

Nuance® Equitrac®

UX Training

Session 4
July 20, 2017

UX Training Session Topics

- 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
- URL access: training.authenticinsight.com
Sign up!

Pattern Guide Sessions 1-2

Reviewed Equitrac Pattern Guide

- Web application STRUCTURE
- The CONTEXT of the application “features”
- Navigation Model (primary, secondary, page level navigation)
- Page types
- Controls, components, interactions that go on a page

Foundations of UX / IA Deep Dive

Session 3

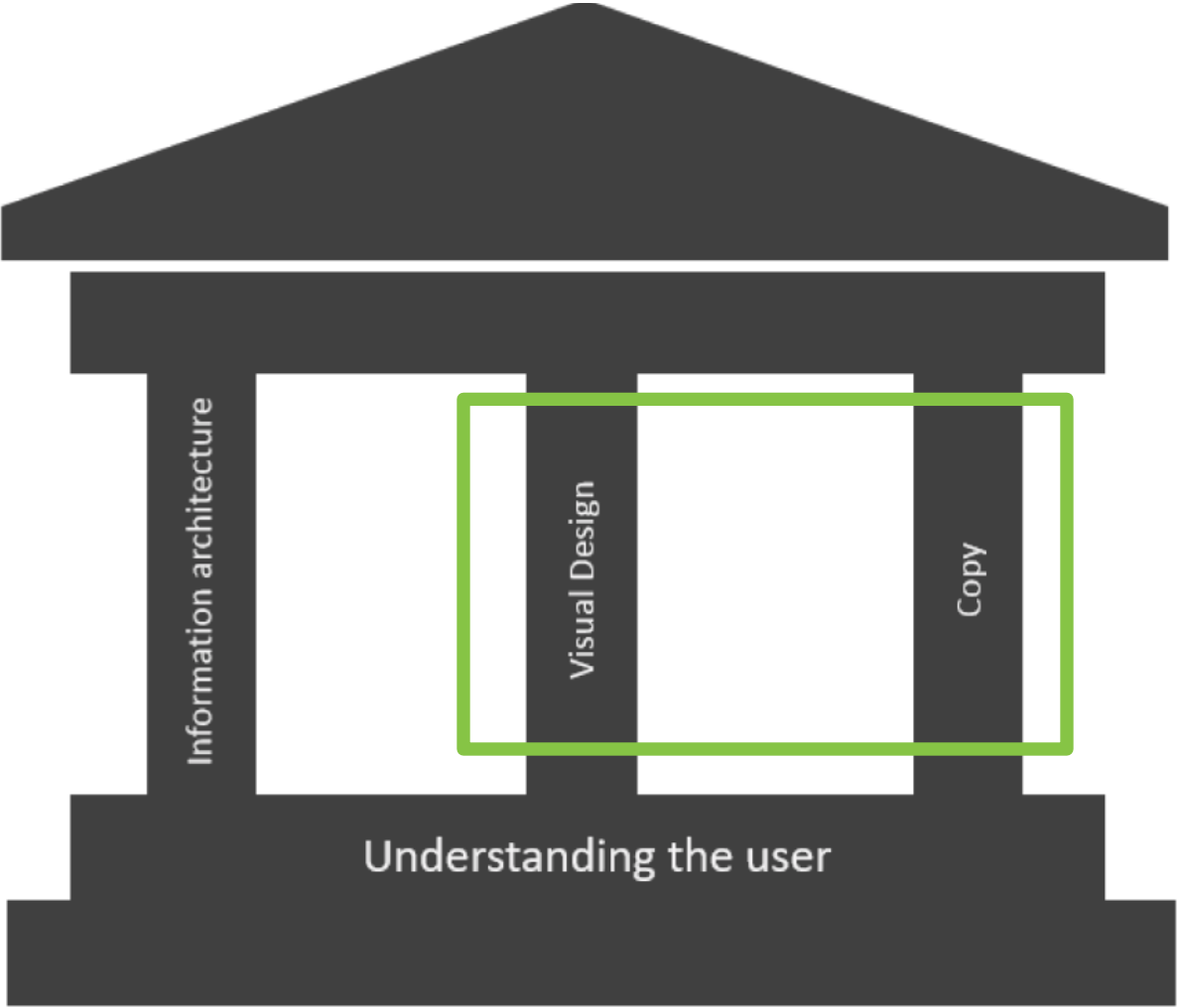
User Experience

- Foundation: Understanding the user
- “Pillars”: Information Architecture, Visual Design, Copy
- Need to get all the elements right
- Good UX - best way to reduce customer support burden

Information Architecture

- Application structure -> Navigation Model
- Categories and labels aligned to users' goals & tasks
- Interaction and page layout “templates”
- Consistency important!!
- Page level navigation and hierarchy
- Reviewed examples of good and bad UX & IA

UX: Foundation & Components



Visual Design

Visual Design

Focuses on the aesthetics of the user interface.

Uses images, colors, fonts, and other elements to enhance a design or interaction, and engage users.

Visual Design

“Good” visual design ensures the application...

- Surfaces & communicates appropriate information & actions to the user (at the right time)
- Is “usable”
- Looks good (first impression is important)
- Conforms to brand guidelines
- Instills trust/credibility

Visual design & page layout
reinforces information architecture
and hierarchy...

Don't want to overdo it...



Or underdo it...



<http://lightersideofrealestate.com/real-estate-humor/30-real-estate-listing-photos-cant-real>

Visual Design System

- Not “artsy fartsy”
- Need a “system” to follow for page designs throughout the application.
- Visual design fundamentals (building blocks):
 - Color
 - Type
 - Grid System

Visual Design System

Good design is achieved through using color, type & grids effectively for...

- Contrast
- Simplicity
- Whitespace
- Consistency (of visual elements)

Color

Use color to create **contrast**

Color Contrast

Search contacts... Dashboard **Contacts** Buckets Programs Pipelines Templates 3 Help JS

Nadine Fox

Follow Up Send a Card

JS Jana Sedivy 7 days ago 483 times 7 days
LAST TEAM CONTACT TOTAL CONTACTED LAST FOLLOW-UP

Company: Consultant Address: (Work)
Title: User Experience Design Professional
Email: nadinefox@gmail.com nadine@authenticinsight.com Website: http://www.google.com/profiles/10899181334... (Profile)
Phone: (Mobile)

Interaction Note

Log an interaction...

Date: 07/05/2017 12:01 pm Type: Phone Call Save

All Calendar Call **Email** Note Text In Person Other Not shared

- JS Jana Sedivy > Nadine Fox jana@authenticinsight.com Jun 23
- Nadine Fox > Jana Sedivy 12/08/16 Equitrac UX redesign - wireframes and product map reviewed today
- Nadine Fox > Jana Sedivy 12/05/16 Equitrac UX redesign - updated wireframes (dec5)
- Nadine Fox > Jana Sedivy (3) 12/05/16 Re: Agenda for the 9:00am meeting with Nuance
- Nadine Fox > Jana Sedivy (2) 12/04/16 Re: Authentic Insight Deliverables Update

Buckets C list Edit Buckets

Team Who knows Nadine? JS Assigned team member None

Documents Drag and drop files here or click to upload

Connections Add Connection

Related Contacts

https://www.contactually.com/dashboard



- Use one or two colors that serve as visual path.
- Blue, green & pink used to highlight and draw attention to specific page elements
- Reinforces visual hierarchy
- Uses light lines to group content areas
- Enhances usability

Color

- Be aware of users that are color blind & visually impaired
- Generally, design elements that are good for color blind users are good design practices for everyone
- A well designed application should be already accessible to all users

Color Combos to Avoid

For red-green color blind users:

Green & Red

Green & Brown

Blue & Purple

Green & Blue

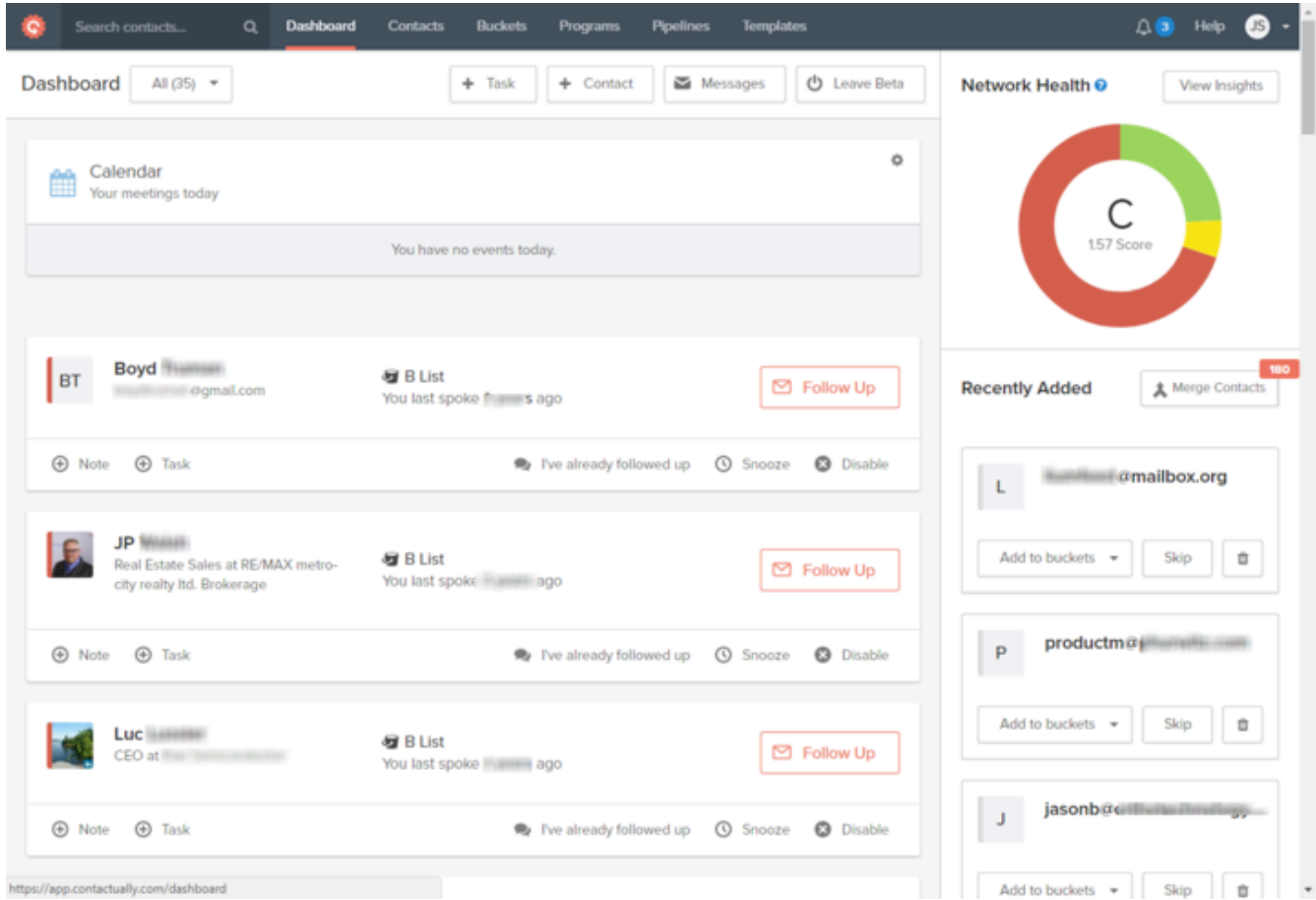
Light Green & Yellow

Blue & Grey

Green & Grey

Green & Black

Color – Use High Contrast (where appropriate)



- Network health use of red...
- “Recently Added” highlighted

Note – use red sparingly

Color - Contrast

The screenshot shows the EquitracUX dashboard. On the left is a dark sidebar with navigation items: Dashboard, Users, Site, Transactions, Emails, COURSES (Equitrac UX training), Help, and Settings. The user is identified as Jana Sedivy. The main dashboard area has a top navigation bar with 'View Your School' and a notification banner: 'Important: In order to be paid out by Teachable, you must provide a working PayPal address.' Below this is a 'New Signups' line chart for the period June 12, 2017, to June 28, 2017. The chart shows a peak of 2 signups on June 15. To the right of the chart are summary cards for 'Today' and 'This month June 2017'. The 'Today' cards show 0 new signups, 1 active student (up 1 new yesterday), 0 lecture completions, and 0 course completions. The 'This month' cards show 4 new signups (up 4 new since last month), 4 active students (up 4 new since last month), 1 lecture completion (up 1 new since last month), and 1 course completion (up 1 new since last month). On the far right is a 'Live feed' of activity logs, including 'Gwen Read logged in.' and 'nadine fox enrolled in Equitrac UX training for free.' At the bottom right, there is a message from 'Laurence from Teachable'.



- Low contrast – not good for usability/accessibility
- Side nav light grey on dark background – low contrast makes quick reading difficult.

Color - Contrast

The screenshot shows the American Harp Society, Inc. website. The header features the organization's logo and name. Below the header is a navigation bar with various menu items. The main content area is titled "Board of Directors Files" and includes a search bar, a category dropdown, and a table of files. A sidebar on the left contains a large green "Upload File" button and a list of dashboard bookmarks. A red "Delete" button is located below the file table.

	Name	Category	Date Uploaded
	AGM.jpg	Meeting Minutes	2017-02-28
	test.pdf	2016	2016-10-26



- Red – use sparingly
- Too much emphasis on Delete button
- Upload file – crazy big, and green draws eye focus

Color – not so good

The screenshot shows the Enbridge website interface. At the top, there is a dark navigation bar with the Enbridge logo on the left and 'myEnbridge Hi [user] Overview | Sign Out' on the right. Below this is a secondary navigation bar with 'HOMES' and 'BUSINESSES' tabs, and links for 'CORPORATE COMMITMENTS', 'SAFETY', 'ABOUT US', and 'CONTACT US'. A search bar is also present. The main content area has a green header with 'myEnbridge' and a sub-header 'myEnbridge > Overview'. A secondary navigation bar includes 'Overview', 'Billing Options & Services', 'Payments', 'Meter Reading', 'I'm Moving', 'Manage My Account', and 'Customer Service'. The main content is divided into two columns. The left column contains 'Account Summary' (Status: Active), 'Billing Options & Services' (Paperless, Pre-Authorized Payment Plan, Budget Billing Plan), and 'Billing Contact' (JANA SEDIVY). The right column is titled 'My current bill overview' and features a 'Pay Now' button in yellow, a 'View Bills' button in blue, and two informational sections: 'Highlights of your current bill' (75 m³ more gas than last month) and 'Rates have changed since last year'.



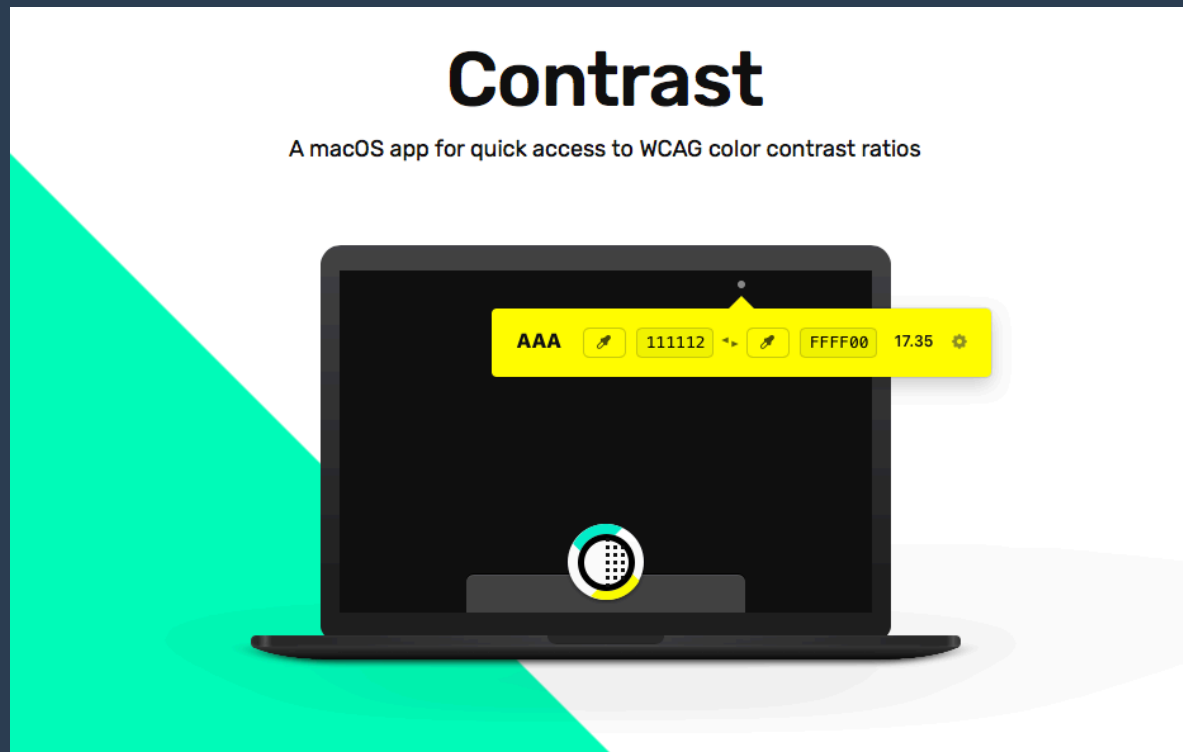
- Good use of blue as secondary color for less important content/actions. Just right contrast.



- Primary call to action "Pay Now" not called out enough
- Yellow gets lost on light background– Yellow as nav highlight not apparent enough. Needs more contrast.
- Green "My Enbridge" has too much emphasis due to contrast. Breaks nav hierarchy.

Color Contrast Testing

Lots of resources online that test color contrast
(WCAG = Web Content and Accessibility Guidelines)



Use a minimal color palette



Nuance Brand – 3 Colorways



brand + digital center

Principles, guidelines and assets

Introduction

Our brand

Our voice principles

Copywriting guidelines

Getting started

Voice and tone

Search engine optimization

Storytelling

Before and after writing examples

Content structure and styles

Collateral

Email

Event and conference

Three colorways

The Nuance visual identity is split into three colorways. Each colorway is comprised of three colors: one primary color and two secondary colors with a shared

neutral palette. **The three colorways are not meant to all be used together, but instead each composition uses a single colorway.**

While most compositions should be limited to a single colorway, certain compositions could use up to two colorways within the same experience.

The colorways should always enhance the experience.

Never use them to represent divisions or products.



For digital use only

A second RGB and HEX value of the secondary palette are **only used against the primary colors** to achieve vibrancy and legibility in the digital space. **Never use against white backgrounds.**

Blue colorway

Orange colorway

Magenta colorway

Color – too many colors example

Member365 Search Contacts Options Refer a Friend Shawn Fogarty

Dashboard Contacts Modules Lists Email Marketing Events Support Financial Reports

View Contact Details

You Are Here: / Dashboard / Contacts / Mr. Shawn Fogarty

Mr. Shawn Fogarty **DONOR**
coach
Member365
amplifyams@gmail.com

Business Residential Organization

123 Main Street
City, South Carolina
United States
Org. Phone 1: 777-777-7777

Communication & File Log

Calls Emails eMarketing Notes Faxes Inquiries Files

Call Date: 2017-06-27

Notes: Notes

Save View All

Name	Call Date	Outcome	Notes
Fogarty, Shawn	2017-03-14		View



- Too many colors...

Color – too many colors example

Assign Ticket

Member ▼
Can't find a specific member?
[Assign](#) [This is my ticket!](#)

Non-Member [Assign](#)

[Close](#)

NAFC Symposium

October 1 - 3, 2017
Omni Interlocken Hotel
Broomfield, United States
80021

Ticket	Type	Fee	Name
1	NAFC Member Early Bird - Early Bird II Fee	\$399.00	Assign Ticket
2	NAFC Member Early Bird - Early Bird II Fee	\$399.00	Assign Ticket
3	NAFC Member Early Bird - Early Bird II Fee	\$399.00	Assign Ticket
4	NAFC Member Early Bird - Early Bird II Fee	\$399.00	Assign Ticket
5	Spouse Rate - Early Bird II Fee	\$125.00	Assign Ticket

[Add Ticket](#) [Continue](#)

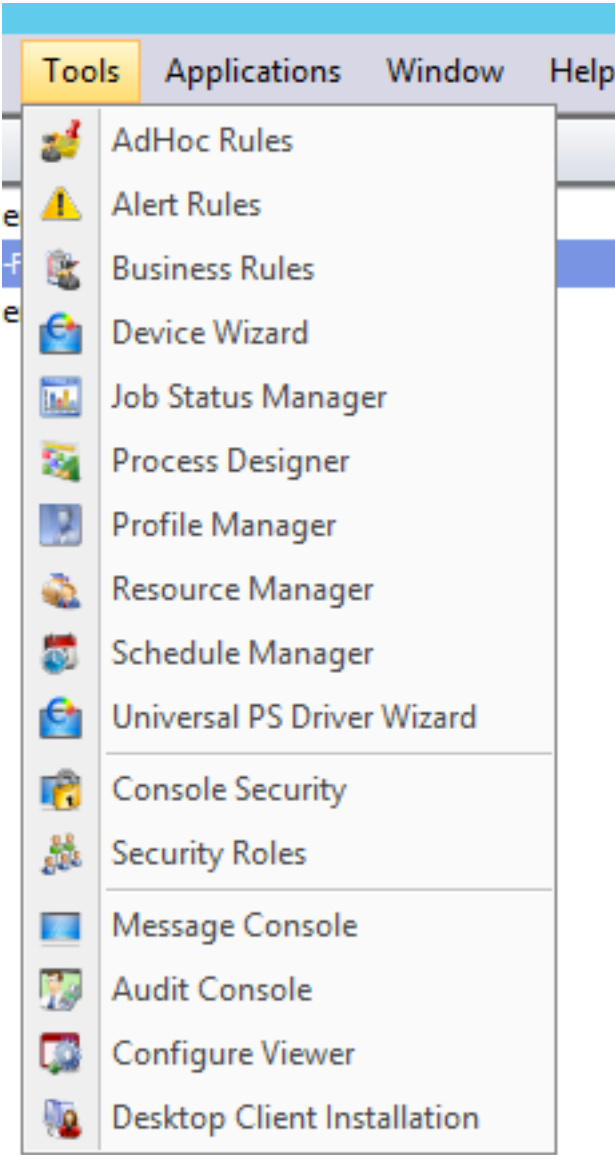
Buttons – minimize use of color. Have primary and secondary button color treatment.



- Too many button colors
- Why is "Close" red?
- Placement – eye all over the place

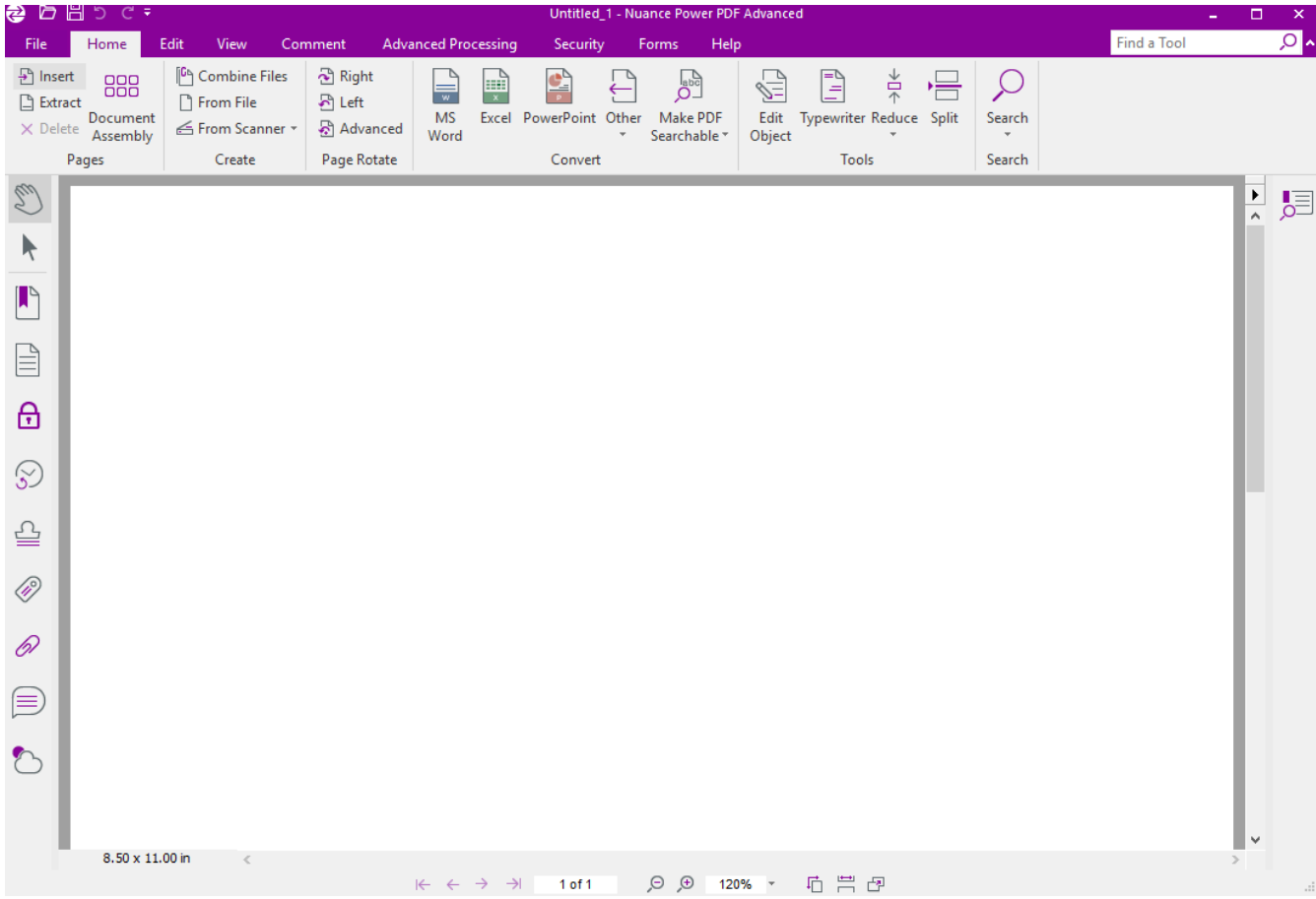
Other Note-
Use disabled button states for actions that aren't available

Color – too many colors example



Too many colors (and shading) results in clutter.

Color – just right (not too many colors)



- Color used sparingly and intentionally for icon treatment
- Dark grey for base icon, purple for action (modifier)
- Uses Purple Colorway but specifically deviated for MS app icons

Use symbols with color to
reinforce state change

Use Color with Symbols

Input with success

Success! You've done it.

Example help text that remains unchanged.

Input with warning

Shucks, check the formatting of that and try again.

Example help text that remains unchanged.

Input with danger

Sorry, that username's taken. Try another?

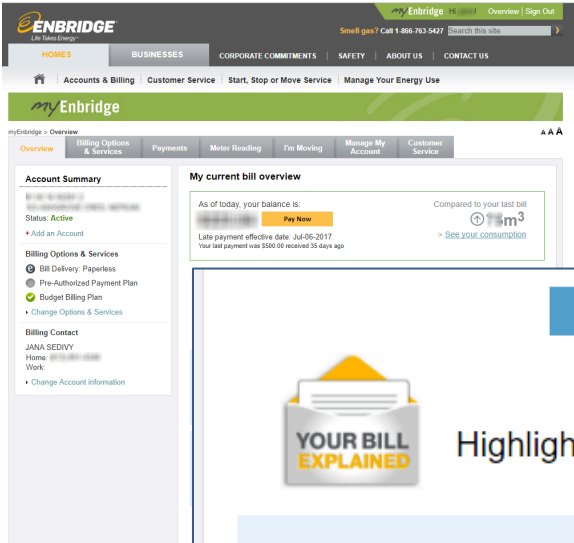
Example help text that remains unchanged.



- Symbols used to reinforce color/field state change
- Symbols assist in communicating a state change to the user
- Good for accessibility

Use various shades of a single color instead of multiple colors

Use various shades of same color...



- Light blue background shape used to group content areas
- Works well to organize information without making the page too busy

A detailed view of the 'View Bills' section of the Enbridge website. The section is titled 'View Bills' and features a 'YOUR BILL EXPLAINED' icon. Below the icon, the text reads 'Highlights of your current bill of \$550.00'. The section is divided into two light blue background blocks. The first block contains a bar chart icon and the text: 'Looks like you used 75 m³ more gas than last month, this is about 21% increase. Keep an eye on your consumption [...read more](#)'. Below this text is a blue button labeled 'Find Ways To Save'. The second block contains a dollar sign icon and the text: 'Rates have changed since last year. Find out why.' Below this text is a blue button labeled 'View Rates'.

Color Recap

- Use color to create contrast
- Avoid certain color combinations
- Use a minimal color palette
- Use symbols along with color for state changes
- Use various shades of a single color instead of multiple colors

Color Recap

- Stick with your color palette!
- Too many/varied colors adds to screen clutter
- Use color intentionally – why am I using this color?

Type

Type

Use consistent font style, sizing, color and behaviours.

- Sets up info hierarchy. Contrast size, weight, color -> reinforces hierarchy
- Helps to establish grouping of content
- Allows user to quickly scan page
- Define a system...stick with it

Type

Defining the System:

- Navigation levels
 - Header1
 - Header2....
 - Body text
 - Button text
 - Links (visually distinguish, no need to underline)
- + States (disabled, hover, selected...)

Nuance Typeface

Primary typeface

Typeface is the visual expression of our voice. Our brand typeface is Helvetica Neue LT Com from the foundry Linotype.

As needed, the font can be purchased at www.linotype.com.

1. Headline font

Nuance's voice should be told through Helvetica Neue LT Com.

- The voice of Nuance is expressed through Bold. Therefore, all headlines are set in Bold.
- Bold is also used for titles including document titles and titles within body copy.

2. Supporting fonts

Nuance's voice is supported by the Helvetica Neue LT Com font family. We recommend using different weights sparingly, in order to denote hierarchy.

- Light is used for subheads to create the right amount of contrast against headlines.
- Roman is the preference for body copy although Light may be used as long as it does not create readability or reproduction issues.

**Reinventing
technology**

ABCDEFGHIJKLMN**OPQR**STU
VWXYZ1234567890abcdefghijklmnop
klmnopqrstuvwxyz

Headline font
Helvetica Neue LT Com 75 Bold

ABCDEFGHIJKLMN**OPQR**STU
VWXYZ1234567890abcdefghijklmnop
klmnopqrstuvwxyz

Supporting font
Helvetica Neue LT Com 65 Roman

ABCDEFGHIJKLMN**OPQR**STU
VWXYZ1234567890abcdefghijklmnop
klmnopqrstuvwxyz

Supporting font
Helvetica Neue LT Com 45 Light

Type Example

The screenshot shows the Enbridge website interface. At the top, there is a dark navigation bar with the Enbridge logo, user name, and links for Overview and Sign Out. Below this is a secondary navigation bar with categories like HOMES, BUSINESSES, CORPORATE COMMITMENTS, SAFETY, ABOUT US, and CONTACT US. A search bar is also present. The main content area is titled 'myEnbridge' and includes a breadcrumb trail 'myEnbridge > Overview'. A secondary navigation bar offers options like Overview, Billing Options & Services, Payments, Meter Reading, I'm Moving, Manage My Account, and Customer Service. The main content is divided into two columns. The left column contains 'Account Summary' (Status: Active), 'Billing Options & Services' (Paperless, Pre-Authorized Payment Plan, Budget Billing Plan), and 'Billing Contact' (JANA SEDIVY). The right column features 'My current bill overview' with a balance section, a 'View Bills' button, and three informational cards: 'YOUR BILL EXPLAINED' (75 m³ more gas), 'Find Ways To Save', and 'View Rates' (Rates have changed).



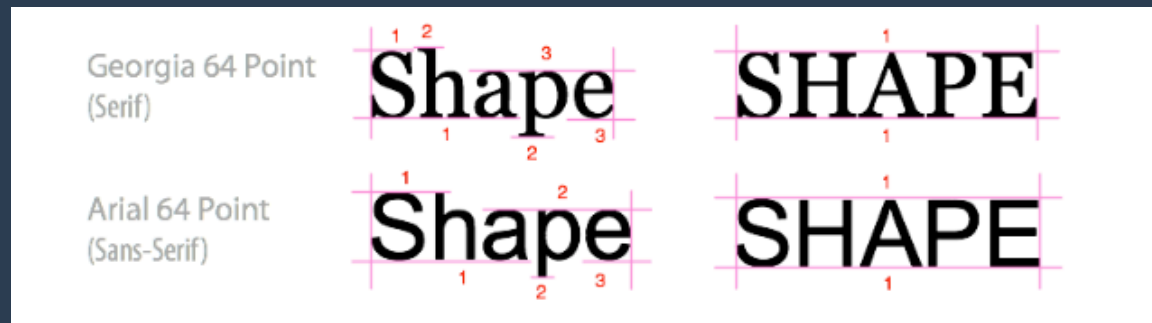
- Main content areas well defined through use of bold and larger text
- Button text looks good



- Capitalization & size used for contrast unsuccessfully
- Not enough differentiation between primary and 3rd level nav

Capitalization

- “All Caps” text is harder to read
- Less shape contrast
- OK to use when not much reading needed (logos, headings, abbreviations)



Good Type Example

Search contacts... Dashboard **Contacts** Buckets Programs Pipelines Templates 3 Help JS

Nadine Fox

Follow Up Send a Card

JS Jana Sedivy 7 days ago 483 times 7 days
LAST TEAM CONTACT TOTAL CONTACTED LAST FOLLOW-UP

Company: Consultant Address: (Work)
Title: User Experience Design Professional
Email: nadinefox@gmail.com nadine@authenticinsight.com Website: http://www.google.com/profiles/10899181334... (Profile)
Phone: (Mobile)

Interaction Note

Log an interaction...

Date: 07/05/2017 12:01 pm Type: Phone Call Save

All Calendar Call **Email** Note Text In Person Other Not shared

- JS Jana Sedivy > Nadine Fox jana@authenticinsight.com Jun 23
- Nadine Fox > Jana Sedivy 12/08/16 Equitrac UX redesign - wireframes and product map reviewed today
- Nadine Fox > Jana Sedivy 12/05/16 Equitrac UX redesign - updated wireframes (dec5)
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- Nadine Fox > Jana Sedivy (2) 12/04/16 Re: Authentic Insight Deliverables Update

Buckets: C list Edit Buckets

Team: Who knows Nadine? JS Assigned team member: None

Documents: Drag and drop files here or click to upload

Connections: Add Connection

Related Contacts

https://www.contactually.com/dashboard



- Main content areas well defined through use of bold and larger text
- Links and actions consistent blue treatment

Bad Type Example


Suzanne Collins

Home Works Biography Interview


Welcome

Hi! Thanks for visiting my website. Here's a picture of me with a rat in Central Park. If you've read my fantasy series, *The Underland Chronicles*, you will have a clue as to why I chose this photo. If not, you may want to click around and find out a little more about my books. Or visit the Scholastic website for cool games and info!

[Click here to check out Scholastic's Underland Chronicles website!](#)



Fly You High!



MOVIE TIE-IN EDITION IS NOW AVAILABLE!

Selected Works

Picture Book
YEAR OF THE JUNGLE
"Important and necessary."
--Kirkus Reviews, STARRED REVIEW
WHEN CHARLIE MCBUTTON LOST POWER
"A clever, humorous story in rhyme."
--School Library Journal

Sci-Fi
MOCKINGJAY
"...every bit as original and thought provoking, as *The Hunger Games*. Wow."
--Los Angeles Times
CATCHING FIRE
"...doesn't disappoint when it segues into the pulse-pounding action readers have come to expect."
--Publishers Weekly, STARRED REVIEW
THE HUNGER GAMES
"...a superb tale of physical adventure, political suspense, and romance."
--Booklist, STARRED REVIEW

Fantasy
GREGOR THE OVERLANDER
"...readers will likely find [the Underland] to be a fantastically engaging place."
--Publishers Weekly, STARRED REVIEW
GREGOR AND THE PROPHECY OF BANE
"Yessss!"
--Kirkus Reviews
GREGOR AND THE CURSE OF



- Mix of serif and sans serif fonts
- Mix of bold and regular type
- Text alignment off
- Lack of organization
- Poor first impression and trust

Grid System

Use a modular grid system
(supported by white space) for a
well balanced and organized
design

Grid System

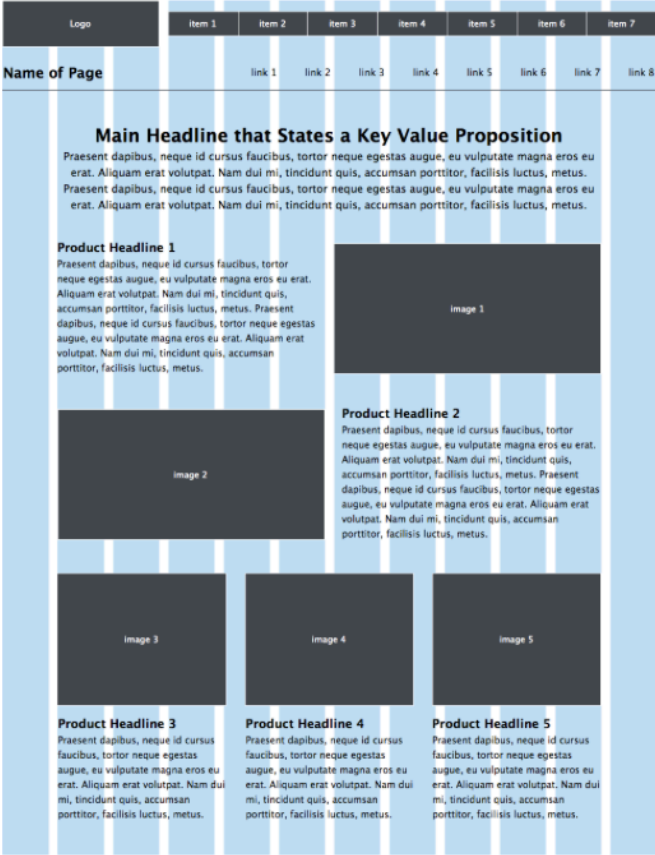
Keeps content organized

- Navigation, action buttons & content placement consistency
- Alignment of objects on the page

Enhances visual hierarchy

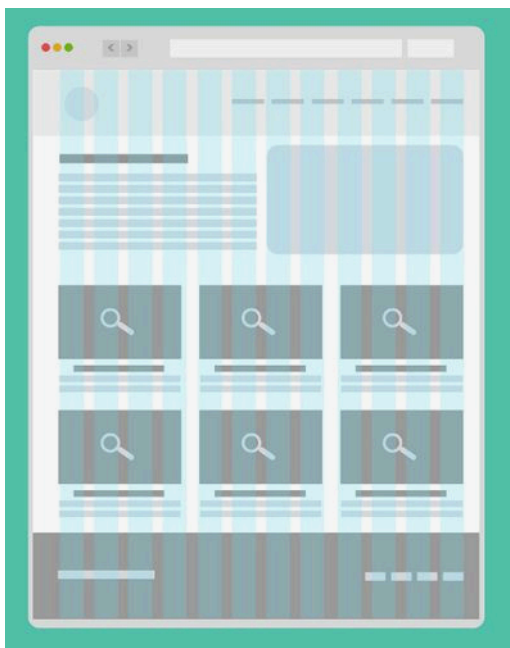
- Reduces clutter – margins create space
- Encourages white space

Grid System



Allows for Responsive Layouts

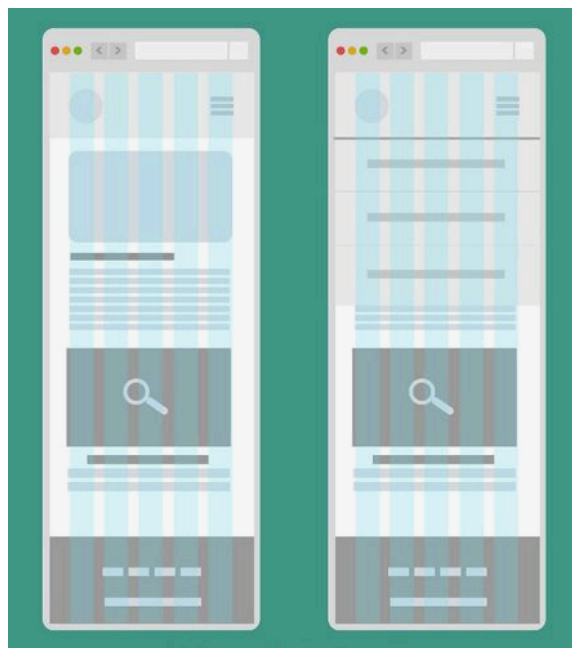
Desktop



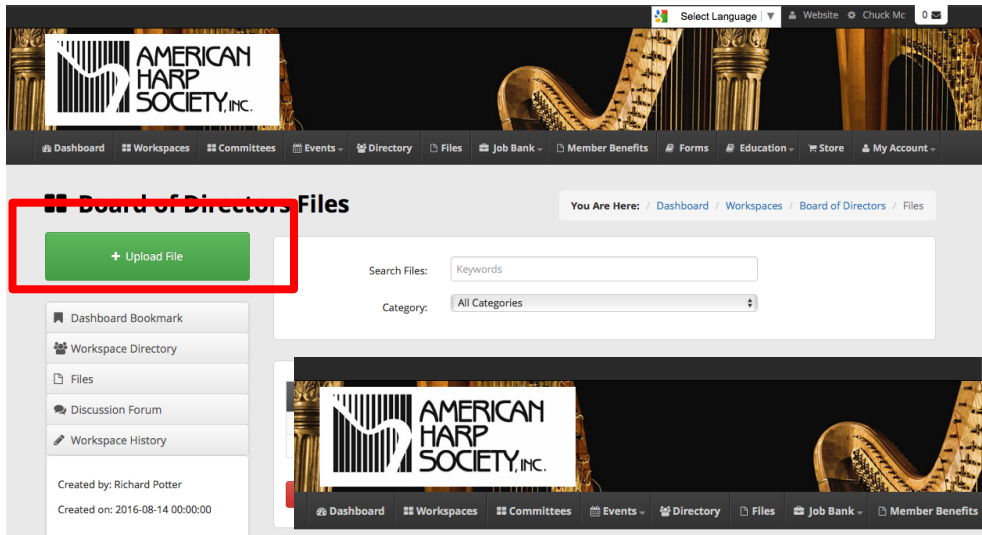
Tablet



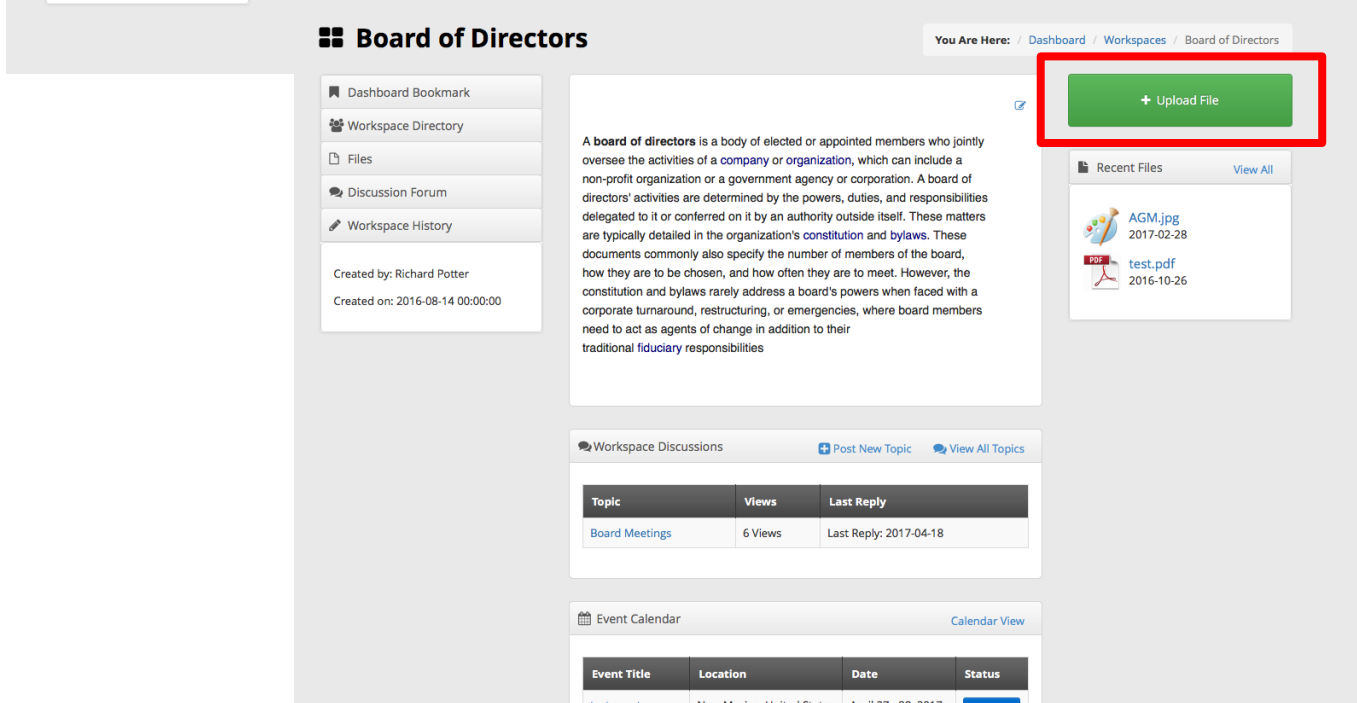
Phone



Consistent Layouts



- Uses variations of a grid system for different page layouts
- Consistent placement for most page elements



- Button placement not consistent

Copy

Copy

All the bits of text that get displayed to the user.

E.g. information text, error messages, calls-to-action buttons etc...

Copy

Don't rely on copy to explain how your product works.

Copy can complement design, but not even the best written instructions or help text is going to make a confusing product suddenly make sense.

Where do all the words go...

- Navigation
- Page intro/explanatory text
- Drop downs
- Form fields
- Tool tips
- Error messages
- Loading screens
- Settings pages
- Landing pages
- Empty states
- Confirmations
- Help & Support
- Style guides
- Product videos
- Customer support scripts
- Emails
- Blogs
- Press releases
- Etc...

Copy

Good copy considers the...

- User

Background knowledge, goals, pain points

- Context

Device, how often app/ feature used

- Flow

What user did before and can do after

- Brand

Promotes & adheres to brand standards

Copy Best Practices

Good copy is...

- Specific
- Short & concise
- Contextual
- Consistent (tone & terminology)
- Uses plain language (no jargon)
- Uses examples when helpful
- Readable at all screen widths/devices
- Is translation-friendly



brand + digital center

Principles, guidelines and assets

Introduction

Our brand

Our voice principles

Copywriting guidelines

Getting started

Voice and tone

Search engine optimization

Storytelling

Before and after writing examples

Content structure and styles

Collateral

Email

Event and conference

Capitalization and punctuation

Content checklist

Visual identity system principles

Brandmark

Color palette

Copywriting guidelines

Who?

The copywriting guidelines are your go-to for guidance on creating copy, content strategies and storytelling best practices. This toolkit is an editorial resource for:

- Internal creative copywriters
- Freelance creative copywriters
- Copywriters within partner marketing teams or agencies – Stakeholder content producers and writers
- Translation and localization teams

Anyone who is responsible for creating content for Nuance, whether it's copy for the website, an email, a datasheet or case study, should reference this toolkit before getting started.

What?

The copywriting guidelines are a copywriting and content creation resource. The purpose of the copywriting guidelines is not to tell you what to say, but rather how to say it. It also includes rules on how to develop messaging that reflects Nuance's brand and connects with the audience.

Why?

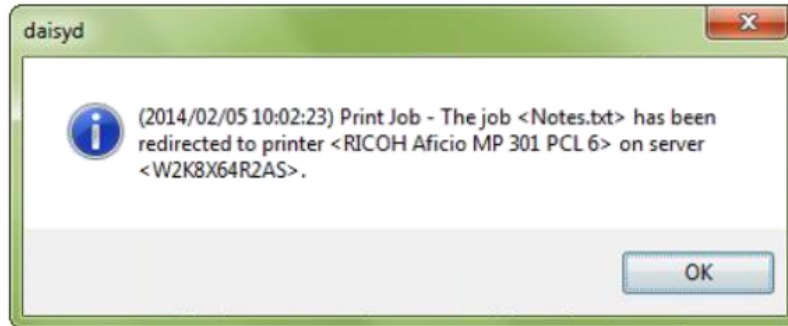
Consistency is key to building a strong brand and lasting client relationships. It's a way for our brand to build equity and distinguish itself from the competition. Because Nuance's offerings consist of dozens of products, serving various audience groups, it's critical that we create a unique brand and voice for delivering that brand.

By using the copywriting guidelines, Nuance's brand values and voice remain consistent

WWAHHHS?

What Would A Helpful Human Say?

Information Message Example



Suggested new text:

Print Job Redirected

We were unable to print to your selected printer because you don't have permission to print to color.

Your document <Notes.txt> has been redirected to printer Ricoh 456 on the 9th floor. [Where is this?](#)



- Why date/time to precise second? Or info there at all...
- Gives information that probably doesn't mean anything to the user – the server info?
- Where is this new printer?
- After select OK, can user still get back to this info?
- No contrast in “type” – what's the main point of this message?

Button Text – Not Short & Concise

The screenshot shows a web application interface with a modal dialog box. The dialog box has a title bar that says "Annual Conference - April 21 - 23, 2017". Inside the dialog, there is a logo for UKATA (United Kingdom Asbestos Training Association) and the text "This is our annual conference!". Below the logo, the event venue is listed: "55 Colonel By Dr, Ottawa, Ontario, Canada, K1N 9J2". At the bottom of the dialog, there is a blue button with the text "Registration for this event closed on April 21st, 2017." and a "Close" button. The background of the application shows a calendar for April 2017 with various events listed.

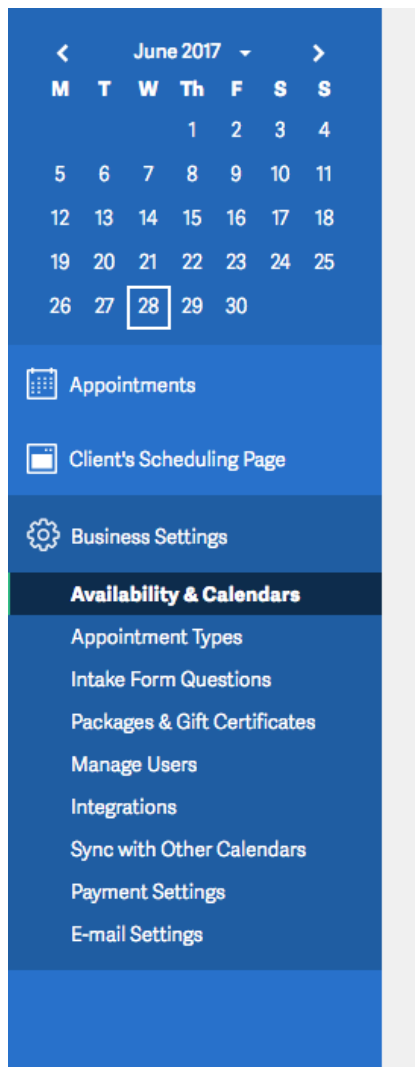
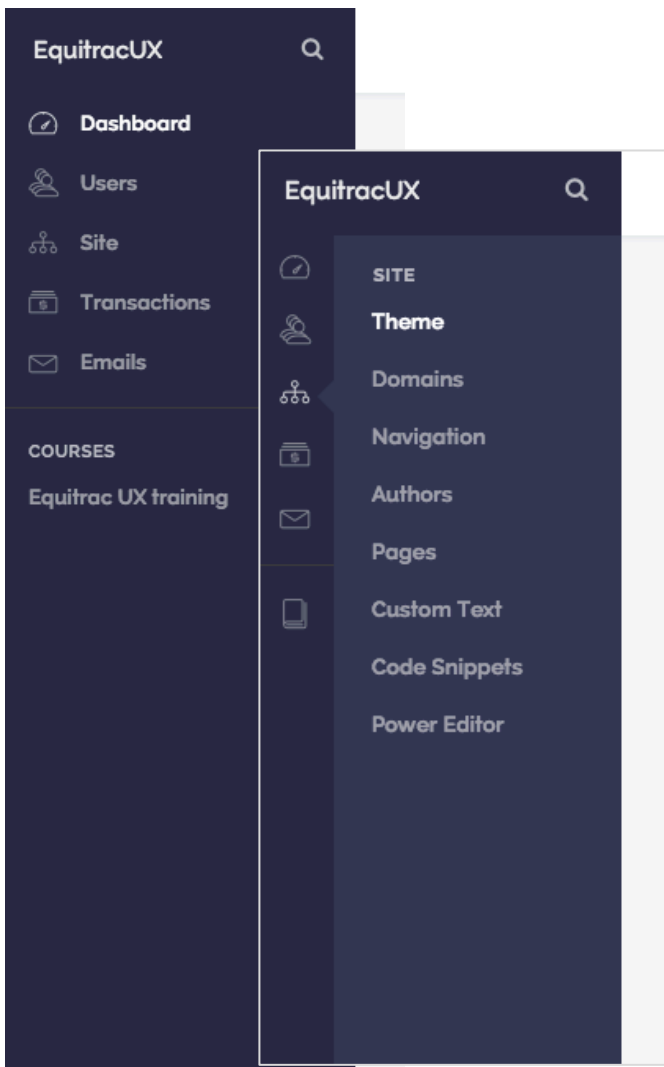


- Button text/"call to action" too long
- Not a call to action (shouldn't even be a button)

Icons – when to use instead of text

- Space is very limited (i.e., too small for text alone)
- The icons are standardized (e.g., the floppy disk image for save)
- The icon has a strong visual association with something in the real world
- Tooltips are required for icons when they are used alone, but they are a poor substitute for text labels

Icons

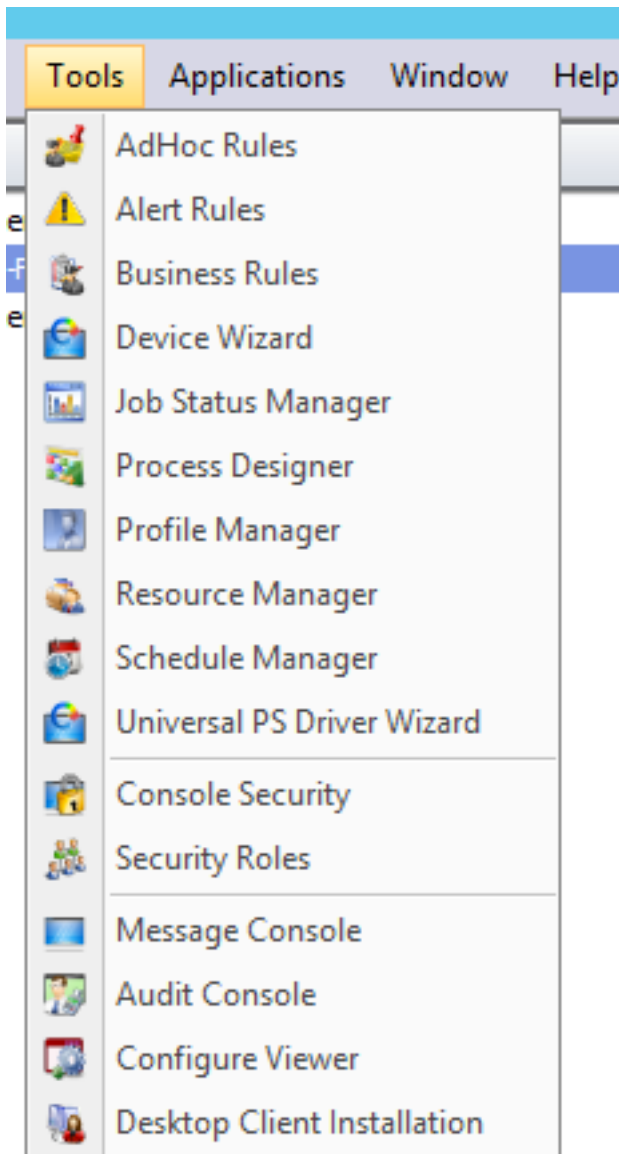


- Meaningful icons, don't compete with labels
- Label for primary nav item goes away...



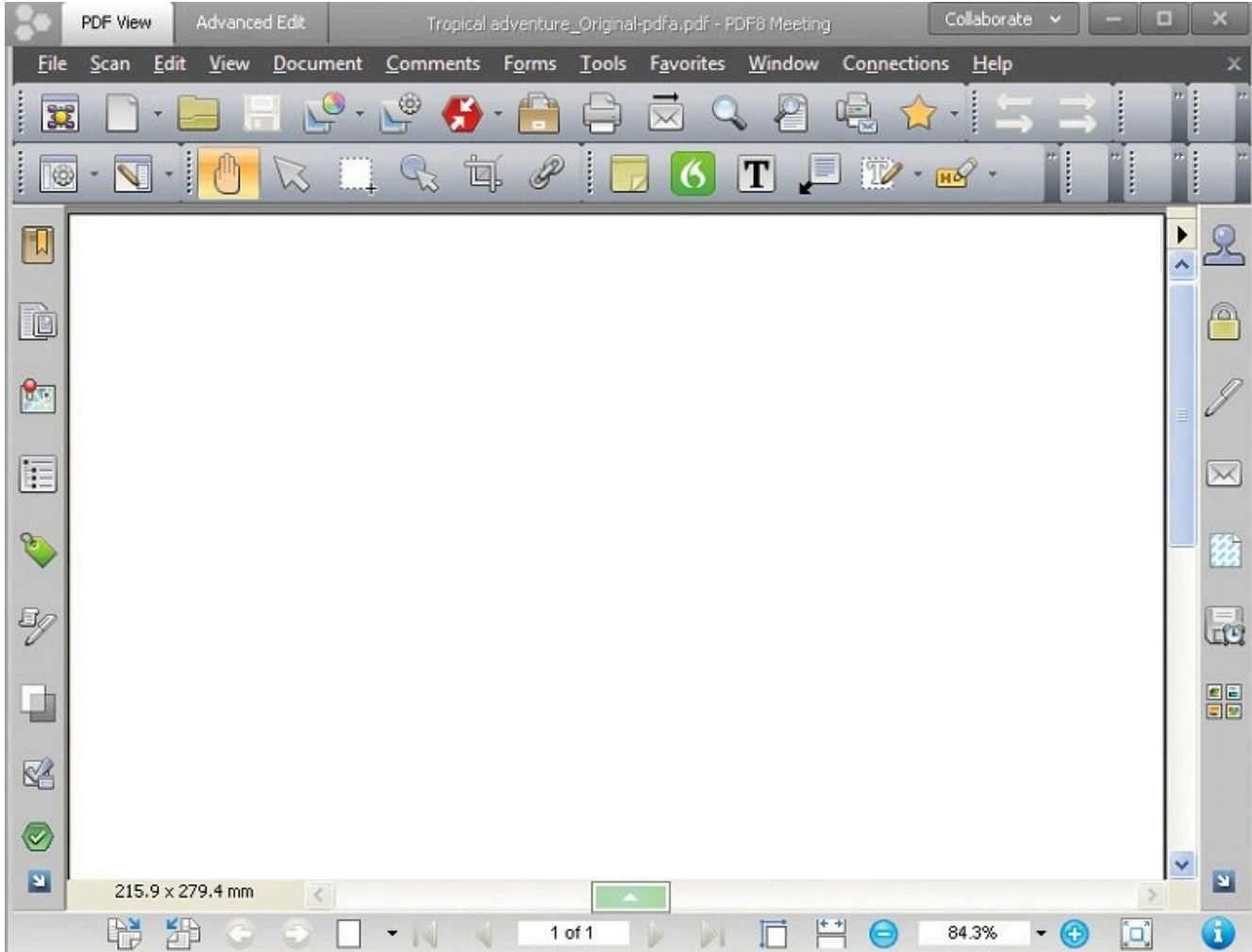
- Icons not meaningful (especially Client Scheduling)
- Icons will actually act as disservice if not meaningful - adds to screen clutter

Icons



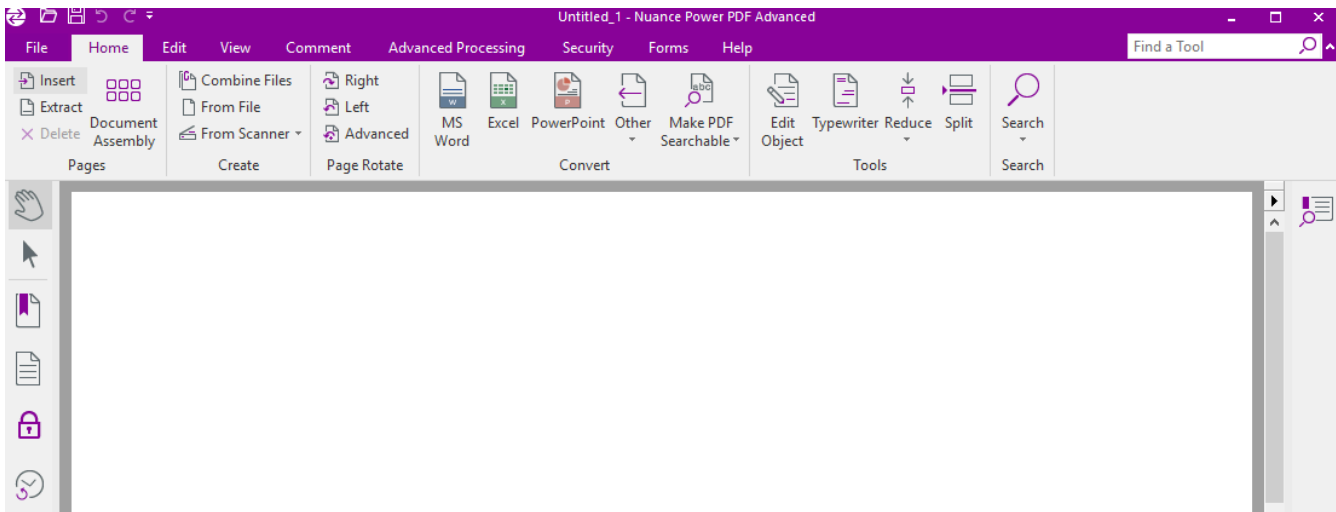
- Very hard to come up with an icons/images that represent some kinds of items
- Too much color -> clutter

Icons

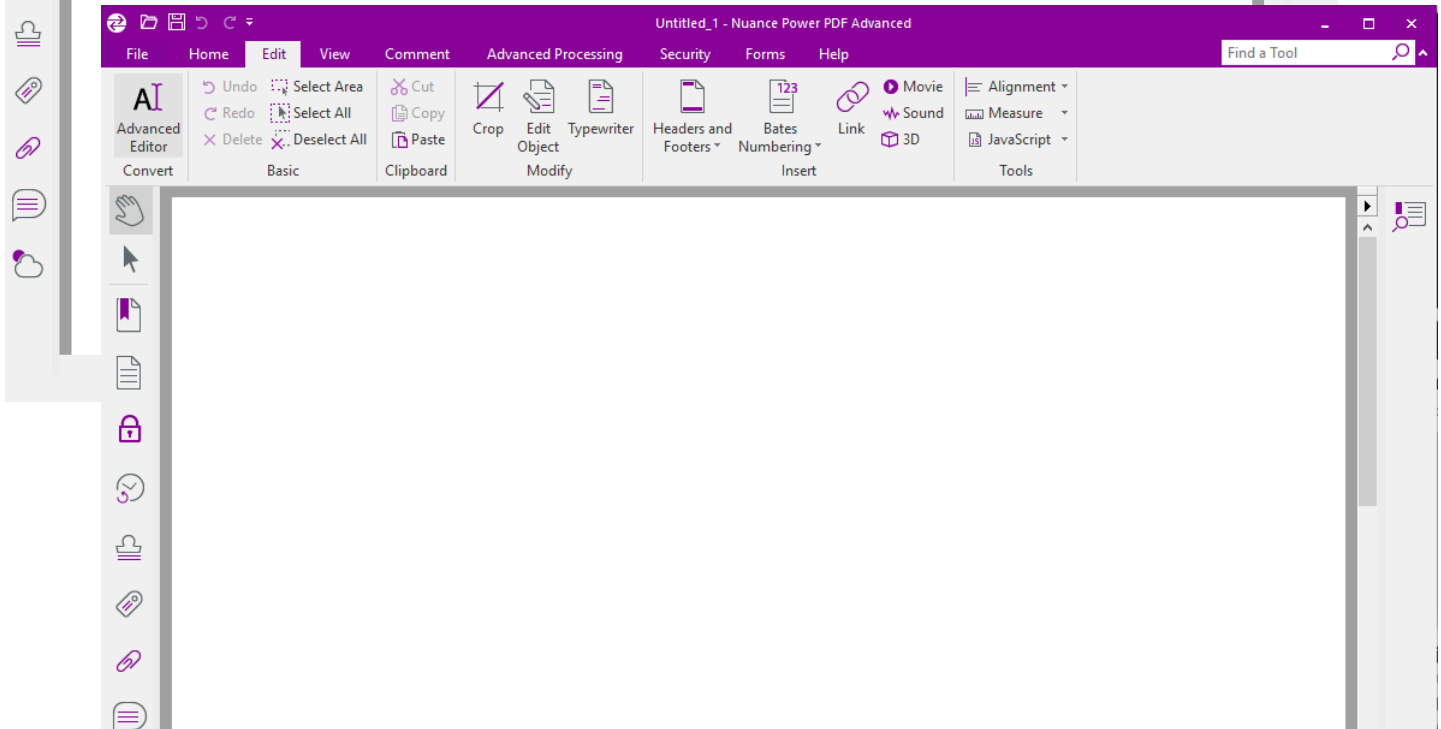


- Too many colors
- Action or action grouping not easily translated to Object/visual representation

Icons

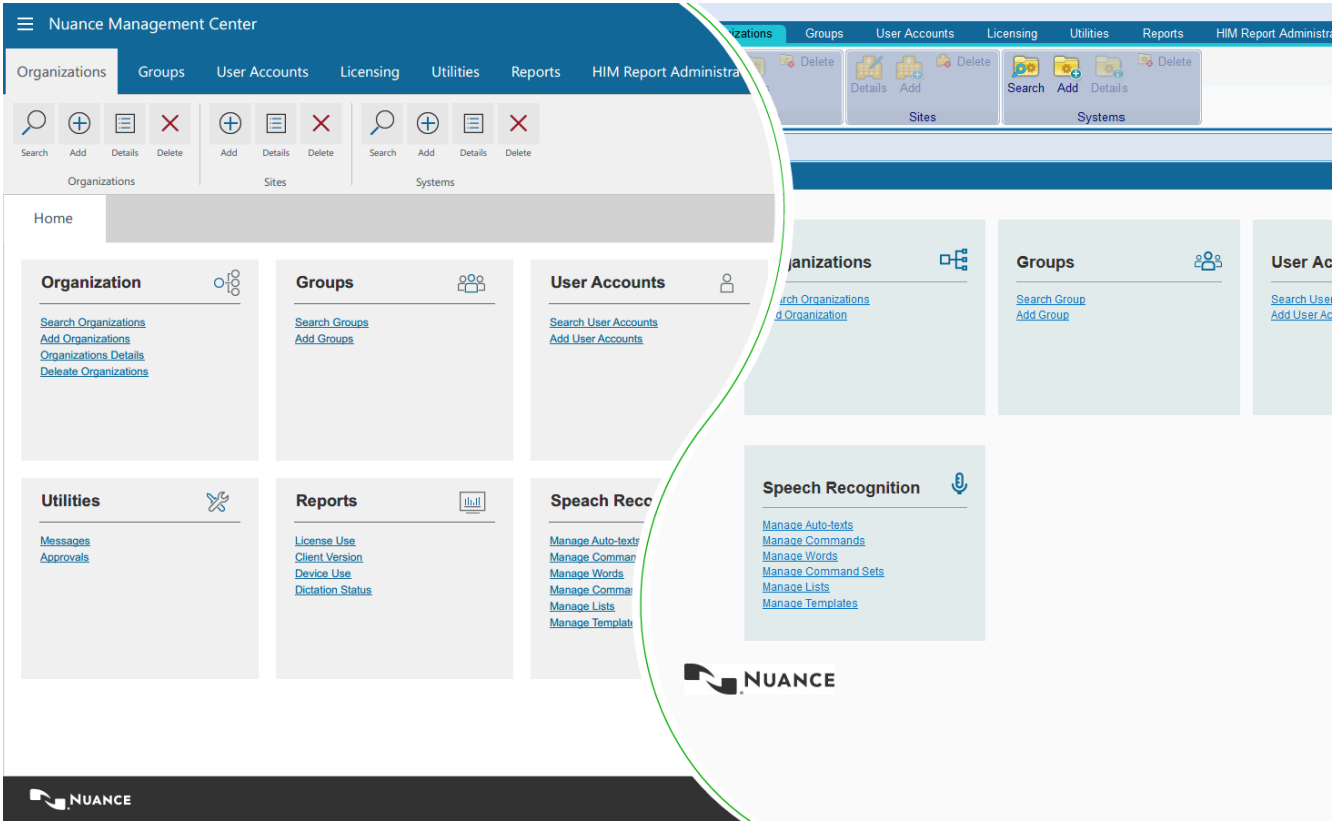


- Labels reinforce visual icon image
- Uses brand Purple colorway
- No other color used in icons except when very intentional



Nuance Power PDF (after)

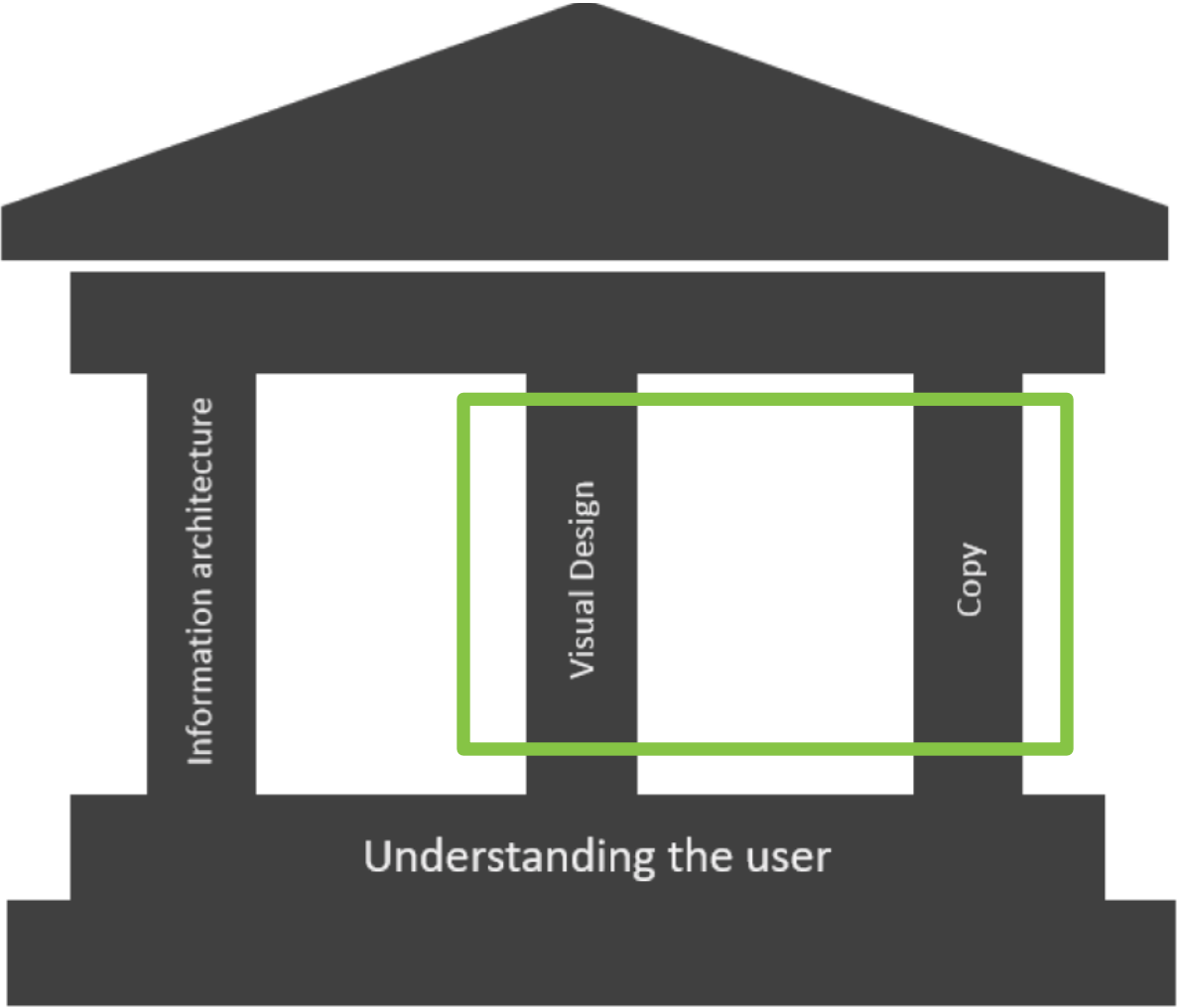
Icon Redesign



- Consistent Styling
- Simplification – fewer concepts encoded in each icon
- Reduced color palette
- Color used intentionally
- Increased white space

Today's Recap

UX: Foundation & Components



Today's Recap

- Visual design reinforces information architecture and hierarchy
- Need a visual design “system” to follow for page designs throughout the application
- Visual design fundamentals (building blocks):
 - Color
 - Type
 - Grid System

Today's Recap

Good design is achieved through using color, type & grids effectively for...

- Contrast
- Simplicity
- Whitespace
- Consistency (of visual elements)

Today's Recap

- Don't rely on copy to explain how your product works
- Copy complements the design
- Icons complement copy (in most cases)



Beware **death by a thousand cuts**

Death by a Thousand Cuts

- One bad button or alignment doesn't really matter
- But 20 do...
- Having a lot of visual design bugs impacts user experience, credibility and trust
- Important to track visual design bugs. Maybe can't fix all of them, but fix 80% (general guideline)

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Next Session

Session5:

General Best Practices

July 27, 2017