

Equitrac Redesign

Pattern Guide

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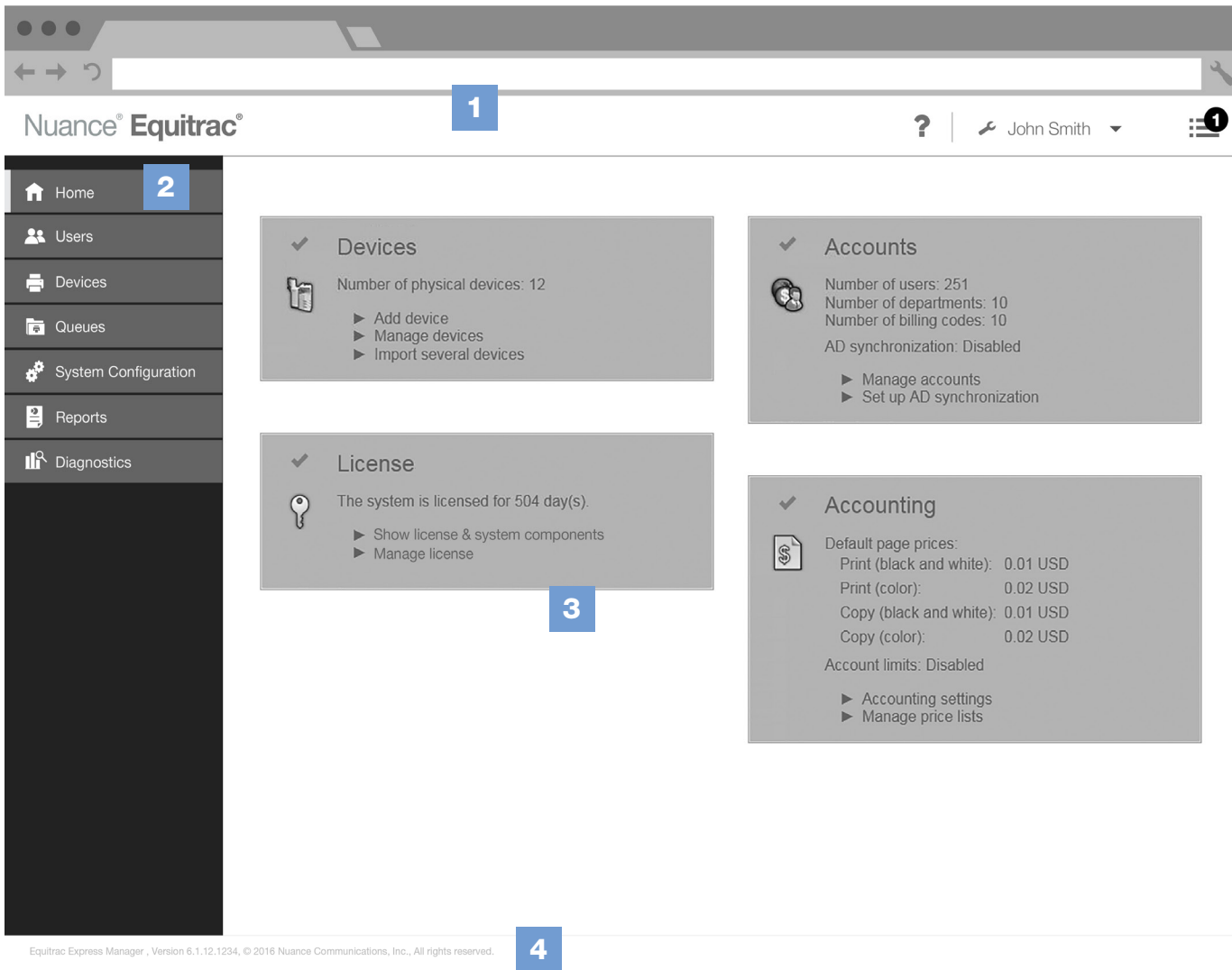
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Navigation



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.

Header



The application header is displayed on every page of the application. It consists of:

- 1 Equitrac logo** - consistent placement of Nuance/Equitrac logo. The logo also acts as a link to the Home Dashboard page.
- 2 Help** - access to application feature level help information. It should be context sensitive such that when Help is selected and the user is in the context of a specific application feature, that feature's help information is prioritized. The user should also be able to access other Help topics.
- 3 User's Name and Drop-down** - the drop-down listing allows for profile switching between the user's Administrator & User profiles. It allows the user to switch from their administrator profile/system manager application view to what they access as a regular user of the system.

The user can also access their Administrator user settings, and sign out of the application.
- 4 Notifications/messages** - future concept. Also refer to future concepts "Notifications/Messaging Panel" on page 91.

Secondary Navigation

The screenshot shows the Nuance Equitrac web interface. The top navigation bar includes the logo, a help icon, a user profile for John Smith, and a notification icon. The left sidebar contains primary navigation items: Home, Users, Devices, Queues, System Configuration, Reports, and Diagnostics. The 'System Configuration' item is expanded, showing secondary navigation options: License, Global Configuration Settings, Accounting & Price Lists, Rules & Routing, and Scheduled Tasks. A blue callout box with the number '1' points to the 'License' option. The main content area displays three panels: 'Devices' (with a checkmark icon), 'Accounts' (with a checkmark icon), and 'Accounting' (with a checkmark icon). The 'Devices' panel shows 'Number of physical devices: 12' and options to 'Add device', 'Manage devices', and 'Manage general devices'. The 'Accounts' panel 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' panel 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'.

- 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

The screenshot shows the Nuance Equitrac web interface. The top navigation bar includes the Nuance Equitrac logo, a help icon, a user profile for John Smith, and a notification icon. The left sidebar contains navigation items: Home, Users, Devices, Queues, System Configuration (highlighted with a blue bar and a '1' notification), License (highlighted with a vertical 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 the following license information:

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

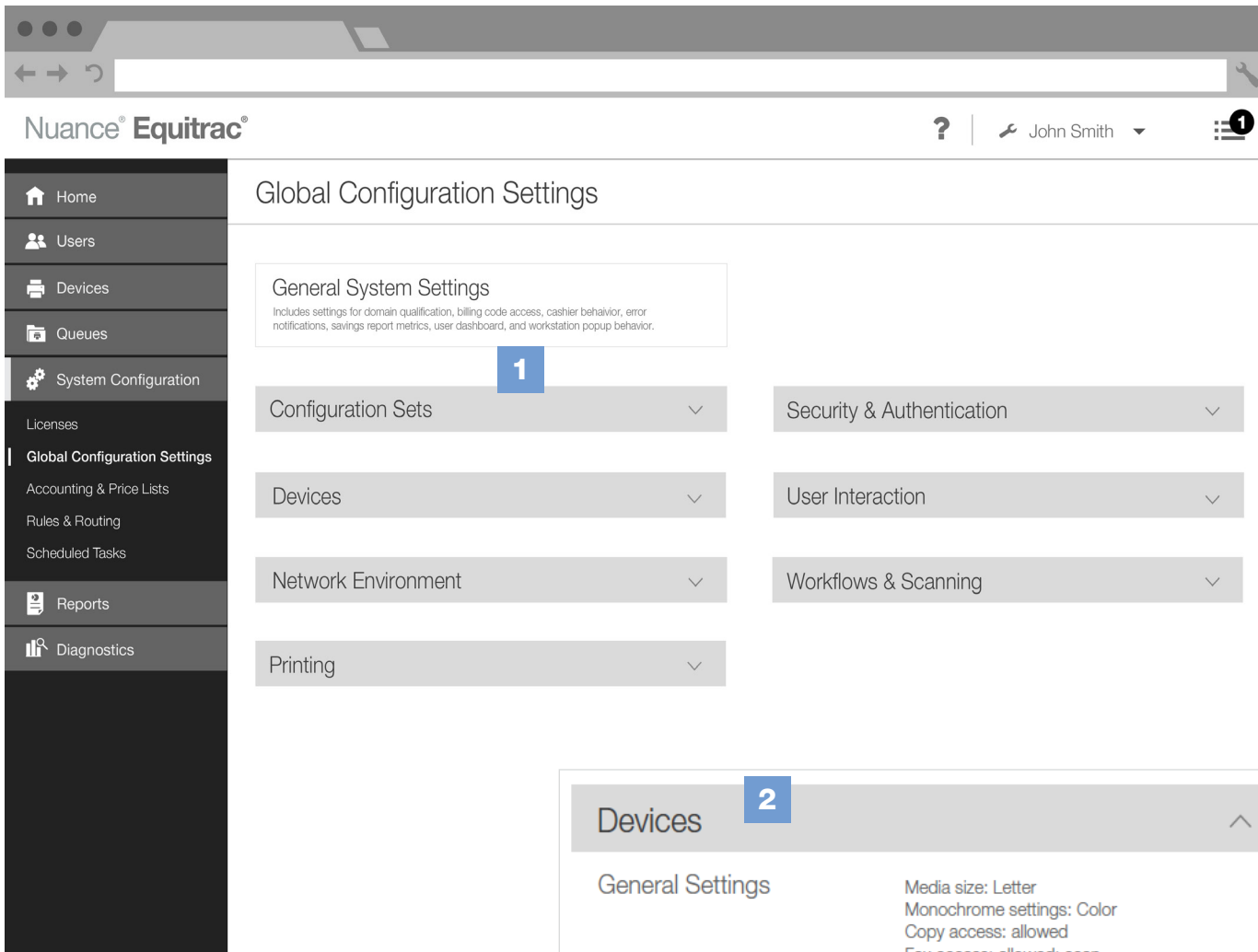
Below this information is a table titled "Licensed Equitrac Components - Total 10".

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

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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.



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.

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"/> WorkCentre 7535	x64	Windows 7	Xerox7535PCL-Win7-64-bit	Xerox WorkCentre 7535
<input type="checkbox"/> WorkCentre 7855	x64	Windows 7	Xerox7855PCL6-Win-64-bit	Xerox WorkCentre 7855 PCL6
<input type="checkbox"/> WorkCentre 7855	x64	Windows 8	Xerox7855PCL6-Win-64-bit	Xerox WorkCentre 7855 PCL6

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.

Manage Drivers

2

- 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"/> Driver Package Name1	x64	1.1	12/21/15	Custom user description of driver package
<input type="checkbox"/> Driver Package Name2	x32	1.1	03/08/12	Custom user description of driver package
<input type="checkbox"/> Driver Package Name3	x64	1.1	01/13/14	Custom user description of driver package
<input type="checkbox"/> Driver Package Name4	x64	1.1	12/21/15	Custom user description of driver package



Embedded Devices Configuration

- Embedded Devices **1**
- Canon MEAP
- Fuji Xerox ECSP
- HP Laser jet
- HP OXP
- Konica Minolta
- Konica Minolta CC
- Kyocera Mita
- Lexmark
- Oce
- Ricoh CC
- Ricoh PCC3
- Ricoh PCC4
- Ricoh PCC5
- Samsung XOA-E
- Samsung XOA-Web
- Sharp OSA
- Sharp OSA 3.5
- Xerox ECSP**
- Xerox Secure Access
- Xerox/Fuji Xerox JBA
- Canon MEAP
- Fuji Xerox ECSP
- HP Laser jet
- Another Device
- Another Device
- Another Device
- Another Device
- Another Device
- Another Device

Xerox ECSP

* Indicates required field

Tracked Activities

Copy	<input checked="" type="checkbox"/>	Received Fax	<input type="checkbox"/>
Print	<input type="checkbox"/>	Sent Fax	<input type="checkbox"/>
Scan	<input type="checkbox"/>		

Device Prompts

Title

Login Prompt

Settings

Force Logout on Swipe

Enable Job Limits

End session after seconds of inactivity

Polling

Interval seconds

Polling Threads

Sidebar Navigation

Application features/pages that are not displayed in the context of the primary sidebar navigation can make use of the sidebar navigation panel area for their own contextual navigation.

1 Sidebar Navigation for "like-type" Objects - in this example the sidebar navigation allows the user to navigate between "like-type" objects (Embedded Devices).

The user can select a specific object in the navigation panel to view/update its settings.

Updates are Applied at a page (single object) level, and the current page stays in display until the user navigates elsewhere.

Also refer to "Form Save using the Apply Button" on page 55.



Nuance® Equitrac®

← Add Physical De

Settings **1**

- General
- Pricing
- Output
- Advanced

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Nuance® Equitrac®

← Xerox WorkCent

Settings

- General
- Pricing
- Output
- Advanced

2

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

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Nuance® Equitrac®

← Manage Drivers

Processor **3**

All

For €



Nuance® Equitrac®

← Configure Comp

4

Default Configuration

Systems

WAT

Clear Search

WAT-ARUNCHEBIUM

WAT-DMACDONALD2

WAT-EQPRINTSRV

WAT-FKQLNICK3

WAT-GJONESL

WAT-STUNNEY

WIN2008-R2-V2

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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.

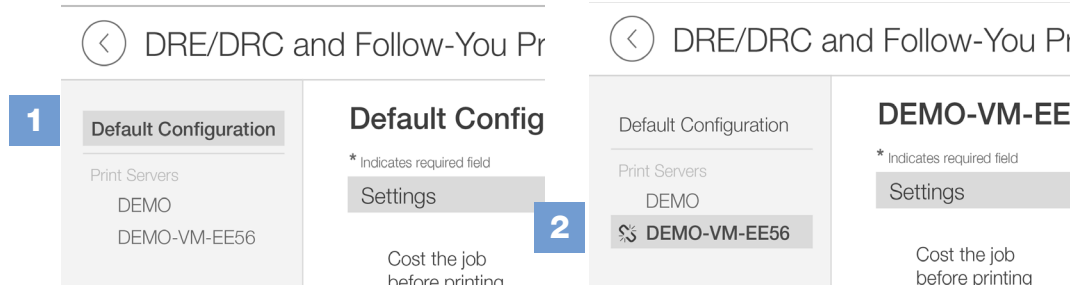
2 Sidebar Navigation with Associated Links & Actions - the sidebar navigation panel can provide navigation access to associated objects and actions.

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

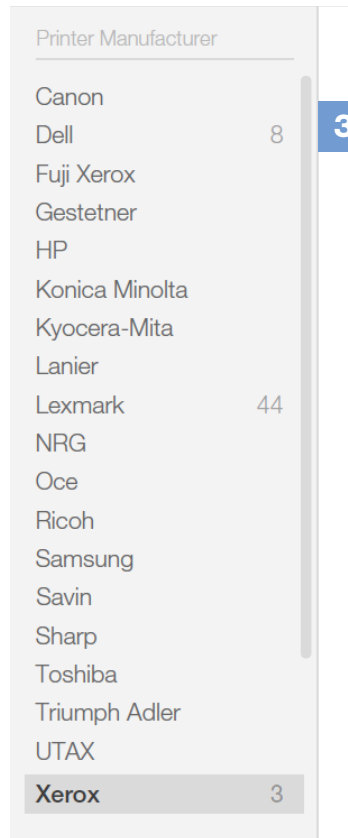
4 Sidebar Navigation with Search - a search control can also be used in the sidebar navigation area. In this example, Default Configuration displays default configuration settings, and selecting any of the Systems underneath displays settings for the selected system. The user has the option to search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

Page Types & Layouts

Landing Pages in Primary Navigation Sidebar Panel Context

Nuance Equitrac 1

Home | Users | Devices | Queues | System Configuration | Reports | Diagnostics

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

Physical Device Name	Network Address	Manufacturer/Model	Color
<input type="checkbox"/> Ricoh Aficio MP C2800	10.17.77.3	Ricoh 4456-ac	No
<input type="checkbox"/> Xerox WorkCentre 7855	10.17.77.9	Xerox 7855-rmb	Yes
<input checked="" type="checkbox"/> Xerox WorkCentre 7970	10.17.77.1	Xerox 7970	Yes
<input checked="" type="checkbox"/> Another Physical Device	10.17.77.2	Ricoh 4456-ac	No
<input checked="" type="checkbox"/> Another Physical Device	10.17.77.4	Xerox 8679-rmb	Yes
<input type="checkbox"/> Another Physical Device	10.17.77.5	Xerox 7676	Yes
<input type="checkbox"/> Another Physical Device	10.17.77.6	Ricoh 4456-ac	No
<input type="checkbox"/> Another Physical Device	10.17.77.7	Xerox 8679-rmb	Yes
<input type="checkbox"/> Another Physical Device	10.17.77.8	Xerox 7676	Yes
<input type="checkbox"/> Another Physical Device	10.17.78.3	Ricoh 4456-ac	No

Nuance Equitrac 1

Home | Users | Devices | Queues | System Configuration | Reports | Software

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

System Name	# of Components
<input type="checkbox"/> WAT-ARUNOHEBIUM	6
<input type="checkbox"/> WAT-DMACDQNALD2	7
<input type="checkbox"/> WAT-EQPRINTSRV	8
<input type="checkbox"/> WAT-FKQLNICK3	6
<input type="checkbox"/> WAT-GJONESL	6
<input type="checkbox"/> WAT-STUNNEY	5
<input type="checkbox"/> WIN2008-P2-V2	6
<input type="checkbox"/> Another System	7
<input type="checkbox"/> Another System	8
<input type="checkbox"/> Another System	6
<input type="checkbox"/> Another System	6
<input type="checkbox"/> Another System	5

- 1 Examples of Primary Navigation Landing Pages - no secondary navigation available/ exposed in the navigation sidebar panel.
- 2 Examples of Secondary Navigation Landing Pages - the secondary navigation section is in a selected state in the navigation sidebar panel.

Nuance Equitrac 2

Home | Users | Devices | Queues | System Configuration | Global Configuration Settings | Accounting & Price Lists | Rules & Routing | Scheduled Tasks | Reports | Diagnostics

General System Settings

Configuration Sets

Devices

Control Terminals

Embedded Devices

Network Environment

Printing

Security & Auth | User Interaction | Workflows & S

Nuance Equitrac 2

Home | Users | Devices | Queues | System Configuration | License | Global Configuration Settings | Accounting & Price Lists | Rules & Routing | Scheduled Tasks | Reports | Diagnostics

License Key 7303-0372-8285-9854 | Customer Acme Company Gainesville, FL

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



"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.

Page Form Display - Add/Edit

Nua **1** Equitrac®

John Smith

← Add Physical Device

Settings

- General **2**
- Pricing
- Output
- Advanced

General Settings

All fields required unless otherwise indicated.

Definition

Name ⓘ

Hostname/IP Address ⓘ

Description ⓘ
Optional

Manufacturer ⓘ

Model ⓘ

Monochrome Settings ⓘ

Location ⓘ

SNMP Configuration ⓘ

Type: Physical Device

Hardware Address: **4**

Release Documents Behavior

Release documents at assigned control terminal ⓘ

Release documents from pull group ⓘ

Settings

Rule Set ⓘ
Optional

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

DME Server ⓘ
Optional

Secure Printing Default ⓘ

5 Save Cancel

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.

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

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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 Form Display - Edit with Apply Model

A page form is also used for editing objects in the context of "like-type" objects.

Also refer to: "Sidebar Navigation for "like-type" Objects on page 12, "Form Button Placement Example - Apply Model" on page 44, and "Form Save using the Apply Button" on page 55.

The screenshot shows the Nuance Equitrac web interface. At the top, there's a navigation bar with the Equitrac logo and a user profile for John Smith. Below that is a breadcrumb trail for "Embedded Devices Configuration". A sidebar on the left lists various device models, with "Xerox ECSP" selected and highlighted. The main content area is titled "Xerox ECSP" and includes a note that an asterisk indicates a required field. It is divided into several sections: "Tracked Activities" with toggle switches for Copy, Print, Scan, Received Fax, and Sent Fax; "Device Prompts" with input fields for Title and Login Prompt; "Settings" with toggle switches for Force Logout on Swipe and Enable Job Limits, and a numeric input for "End session after" (set to 60) seconds of inactivity; "Polling" with a numeric input for "Interval" (set to 2.5) seconds and a text input for "Polling Threads"; and "External Application" with dropdown menus for "Name" and "Services Home Container", both currently set to "None". At the bottom right, there are two buttons: "Reset to Last Saved Settings" and "Apply".

Sidebar Navigation & Page Form Behavior - Unlinking from Default Settings

The image consists of three overlapping screenshots of the Nuance Equitrac web interface, illustrating the process of unlinking an object from default settings. The screenshots are numbered 1, 2, and 3.

- Screenshot 1:** Shows the "Default Configuration" page for "DRE/DRC and Follow-You Printing". The "Customize Configuration" toggle is turned off. A blue box with the number "1" is in the top right corner.
- Screenshot 2:** Shows the configuration page for "DEMO-VM-EE56". The "Customize Configuration" toggle is turned on. A blue box with the number "2" is in the top left corner.
- Screenshot 3:** Shows the same "DEMO-VM-EE56" configuration page. The "Customize Configuration" toggle is turned on, and a blue box with the number "3" is in the top right corner. A blue box with the number "4" is in the top left corner.

- 1 Object Type Default Settings** - the default settings section for an object type is selected by default.
- 2 Object Picks Up Default Settings** - by default an object picks up the settings defined in the default settings. The object's settings are displayed in a disabled state.
- 3 Customize Configuration** - the user can select to switch the Customize Configuration toggle to ON and then the object's setting fields become enabled (disengaging the object from default settings).
- 4 Unlinked indicator** - upon updating the specific object's settings and selecting Apply, the updated object is no longer linked to the default settings. A visual indicator denoting the updated unlinked state is displayed beside the object in the sidebar navigation.

* 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.

← New Scheduled Task

Select 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 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.

Information & Text

Page Titles

1 Global Configuration Settings

1 Nuance Equitrac

1 Nuance Equitrac

1 Nuance Equitrac

1 Xerox WorkCenter 7970

1 Nuance Equitrac

1 Xerox WorkCenter 7970

1 Nuance Equitrac

1 Xerox WorkCenter 7970

1 3 Selected Physical Devices

1 **Page Titles** - all screens must have a title. The position of the title varies according to the Page Type.

2 **Page Titles with Parent Object Info** - the parent object information is displayed with the primary Page Title when objects are added/edited in context of an associated "parent" object. In this example "Add Embedded Device" is the primary Page Title and "Xerox WorkCenter 7970" is the parent object information.

Note: The parent object text is not a link, and is for informational purposes only.

3 **Page Titles with Number of Items** - in scenarios where a user has selected multiple items on the "parent" page and then chosen to edit all their common properties, a page display of the common properties is used (rather than a modal window for a single edit action).

In this case, the number of selected items that the user previously selected on the parent page, is passed through to the edit (common) properties page title.

Also refer to "Page Form Display - Multiple Selected Items Edit All" on page 19.

2 Xerox WorkCenter 7970

2 Add Embedded Device

2 General Settings

2 Definition

3 Edit All

3 3 Selected Physical Devices

3 General Settings

3 Definition


Embedded Devices Configuration

- Embedded Devices
- Canon MEAP
- Fuji Xerox ECSP
- HP Laser jet
- HP OXP
- Konica Minolta
- Konica Minolta CC
- Kyocera Mita
- Lexmark
- Oce
- Ricoh CC
- Ricoh PCC3
- Ricoh PCC4
- Ricoh PCC5
- Samsung XOA-E
- Samsung XOA-Web
- Sharp OSA
- Sharp OSA 3.5
- Xerox ECSP**
- Xerox Secure Access
- Xerox/Fuji Xerox JBA
- Canon MEAP
- Fuji Xerox ECSP
- HP Laser jet
- Another Device

Xerox ECSP

All fields required unless otherwise indicated.

Tracked Activities

Copy	<input checked="" type="checkbox"/>		Received Fax	<input type="checkbox"/>
Print	<input type="checkbox"/>	Saving...	Sent Fax	<input type="checkbox"/>
Scan	<input type="checkbox"/>			

Device Prompts

Title <small>Optional</small>	<input type="text"/>	<small>i</small>
Login Prompt <small>Optional</small>	<input type="text"/>	<small>i</small>

Settings

Force Logout on Swipe	<input type="checkbox"/>	<small>i</small>
Enable Job Limits	<input checked="" type="checkbox"/>	<small>i</small>
End session after	<input type="text" value="60"/>	seconds of inactivity <small>i</small>

Activity Indicator - Saving Spinner

1 Save Spinner - if the system needs to "block" the user from continuing to use the application after an object has been updated or saved, then the user is notified with an animated Save Spinner that the system is "working".

The Spinner is center aligned in the middle of the application display/page. While the Spinner is displayed, the entire application is in a disabled "greyed out" state behind the Spinner.

After the save is completed (with either successful or unsuccessful results), the Spinner disappears, the application is "unlocked", and a notification is displayed to inform the user of the save process result.

Also refer to "Notifications - Alert/Toast" on page 34.

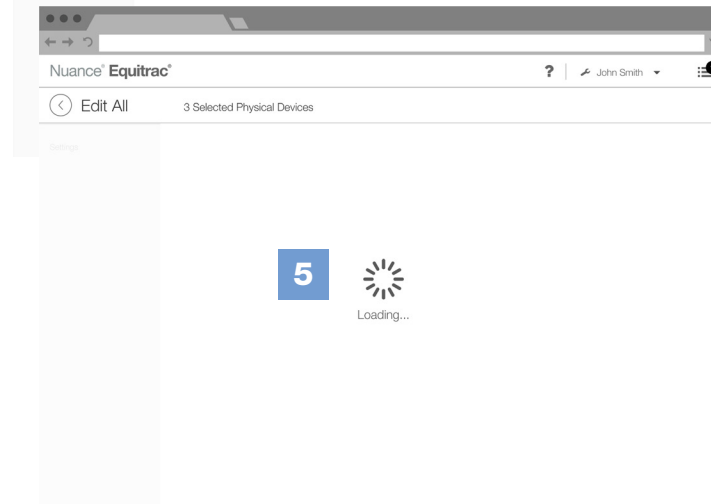
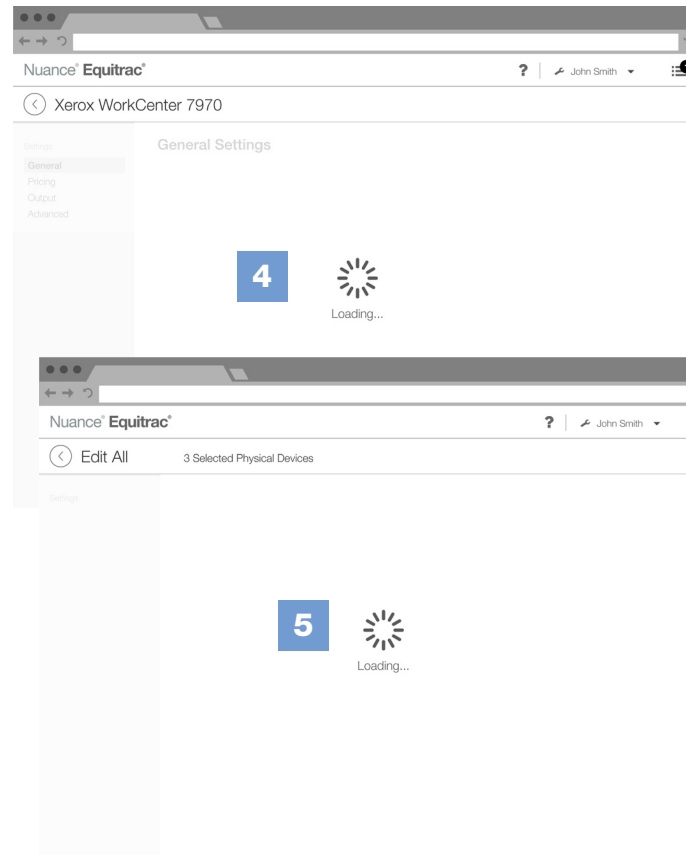
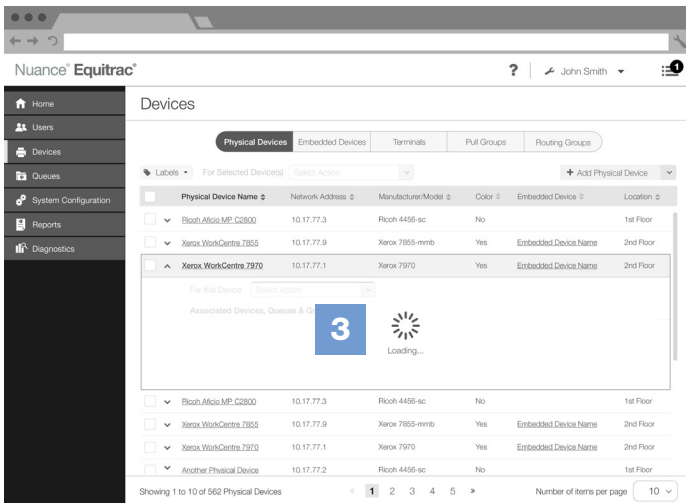
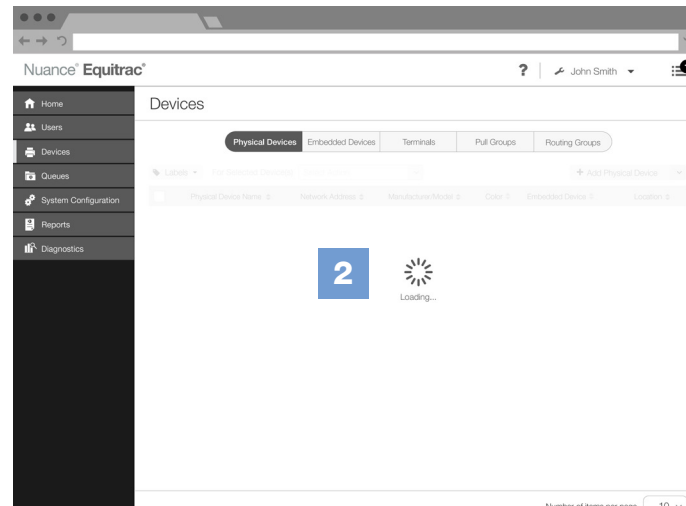
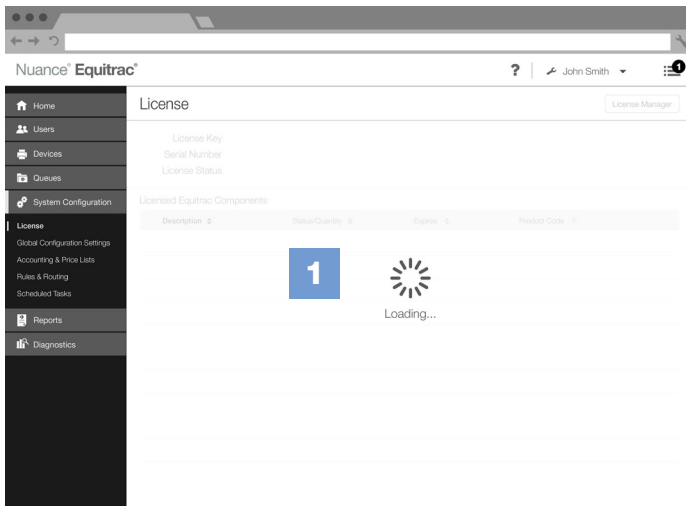
Activity Indicator - Loading Spinner

If the system takes longer than one second to display/load data then a loading activity indicator (spinner) is displayed while the loading process is underway.

- Show the Loading Spinner for loading processes that take on average between one second and ten seconds.
- Show a Determinate Progress Bar if the load process on average takes longer than ten seconds. ("Determinate Progress Bar" - refer to page 29)
- Don't show the Loading Spinner for loading processes that take less than one second.
- Delay one second before showing Loading Spinner.

Examples of page data/content loading:

- 1 Page loading in context of primary navigation sidebar.
- 2 Page loading in context of primary navigation sidebar and page level tab navigation.
- 3 Expanded table row loading.
- 4 Page loading in context of settings sidebar navigation (for single object).
- 5 Page loading in context of settings sidebar navigation (for multiple objects).

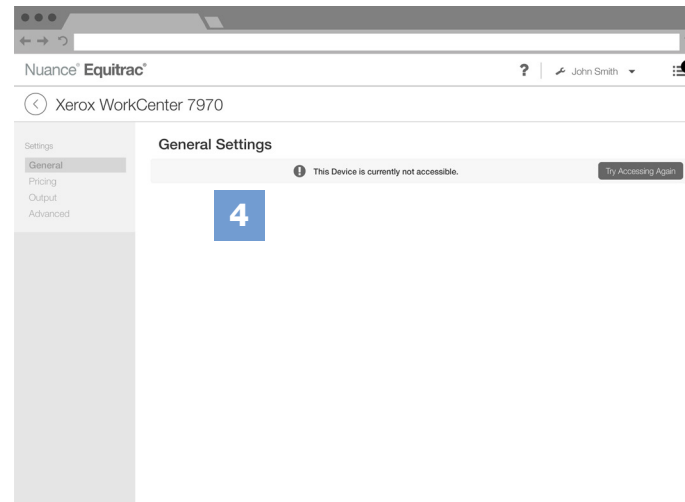
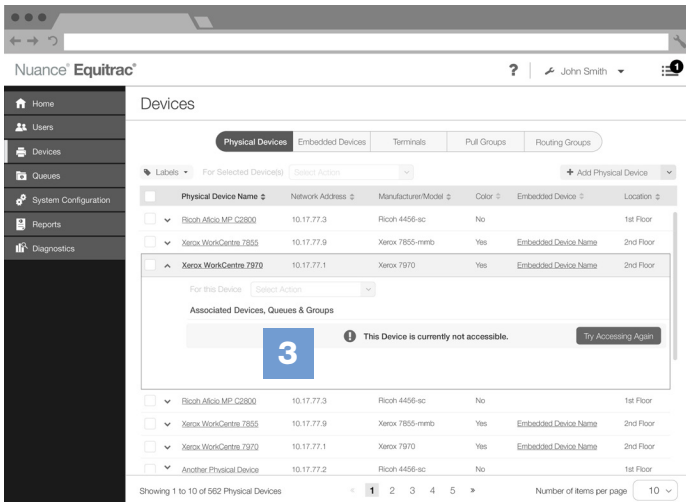
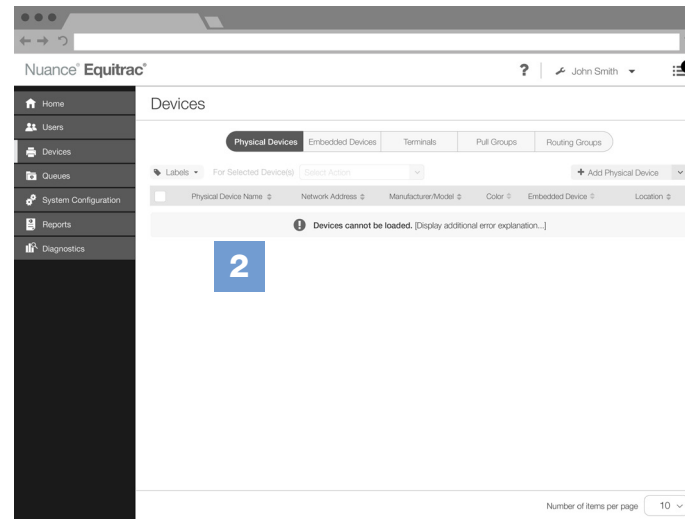
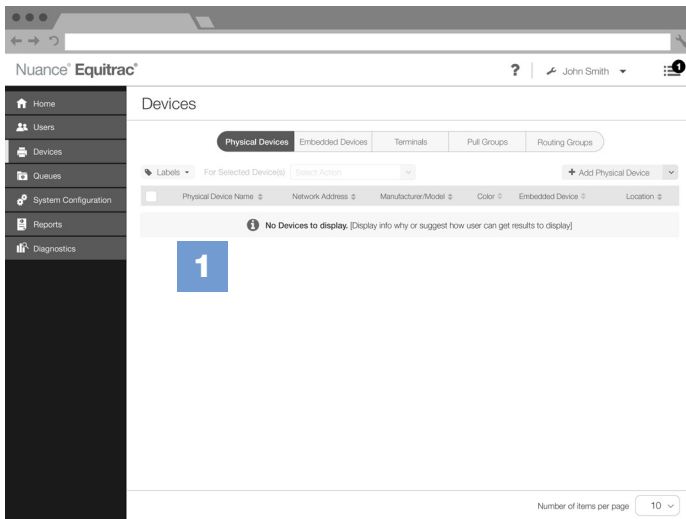


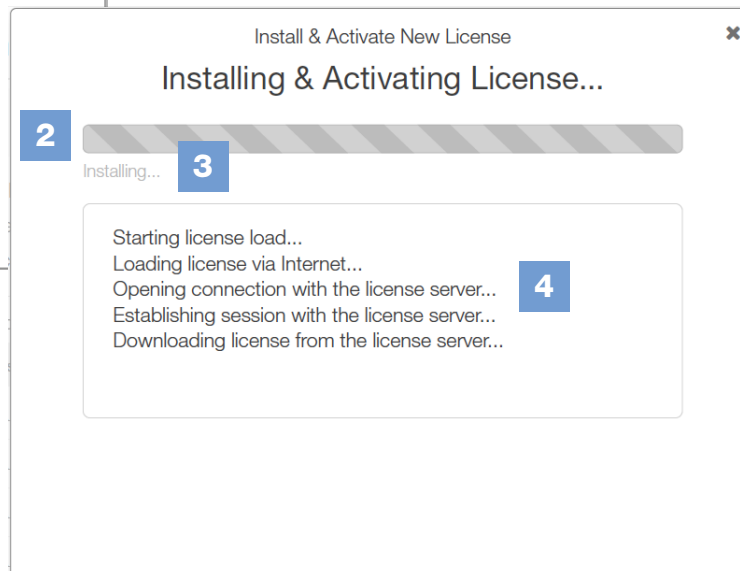
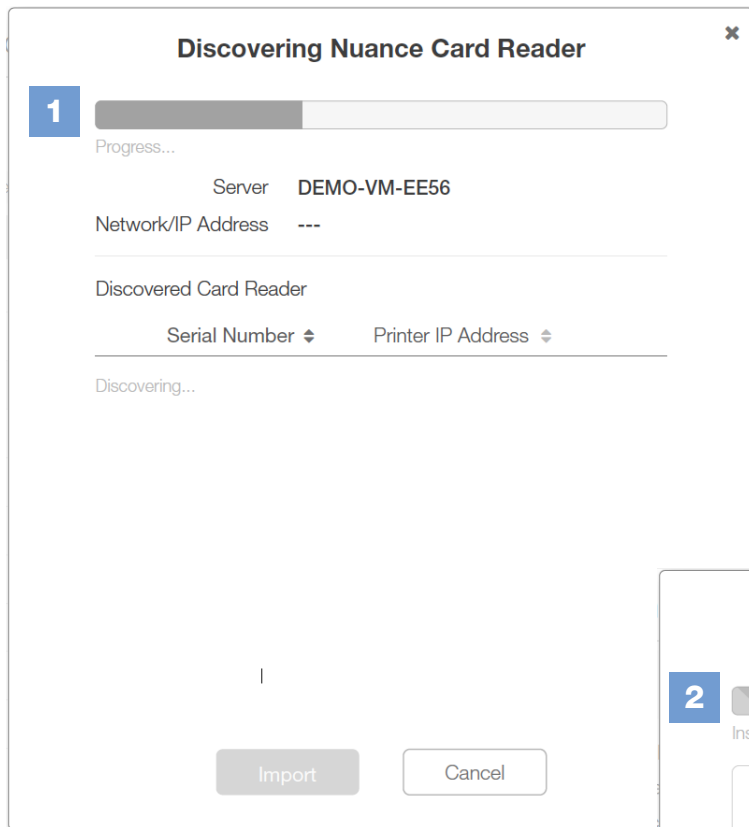
Loading - No Results or Error

After the loading process has completed successfully, the retrieved data is displayed. Other completion scenarios are that the system returns no results, or an error.

Examples of non-successful loading scenarios:

- 1 **Table display with no results returned.**
- 2 **Table display with loading error.**
- 3 **Expanded table row loading error** - note that the user has the option to "Try Accessing Again".
- 4 **Settings page loading error** - note that the user has the option to "Try Accessing Again".





Progress Indicators

Progress Bar - a progress bar is used to visualize the progression of an extended system process, such as card reader discovery, or license activation and installation.

- 1 **Determinate Progress Bar** - used in situations where the percentage complete of the process is known. The size of the filled portion is in relation to the total amount of progress.
- 2 **Indeterminate Progress Bar** - used in situations where the extent of the task is unknown or the progress of the task cannot be determined in a way that can be expressed as a percentage.
- 3 **Progress Description** - text associated with the progress bar can describe the specific task that is in process. The text description can update as progress tasks are completed.
- 4 **Progress Details** - details of the progress can be displayed.

Discovering Nuance Card Readers

Progress...

Server DEMO-VM-EE56
Network/IP Discovery Range 10.17.77.1 - 10.17.79.0

Discovered Card Readers - Total: 11

<input type="checkbox"/>	Serial Number ↕	Printer IP Address ↕
1 <input type="checkbox"/>	430000983	10.17.77.1
<input type="checkbox"/>	430000984	10.17.77.2
<input type="checkbox"/>	430000985	10.17.77.3
<input type="checkbox"/>	430000986	10.17.77.4
<input type="checkbox"/>	430000987	10.17.77.5
<input type="checkbox"/>	430000988	10.17.77.6
<input type="checkbox"/>	430000989	10.17.77.7

Import Cancel Hide

Rebooting Nuance Card Readers

Progress...

Card Read Name ↕	Reboot Status ↕
Nuance Card Reader 43000983	<input checked="" type="checkbox"/>
Nuance Card Reader 43000984	Rebooting... ✕
Nuance Card Reader 43000985	Rebooting... ✕

Hide

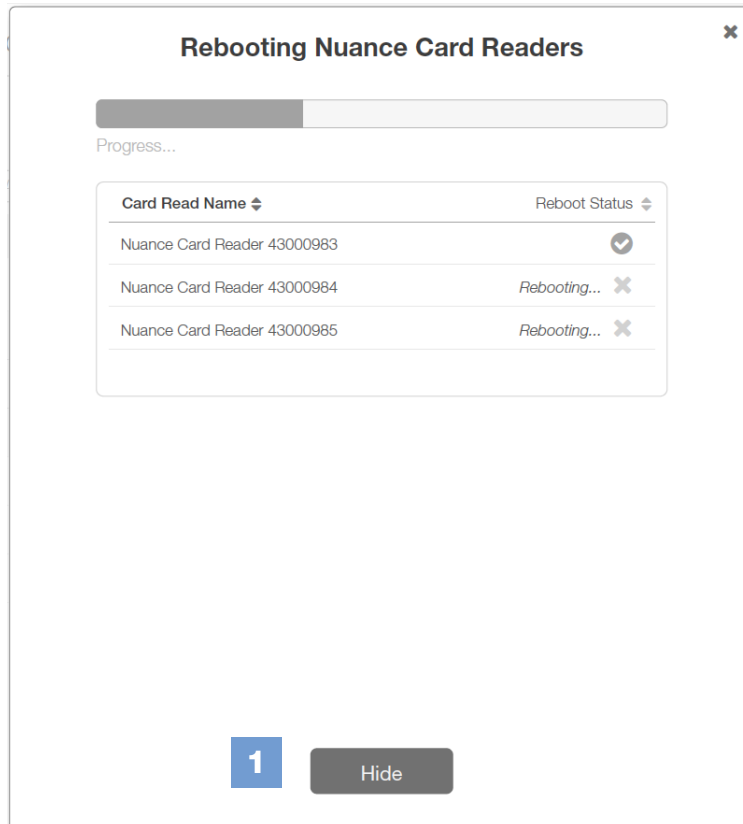
In Progress Results

Results Displayed While In Progress - there are scenarios where results are displayed while a process is underway.

- 1 Example: Discovered Card Readers** - card readers that have been discovered automatically get added to the results listing as the discovery process progresses.
- 2 Example: Rebooting Card Readers** - the user is shown the reboot status of multiple card readers as the rebooting process progresses.
- 3 Canceling the Process** - if the user cannot cancel the process that is underway, the Progress modal window still has the "x" to close in the upper right corner (for interaction consistency). If the user selects to close the modal window, then a message is displayed to the user (via an Alert/Toast message in context of the modal window) informing them that they cannot cancel the process that is underway. Refer to "Notifications - Alert/Toast" on page 34.

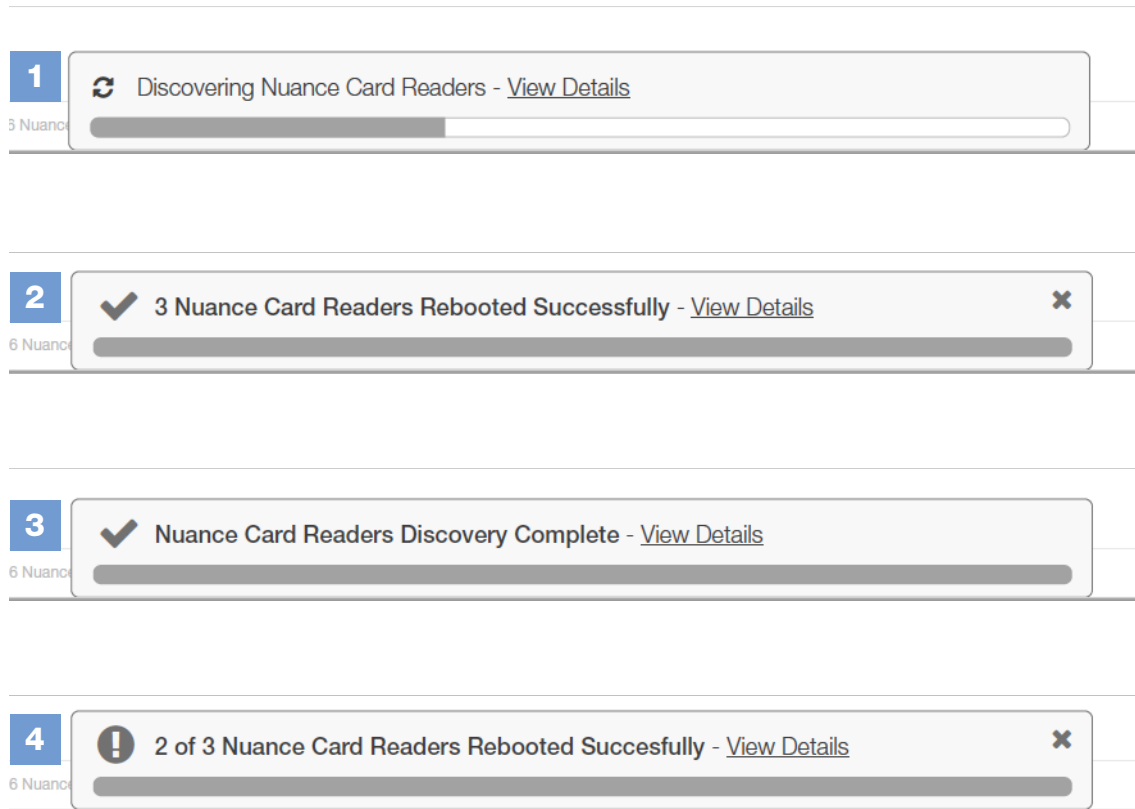
If selecting "close" can cancel the process, or the user selects the Cancel button within the Progress window, then a Confirmation Modal Window is displayed to the user asking them to confirm that they want to cancel the process. Refer to "Confirmation Modal Windows" on page 64.

Progress - Hidden State



- 1 Progress Modal Window Hide Button**
- if a process is going to take a significant amount of time, and also allows for parallel processing so the user can interact with the application while the process is underway, then the user can have the option to Hide the modal window where the progress details are displayed.

Progress - Hidden State Cont...



The initial modal window progress display is closed/minimized to an overlay window positioned at the top of the screen. The progress bar is displayed with a status and description of the progress.

Selecting a View Details link takes the user back to the original progress modal window which shows details of the progress.

- 1 Hidden State - In Progress** - there is no ability to close the overlay window when a process is progressing.
- 2 Hidden State - Completed Successfully, No Further Action Required** - user has the ability to close the overlay window (select "x"), or View Details.
- 3 Hidden State - Completed Successfully, Further Action Required** - if the result of the progress requires that the user complete some actions in the original progress modal window, then the "x" to close is not available and the user must select View Details to finish the actions in the context of the modal window. An example of this is at the completion of Nuance Card Readers Discovery. The user must return to the modal window to import selected card readers.
- 4 Hidden State - Alert/Partial Success** - user has the ability to close the overlay window (select "x") , or View Details.

Note: Design update - the wireframes show the Hidden State overlay window positioned at the bottom of the screen. The position of the Hidden State has been updated to be at the top of the screen.

If the Alert/Toast is displayed at the same time as the Hidden State Progress overlay window, then the Hidden State Progress remains positioned at the top of the screen and the Alert/Toast is displayed beneath it. Also refer to "Notifications - Alert/Toast" on page 34.

Progress Final Results

Final Progress Results - for both determinate & indeterminate progresses (in modal window context):

- 1 Completed Successfully
- 2 Error
- 3 Alert/Partial Success

The image shows three overlapping modal windows illustrating the progress of discovering and rebooting Nuance Card Readers.

Window 1: Discovering Nuance Card Readers (Status: 1 - Completed Successfully)

- Discovery Complete
- Discovered Card Readers - Total: 3
- Serial Number dropdown menu with three items: 430000983, 430000984, and 430000985.
- Import button

Window 2: Discovering Nuance Card Reader (Status: 2 - Error)

- No Card Reader Discovered
- Server: DEMO-VM-EE56
- Network/IP Address: 10.17.77.1
- Discovered Card Reader section with a Serial Number input field.
- Try Again with button

Window 3: Rebooting Nuance Card Readers (Status: 3 - Alert/Partial Success)

- 2 of 3 Nuance Card Readers Rebooted Successfully
- You can try again to reboot Card Readers that failed by selecting Card Reader(s) and then selecting "Try Reboot Again".
- Table showing Reboot Status for three readers:

Card Read Name	Reboot Status
<input checked="" type="checkbox"/> Nuance Card Reader 43000984	Reboot Failed !
<input type="checkbox"/> Nuance Card Reader 43000983	✓
<input type="checkbox"/> Nuance Card Reader 43000985	✓

- Try Reboot Again button
- Close button

Notifications - Alert/Toast

Devices

1

The physical device **Xerox WorkCentre 7970** has been deleted

Physical Devices

Embedded Devices

Terminals

Custom Views

Showing 1 to 100 of 562 Physical Devices

Export/Print

Filter

+ Add Physical Device

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

2

2

Nuance Card Reader imported and assigned to Xerox WorkCentre 7970 - [Configure](#)

Physical Devices

Embedded Devices

Terminals

Pull Groups

Routing Groups

- 1 Update Notification** - after an object is updated, added, saved, deleted, or imported, a notification is displayed to confirm the results of the action.
- 2 Update Notification with Link** - the notification message can include a link, so as to facilitate navigation to the next step in a workflow.

All alert/toast notifications appear temporarily (30 seconds) before disappearing. The user has the option to select an "x" to close/dismiss the notification.

Notes:


The alert/toast component includes an "x" to close which is not reflected in the wireframe designs.

If the Alert/Toast is displayed at the same time as the Hidden State Progress overlay window, then the Hidden State Progress remains positioned at the top of the screen and the Alert/Toast is displayed beneath it.

Refer to "Progress - Hidden State" on page 31.

License

1

 Your Equitrac system requires a new License.

[Install & Activate New License](#)


License Key 7303-0372-8285-9854


Customer **Acme Company**
Gainesville, FL


Serial Number 106


 License Status **Version 6.0.1.2 default installation license**


2 **Add Printer/Driver** ✕

 Printer Model, Environment and OS Version combination has already been mapped to a print driver.

Model Name 

Environment 

OS Version 

Package Name 

Driver Name

[Save & Replace Existing Driver Mapping](#)

Alerts & Warnings

Alert & Warning Notifications - alert and warning messages can be shown in either a page or modal window context.

An alert or warning icon is used to highlight the messaging. Alerts are more severe than warnings. Warnings can be considered more informational, where as an alert often requires an action from the user.

Note: icons can be used to tie specific fields with the alert or warning message.

- 1 **Alert Notification in Page Context**
- 2 **Alert Notification in Modal Window Context**

Alerts & Warnings Cont...

The screenshot shows a modal window titled "Configure Component" with a close button (x) in the top right corner. A warning banner at the top left contains a warning icon and the text: "Update Component configuration only upon guidance from Equitrac Technical Support." A blue square with the number "1" is positioned to the right of the warning banner. Below the banner is a text input field labeled "LastAuthUpload" containing the value "AQAAAn+EkRRpWal3UGU". At the bottom of the modal are two buttons: "Save" and "Cancel".

- 1 Warning Notification in Modal Window Context
- 2 Warning Notification in Page Section Context

The screenshot shows a page section titled "What to Run *" with a blue square containing the number "2" in the top right corner. A warning banner below the title contains a warning icon and the text: "Running a Command can adversely affect your System. Ensure you are familiar with the Command you specify to run." Below the banner are two input fields: "Command Line *" with a text box and a button with three dots "...", and "Working Directory *" with a text box.

Summary Information

When to Show Summary Information - it is often useful for the user to see a cohesive summary of information that is either specified on another screen, or specified as separate fields on the same page.

Some examples:

- 1 Viewing a Rule Definition** - selecting a rule allows the user to view it's definition.
- 2 Viewing When to Run a Scheduled Task** - when creating or editing a scheduled task the user can see a summary of the field selections as they are created/edited.

+ New Rule Set

Rule Set & Rules	Description	
^ Rule Set1	This is Rule Set1 Description	+ New Rule
Rules	Type	1
weekend printing	All	← Select a Rule to view its type, actions and conditions
another rule	All	
^ Rule Set1	This is Rule Set1 Description	+ New Rule
Rules	Type	1
weekend printing	All	↑ ↓ Rule weekend printing
another rule	All	
^ Rule Set2		Edit Rule

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

Action
Allow this job to complete

Condition(s)
When the day of the week is: Saturday, Sunday

When to Run

Schedule *

Repeat Every * days

Start Date *

Start Time *

End Date

Summary **Daily, Repeat every 1 day, Start Date 02/20/2017, No End Date** **2**

* Indicates required field

Name *

Type * Apply this rule to...

Action *

Condition(s)

1

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

Allow this job to complete

Dynamic Detail Information

1 **Dynamic Detail Information** - informational text displayed directly on the page and associated with form field inputs.

Refer to "Form with Dynamic Information Displayed" on page 22.

Controls/Widgets

Tab Navigation

The screenshot shows the Nuance Equitrac web interface. At the top, there is a navigation bar with the logo, a user profile for John Smith, and a notification icon. Below this is a sidebar with navigation options: Home, Users, Devices, Queues, System Configuration, Reports, and Diagnostics. The main content area is titled 'Devices' and features a tabbed interface with five tabs: Physical Devices (active), Embedded Devices, Terminals, Pull Groups, and Routing Groups. A blue box with the number '1' is positioned above the 'Physical Devices' tab. Below the tabs, there is a search and filter section with a 'Labels' dropdown, a 'For Selected Device(s)' field, a 'Select Action' dropdown, and a '+ Add Physical Device' button. The main content is a table of physical devices with columns for Physical Device Name, Network Address, Manufacturer/Model, Color, Embedded Device, and Location. The table contains 10 rows of device information. At the bottom, there is a pagination control showing 'Showing 1 to 10 of 562 Physical Devices' and a 'Number of items per page' dropdown set to 10.

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

1 **Top Level Tabs** - top level tabs are used for page level navigation. The tab selection drives the content that is displayed on the page below the tabs.

Top Level Tabs should be fixed at the top of the screen (under the page title). If there is a page scroll, the tabs stay visible & fixed in place, and the user can access them for navigation.

Tab Navigation - 2nd Level

Nuance® Equitrac®

Home | Users | Devices | Queues | System Configuration | Reports | Diagnostics

Devices

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

For Selected Physical Device(s) [Select Action] + Add Device Manage Pull Groups

Pull Group1	Pull Group2	Pull Group3	Pull Group4	Unassigned Devices		
Physical Device Name	Network Address	Manufacturer/Model	Color	Embedded Device	Location	
<input type="checkbox"/> Ricoh Aficio MP C2800	10.17.77.3	Ricoh 4456-sc	No		1st Floor	
<input type="checkbox"/> Xerox WorkCentre 7855	10.17.77.9	Xerox 7855-mmb	Yes	Embedded Device Name	2nd Floor	
<input type="checkbox"/> Xerox WorkCentre 7970	10.17.77.1	Xerox 7970	Yes	Embedded Device Name	2nd Floor	

1 Second Level Tabs - a secondary set of tab navigation can be displayed underneath the primary top level tabs (for a selected tab).

Best practice is to also have these tabs fixed in place, such that if there is a page scroll, then the user can access them for navigation.

2 Accessing Overflow Tabs - if there are more tabs than can fit in the screen display, then tabs that are not in view are accessed via a More drop-down.

If the user selects a tab in the More drop-down then the last tab in the row gets replaced with the drop-down's selected tab. The user can reorder their tabs in view by drag and drop. The state of the secondary level tabs is stored (via cookies) such that when the user opens their browser again to this page, the last session's state/order of the tabs is reflected in the new session.

Nuance® Equitrac®

Home | Users | Devices | Queues | System Configuration | Reports | Diagnostics

Devices

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

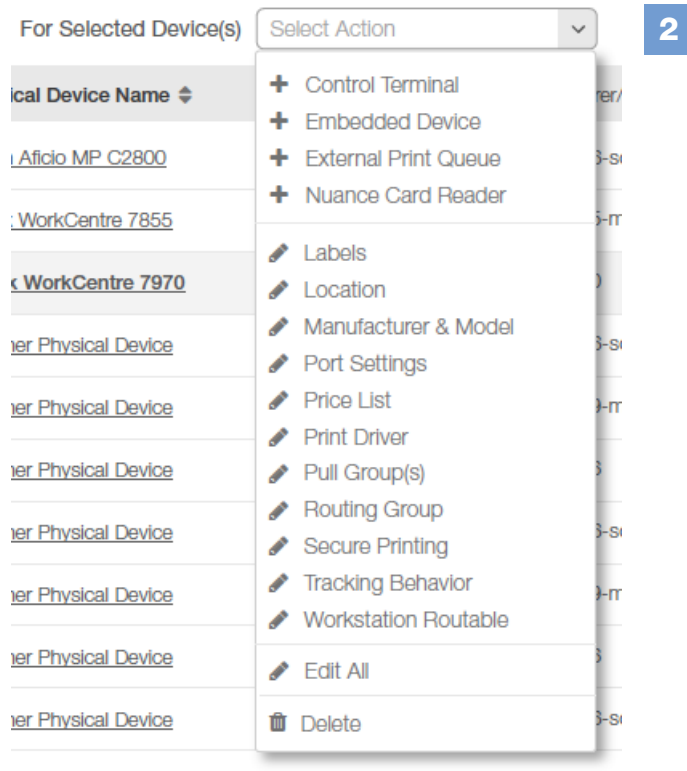
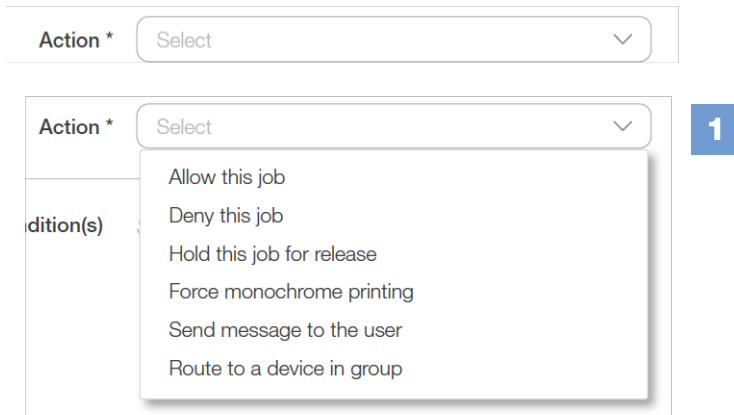
For Selected Physical Device(s) [Select Action] + Add Device Manage Pull Groups

Pull Group1	Pull Group2	Pull Group3	Pull Group4	Pull Group5	Pull Group6	Pull Group7	More...		
Physical Device Name	Network Address	Manufacturer/Model	Color	Embedded Device	Location				
<input type="checkbox"/> Ricoh Aficio MP C2800	10.17.77.3	Ricoh 4456-sc	No		1st Floor				
<input type="checkbox"/> Xerox WorkCentre 7855	10.17.77.9	Xerox 7855-mmb	Yes	Embedded Device Name	2nd Floor				
<input type="checkbox"/> Xerox WorkCentre 7970	10.17.77.1	Xerox 7970	Yes	Embedded Device Name	2nd Floor				

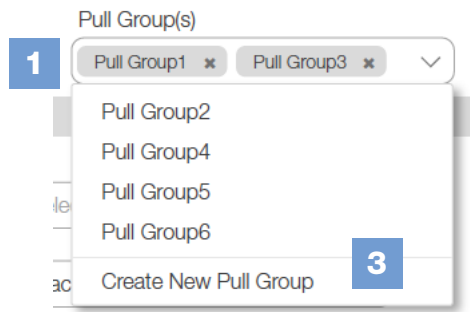
Drop-down Controls - Basic & Select Action

A number of drop-down type controls are used in the application.

- 1 **Basic Select Drop-down** - standard "combo box" drop-down control.
- 2 **"Select Action" Drop-down Button** - selecting an action in the drop-down list enables the user to perform the selected action in a new screen (page or modal window).



Multi-select Drop-down



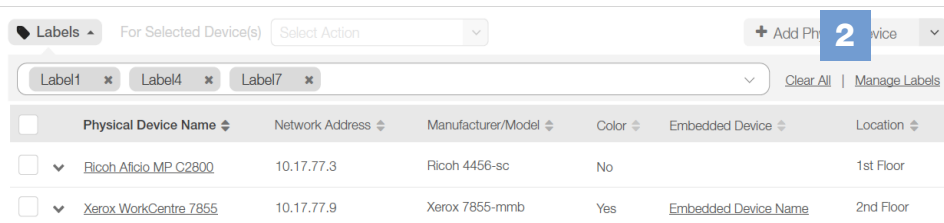
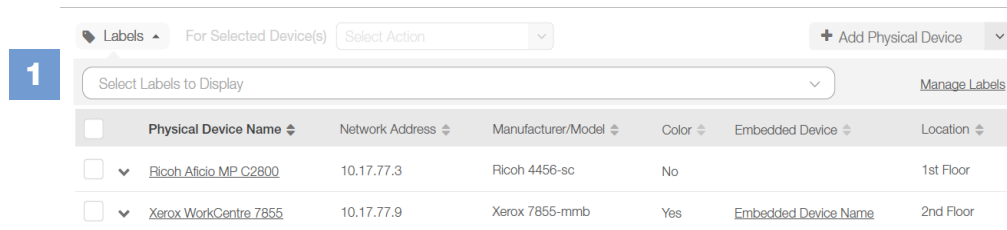
- 1 **Multi-select Drop-down** - the multi-select drop-down allows the user to select multiple values that are listed in the drop-down control. Selecting a value from the list results in the value being added to the input area, and the value is no longer displayed in the available value list.

The user can remove a selected value by selecting the value's associated "x".

Note: the drop-down list of available values does not have a set maximum horizontal width; it extends to accommodate the display of values that may exceed the default width (values do not text wrap).

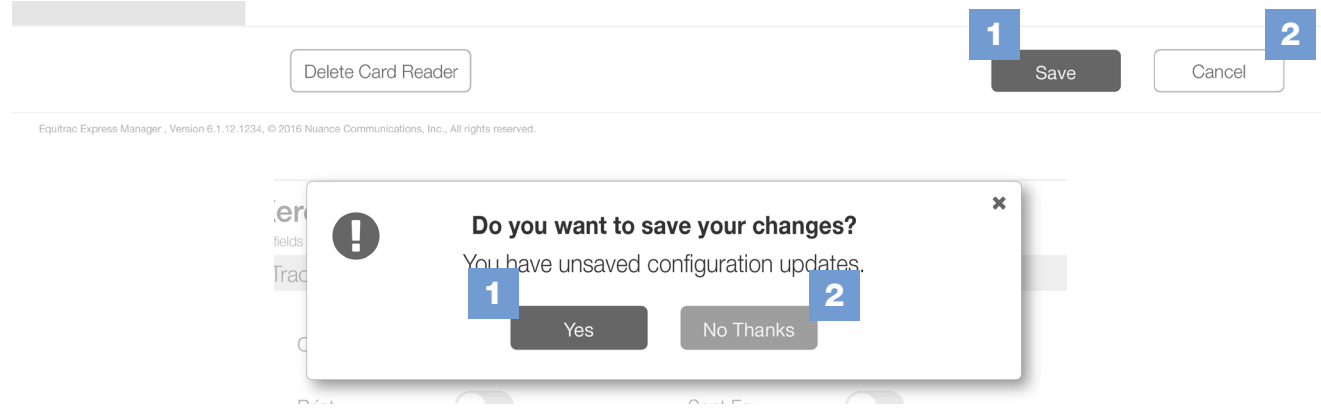
- 2 **Clear All** - another variation of the multi-select drop-down allows the user to easily clear all their selected values. The Clear All action is not available unless one or more values have been selected.

- 3 **Create New [Item]** - some multi-select drop-downs provide the ability for the user to initiate the creation of a new value within the drop-down listing. When Create New [Item] is selected, a modal window is displayed where the user creates the new item and upon saving (in the modal window context) the display returns to the initial multi-select drop-down control with the new value inputted.

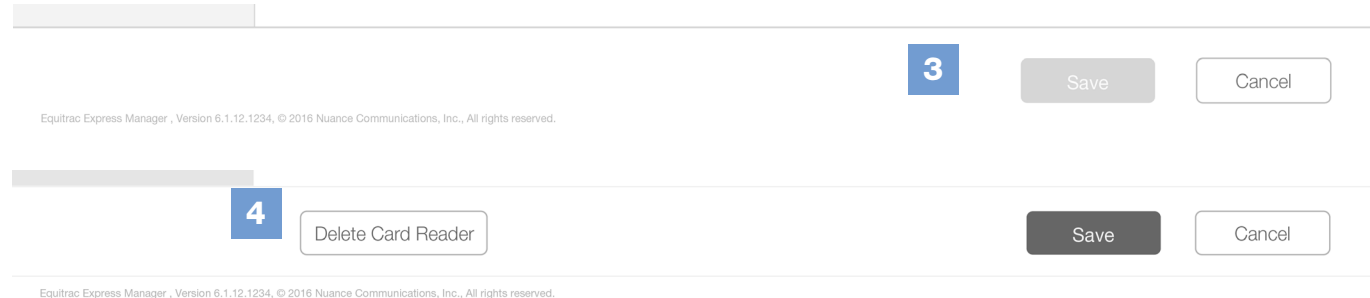


Primary & Secondary Buttons

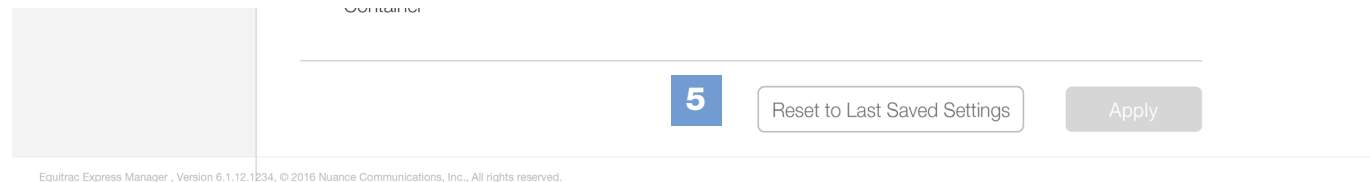
Primary & Secondary Buttons



Form Button Placement Example - Save Model



Form Button Placement Example - Apply Model



Primary & Secondary Buttons

The application uses two level of buttons: primary and secondary buttons.

- 1 Primary Buttons** - primary buttons are associated with the primary action for the context. There should only ever be one button on the screen that is primary.
- 2 Secondary Buttons** - secondary buttons are used for other available actions on the screen, besides the primary action, that are initiated with a button control. There can be more than one secondary button.

Form Button Placement Example - Save Model

3 Buttons When Adding a New Object

4 Buttons When Editing an Object

- when a Delete or Reset to Default Settings action is available it should not be placed in close proximity to the Save & Cancel buttons.

Also refer to "Page Form Display - Add/Edit" on page 18 and "Form Save Model" on page 54.

Form Button Placement Example - Apply Model

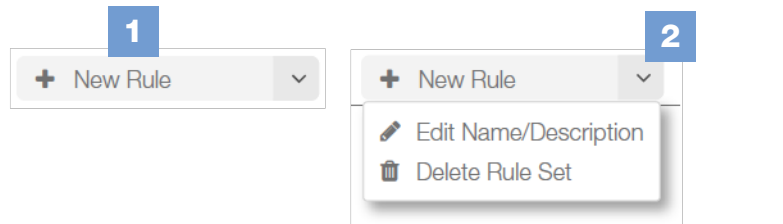
5 Buttons When Editing an Object

- there is no Cancel button when the Apply button is displayed. Reset to Last Saved Settings can be placed in close proximity to the Apply button.

Also refer to "Sidebar Navigation for "like-type" Objects on page 12, "Page Form Display - Edit with Apply Model" on page 20 and "Form Save using the Apply Button" on page 55.

Split-Action Button & Links

Split-action Button



Split-action Button

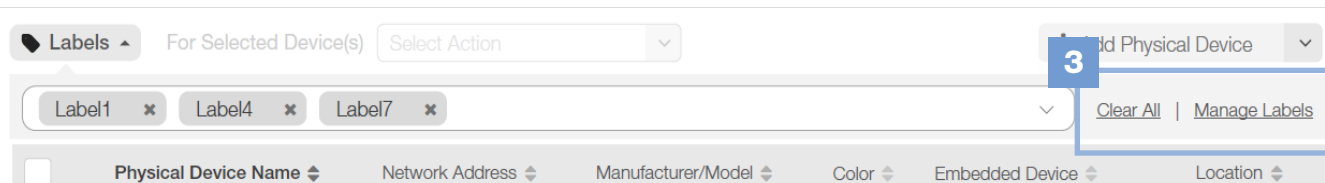
A split-action button acts as two distinct buttons in one. It is used when there is a primary action (displayed) and one or more secondary actions (viewed when selecting the drop-down).

- 1 Split-action Button Primary Action** - The user can immediately select the primary action by simply selecting the main portion of the button (New Rule in this example).
- 2 Split-action Button Other Actions** - when the arrow is selected it exposes a drop-down list of alternative actions. The user then selects one of these actions.

Links

- 3 Links** - links are used (instead of buttons) for lesser actions and when screen layout requires visual hierarchy to be reinforced.

Links



"..." Button

1

Command Line *

Radio Buttons

2

Release Documents Behavior

Release documents at assigned control terminal

Release documents from pull group

Toggle Button

3

Cost the job before printing

Retrieve username from PJJ setting

"...", Radio & Toggle Buttons

- 1 **"..." Button** - selecting this button open the user's operating system file browser so the user can select a specific file
- 2 **Radio Buttons** - a radio button allows the user to choose only one of a predefined set of options.

Radio buttons are arranged in groups of two or more. Each radio button has an associated label describing the choice that the radio button represents. The choices are mutually exclusive - only one radio button can be selected.
- 3 **Toggle Button** - a toggle button allows the user to change a setting between an On & Off state.

Checkbox

1 Over 2 Card Readers - Total: 3

<input checked="" type="checkbox"/>	Serial Number ⌵	Printer IP Address ⌵
<input checked="" type="checkbox"/>	430000983	10.17.77.1
<input type="checkbox"/>	430000984	10.17.77.2
<input checked="" type="checkbox"/>	430000985	10.17.77.3

Discovered Card Readers - Total: 3

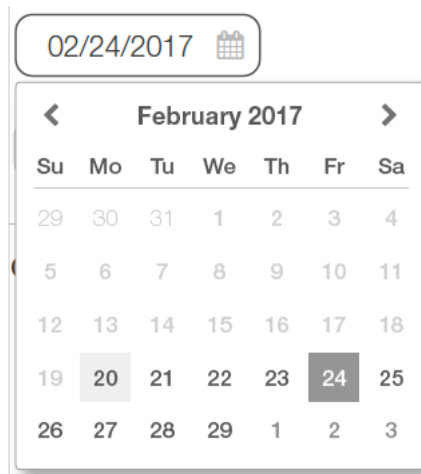
<input checked="" type="checkbox"/>	Serial Number ⌵	Printer IP Address ⌵
<input checked="" type="checkbox"/>	430000983	10.17.77.1
<input checked="" type="checkbox"/>	430000984	10.17.77.2
<input checked="" type="checkbox"/>	430000985	10.17.77.3

- 1 Checkbox** - checkboxes are used when more than one option or item can be selected. Checking the box enables/selects the option. Unchecking it, or leaving it unchecked, disables/deselects it.
- 2 Select/Deselect All** - If no items have been selected, the user can select all the items in a table or list display by selecting the checkbox in the header area. If one or more items in the listing are selected, then the header checkbox will automatically appear in a "greyed out" semi-selected state to indicate to the user that there are one or more selected items in the listing.

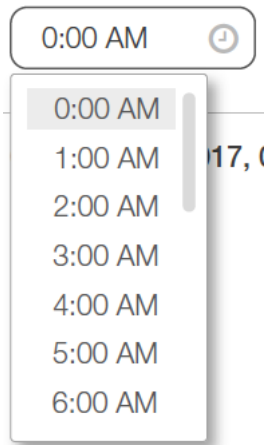
If the header checkbox is selected while in a "greyed out" semi-selected state, then all selected items in the list will be deselected.

Calendar & Time Picker

1 Calendar Control



2 Time Picker



1 Calendar Control - the user can either select a date from the calendar, or manually enter a specific date in the field input area.

Dates that are not selectable are in a disabled state. "Today's" date is visually differentiated. When a date is selected it has a selected state. The user can navigate the month view forward or backward.

2 Time Picker - upon selection of the time picker control the user can either select a time from the drop-down list, or manually enter a specific time in the field input area.

Read-only Field

Name *

Name *

Version 1.1 **1**

Disabled Fields

IP Configuration

Enable DHCP Client **2**

Static IP Configuration

IP Address

Gateway IP

Subnet mask

DNS Server

IP Configuration

Enable DHCP Client **3**

Static IP Configuration

IP Address

Gateway IP

Subnet mask

DNS Server

Package Name **4**

Driver Name **2**

Read-only & Disabled Fields

- 1 Read-only Field** - a read-only field is a field value that can be displayed but not modified on the screen.
- 2 Disabled Field Controls** - some fields are not editable, but have the potential to be editable dependent on another field value (toggle or drop-down) that is also displayed on the screen.
- 3 Toggle Control Disabled Dependency** - In this example having the toggle in the ON (Default) state disables the capability to edit dependent fields. Switching the toggle to OFF enables editing.
- 4 Select Drop-down Disabled Dependency** - In this example the second (dependent) drop-down is disabled until a selection is made from the first drop-down.

Field Disclosure Based on Radio Button Selection Example

Release Documents Behavior

Release documents at assigned control terminal

1 Release documents from pull group

Release Documents Behavior

Release documents at assigned Control Terminal *i*

1 Release documents from Pull Group *i*

2 Pull Group(s)

Pull Group1 x Pull Group3 x v

Settings

Rule Set Sele

Tracking Behavior Trac

Pull Group2

Pull Group4

Pull Group5

Pull Group6

Create New Pull Group

- 1 Field Disclosure** - field(s) can be disclosed/ displayed based on a dependency on another field's input value. This can either mean that the dependent field is disabled or not visible until the other field value is altered. In this example the Pull Group drop-down is not visible until the lower radio button is selected.
- 2 Visually Reinforce Dependency** - disclosed field(s) should be placed in close proximity and have a visual hierarchy below the field that "drives" the display of the disclosed field(s).

Disclosure Button - Show/Hide Details

Licensed Equitrac Components - Total 10 1 Show Details ▼

Licensed Equitrac Components - Total 10 2 Hide Details ▲

Description ▲	Status/Quantity ▲	Expires ▲
Equitrac Component1	Enabled	6/30/2017
Equitrac Component2	500 Users	6/30/2017
Equitrac Component3	100 Devices	6/30/2017
Equitrac Component4	Enabled	6/30/2017
Equitrac Component5	Enabled	6/30/2017
Equitrac Component6	Enabled	6/30/2017
Equitrac Component7	Enabled	6/30/2017

1 Show Details Button - When application details are available, but it's not deemed necessary that the user to view them immediately, a Show Details button can be used. When selected, more information/details are displayed in association with the text that the button is associated with.

The default state is always Show Details (details not displayed). This helps to reduce visual clutter on the screen and allows the user to focus on the most important information.

Note: the arrow associated with the button always points in the direction that the action will result. For example, a down arrow for "expand" (down) to show details, and an up arrow to "collapse" (up) the details.

2 Hide Details Button - when the details are visible, the button updates to read "Hide Details". When it is selected the disclosed information will disappear and the button reverts to it's original default state " Show Details".

Disclosure Button - Labels

Labels ▾ **1** Selected Device(s)

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

Labels ▾ **2** Selected Device(s)

<input type="checkbox"/>	Physical Device Name ⇅	Network Address ⇅	Manufacturer/Model ⇅	Color ⇅	Embedded Device ⇅	Location ⇅
<input type="checkbox"/>	▼ Ricoh Aficio MP C2800	10.17.77.3	Ricoh 4456-sc	No		1st Floor

- 1 Labels Disclosure Button - Closed State**
- the Labels button (in the Devices View context) is a disclosure button. When initially selected it opens the multi-select labels drop-down filter area below the button.
- 2 Labels Disclosure Button - Open State**
- selecting the Labels button again will close/ hide the label filtering area.

If labels are selected then the Devices view is filtered by the selected labels and the Labels button changes color to indicate to the user that label filtering is applied. The filter(s) applied button state applies to both the open and closed button states.

Selecting labels is performed via a multi-select drop-down control. Also refer to: "Multi-select Drop-down" on page 43.

Save Models, Validation & Errors

5 Equitrac[®] John Smith

← xerox WorkCenter 7970

Settings

1 General Settings * Indicates required field

2 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

Nuance Card Reader

Nuance Card Reader 43000983

+ Control Terminal

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

Release Documents Behavior

Release documents at assigned Control Terminal

Release documents from Pull Group

Pull Group(s) *

Pull Group1

Settings

Rule Set Select

Tracking Behavior Track and record print transac...

DME Server Select

Secure Printing Default System default

Routing Group Select

3 Delete Card Reader **3** Save **4** Cancel

Form Save Model

- 1 Saving Form Data** - forms pertaining to object settings can be rendered in the context of a full page display.
- 2 Sidebar Navigation** - settings can be categorized into sections that are accessed via the sidebar navigation (settings sectional navigation is optional). The user can navigate between the object's setting sections in the sidebar navigation without being forced to save the settings.
- 3 Save Button** - the Save button applies to the entire object settings. For object settings that are separated into navigation sections, all the object's associated setting sections are saved when the user selects Save (not just the section that's currently in view/selected).

If the user is editing a form, the Save button is initially in a disabled state until the user updates any of the existing form data; the Save button then becomes enabled.

Selecting Save saves to the updated form data to the system and returns the user to the page where the form was launched from.

- 4 Cancel Button** - cancels the edit session and returns the user to the page where they initiated the edit.
 - 5 Back Button** - If the user has entered or updated form data, and they select the Back button or navigate elsewhere in the site, a confirmation modal window is displayed asking the user if they want to save their changes.
- Refer "Confirmation Modal Windows" on page 64.

Also refer to "Page Form Display - Add/Edit" on page 18 and "Form Button Placement Example - Save Model" on page 44.

Nuance® Equitrac® ? | John Smith ▾

Embedded Devices Configuration

Embedded Devices

- Canon MEAP
- Fuji Xerox ECSP
- HP Laser jet
- HP OXP
- Konica Minolta
- Konica Minolta CC
- Kyocera Mita
- Lexmark
- Oce
- Ricoh CC
- Ricoh PCC3
- Ricoh PCC4
- Ricoh PCC5
- Samsung XOA-E
- Samsung XOA-Web
- Sharp OSA
- Sharp OSA 3.5
- Xerox ECSP**
- Xerox Secure Access
- Xerox/Fuji Xerox JBA
- Canon MEAP
- Fuji Xerox ECSP
- HP Laser jet
- Another Device
- Another Device
- Another Device
- Another Device
- Another Device
- Another Device

Xerox ECSP

* indicates required field

Tracked Activities

Copy	<input checked="" type="checkbox"/>	Received Fax	<input type="checkbox"/>
Print	<input type="checkbox"/>	Sent Fax	<input type="checkbox"/>
Scan	<input type="checkbox"/>		

Device Prompts

Title

Login Prompt

Settings

Force Logout on Swipe

Enable Job Limits

End session after seconds of inactivity

Polling

Interval seconds

Polling Threads

External Application

Name

Services Home Container

2 Reset to Last Saved Settings
1 Apply

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.



Pages With No Explicit Save

- 1 **"Manage" Listings** - Manage listings do not have an explicit Save button.

When the user adds an item to the list, then the listing is immediately updated when the Add button is selected (as long as there is no error associated with the new input).

Editing an object is done in a modal window, and the parent table listing is updated when the user selects Save in the modal window context.

Deleting an item brings up a confirmation modal window. When the user selects Yes in the confirmation modal window the listing is updated with the deletion removed.

Also refer the page type "Manage" Listing" on page 79.

Nuance Equitrac

Xerox WorkCenter 7970

4 General

3 You have error(s) to fix before updated settings can be saved.

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 x

Release Documents Behavior

Release documents at assigned Control Terminal

Release documents from Pull Group

1 Pull Group(s) *

Select

Select a Pull Group

Settings

Rule Set Select **2**

Tracking Behavior Track and record print transac...

DME Server Select

Secure Printing Default System default

Routing Group Select

5 Delete Card Reader Save Cancel

Form Field Validation & Error Handling

1 Field Errors - field validation is performed both in real-time (for client-side validation like checking if required fields are entered), and server-side validation (performed when user selects Save or Apply).

Fields that are in error - are highlighted and an associated error message is displayed.

This method of displaying field errors is used in all contexts - for page forms and modal window field displays.

2 For client-side validation, such as required fields, a field error is displayed in real-time, for any required fields that have been "skipped" by the user in the form field filling sequence order, or have been entered but do not meet field validation requirements.

In this wireframe scenario, the user has the Rule Set field in focus, but skipped over selecting the Pull Groups required field.

3 Error Alert Message - upon selecting Save, page forms also display an error alert message at the top of the page if there are errors.

4 Sidebar Navigation Section Error Indicator - for Settings that have navigational sections, selecting Save checks for errors for all the sections. If there is a section that has fields in error, the section name in the sidebar navigation has an error icon associated with it (the error icon is displayed until all errors in the section are fixed).

4 Disabled Save Button - the Save button is disabled until all the form field errors are fixed (for all sections).

Form Field Validation & Error Handling Cont...

Nuance Equitrac

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

Nuance Card Reader

Nuance Card Reader 43000983

+ Control Terminal

1 You have error(s) to fix before updated settings can be saved.

Output

* Indicates required field

Port Settings

Protocol *

Raw Port Number *

Notification Page *

Hardware Page Counting (PUL) *

Workstation Routable

LPR Byte Counting Enabled

Proxy IP Address

Separator Page

Compression

Format *

Level *

Print Driver Assignment

[Print Driver Mapping Global Settings](#)

OS Version	Print Driver	
Win 7 32-bit	None Specified (Default)	<input type="button" value="Edit"/>
Win 7 64-bit	Xerox WorkCentre 7970 PCL5 (Override)	<input type="button" value="Edit"/>
Win 8 32-bit	None Specified (Default)	<input type="button" value="Edit"/>
Win 8 64-bit	Xerox WorkCentre 7970 PCL6 (Default)	<input type="button" value="Edit"/>
Win 10 32-bit	None Specified (Default)	<input type="button" value="Edit"/>
Win 10 64-bit	None Specified (Default)	<input type="button" value="Edit"/>

- 1 Error Alert Message** - for Settings that have navigational sections, the error alert message remains displayed until all errors are fixed.

Form Field Validation & Error Handling Cont...

1 Example of Errors in Multiple Setting Sections

Nuance Equitrac

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

Nuance Card Reader

Nuance Card Reader 43000983

Control Terminal

1 You have error(s) to fix before updated settings can be saved.

General Settings

* Indicates required field

Definition

Name * Xerox WorkCenter 7970

1 **Hostname/IP Address *** 10.17.77.1

IP Address already in use by another Physical Device

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 x

Release Documents Behavior

Release documents at assigned Control Terminal

Release documents from Pull Group

Pull Group(s) *

Pull Group1

Settings

Rule Set Select

Tracking Behavior Track and record print transac...

DME Server Select

Secure Printing Default System default

Routing Group Select

Delete Card Reader Save Cancel

Form Field Validation & Error Handling Cont...

Nuance Equitrac

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

Nuance Card Reader

Nuance Card Reader 43000983

+ Control Terminal

1 You have error(s) to fix before updated settings can be saved.

General Settings

* Indicates required field

Definition

Name * Xerox WorkCenter 7970

Hostname/IP Address * 10.17.77.2

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 x

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...

DME Server Select

Secure Printing Default System default

Routing Group Select

Delete Card Reader Save Cancel

1 **Section Error(s) Not In Current Display** - this example assumes that the user corrected the error that was in the General Settings section (see previous page). The error icon associated with the General section in the sidebar navigation goes away. The Settings still has one or more errors associated with the Pricing section.

The user must correct the error(s) in the Pricing section before the Save button is enabled.

Modal Window Saving, Field Validation & Error Handling

The screenshot shows a modal window titled "Add Printer/Driver" with a close button (x) in the top right corner. A blue square with the number "1" is in the top left. The form contains five dropdown menus, each with a placeholder text and a downward arrow:

- Model Name: Select Model
- Environment: Select Environment
- OS Version: Select OS
- Package Name: Select Package (with an information icon 'i' to its right)
- Driver Name: Select Driver

At the bottom, there are two buttons: "Save" (disabled, grey) and "Cancel" (active, white with border).

- 1 **Modal Window Save Model** - the patterns for saving, field validation and error handling for form fields displayed in a modal window context are the same as for when fields are displayed in a page view.

The only exception is that there is no error alert message displayed at the top of the screen.

Synopsis:

- Save button is not enabled until all required fields are inputted.
- Client-side and server-side error validation performed.
- Fields in error have visual treatment with field level error message.

Modal Windows

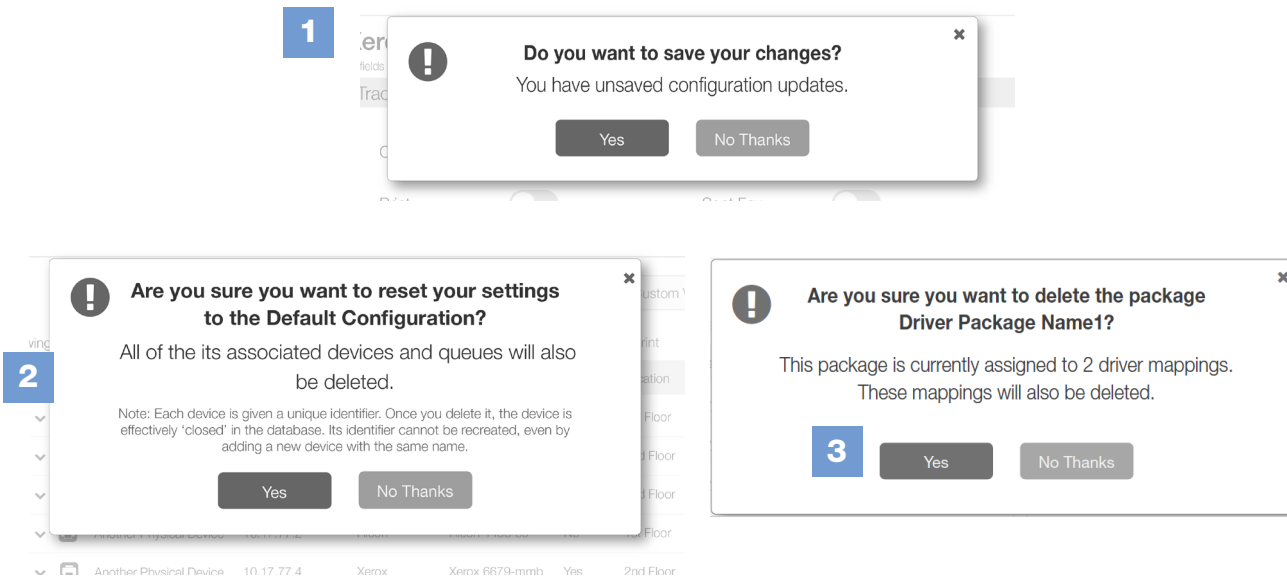
Modal Window - What is it?

The screenshot displays the Nuance Equitrac web application interface. A modal window titled "Assign Pull Group(s)" is open, showing "3 Selected Physical Devices". The modal contains a dropdown menu for "Pull Group(s)" with options: Pull Group1, Pull Group3, Pull Group2, Pull Group4, Pull Group5, Pull Group6, and Create New Pull Group. The background shows a table of physical devices with columns for IP address, device name, and location.

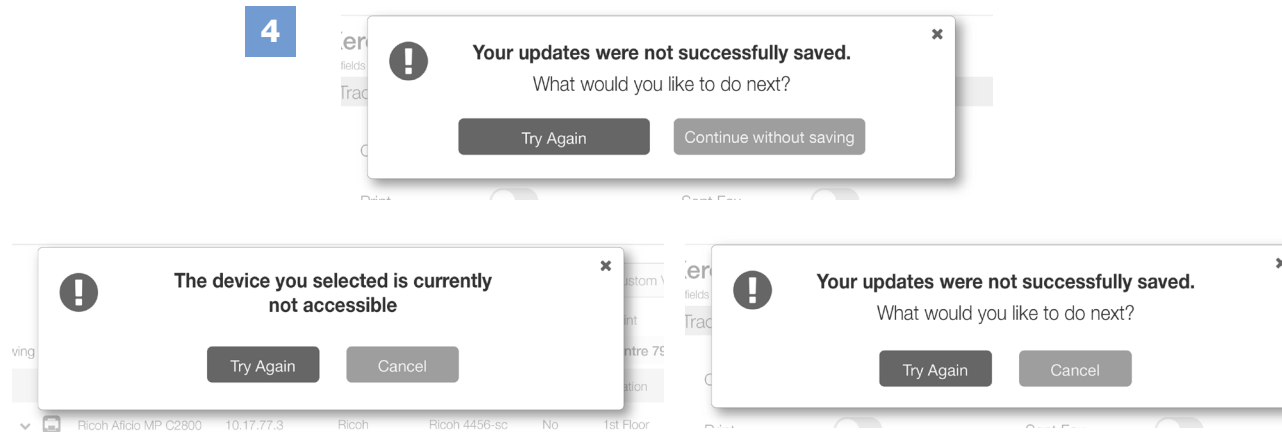
Label	IP Address	Device Name	Location
Another Physical Device	10.17.77.5	Xerox 7676	2nd Floor
Another Physical Device	10.17.77.6	Ricoh 4456-sc	3rd Floor
Another Physical Device	10.17.77.7	Xerox 6679-mmb	3rd Floor
Another Physical Device	10.17.77.8	Xerox 7676	1st Floor
Another Physical Device	10.17.78.3	Ricoh 4456-sc	2nd Floor

- 1 **What is a Modal Window?** - "... a modal window is a graphical control element subordinate to an application's main window. It creates a mode that disables the main window, but keeps it visible with the modal window as a child window in front of it. Users must interact with the modal window before they can return to the parent application." [\(Wikipedia reference\)](#)

Confirmation Modal Windows



"What would you like to do next?" Modal Windows



Modal Windows - When To Use

Confirmation Modal Windows

1 **Confirmation Dialogs** - modal windows are used to display confirmations of a previous action to ensure the user wants this action to be performed. Sometimes the modal will provide an alert for important actions that require a confirmation before finalizing. Sometimes the modal will ask the user to perform an action that was previously not initiated. (e.g. Save)

2 **Levels of Text** - There can be up to three levels of text.

The first sentence/header asks a question to the user relating to the previous action to be confirmed.

The second sentence or phrase is optional and outlines potential impact(s) of the action.

If needed, a third level of explanatory text can be displayed to give further information.

3 **Yes vs No Thanks** - responding "Yes" proceeds with the action stated in the question. Actions that result in an item update, add new, delete, import, displays an Alert/Toast notification of the ensuing action.

Refer to "Notifications - Alert/Toast" on page 34.

"No Thanks" cancels the action and returns the user to the application's parent screen.

"What would you like to do next?" Modal Windows

4 **"What would you like to do next?"** modal windows are also used to display messaging that a desired action is not possible, and asking the user what they would like to do.

1 **Edit Printer/Driver** ✕

Model Name ▾

Environment ▾

OS Version ▾

Package Name ▾ ⓘ

Driver Name ▾

2

1 **Rule Set Properties** ✕

Rule Set Name

Description

Properties (Add/Edit) Modal Windows

- 1 Object Properties Modal Windows** - modal windows are used to add or edit object properties when there are not many property fields to display.

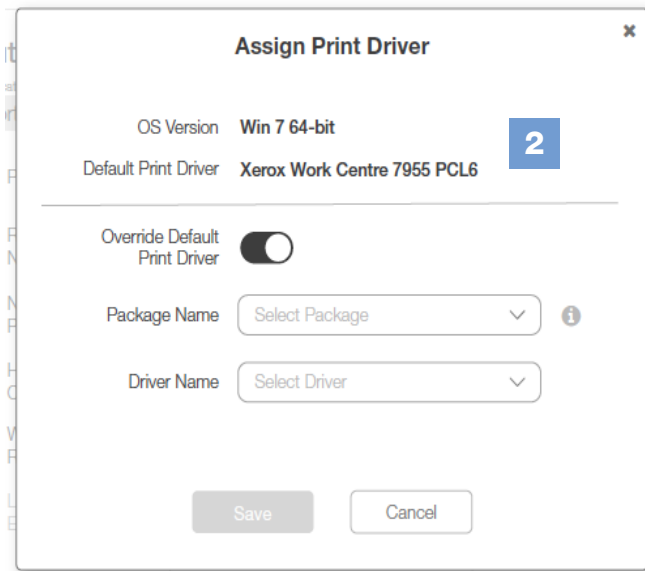
If the modal window vertical height exceeds 600 px, with the stacked field layout (including space for error message below fields that can have errors), then do not use a modal window to display object properties, use a page layout instead.

- 2 Save Button** - When editing properties, the Save button is initially disabled when the modal window is displayed. When the user updates a field, the Save button is enabled.

When adding a new object, the Save button is disabled when the modal window is initially displayed. It is enabled when all required property fields are entered.

Print Driver Assignment

OS Version	Print Driver	Print Driver Mapping Global Settings
Win 7 32-bit	None Specified <i>(Default)</i>	Edit 1
Win 7 64-bit	Xerox WorkCentre 7970 PCL6 <i>(Default)</i>	Edit
Win 8 32-bit	None Specified <i>(Default)</i>	Edit
Win 8 64-bit	Xerox WorkCentre 7970 PCL6 <i>(Default)</i>	Edit
Win 10 32-bit	None Specified <i>(Default)</i>	Edit
Win 10 64-bit	None Specified <i>(Default)</i>	Edit



The modal window titled "Assign Print Driver" displays the following information and controls:

- OS Version: Win 7 64-bit **2**
- Default Print Driver: Xerox Work Centre 7955 PCL6
- Override Default Print Driver:
- Package Name: Select Package (dropdown menu)
- Driver Name: Select Driver (dropdown menu)
- Buttons: Save, Cancel

Properties Modal Windows Cont...

- 1 Edit Button to Open** - selecting the Edit button in this table display example opens a modal window where the user can edit the associated (row's) properties.

Modal windows can also be used to display property fields when it becomes too complex to display them in a parent screen context.
- 2 Show Context** - ensure that the context of the property fields (from the previous table) is apparent. In this example, the fields that provide context are emphasized and displayed as read only text.

Properties Modal Windows Cont...

The screenshot displays the Nuance Equitrac interface. The main window shows a table of physical devices with columns for IP address, device name, location, and status. A modal window titled "Assign Pull Group(s)" is open, showing "3 Selected Physical Devices" and a dropdown menu for "Pull Group(s)". The dropdown menu is open, showing options: "Pull Group1", "Pull Group2", "Pull Group3", "Pull Group4", "Pull Group5", "Pull Group6", and "Create New Pull Group". A second modal window titled "Create New Pull Group" is open, showing a text input field for "New Pull Group Name" with the value "My New Pull Group" and "Save" and "Cancel" buttons.

IP Address	Device Name	Location	Status
10.17.77.5	Xerox 7676	1st Floor	Yes
10.17.77.6	Ricoh 4456-sc	2nd Floor	No
10.17.77.7	Xerox 6679-mmb	2nd Floor	Yes
10.17.77.8		1st Floor	
10.17.78.3		2nd Floor	

1 Show Context - ensure that the context of the property fields is apparent in the title.

In this example the modal window's second level header text is used to let the user know the context of the fields displayed below.

In the parent screen the user multi-selected objects (3 physical devices) and specified a single "edit" action. A single "edit" action for multi-selected objects always opens a modal window (it is a snippet of an object's "edit all"/overall properties).

2 Best Practice - No Modal on top of Modal Window - best practice is not to have an action in one modal window initiate the opening of another modal window.

There is only one scenario in the application design where this currently happens. Selecting "Create New..." in a drop-down selection opens another modal window.

In this instance, this second modal window should temporarily replace the first modal instead of overlapping or residing above. When the action in the second modal is complete the user will return to the first modal.

Note: creating a new object in the context of the drop-down control (preferred experience solution) was discussed, but it was decided that it had to be performed in a separate window because of knowing how/when to "save" the new object.

Stepped Workflow

Condition(s) Add Condition **1**

Add Rule Condition **2**

User Conditions

User is in a specified group

User is in a specified department

Other Conditions

The day of the week is as specified

The time of day is in a specified range

Job Conditions

The job has less than a specified number of pages

The job has more than a specified number of pages

The job has more than a specified number of color pages

The job has less than a specified number of KB

The job has more than a specified number of KB

The job has one or more color pages

The job has no color pages

The job has one or more duplex pages

The job has no duplex pages

The job title matches specified string

Next > Cancel

Select Day(s) of the Week **3**

The day of the week is as specified...

- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday
- Sunday

← Back
Add Condition
Cancel

Condition(s) The day of the week is as specified ✎ 🗑️

When the day of the week is: Saturday, Sunday

4

Add Condition

Stepped Workflow - 2 Step Example

1 Initiation - in this scenario, a 2 step process is initiated by selecting a button (in the context of an add/edit page) that allows the user to add a condition to a rule.

2 Step 1 - A modal window opens where the user selects their first criteria (condition type).

Buttons in the first step's window are Next and Cancel (no Back). The Next button is disabled until required fields are entered (a single selection in this case).

Selecting Next takes the user to the next step in the workflow. Cancel, closes the window and returns the user to the page where the workflow was launched.

3 Step 2 (final step) - in this scenario, the information displayed in the second step is dependent on the user's input in the first step; however, there does not have to be any dependency between steps (besides step1 must be completed before step2).

Buttons in this next (and final) step's window are Back (takes the user back to step1), Add Condition (the final action/result of the workflow), and Cancel.

The Add Condition button is disabled until required fields are entered (at least one selection in this case).

4 Stepped Workflow Result - selecting Add Condition closes the modal window and returns the user to the page where the workflow was launched, with the new Condition added.

License Manager

1 How do you want to manage your License? ?

Update & reactivate License

Deactivate & uninstall License

Next >

Install & Activate New License

2 Install & Activate License ? **3**

Select below to either install and activate the License automatically (internet connection required), or to install the License file manually (no internet connection necessary).

Install & Activate License Automatically
Internet connection required

License Key

Install License Manually
No internet connection required

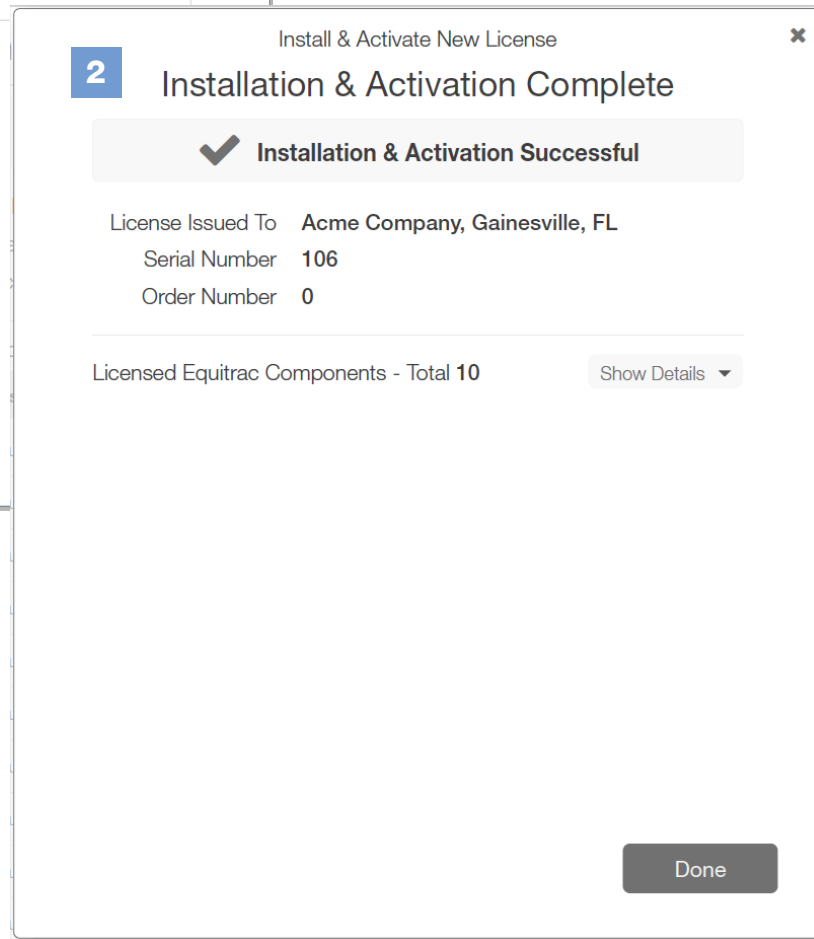
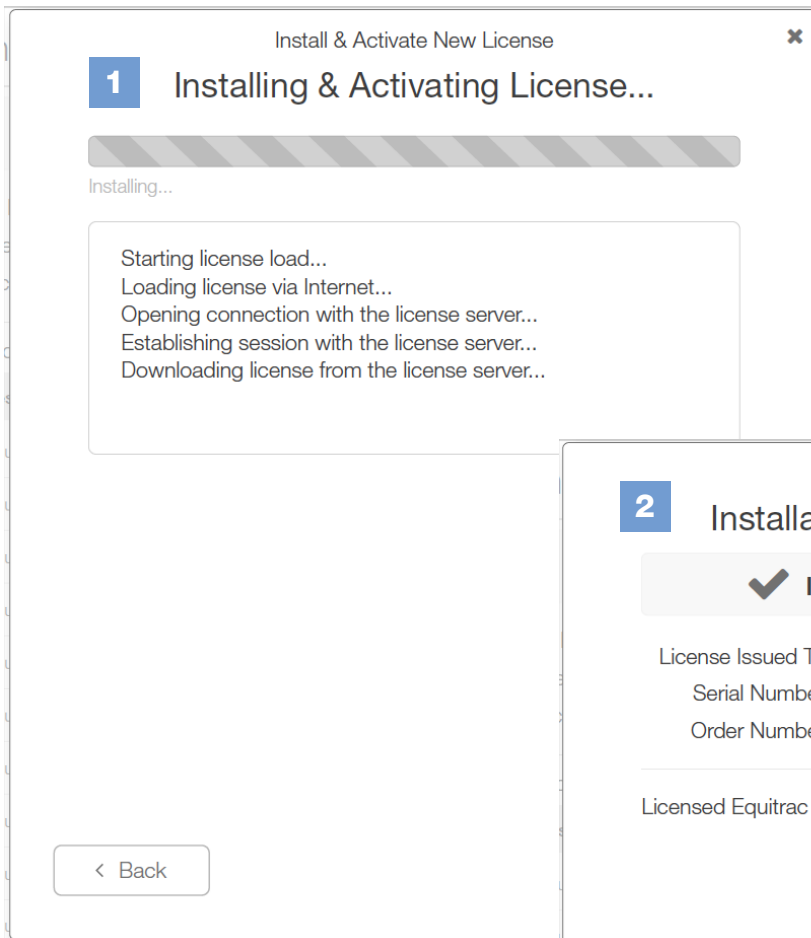
Next > Cancel

Stepped Workflow - Wizard

- 1 Initiation** - a stepped workflow can be directly initiated by selecting a button or by launching an introductory "gateway" modal window which, based on the user's selection, will determine the ensuing steps to display in the workflow.
- 2 Step 1** - can be initiated directly from a page or launched from a prior "gateway" window (include a Back button if launched from "gateway").

Other buttons in the first step's window are Next and Cancel. The Next button is disabled until required fields are entered.

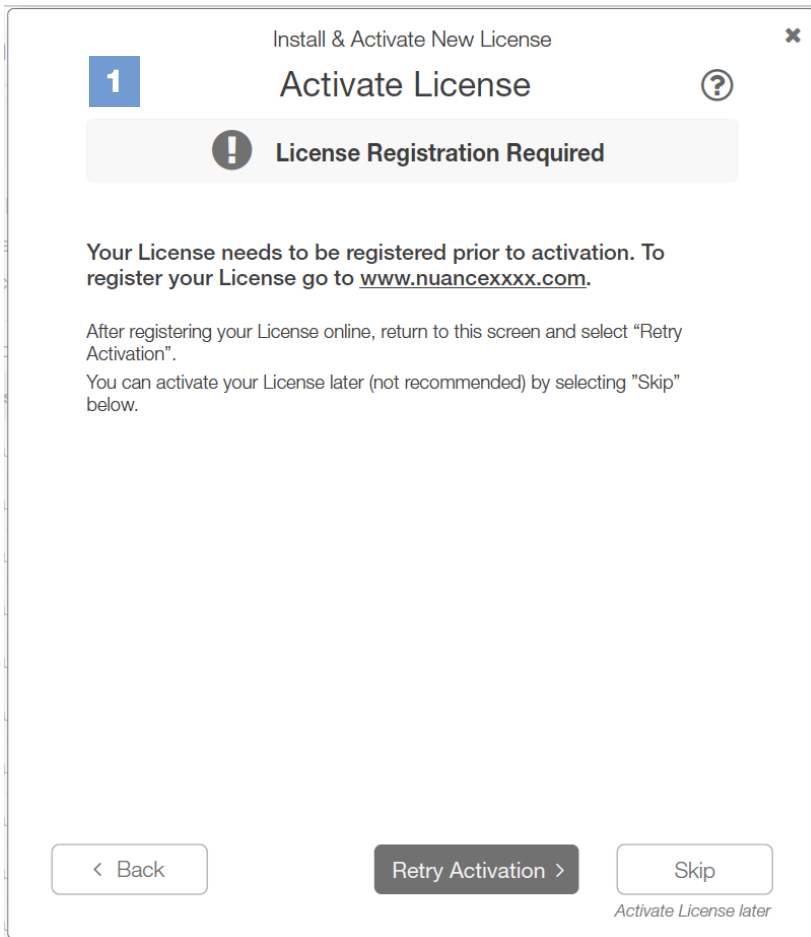
Selecting Next takes the user to the next step in the workflow. Cancel, closes the window and returns the user to the page where the workflow (or "gateway") was launched.
- 3 Help** - access to help with either the workflow process or contextual window content is accessed within the modal experience. The Help that is in the site header is not accessible in a modal experience. Help content should be presented in a different browser session or window so the user does not lose where they are at in the application.



Stepped Workflow - Wizard Cont...

- 1 **Processing Step** - if a step in the workflow reflects a processing state, then the Next button is not displayed until after the processing is complete. The user can select Back or Cancel.
- 2 **Final Step** - the results of the stepped workflow in this example are contained in the workflow and reflected in the final step.

The final step's only button in this scenario is Done, which upon selection closes the modal window and returns the user to the page where the workflow was launched.



Stepped Workflow - Wizard Cont...

- 1 **Skip Step** - depending on the workflow, sometimes a step is not required. In this case, Skip can be a button option.

Tables

Table Features

Show All Terminals For Selected Terminal(s) Select Action Discover Card Readers

<input type="checkbox"/>	Terminal Name	Type	Server	Description	Assignment
<input type="checkbox"/>	Control Terminal Name	Control Terminal	WAT-IJ-2012R2	Description goes here	Unassigned
<input type="checkbox"/>	Nuance Card Reader 43000983	Card Reader	DEMO-VM-EE56	Discovered card reader	Xerox WorkCentre 7970
<input type="checkbox"/>	Nuance Card Reader 43000984	Card Reader	DEMO-VM-EE56	Discovered card reader	Unassigned
<input type="checkbox"/>	Nuance Card Reader 43000985	Card Reader	DEMO-VM-EE56	Discovered card reader	Unassigned
<input type="checkbox"/>	Nuance Card Reader 43000987	Card Reader	DEMO-VM-EE56	Discovered card reader	Unassigned
<input type="checkbox"/>	Nuance Card Reader Name	Card Reader	WAT-IJ-2012R2	Discovered card reader	Unassigned
<input type="checkbox"/>	Page Control Touch Name	Page Control Touch	WAT-IJ-2012R2	Description goes here	Unassigned

1 Column Headers & Sorting - the first column of a table has the default sort applied (ascending). The column title to which the sort is applied should have more visual emphasis than the other column titles.

Selecting the sort icon associated with any other column header updates the sort to be applied to that column. Selecting the sort icon of the currently sorted column changes the direction of the applied sort.

Column sorting is optional for table displays.

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

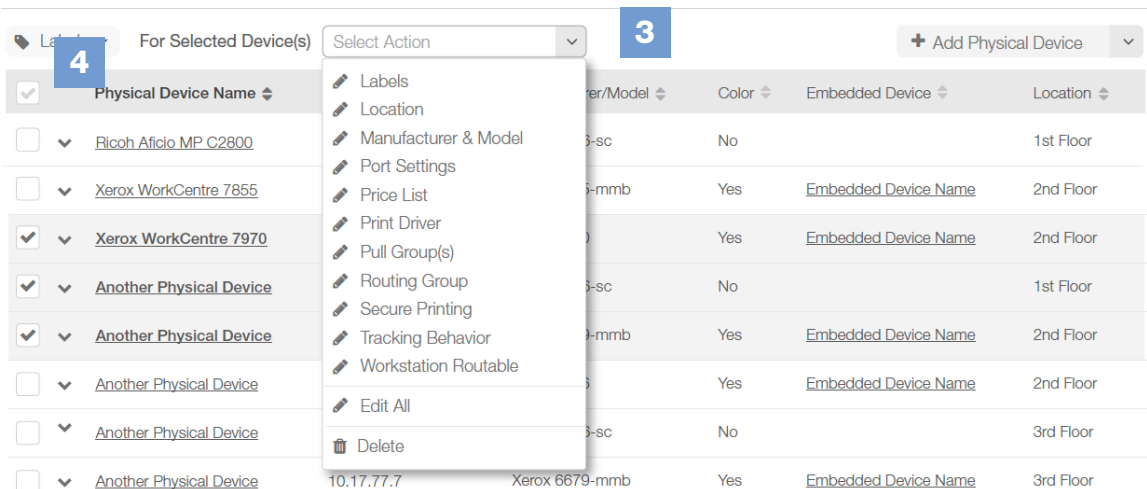
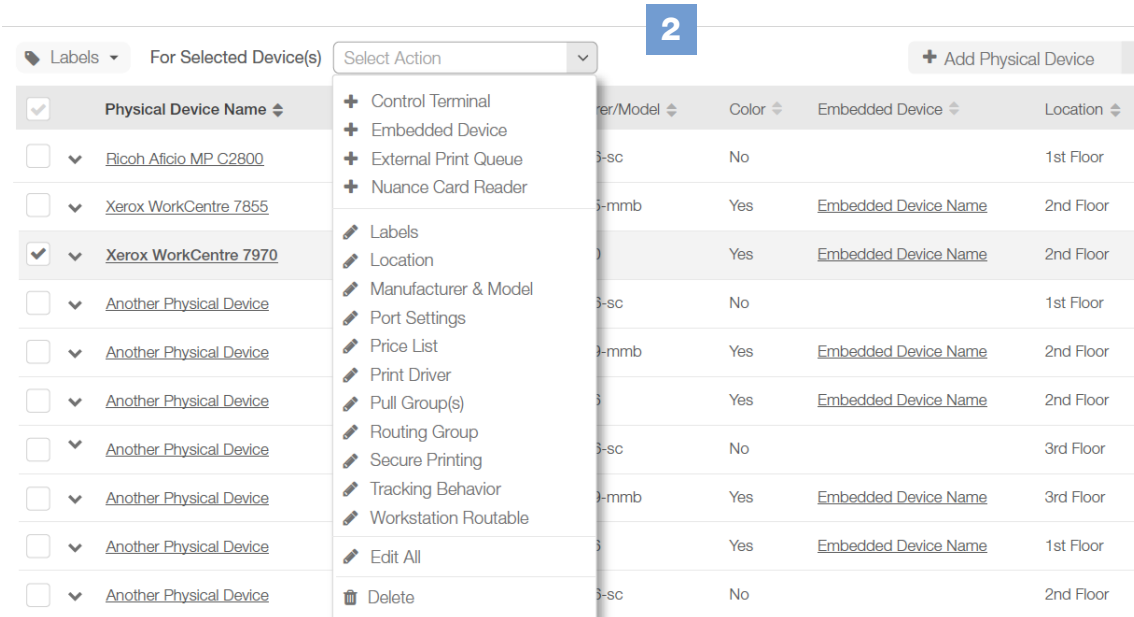
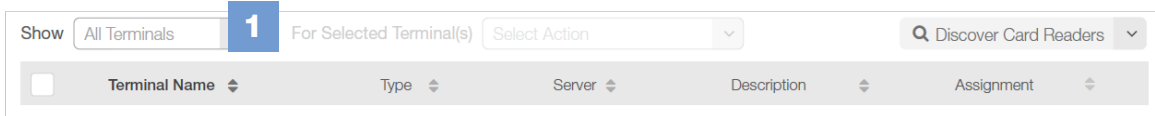
2 Field Links - field links are visually distinguished. In general, a link usually goes to an associated Settings page.

3 Expanded Row - by selecting an associated "expand" icon, a row can be expanded so as to display more detailed information.

Expandable rows are optional for table displays. Either all rows should have the expand capability, or no rows should have it.

4 Scrolling - the table column headers (and screen area above) should stay fixed on the page so that the user can maintain a view the column headers and any controls positioned above the table. The vertical screen scroll starts below the column headers.

Select/Multi-select Actions



1 Actions for Selected Item(s) - the user can select an action to perform on selected item(s) in the table listing. By default, if no items are selected in the table, the Select Action drop-down control and associated label is displayed in a disabled state.

2 Single-select Action - once an item/row in the table is selected, the Select Action drop-down control is enabled. Then the user can select to perform any available action, in the drop-down listing, for the selected item.

3 Multi-select Action - if multiple items/rows in the table are selected, the Select Action drop-down control is enabled. The user can select to perform an action on the selected items from the drop-down listing.

Note: When selecting multiple items the available actions may be less than when a single item is selected. Only actions that are applicable to *all* selected items should be shown.

4 Select/Deselect All Checkbox - the user can select all the items in the table display by selecting the checkbox in the table header. If one or more items in the table are selected, then the checkbox will appear in a "greyed out" selected state to indicate to the user that there are one or more selected items in the table.

If the table header checkbox is selected while in a "greyed out" selected state, then all selected items in the table will be deselected.

Show Filter & Show By

1

Show Selected Terminal(s)

<input type="checkbox"/>	Terminal Name	Type	Server	Description	Assignment
<input type="checkbox"/>	Control Terminal Name	Control Terminal	WAT-IJ-2012R2	Description goes here	Unassigned
<input type="checkbox"/>	Nuance Card Reader 43000983	Card Reader	DEMO-VM-EE56	Discovered card reader	Xerox WorkCentre 7970
<input type="checkbox"/>	Nuance Card Reader 43000984	Card Reader	DEMO-VM-EE56	Discovered card reader	Unassigned
<input type="checkbox"/>	Nuance Card Reader 43000985	Card Reader	DEMO-VM-EE56	Discovered card reader	Unassigned
<input type="checkbox"/>	Nuance Card Reader 43000987	Card Reader	DEMO-VM-EE56	Discovered card reader	Unassigned

1 **Show Filter** - the table display can be filtered by using a Show drop-down selection to filter the table by a selected field. The default value is Show All.

Note that for Devices, the table display can be filtered by selecting labels to filter the table by.

Refer to "Multi-select Drop-down" on page 43.

2 **Show By** - updating the Show By value pivots the table view, such that the first column in the table (and primary sort) is the selected Show By field.

2

Show by Selected System(s)

<input type="checkbox"/>	System Name	# of Components
<input type="checkbox"/>	WAT-ARUNCHEBIUM	6
<input type="checkbox"/>	WAT-DMACDONALD2	7
<input type="checkbox"/>	WAT-EQPRINTSRV	8

Search

Show by For Selected System(s) **1**

<input type="checkbox"/>	System Name	# of Components
<input type="checkbox"/>	WAT-ARUNCHEBIUM	6
<input type="checkbox"/>	WAT-DMACDONALD2	7
<input type="checkbox"/>	WAT-EQPRINTSRV	8
<input type="checkbox"/>	WAT-FKQLNICK3	6
<input type="checkbox"/>	WAT-GJONESL	6
<input type="checkbox"/>	WAT-STUNNEY	5

WAT|
WAT-ARUNCHEBIUM
WAT-DMACDONALD2
WAT-EQPRINTSRV
WAT-FKQLNICK3
WAT-GJONESL
WAT-STUNNEY

Show by For Selected System(s) **2** [Clear Search](#)

<input type="checkbox"/>	System Name	# of Components
<input type="checkbox"/>	WAT-EQPRINTSRV	7

Show by For Selected System(s) **3** [Clear Search](#) **4**

<input type="checkbox"/>	System Name	# of Components
<input type="checkbox"/>	WAT-ARUNCHEBIUM	6
<input type="checkbox"/>	WAT-DMACDONALD2	7
<input type="checkbox"/>	WAT-EQPRINTSRV	8
<input type="checkbox"/>	WAT-FKQLNICK3	6
<input type="checkbox"/>	WAT-GJONESL	6
<input type="checkbox"/>	WAT-STUNNEY	5

- 1 Search** - the search has a single field search capability. As the user starts typing inside the search control, the system returns matching field values in the drop-down list which update accordingly as the user continues typing. The user can select a value from the drop-down search criteria.
- 2 Search Criteria & Results - Value Selected** - upon selection of a value in the drop-down listing the search is applied. The table display is updated with the associated search results.
- 3 Search Criteria & Results - Text Entered** - the user also has the option to hit Enter, or to select the search icon at any point while typing in their search criteria; either of these interactions apply the search string that has been entered in the search criteria.
- 4 Clear Search** - the user has the ability to clear their search and return the table display to its non-filtered state. Clear Search only displays when the table is in a filtered state.

Labels ▾ For Selected Device(s) ▾ + Add Physical Device ▾

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

1 Showing 1 to 10 of 562 Physical Devices < **1** 2 3 4 5 > Number of items per page **2** ▾

Pagination

- 1 **Pagination** - the table display can be broken into pages if the loading of table results is taxing on the system and results in a poor user experience.
- 2 **Number of Items per Page** - the user has the ability to select how any items/rows are displayed on each page.

"Manage" Listing

1 Labels: 2

Label1		
Label2		
Label3		
Label4		
Label5		
Label6		
Label7		
Label8		
Label9		
Label10		

3

Rules Listing

+ New Rule Set

4	Rule Set & Rules	Description	
^	Rule Set1	This is Rule Set1 Description	+ New Rule v
	Rules	Type	
	weekend printing	All	Select a Rule to view its type, actions and conditions
	another rule	All	
			+ New Rule Set
v	Rule Set2	This is	
	Rule Set & Rules	Description	
	^	Rule Set1	This is Rule Set1 Description + New Rule v
	Rules	Type	<input type="button" value="Edit Rule"/> v
	weekend printing	All	Rule weekend printing Type Apply this rule when a user prints a document through the print server and workstation direct IP printing. Action Allow this job to complete Condition(s) When the day of the week is: Saturday, Sunday
	another rule	All	5

Table Display Variations

"Manage" Listing

- 1 **"Manage" Listing** - This table display is used in the context of managing labels, pull groups and routing groups.
- 2 **"Manage" Listing - Add Value** - The user has the ability to add a new value to the listing directly on the page.

Note: there is no explicit Save for the table listing.
- 3 **"Manage" Listing - Edit & Delete Value** - The user has the ability to edit or delete an item in listing. Selecting an item's name link or associated edit icon displays the properties of the item.

Rules Listing

- 4 **Rules Listing** - The user initially sees listing of Rule Sets and has the ability to create a New Rule Set, or New Rule for a specific Rule.

The user can expand a Rule Set to view its associated Rules
- 5 **Rule Description** - The user can select a Rule to view it's description in the context of the table. In the contextual description area the user also has the ability to perform an action on the rule (e.g. Edit and Delete), and move the Rule up or down in priority order.

Assign Physical Device

Nuance Card Reader 43000984

2 ×

Select the Physical Device you want to assign this Card Reader to.

Labels ▾

Physical Device Name ↕	Network Address ↕	Manufacturer/Model ↕
<input type="radio"/> Ricoh Aficio MP C2800	10.17.77.3	Ricoh 4456-sc
<input type="radio"/> Xerox WorkCentre 7855	10.17.77.9	Xerox 7855-mmb
<input checked="" type="radio"/> Xerox WorkCentre 7970	10.17.77.1	Xerox 7970
<input type="radio"/> Another Physical Device	10.17.77.2	Ricoh 4456-sc
<input type="radio"/> Another Physical Device	10.17.77.4	Xerox 6679-mmb
<input type="radio"/> Another Physical Device	10.17.77.5	Xerox 7676
<input type="radio"/> Another Physical Device	10.17.77.6	Ricoh 4456-sc
<input type="radio"/> Another Physical Device	10.17.77.7	Xerox 6679-mmb
<input type="radio"/> Another Physical Device	10.17.77.8	Xerox 7676
<input type="radio"/> Another Physical Device	10.17.78.3	Ricoh 4456-sc

Showing 1 to 50 of 166 Physical Devices with no Card Readers currently assigned

< 1 2 3 4 >

Assign
Cancel

Table Display Variations Cont...

- 1
Single Select Row - this table includes radio buttons for each row, allowing the user to single select a specific row item. With multiple radio buttons, only a single item can be selected.
- 2
Modal Window Display - the context of this table display is in a modal window.

Note: since a very large number of records can be displayed (Devices), the table includes the Labels filter and pagination control that are in the page display version of the table (without single select capability).

Licensed Components

1	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	1/31/2017	component_5
	Equitrac Component6	Enabled	1/31/2017	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

Licensed Components

	Description ▾	Status/Quantity ▾	Expires ▾	Product Code ▾
	Equitrac Component1	Enabled	6/30/2017	component_1
	Equitrac Component2 (Users)	500 Users, 126 available	6/30/2017	component_2
	Equitrac Component3 (Devices)	100 Devices, 56 available	6/30/2017	component_3
2	Equitrac Component4	Enabled	6/30/2017	component_4
!	Equitrac Component5	Expired	1/31/2017	component_5
!	Equitrac Component6	Expired	1/31/2017	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

Table Display Variations Cont...

- 1 **Simple Table** - this table listing only has column sorting capability.
- 2 **Icon Indicator** - A row can have an icon indicator associated with it.

Table Display Variations Cont...

Print Driver Assignment		
OS Version	Print Driver	Print Driver Mapping Global Settings
Win 7 32-bit	None Specified <i>(Default)</i>	1 Edit
Win 7 64-bit	Xerox WorkCentre 7970 PCL6 <i>(Default)</i>	Edit
Win 8 32-bit	None Specified <i>(Default)</i>	Edit
Win 8 64-bit	Xerox WorkCentre 7970 PCL6 <i>(Default)</i>	Edit
Win 10 32-bit	None Specified <i>(Default)</i>	Edit
Win 10 64-bit	None Specified <i>(Default)</i>	Edit

- 1 No Sorting & Explicit Edit Button** - each row in the table has an associated Edit button; it is the only action the user can perform on a row item.
- 2 Icon Indicator** - An icon indicator is used - in this case to show when an item/row is divorced from its default properties.

Print Driver Assignment		
OS Version	Print Driver	Print Driver Mapping Global Settings
2 Win 7 32-bit	None Specified <i>(Default)</i>	Edit
⚡ Win 7 64-bit	Xerox WorkCentre 7970 PCL5 <i>(Override)</i>	Edit
Win 8 32-bit	None Specified <i>(Default)</i>	Edit
Win 8 64-bit	Xerox WorkCentre 7970 PCL6 <i>(Default)</i>	Edit
Win 10 32-bit	None Specified <i>(Default)</i>	Edit
Win 10 64-bit	None Specified <i>(Default)</i>	Edit

Table Display Variations Cont...

Discovered Card Readers - Total: 11

1

<input type="checkbox"/>	Serial Number ↕	Printer IP Address ↕
<input type="checkbox"/>	430000983	10.17.77.1
<input type="checkbox"/>	430000984	10.17.77.2
<input type="checkbox"/>	430000985	10.17.77.3
<input type="checkbox"/>	430000986	10.17.77.4
<input type="checkbox"/>	430000987	10.17.77.5
<input type="checkbox"/>	430000988	10.17.77.6
<input type="checkbox"/>	430000989	10.17.77.7

Discovered Card Readers - 3 of 22 Selected

2

<input type="checkbox"/>	Serial Number ↕	Printer IP Address ↕
<input type="checkbox"/>	430000983	10.17.77.1
<input checked="" type="checkbox"/>	430000984	10.17.77.2
<input checked="" type="checkbox"/>	430000985	10.17.77.3
<input type="checkbox"/>	430000986	10.17.77.4
<input checked="" type="checkbox"/>	430000987	10.17.77.5
<input type="checkbox"/>	430000988	10.17.77.6
<input type="checkbox"/>	430000989	10.17.77.7

1 **Total display** - Tables with no pagination can show a total record count.

Note - the pagination component displays record totals.

2 **Selected Total** - if the user has the ability to multi-select items in the table, the total count updates to show the number of items selected out of the total.

WAT-EQPRINTSRV



ACO	∨
ADS	∨
CAS	∨
CPS	∨
CSH	∨
DCE	∧
1	
Name	Value
∨ No Classification	
∧ XeroxDC	
LastAuthUpload	AQAAAn+EkRRpWal3UGU 
LastPoll	AQAAA+UgEEpWal3UTY 
DCS	∨
DRE	∨

Table Display Variations Cont...

- 1 Nested Table**- this table allows for multiple levels of expansion to disclose table rows.
- 2 Edit Row** - at the last expansion level, where final details are displayed, the user has the ability to edit a row item.

Table Display Variations Cont...

Report Type *

Select a report type from the grouped listing below.

1

^ Accounts

Type	Description
<input type="radio"/> Account Adjustment	Standard report for account adjustment
<input type="radio"/> Account Listing	Standard report for account listing
<input type="radio"/> Account Statement	Standard report for account statement
<input type="radio"/> Billing Code Authorization	Standard report for billing code authorization
<input type="radio"/> Color Quota Summary	Standard report for color quota summary
<input type="radio"/> Department Members	Standard report for department members
<input type="radio"/> Pay Station Deposit Center Account	Standard report for pay station deposit center account adjusting
<input type="radio"/> Adjustment	Standard report for user delegates

2

3

Report Type *

Select a report type from the grouped listing below.

Report Selected: Color Quota Summary

3

^ Accounts

^ Analysis

^ Detailed Activity

^ Summary Activity

^ Total Activity

- 1 Expandable Sections** - this table has one level of expansion to disclose associated table rows.
- 2 Single Select Row** - radio buttons are used to allow the user to select a single item in the table.
- 3 Selected Item Value Display** - the selected value is displayed at the top of the table, so that when sections are in a collapsed state the user knows what item has been selected.

Additional Designs

Single & Multiple Field(s) Display

1 User can select single field to display:

A From

- Field Name1
- Field Name2
- User's Email
- Expiry Day Count
- Field Name4
- Field Name5

B From

- 1 Single Field Selection/Display
- 2 Multiple Fields Selection/Display

2 User can select multiple fields to display:

A From

- Field Name1
- Field Name2
- User's First Name
- User's Last Name
- Field Name4
- Field Name5

B From

- Field Name1
- Field Name2
- User's Last Name
- Field Name4
- Field Name5

Selected field is not longer available in dropdown list of values

C From

1 User can select fields to display within custom text input (like a custom email message):

A Email Message Insert Field ▾

Your self-service account requires activation.
To activate your account please click the following URL: Activation URL ✕
Your account will expire after Expiry Day Count ✕ if not activated.

System fields are displayed like Labels tags within editable text.
Insert Fields dropdown control is in a disabled state until user interacts with text/fields.

B Email Message Insert Field ▾

Your self-service account requires activation.
To activate your account please click the following URL: Activation URL ✕
Your account will expire after Expiry Day Count ✕ if not activated.

Example of deleting a field.
User can edit text, insert a field, or select to delete a field.

C Email Message Insert Field ▾

Your self-service account requires activation.
To activate your account please click the following URL: |
Your account will expire after Expiry Day Count ✕ if not activated.

Upon field deletion, cursor is placed where the field was in the text body. Insert Field dropdown control is now active.

D Email Message Insert Field ▾

Your self-service account requires activation.
To activate your account please click the following URL: |
Your account will expire after Expiry Day Count ✕ if not activated.

- Field Name1
- Field Name2
- Activation URL
- Expiry Day Count
- Field Name4
- Field Name5

User can select a field to insert where their cursor is placed in the text body.

E Email Message Insert Field ▾

Your self-service account requires activation.
To activate your account please click the following URL: Activation URL ✕ |
Your account will expire after Expiry Day Count ✕ if not activated.

After field insertion, cursor is placed after the field placement.

1 Field Selection/Display within Custom Text

Future Items

Future Items

- 1 Field Level Help
- 2 Field Level Help with Contextual Link(s)
- 3 Right-click Actions

Device Prompts

Title



Field Level information text goes here. Include implications of what setting does....

1

Login Prompt



Release documents at assigned Control Terminal



Release documents from Pull Group



Use Pull Groups to lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh.

[Manage your Pull Groups >](#)

2

Pull Group(s)

Pull Group1 x

Pull Group3 x



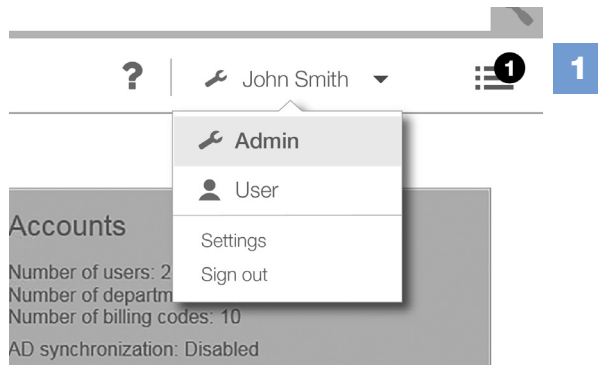
Pull Group2

Diagnostics

<input type="checkbox"/>	▼		Xerox WorkCentre 7659	10.17.77.8	Xerox	Xerox 7659	Yes	2nd Floor
<input checked="" type="checkbox"/>	▼		Xerox WorkCentre 7970		Xerox	Xerox 7970	Yes	2nd Floor
<input type="checkbox"/>	▼		Another Physical Device			Ricoh 4456-sc	No	1st Floor
<input type="checkbox"/>	▼		Another Physical Device			Xerox 6679-mmb	Yes	2nd Floor
<input type="checkbox"/>	▼		Another Physical Device			Xerox 7676	Yes	2nd Floor
<input type="checkbox"/>	▼		Another Physical Device			Ricoh 4456-sc	No	3rd Floor
<input type="checkbox"/>	▼		Another Physical Device			Xerox 6679-mmb	Yes	3rd Floor
<input type="checkbox"/>	▼		Another Physical Device	10.17.77.8	Xerox	Xerox 7676	Yes	1st Floor

- Edit
- + Control Terminal
- + Embedded Device
- + External Print Queue Device
- + Managed Print Queue
- + Nuance Card Reader
- Delete

Future Items Cont...



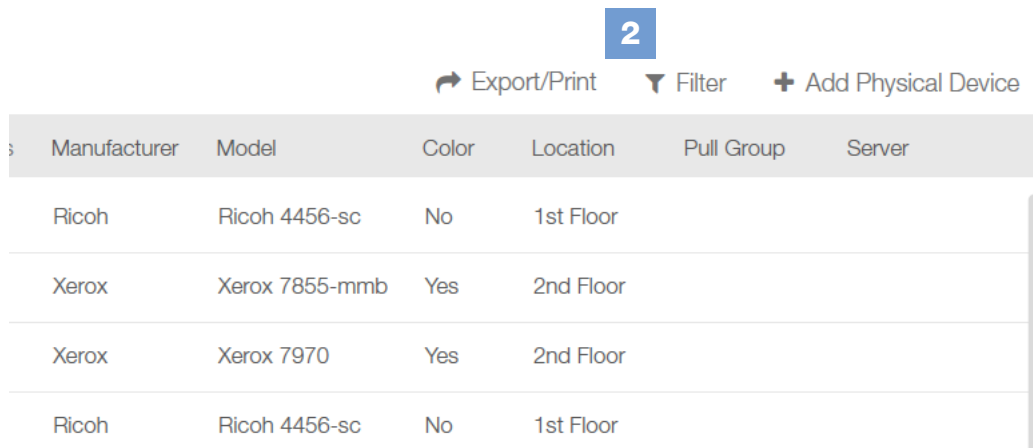
1

John Smith

- Admin
- User
- Settings
- Sign out

Accounts

Number of users: 2
Number of departments: 10
Number of billing codes: 10
AD synchronization: Disabled



2

Export/Print Filter Add Physical Device

Manufacturer	Model	Color	Location	Pull Group	Server
Ricoh	Ricoh 4456-sc	No	1st Floor		
Xerox	Xerox 7855-mmb	Yes	2nd Floor		
Xerox	Xerox 7970	Yes	2nd Floor		
Ricoh	Ricoh 4456-sc	No	1st Floor		

Rule Set
Optional

Select

Tracking Behavior

Track and record print transactions

DME Server
Optional

Select

3

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

- 1 Notifications/Messaging Panel
- 2 Export, Print, Filter for Table Displays
- 3 Display potential impact of field selection