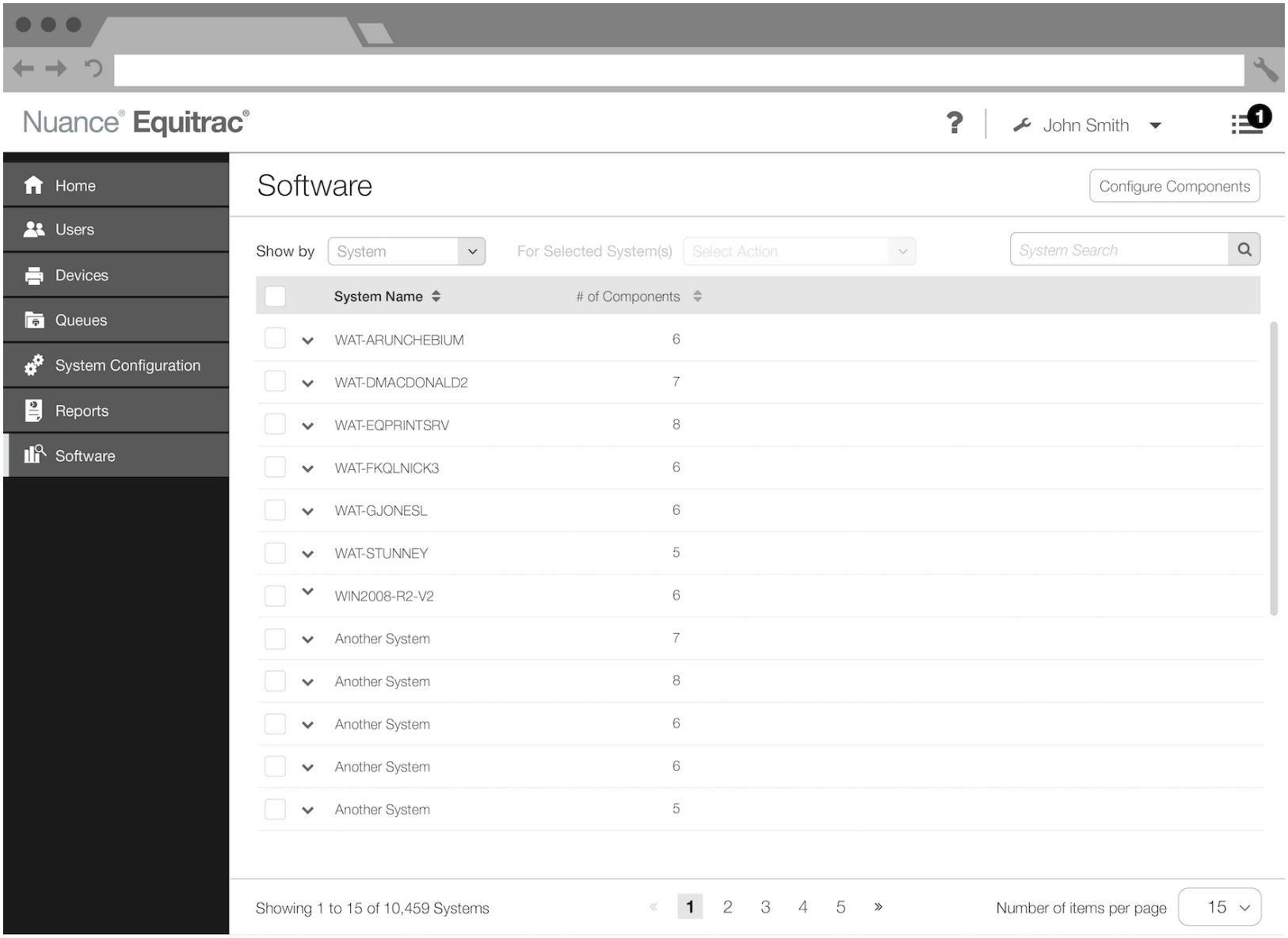
Landing Pages (Pattern Guide p 16)

- 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



Primary Navigation Landing Page Example



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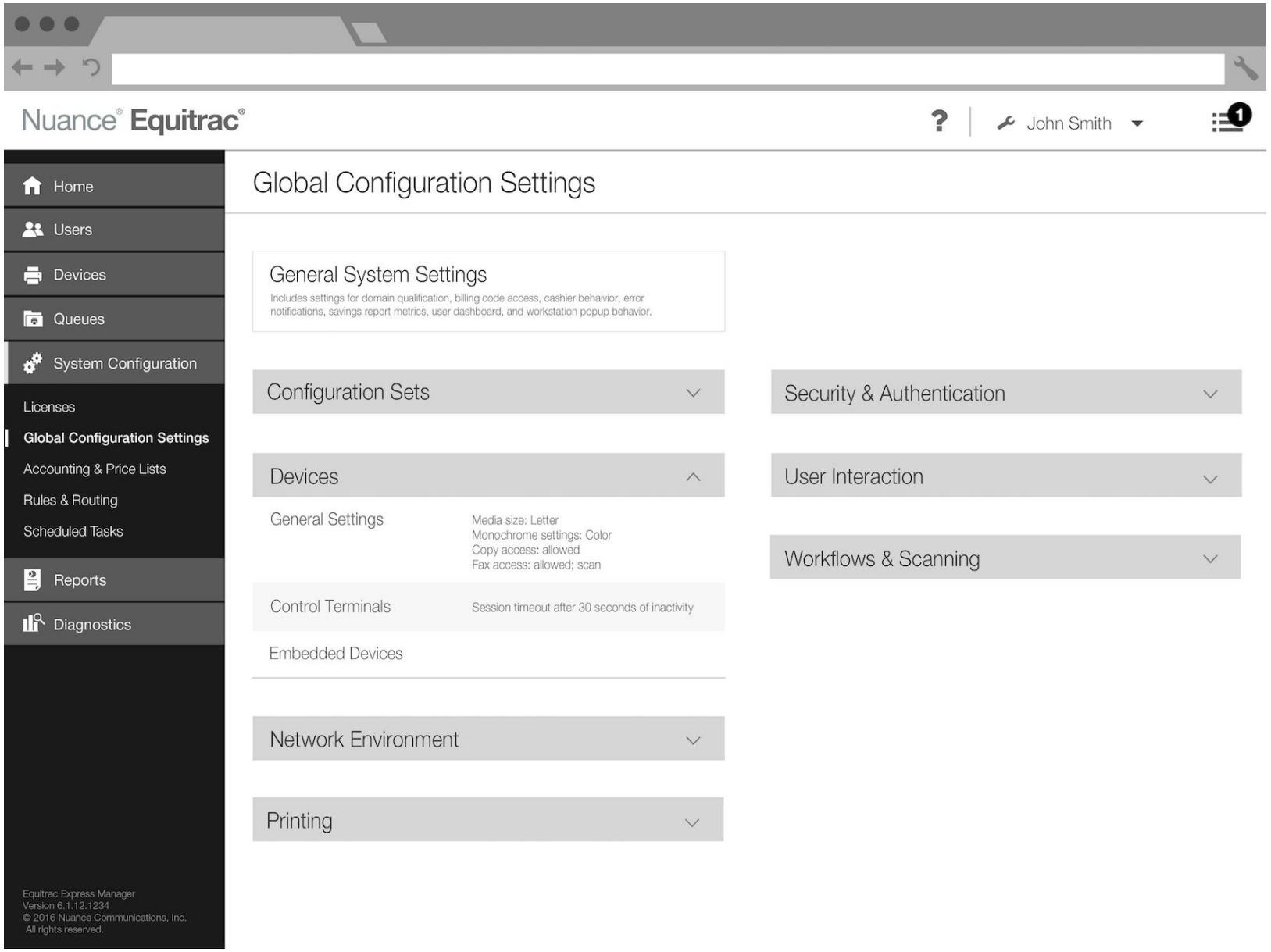
Primary Nav Landing Page (Pattern Guide p 16)

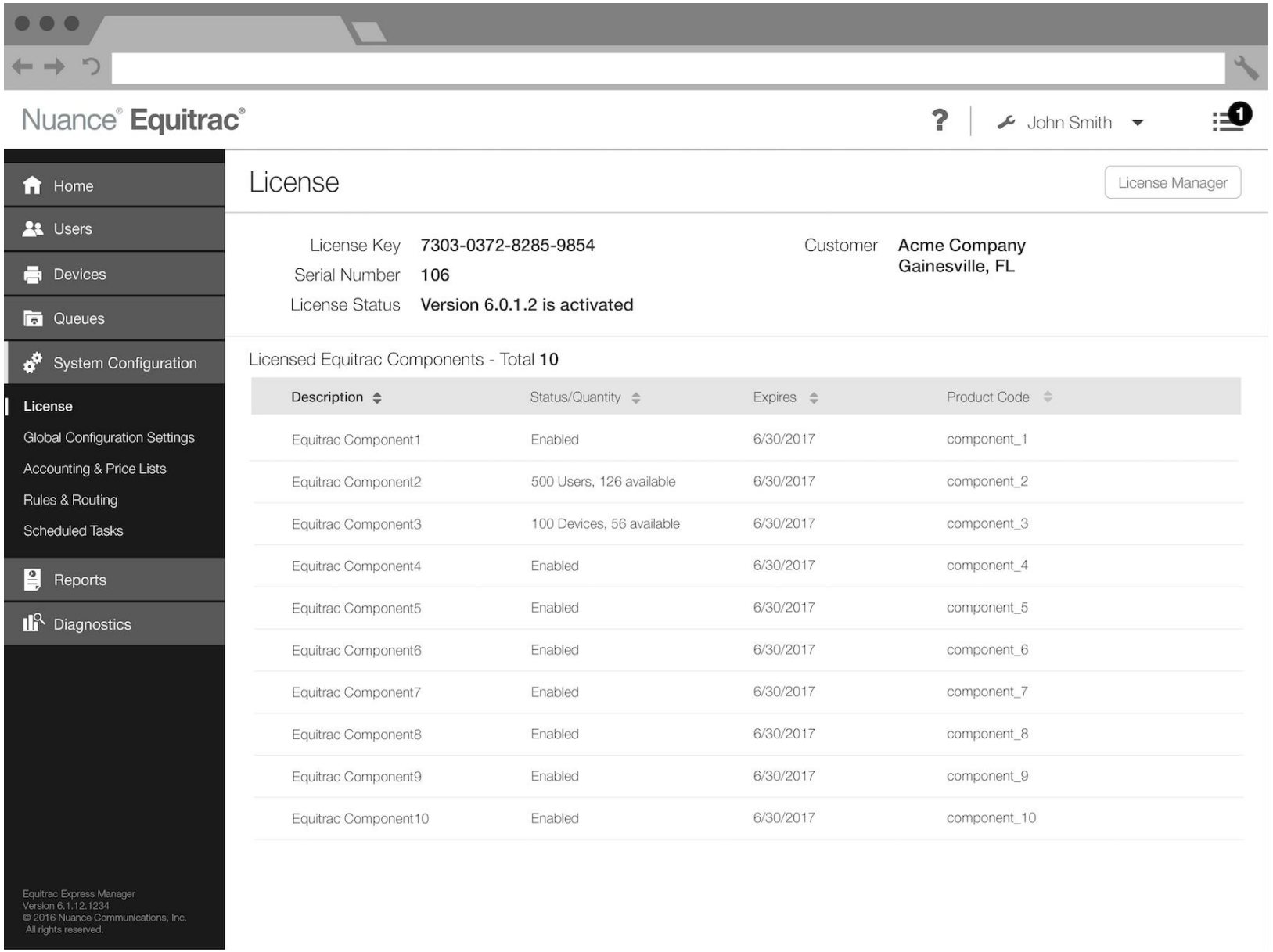
- No secondary navigation available/exposed in the navigation sidebar panel.

- Primary Nav selected item is in a selected/highlighted state

Secondary Navigation Landing Page Example



Secondary Navigation Landing Page Example

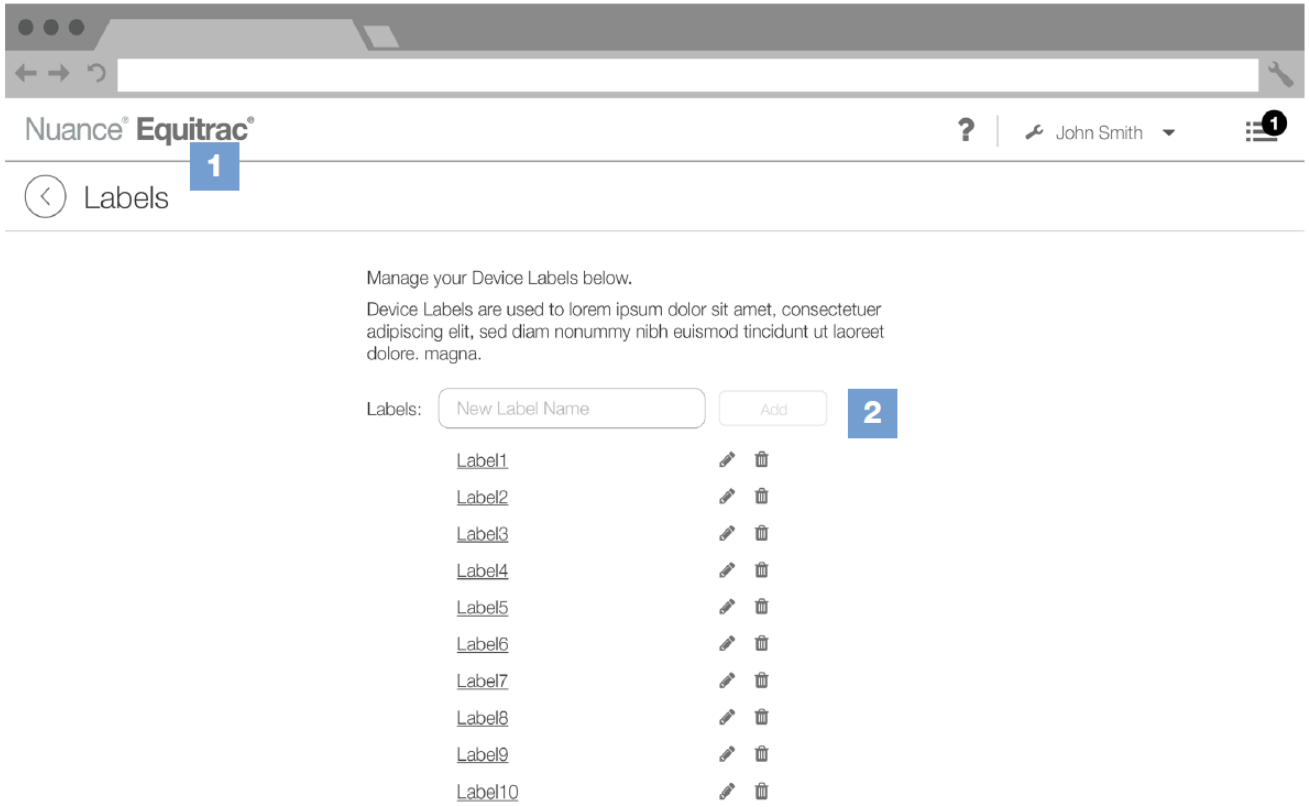


Secondary Nav Landing Page (Pattern Guide p 16)

- 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



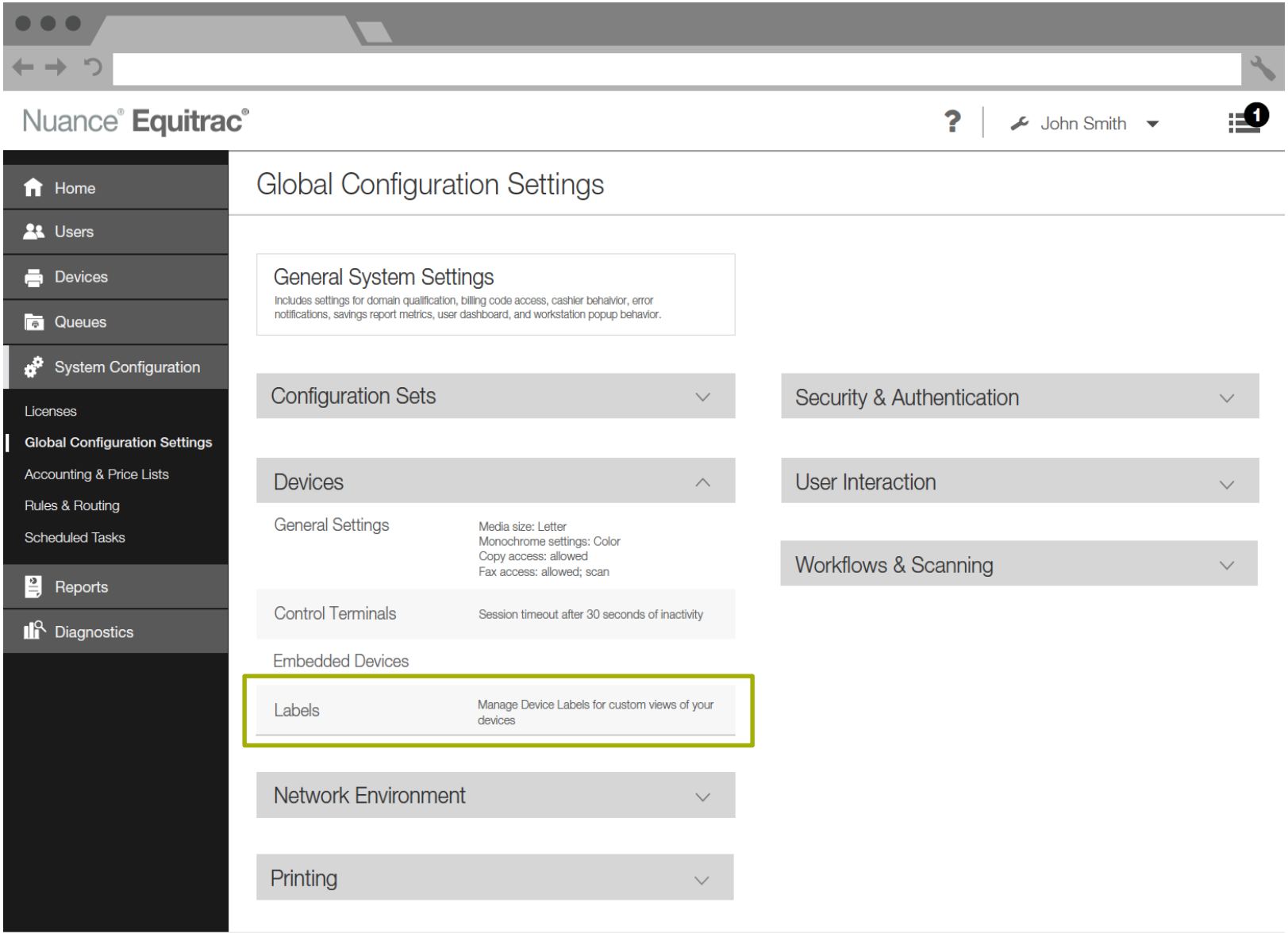
"Manage" Listing Page Display

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

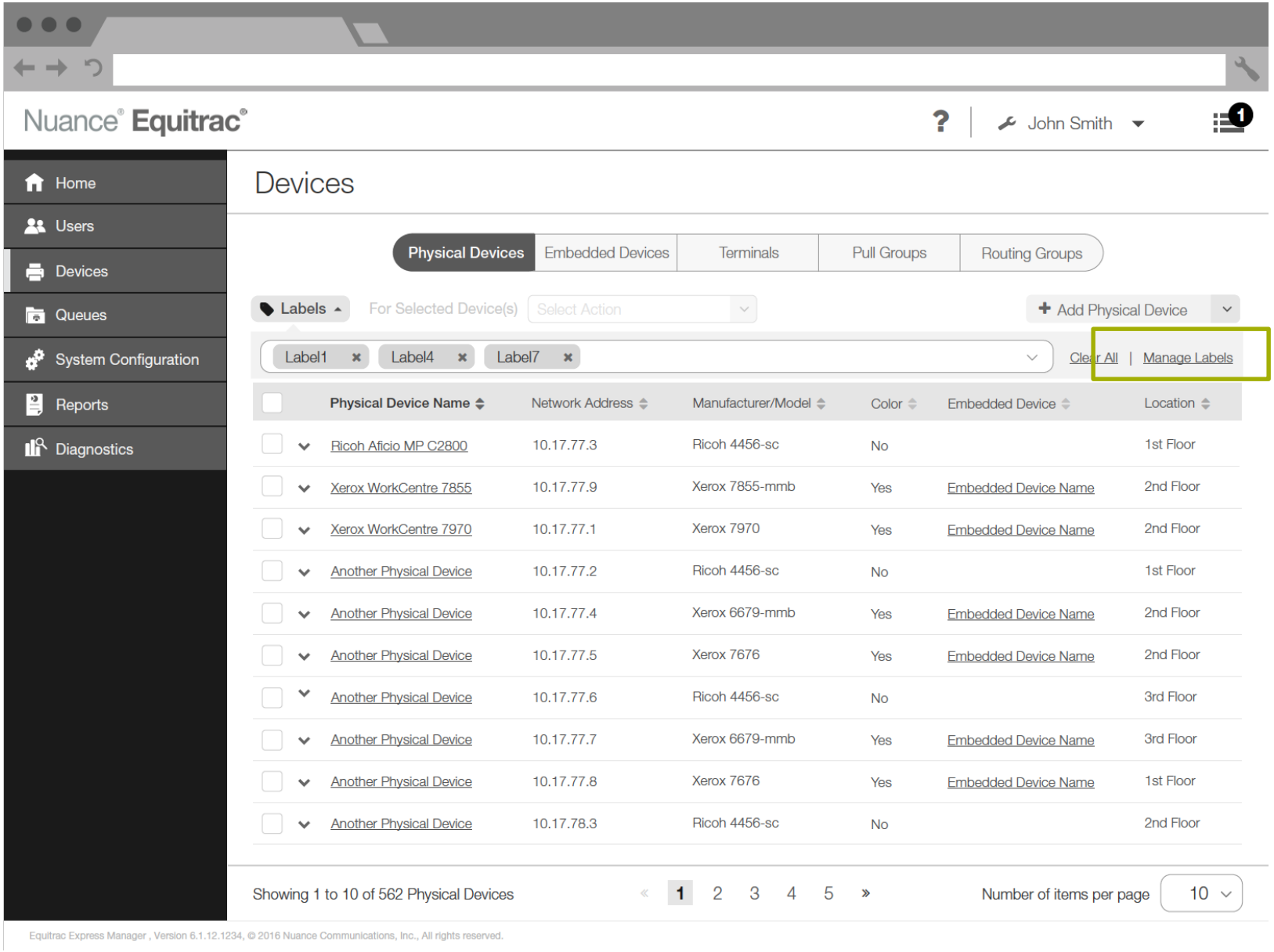
2 **"Manage" Listing** - this table display is used in the context of managing labels, pull groups and routing groups.

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

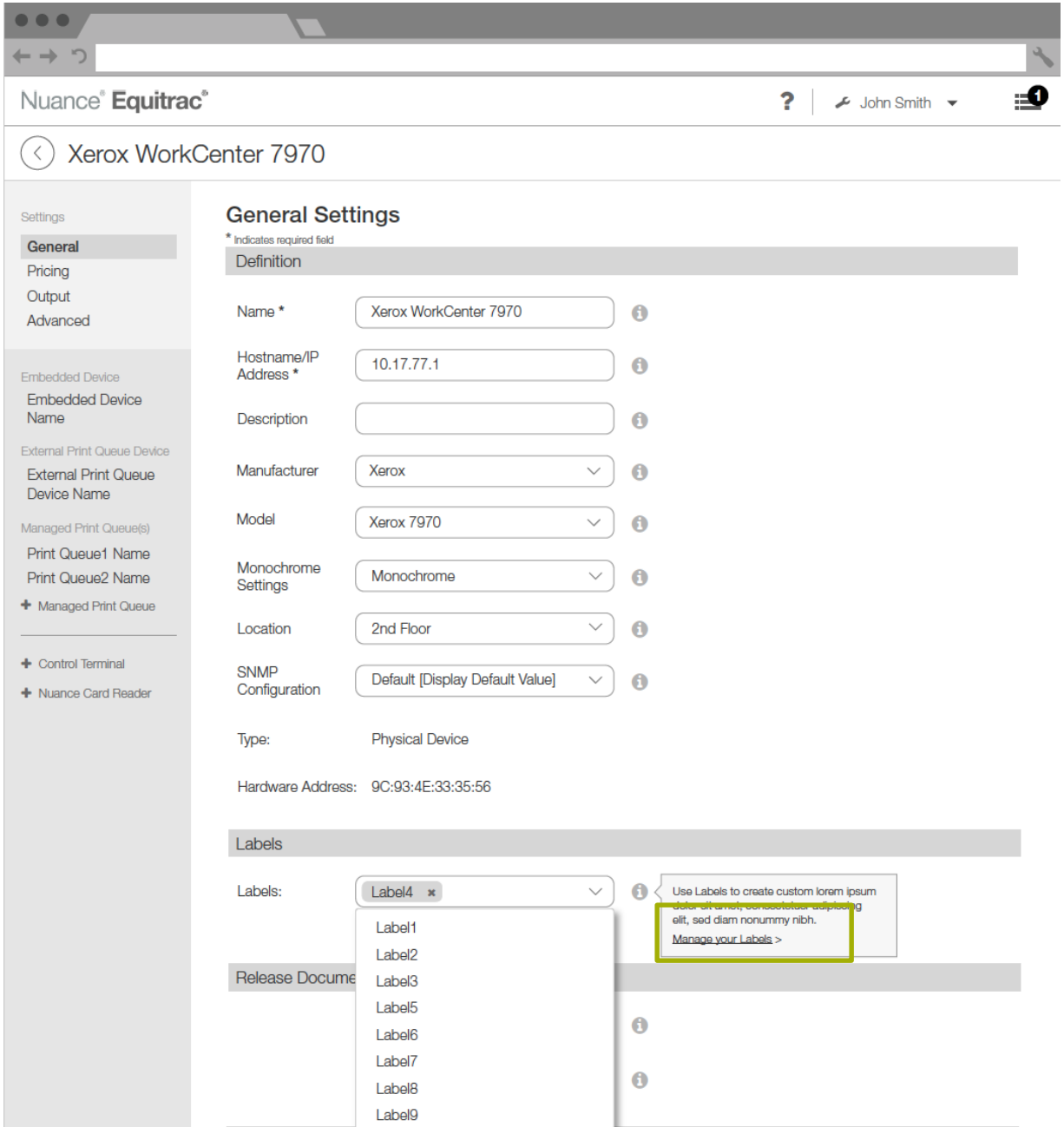
Accessing "Manage Labels"



Accessing "Manage Labels"



Accessing "Manage Labels"



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)

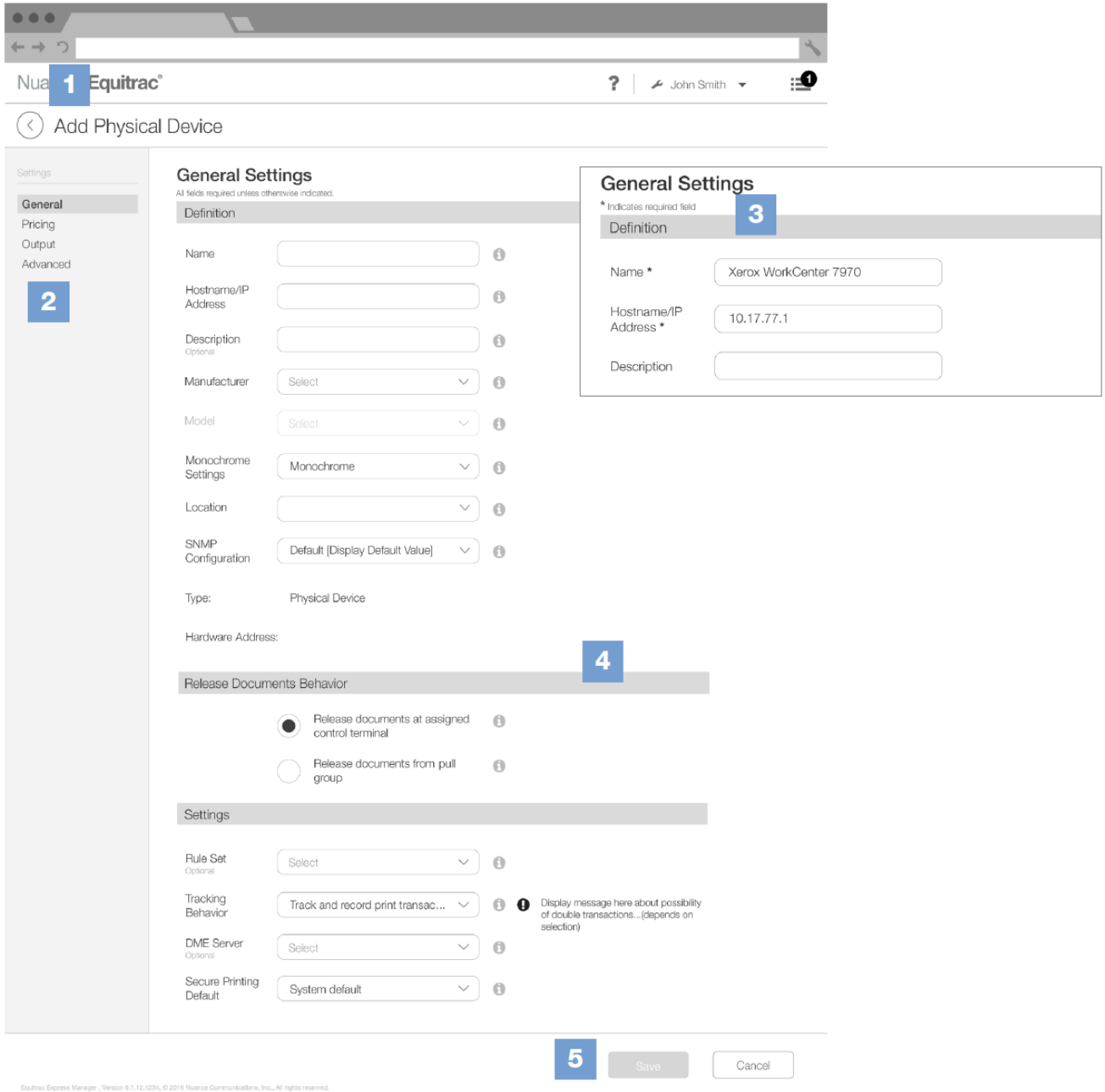
- It is EXPERIENTIAL (vs structural)

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.

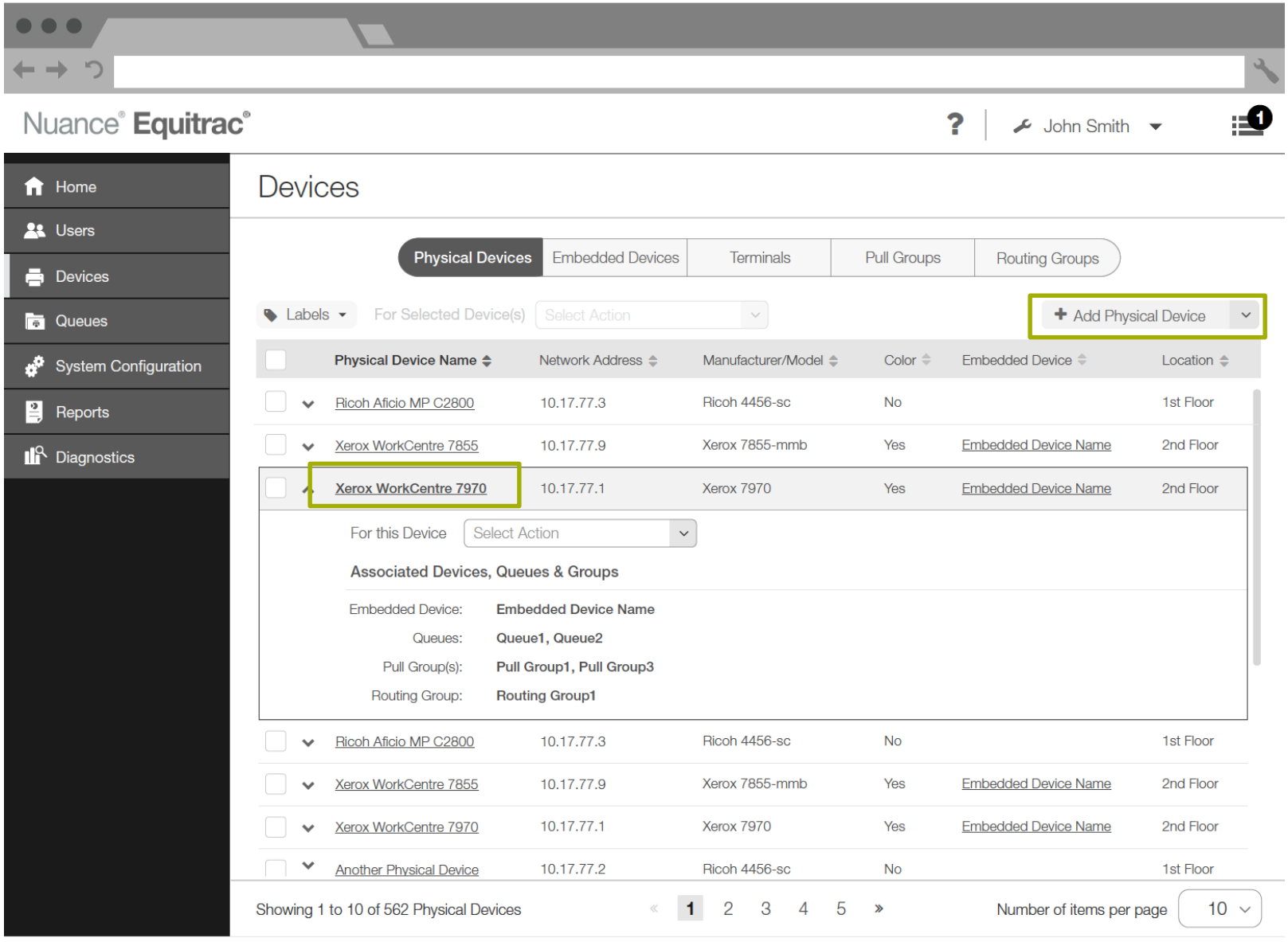
Page Forms – Add/Edit (Pattern Guide p 18)

- 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)

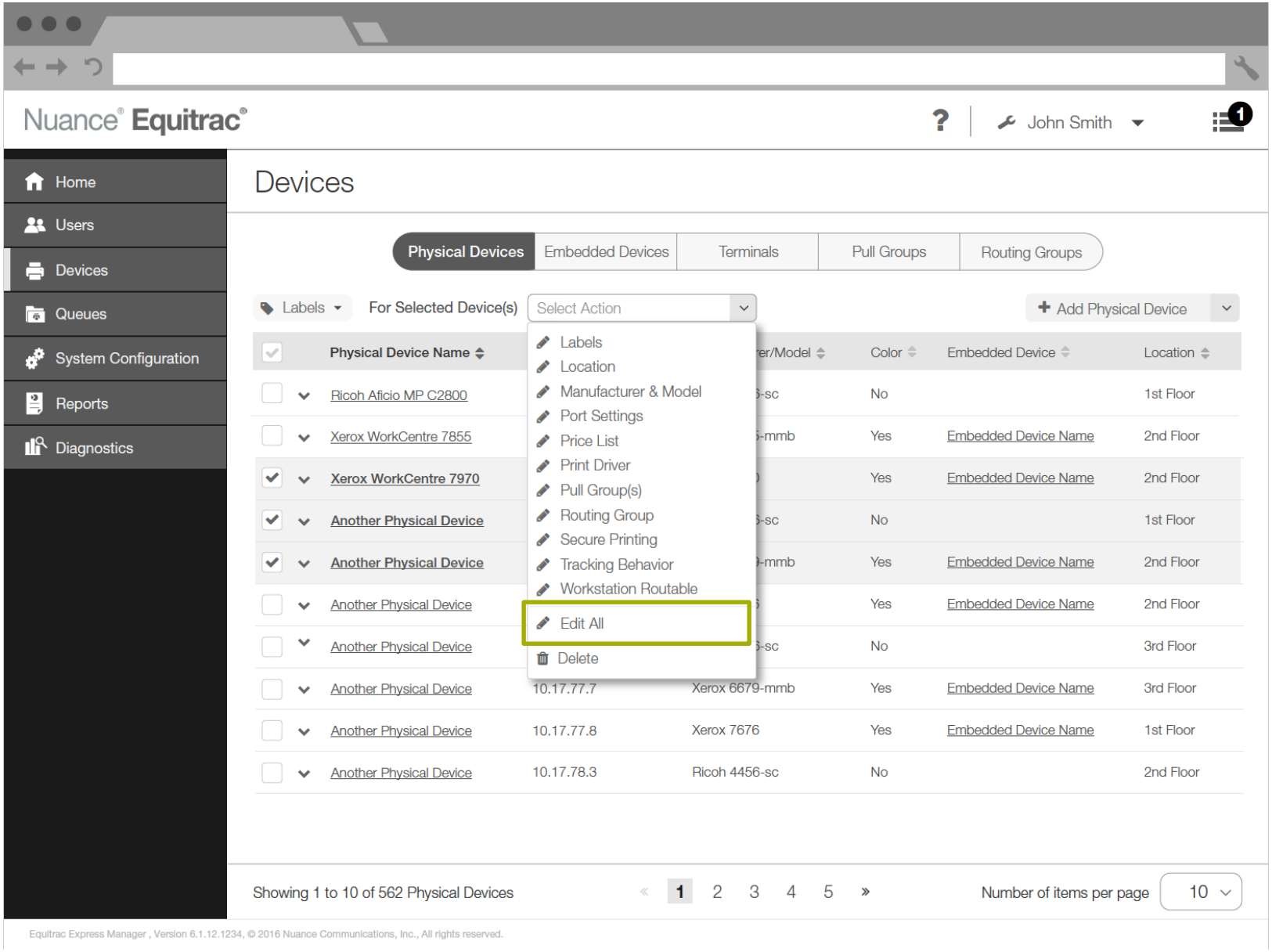
Note: For small number of properties a modal window may be a better choice (e.g. editing an object in the Manage List")

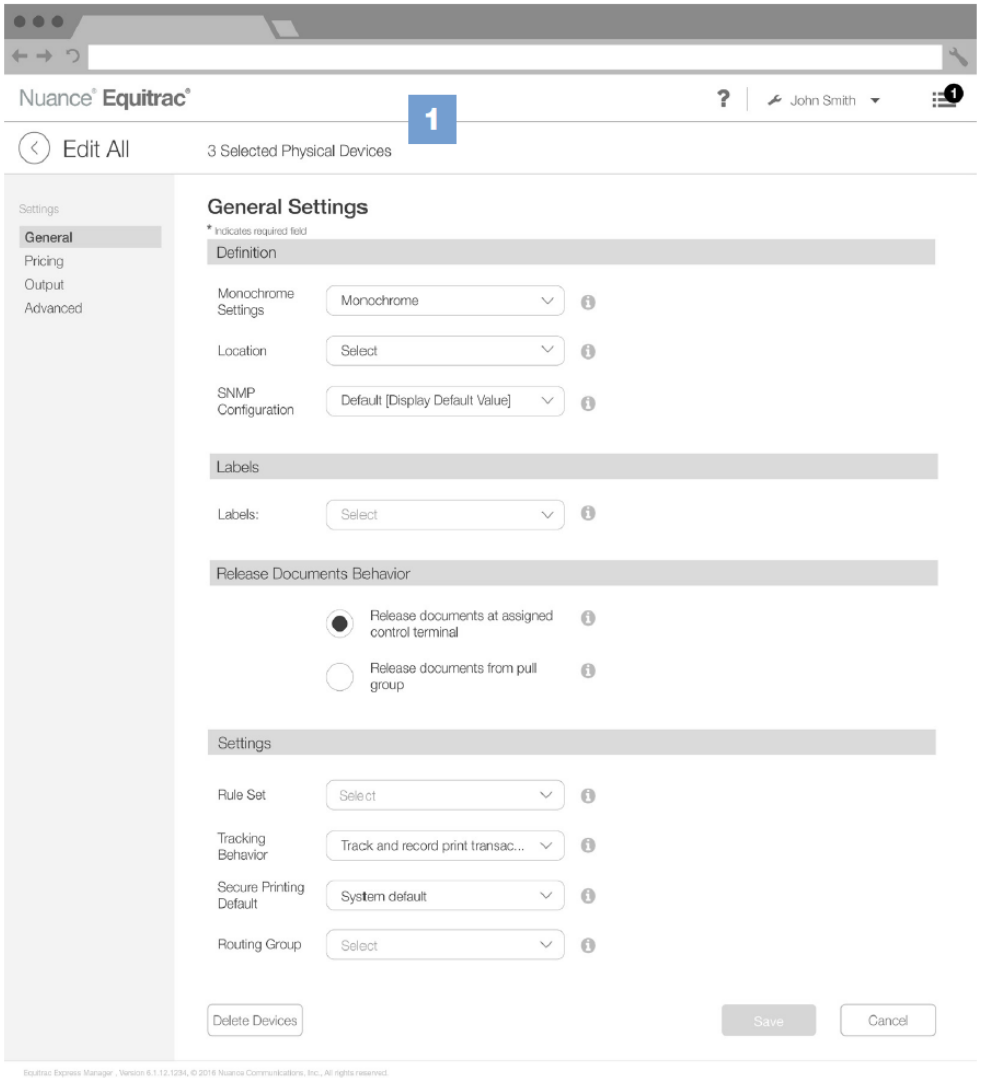
-

Accessing "Add/Edit Page Form"



“Edit All” Variation





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:

1. **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

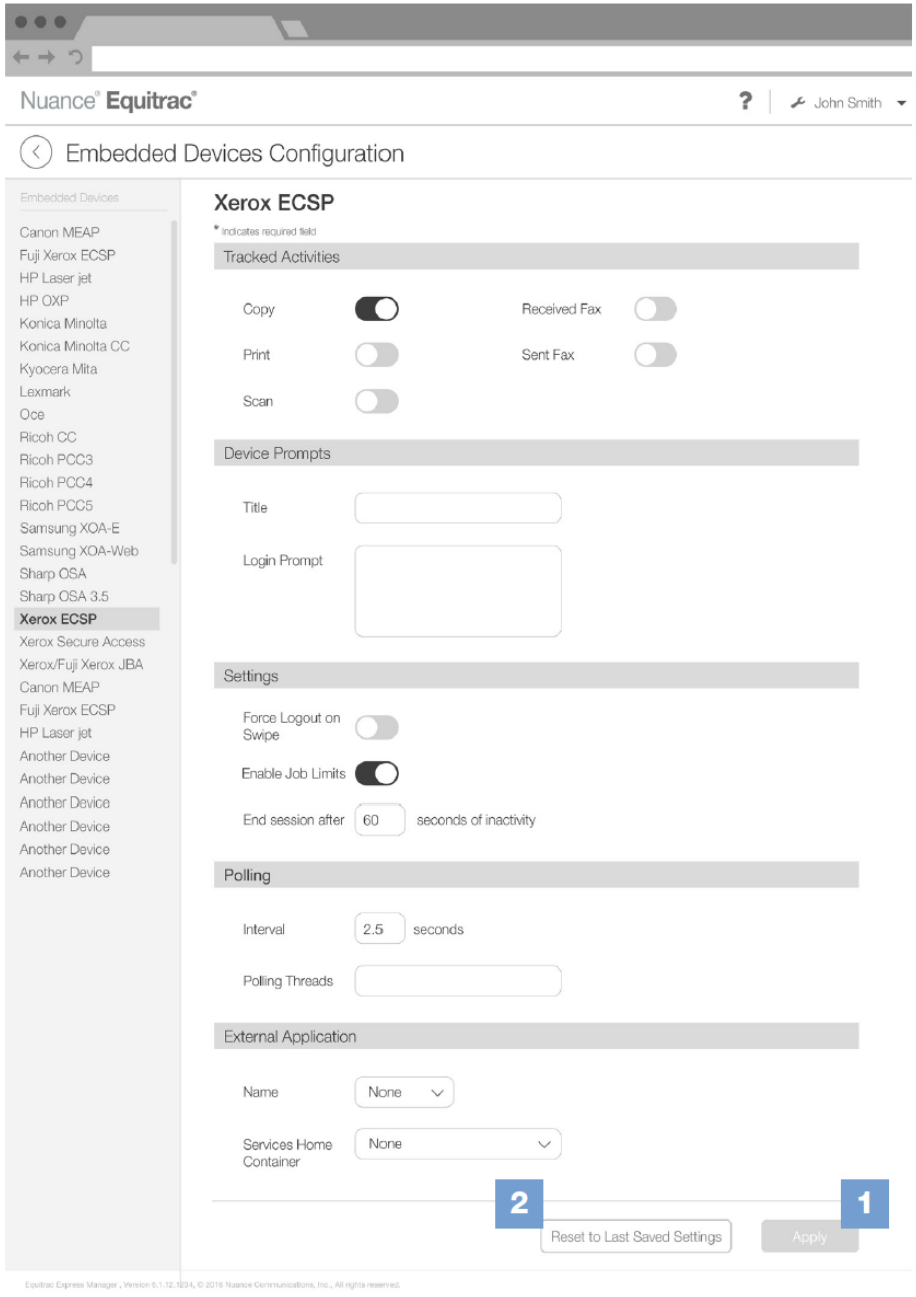
(Pattern Guide p 20)

- 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.

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:

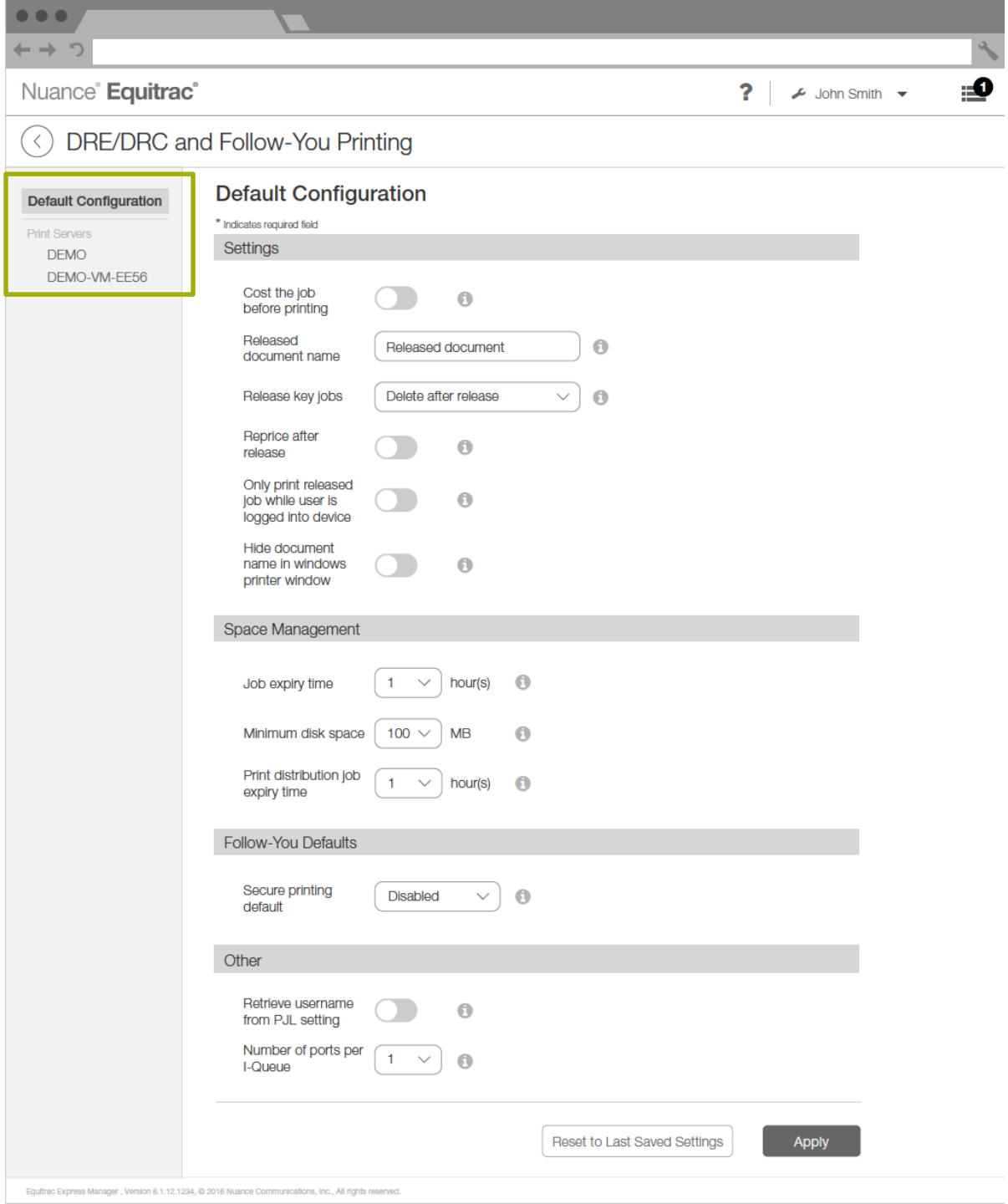
- No Landing Page or table listing to initially select object
- User task is configuring multiple objects (or initial set up)

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


Nuance® Equitrac®
John Smith
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
Released document
Release key jobs
Delete after release
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
1
hour(s)
Minimum disk space
100
MB
Print distribution job expiry time
1
hour(s)
Follow-You Defaults
Secure printing default
Disabled
Other
Retrieve username from PJL setting
Number of ports per I-Queue
1
Reset to Last Saved Settings
Apply
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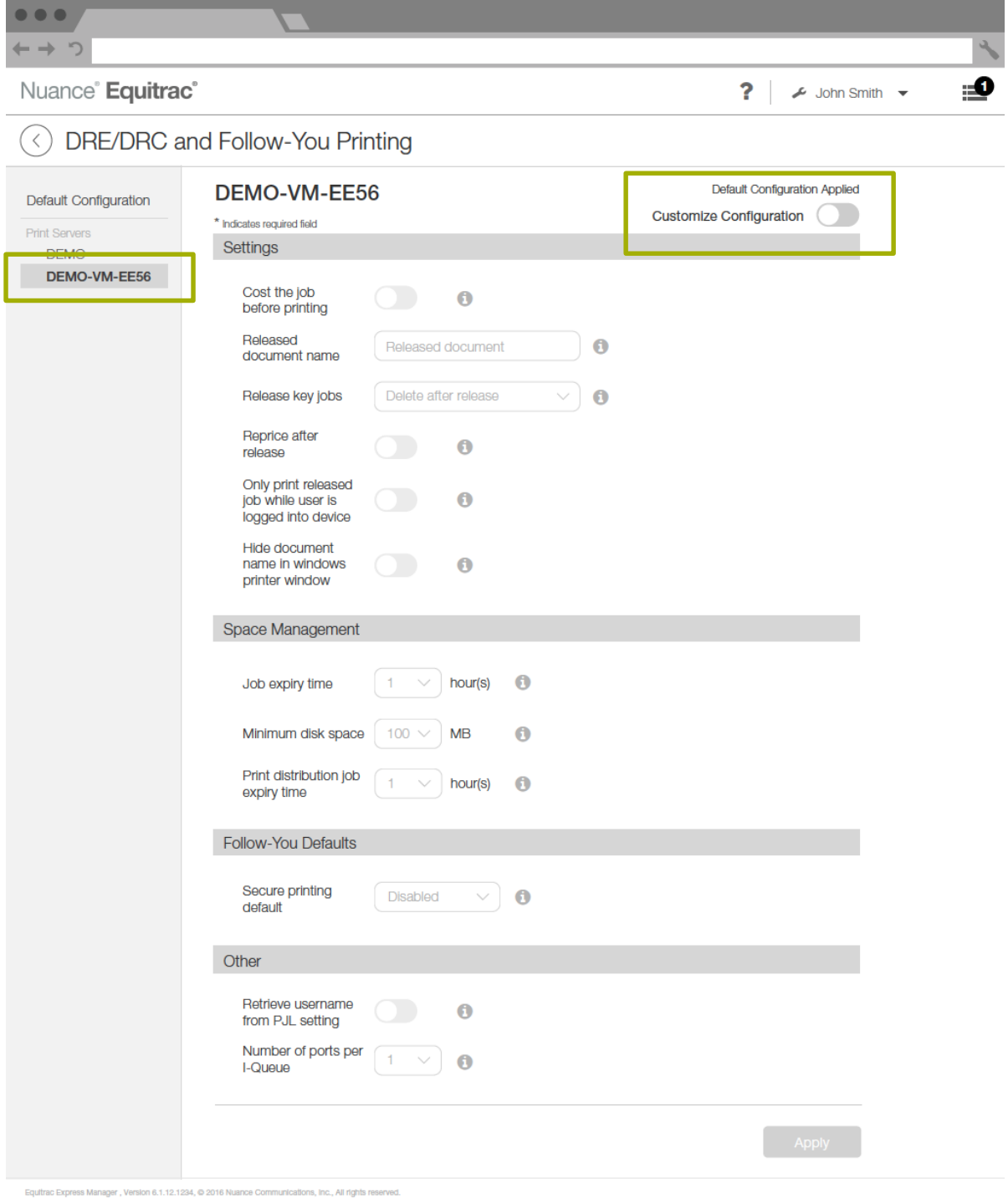
Nuance® Equitrac®
John Smith
DRE/DRC and Follow-You Printing
Default Configuration
Print Servers
DEMO
DEMO-VM-EE56
DEMO-VM-EE56
Default Configuration Applied
Customize Configuration
* Indicates required field
Settings
Cost the job before printing
Released document name
Released document
Release key jobs
Delete after release
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
1
hour(s)
Minimum disk space
100
MB
Print distribution job expiry time
1
hour(s)
Follow-You Defaults
Secure printing default
Disabled
Other
Retrieve username from PJL setting
Number of ports per I-Queue
1
Apply
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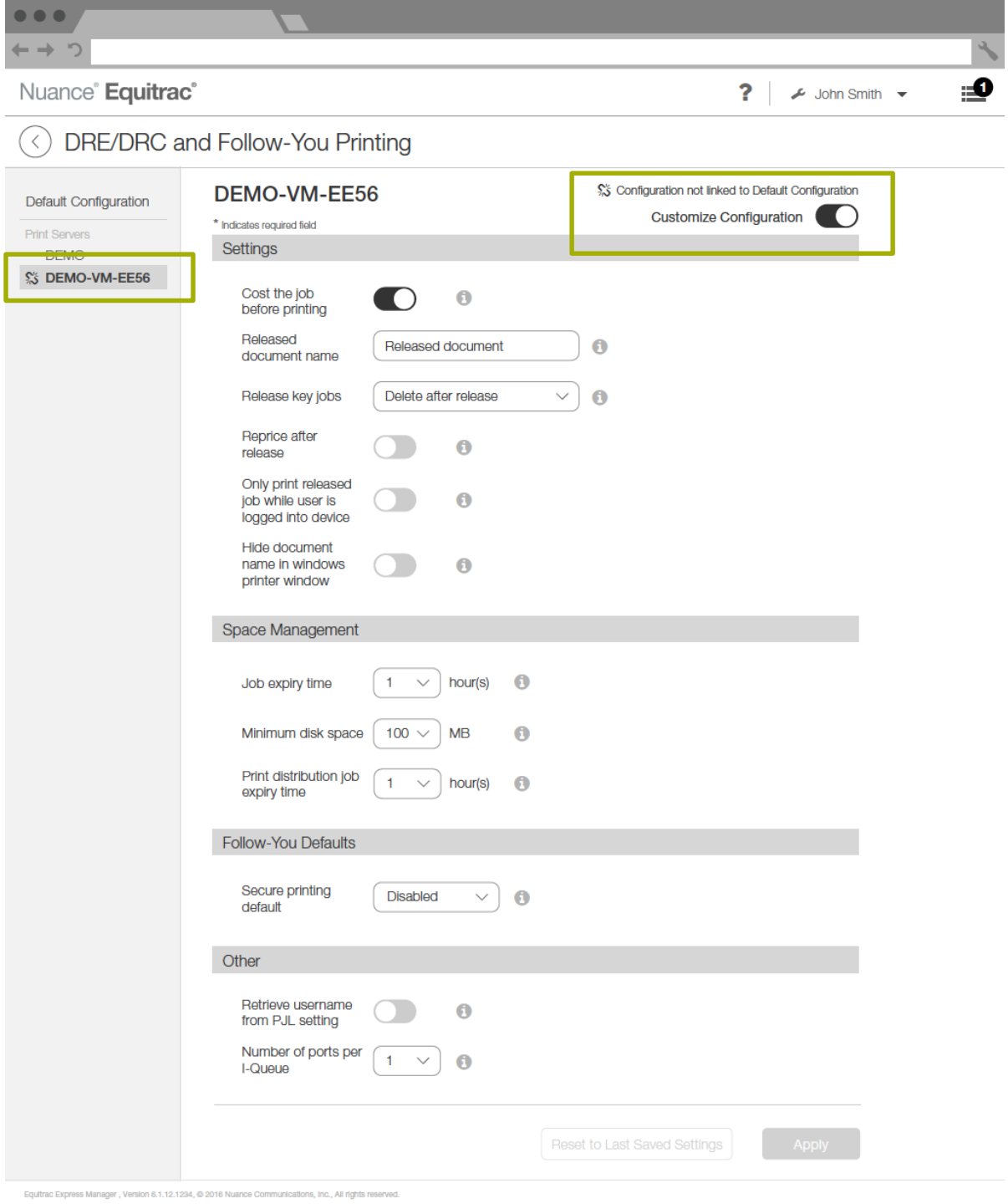
Nuance® Equitrac®
John Smith
DRE/DRC and Follow-You Printing
Default Configuration
Print Servers
DEMO
DEMO-VM-EE56
DEMO-VM-EE56
Configuration not linked to Default Configuration
Customize Configuration
* Indicates required field
Settings
Cost the job before printing
Released document name
Released document
Release key jobs
Delete after release
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
1
hour(s)
Minimum disk space
100
MB
Print distribution job expiry time
1
hour(s)
Follow-You Defaults
Secure printing default
Disabled
Other
Retrieve username from PJL setting
Number of ports per I-Queue
1
Reset to Last Saved Settings
Apply
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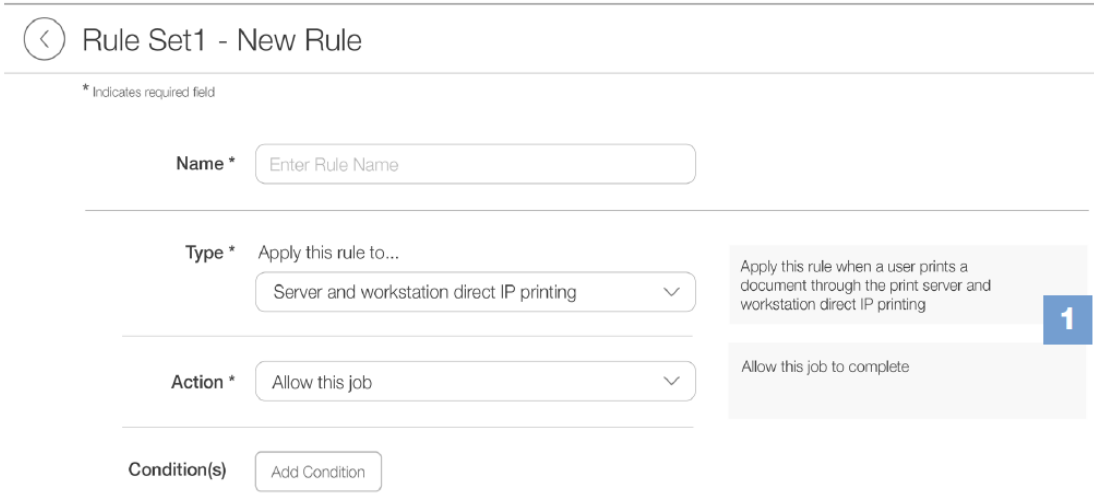
Page Form Variation - Unlinking Object from Default Settings

(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



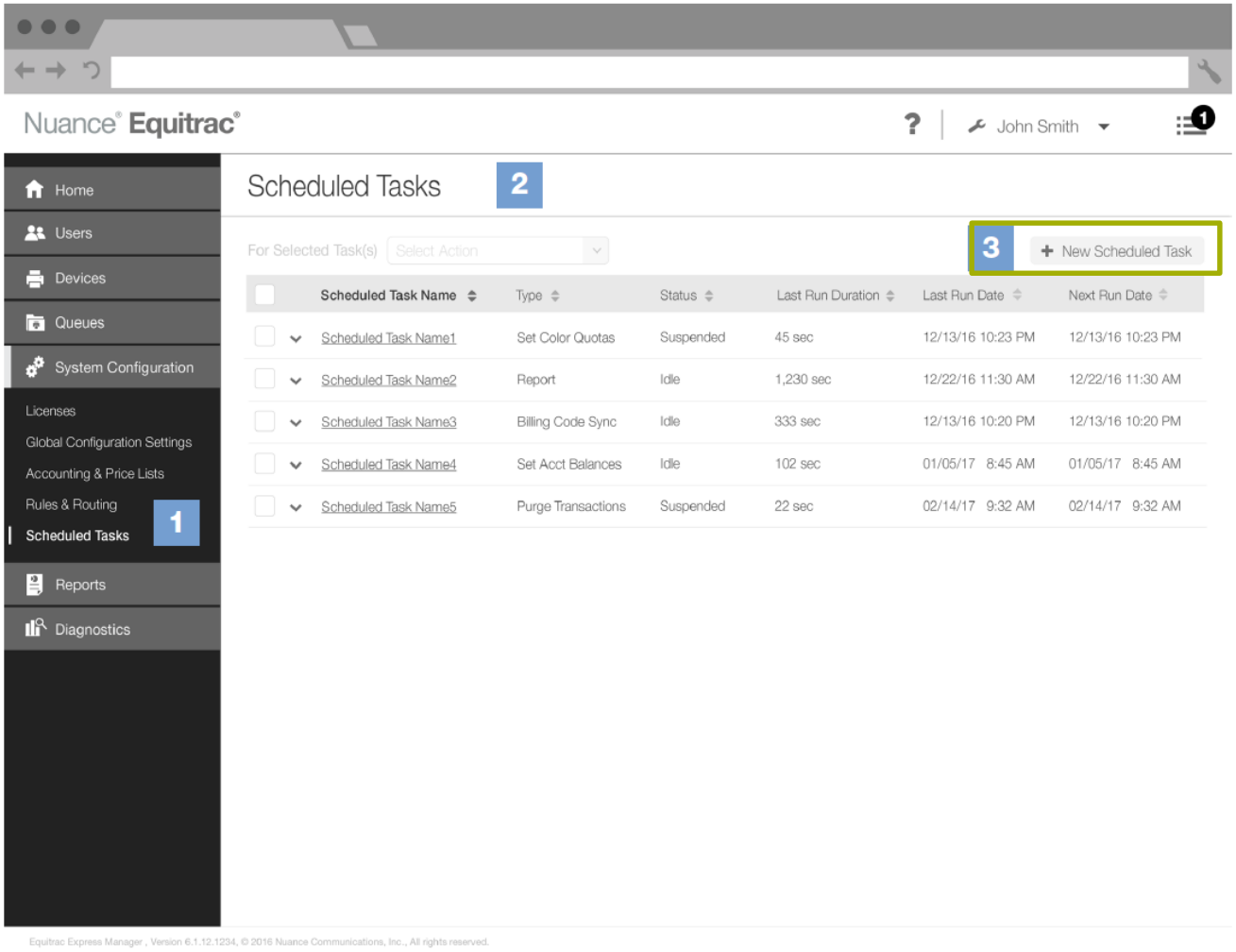
Form with Dynamic Information Displayed

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.

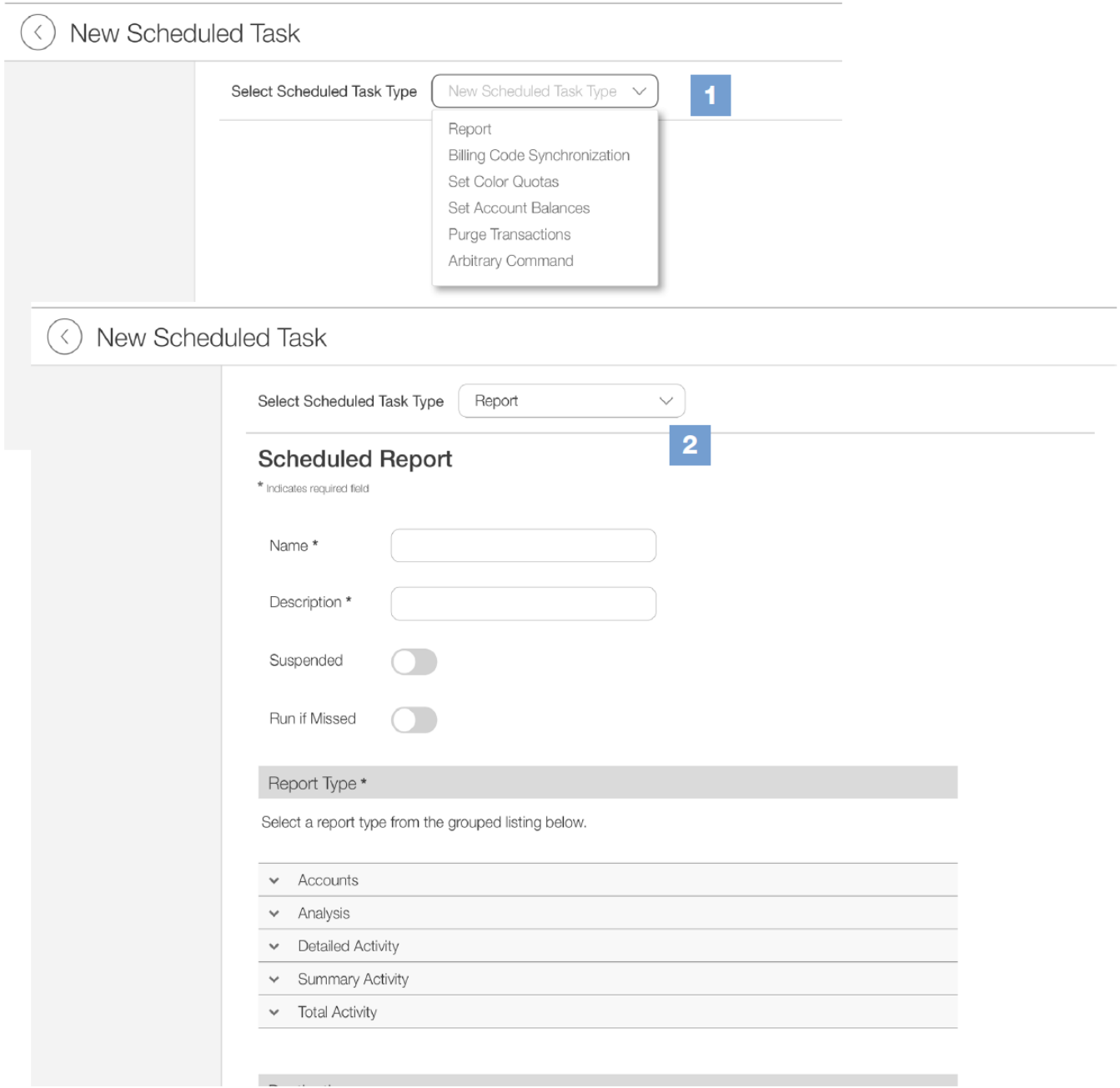
Adding a New Scheduled Task



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.



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*