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UX Training

Session 5 July 27, 2017

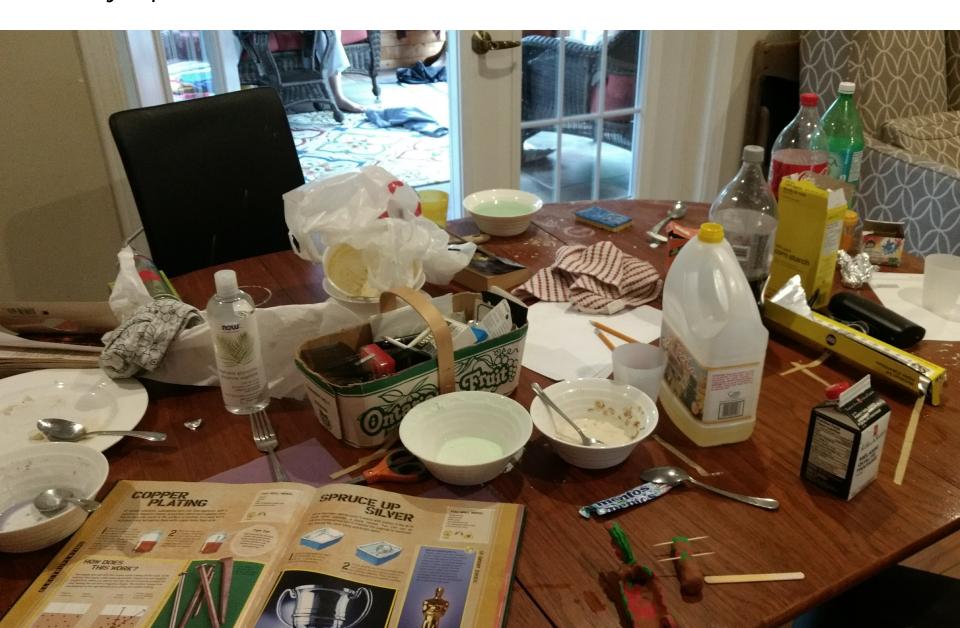


UX Training Session Topics

- First 2 sessions focus on Pattern Guide
- Session3: Foundations of User Experience/Information Architecture deep dive
- Session4: Visual Design/Copy (writing)
- Session5: General Best Practices
- URL access: <u>training.authenticinsight.com</u>
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UX: General Best Practices

Things will get messy, unless you make a constant effort to tidy up.



Small deviations between groups can result in big changes!



User Experience Consistency

- Ensure teams do things the same way (interactions, layout, styling)
- Custom tweaks (at team level) need to be shared with rest of Dev. Make sure tweak doesn't mess up things elsewhere
- One little change can have repurcussions.... diverging paths
- Same problem set can end up with 2 (or more) ways of letting the user interact. Not necessarily one way is preferred...just need to make sure there's consistency

New design variations seen so far:

- Icons displayed in sidebar nav (for embedded device types)
- Multiple tables on a page. Design recommendation: NO

Let the Pattern Guide be your Guide



User Experience Consistency

- We created the Pattern Guide to assist standard and consistent designs across the application
- We're doing this UX training
- Also have shared components
- Necessary to share any new UX designs (or new variations) between Dev teams

Modal Windows & Overlays

Modal Windows

When to use:

- Need to get user's attention
- Need user input
- Want to display additional information
- Want to keep the user in context of the parent/initiating page

When not to use:

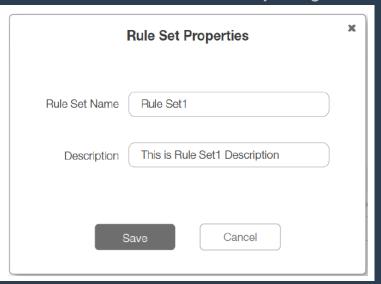
For field errors, success or warning messages.
 Keep these in page context. Use "toast" instead.

Modal Windows Examples

Dialog/confirmation



"Quick" info collection or display



Modal Windows

Window should have

- "Escape hatch"
 - Cancel button
 - Close button/icon
 - Keyboard accessibility to close (escape key)
- Descriptive title/primary message
 - Not too long
 - Use direct language
 - Button action tied to primary message
- Buttons
 - Button labels should have actionable, understandable words

Modal Windows - Size & Location

The goal is to keep the parent window context...

- Should not take up the whole screen view.
 Content should fit the window. If a scrollbar is needed, consider creating a new page instead.
- Location upper half of the screen because in mobile view modal may be lost if placed lower
- Size Try not to use more than 50% of the screen

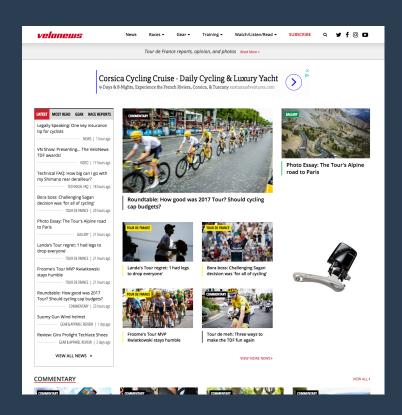
Modal Windows - Focus

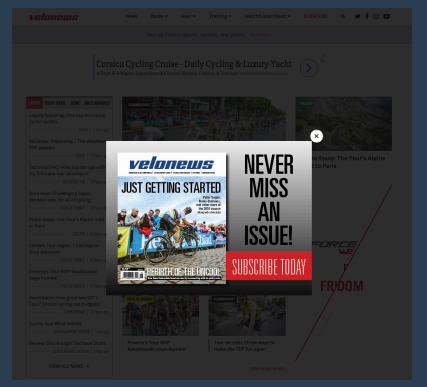
 Use a lightbox effect (disable/darken the background). Draws attention to the modal and indicates that the user can't interact with the parent page.

Accessibility Tip: put the keyboard focus on the modal

Modal Windows – User Initiated

Consumer sites sometimes pop open a modal window for advertising...





Modal Windows – User Initiated

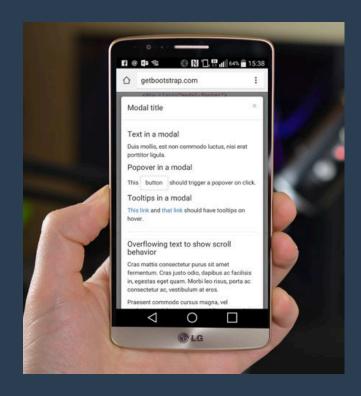
Don't surprise the user by popping up a modal in Business Productivity Apps.

Let a user's action trigger the modal (like a button click, selecting a link or options)

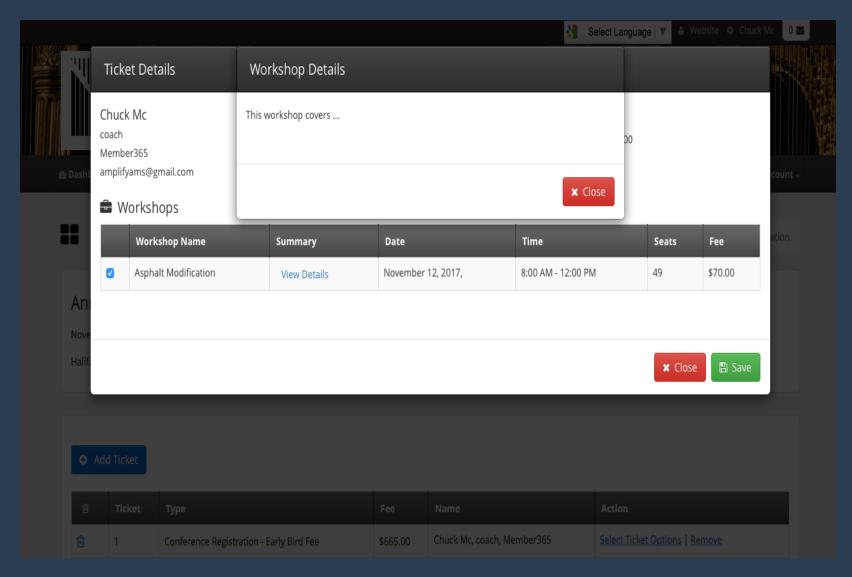
Mobile Modals

- Most often modals in mobile don't work well
- Viewing the content is difficult because modals either are too large, taking up too much screen space or too small
- Other option new screen (with back or close button)

 can lose parent context though

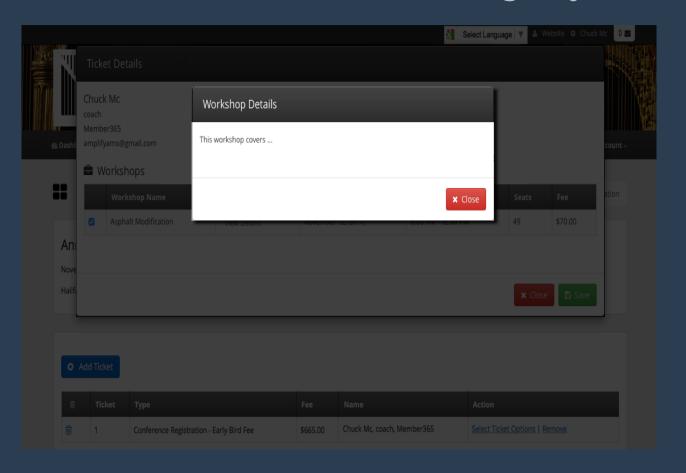


Goal: No Modal on top of Modal



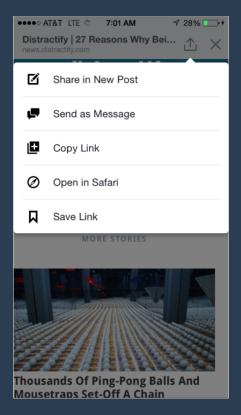
If you have to spawn another modal...

- Make sure 1st modal is in a background style state
- Position the second modal slightly lower



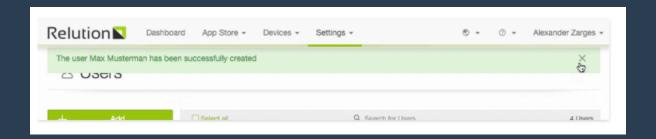
Overlay Example

- Modal experiences also called "overlays", lightboxes
- Tap/select outside window to close rather than "X" or Close button



"Toast" – Non Modal Overlay

- Small alert message that shows up in a and disappears on its own after few seconds
- Toasts used for errors, success or warning alert messages
- Provides feedback about an operation usually an activity that was initiated by the user
- Want to keep message in page context
- Message doesn't require specific attention that would prevent the user from continuing to use the application



Forms

Forms - Goal

 Get people to fill out the forms as easily & quickly as possible

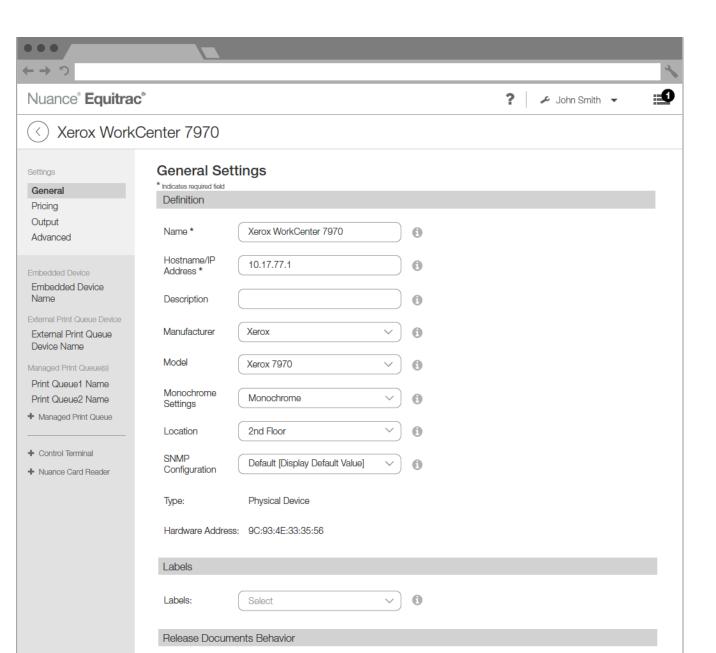
Prevent errors ahead of time

Form Field Layout & Order

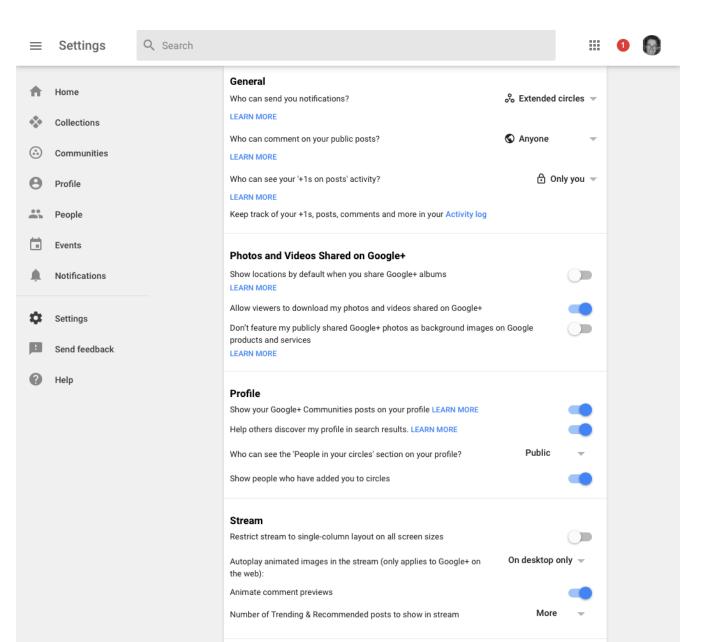
 Order fields logically from a user's perspective, not the application or database logic

 Group associated fields – within a section on the page, or use page navigation for grouping

Form Example: Field Grouping & Layout

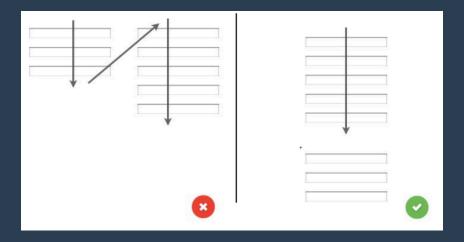


Form Example: Field Grouping & Layout



Form Field Placement

- Display fields in a single column (only ask one question per row)
- Reading in a Z pattern is more difficult for the user.
 Single column straight line down the page is easier for completion and comprehension.



Form Field Label Placement

Top Aligned

Pros

- Tends to reduce time for user to complete form easy to read input label & field together
- Good for responsive page layouts
- Works well for localization or long labels

Cons

Takes up a lot of vertical real estate

Top Aligned Label: Longer Label: Select Value Even Longer Label: One More Label: Value 1 Value 2

Right Aligned

Pros

Takes up less vertical real estate

Cons

- Bit slower to complete
- Label width variation creates stagger makes harder to scan

Label Longer Label Even Longer Label One More Label Walue 1 Value 2

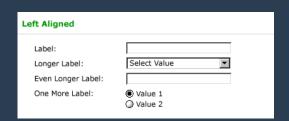
Left Aligned

Pros

- Takes up less vertical real estate
- Easiest for user to scan labels
- Good for forms with lots of optional fields or unfamiliar data (like preferences, settings)

Cons

Longest to complete – label & input not so closely associated



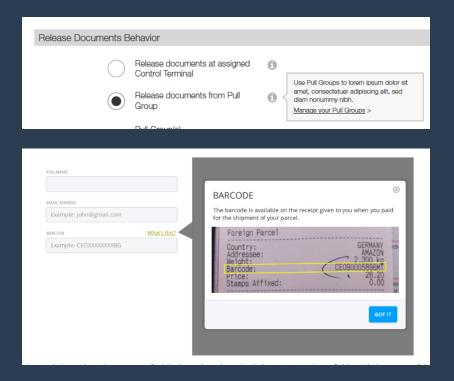
Floating Label Pattern

- Mobile pattern seen more and more in desktop environment
- Mostly in consumer sites that don't have forms with a lot of fields to fill in

Title Vintage 5	0
Price	Location (optional)
Description	

Form Text

- Make sure labels are short and descriptive makes scanning easier
- Labels aren't help or info text
- Provide help/information for unfamiliar fields



Form Field Selection Defaults

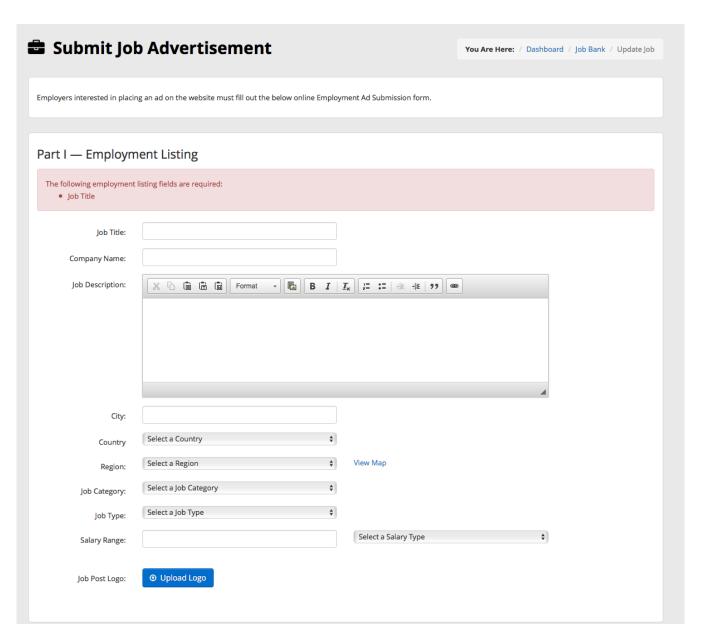
- Only have default selections for field values that a large portion of your user's will select (e.g. 90%).
 Otherwise, likely to introduce errors as users often just skip reading the field and keep the default value.
- If it's a required field, be really sure users will most often want the default selection
- Smart defaults (e.g. pre-filled fields based on a dependency, location...) can make form filling faster and more accurate. Be cautious – user will most likely keep the default value.

Form Validation & Error Handling

Minimize errors ahead of time

- Use clear & understandable labels
- Use real-time inline field validation (where possible),
 with informative error messages (WWAHHS)
- Input format requirements be as forgiving as possible
- Use input masks for formatting accuracy

Field Validation & Errors



- Minimize errors ahead of time
- Show required fields (or optional) fields
- Make sure errors are associate with field(s) in error. Use color, symbol and message to associate error with a field

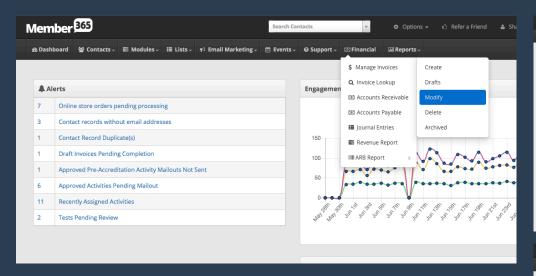
input with danger	
	×
Sorry, that username's taken. Try another?	

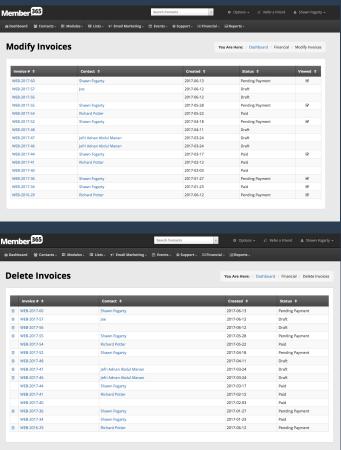
Tables

Tables - Object -> Action

Example of what NOT to do

Selecting the action before the specific object (to perform action on)

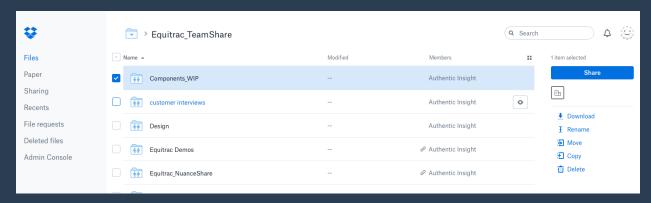




Tables - Object -> Action

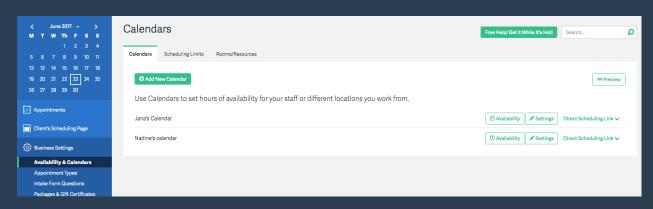
Examples of what to do

Selecting the object and then the action





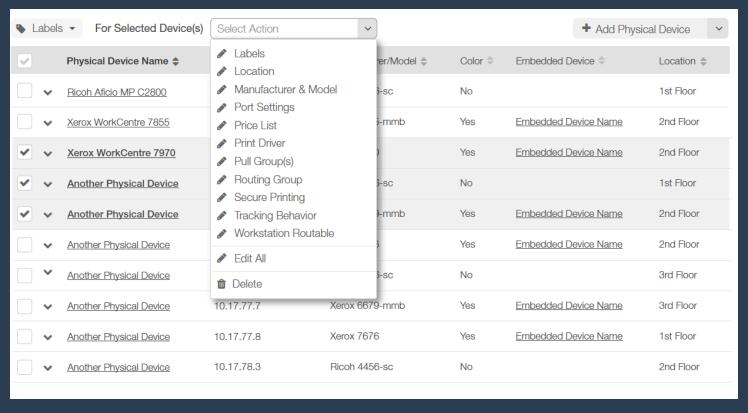
Dropbox



Tables - Object -> Action

Example of what to do

Selecting the objects and then the action



More Table Best Practices

- Fixed column header scroll below
- Sortable columns
- First column should be the most relevant
- If horizontal scroll keep first column in place as an anchor
- Expandable rows to view more details
- Filtering
- Searching (for large data sets)

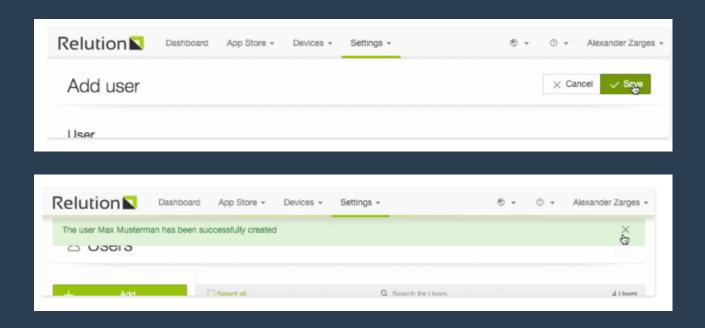
Good table design reference:

"Designing better data tables" by Andrew Coyle https://uxdesign.cc/design-better-data-tables-4ecc99d23356

Informative Feedback

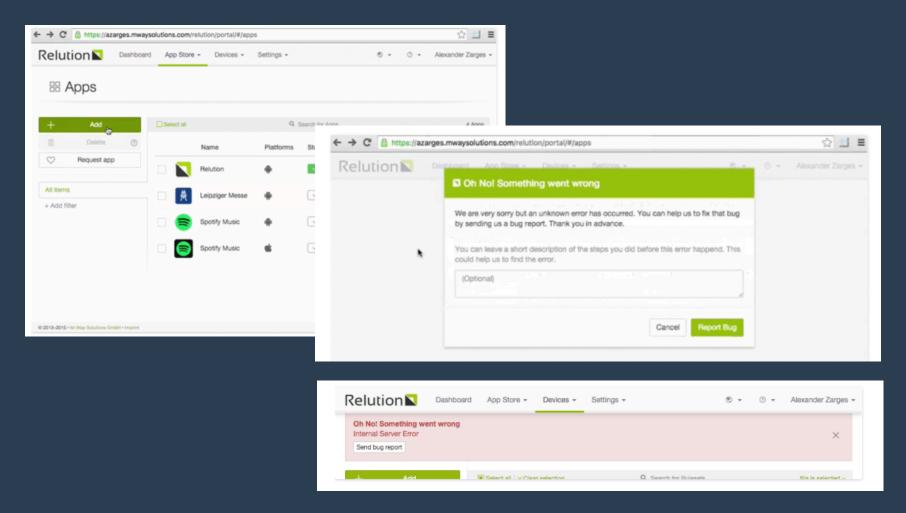
Provide Informative Feedback to the User

Use "toast" to let user know Save successful



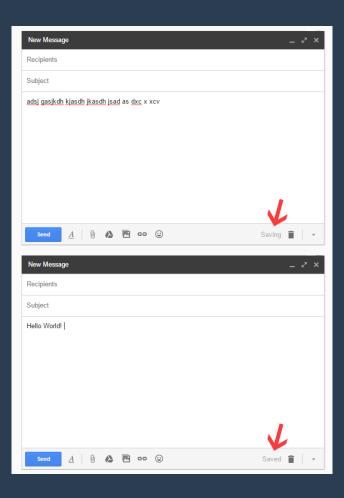
System/Server Error Feedback

System Error feedback examples



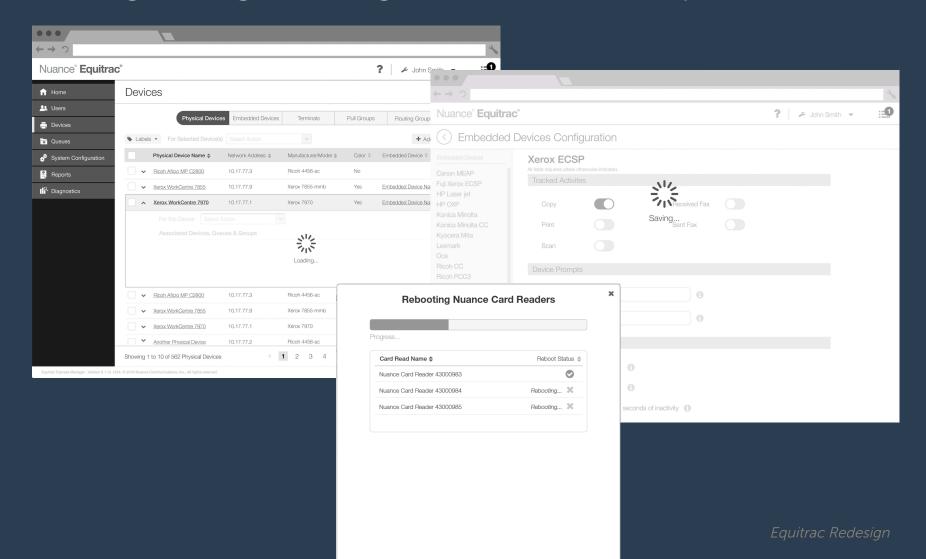
Status Information Feedback

Subtle status feedback provided to the user which doesn't interrupt their current task



Progress Feedback

Loading, Saving and Progress feedback examples



Understanding the User

Understanding the Equitrac User

- Don't assume a technically savvy user
- User is interacting with multiple admin tools/apps
- Keep in mind the user's level of understanding
 - No jargon
 - No tricky technical concepts

"Typical" System Administrator



- Degree in political science
- Got into sysadmin work through a summer job at an accountant's office

- Manages about 20-30 different systems, all of which work completely differently.
- Primary concern is that none of his systems ever go down.
- "We always get the crappy UIs. People think that we're programmers, but we're not. I don't understand half the stuff I'm managing."

Accessibility

Accessibility Best Practices



Solid structure

- Clear, logical and consistent designs benefit everyone
- Inconveniences like cluttered screens or navigation inconsistency become even bigger obstacles for people who are visually impaired

Keyboard navigation

- Not just tab order, also have keyboard shortcuts
- Simple test try using your app without a mouse....

Text clarity

- Contrast, size & spacing between lines
- Allow for font resizing

Accessibility Best Practices

Don't rely exclusively on color

 For touch/mobile – make sure clickable area big enough (at least 40x40 pt)

Provide a visual indication for keyboard focus

Good reference: https://www.uxpin.com/studio/blog/8-website-accessibility-best-practices-to-improve-ux/

Trends in UX Design

Today's Environment

Enterprise Business Productivity applications are following users' expectations from Consumer apps

- Strong grid
- Simple & minimalist design
- Lots of white space
- Style supports usability

Consumer vs Biz Productivity apps

Don't assume all Consumer UX design is appropriate for Business app design

Some things that have evolved from consumer apps you don't want...

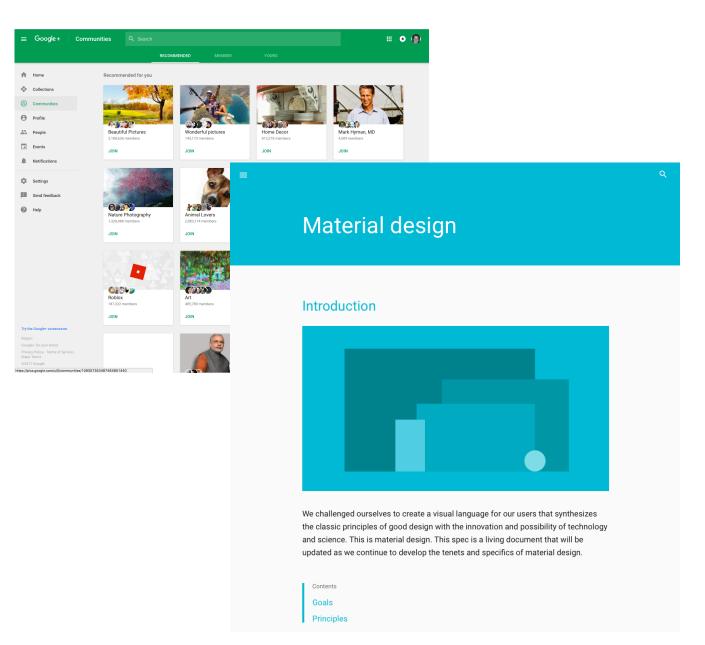
- Popups (marketing)
- Gamification

Consumer – want user to spend lots of time in app

Biz Productivity – want user to spend as little time in app

- Aim is to help user quickly achieve goals/tasks
- Anything that makes task take longer, not good

Google Visual Language (Consumer)



Google Material design

- -Minimalist
- Flat
- Strong grid

https://material.io/guidelines/
material-design/introduction.html

Contemporary Design Examples

Light text – often not enough contrast for good usability

Toggle switch vs check box (mobile standard)

 Flat & simple iconography. Icons once reflected skeumorphism (looked like real world objects)

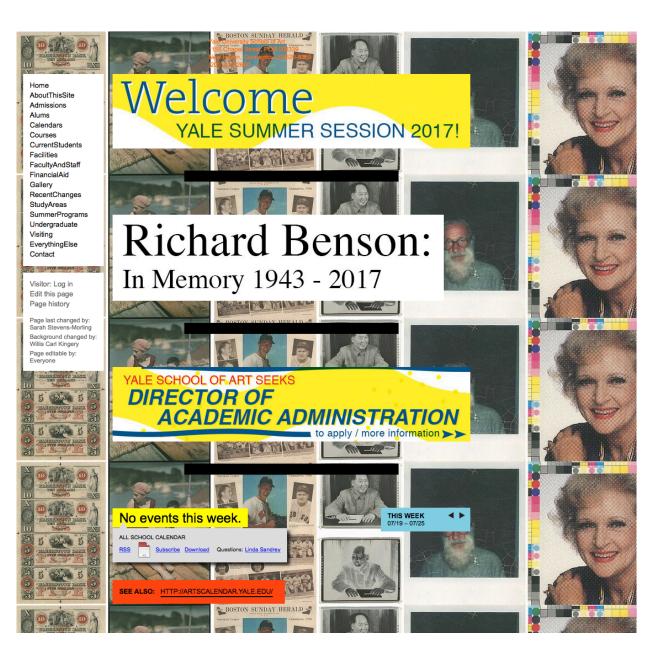
New Trends

New trends in some consumer web sites don't always reflect "good" design

- "Art" vs Usability
- Reminiscent of the '90's
- Good reference is New York Times Article: "The Latest in Web Design? Retro Websites Inspired by the '90s"

https://www.nytimes.com/2017/07/17/fashion/90s-web-design.html

New Trend - Retro



Yale School of Art

- Reminiscent of the '90's
- "Anti-design brutalism"
- "Art"?

New Trend – Really Really Minimalist



UX Training Recap

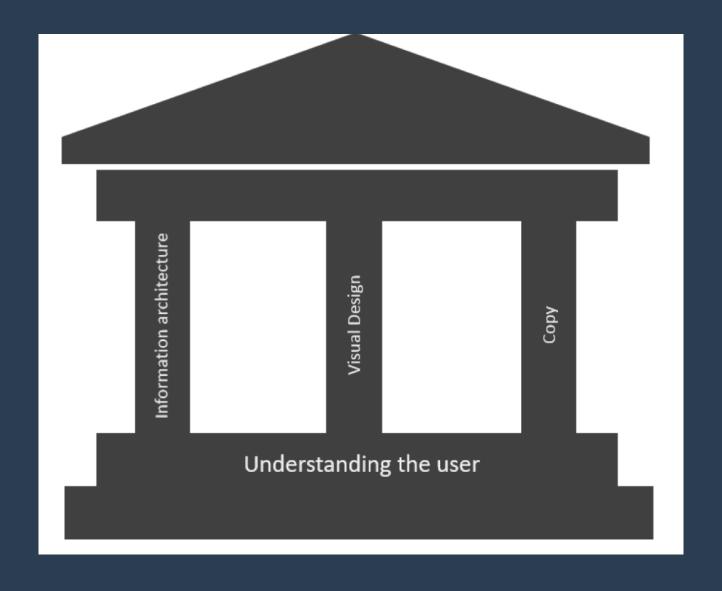
Pattern Guide Sessions 1-2

Reviewed Equitrac Pattern Guide

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

Foundations of UX / IA Deep Dive

Session 3



Foundations of UX / IA Deep Dive Session 3

User Experience

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

Information Architecture

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

Visual Design & Copy

Session 4

Visual Design

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

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

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

Visual Design & Copy cont...

Session 4

Copy (writing)

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

Death by a Thousand Cuts

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

General Best Practices

Today's Session 5

- Strive for UX Consistency
- Modal Windows
- Forms
- Tables
- Informative Feedback
- Understanding the User
- Accessibility
- Trends in UX Design

UX Training Sessions Are Posted

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