IBM Cúram Social Program Management

User Inteface Guidelines

Version 6.0.4

Note

Before using this information and the product it supports, read the information in Notices at the back of this guide.

This edition applies to version 6.0.4 of IBM Cúram Social Program Management and all subsequent releases and modifications unless otherwise indicated in new editions.

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Chapter 1

Introduction

1.1 Purpose

This document describes the user experience guidelines that should be followed when designing or implementing an IBM Cúram Social Management Platform application. This document does not attempt to describe the user experience design process, nor does it explain how to use infrastructure components to develop an application.

This document describes the user interface guidelines in chapters dedicated to each of the components of the user interface. In addition, the appendix contains a UI checklist highlighting common implementation mistakes.

1.2 Components of the Cúram User Interface

The user interface consists of the following components:

- Application Banner
- Appliction Tabs
- Shortcuts Panel

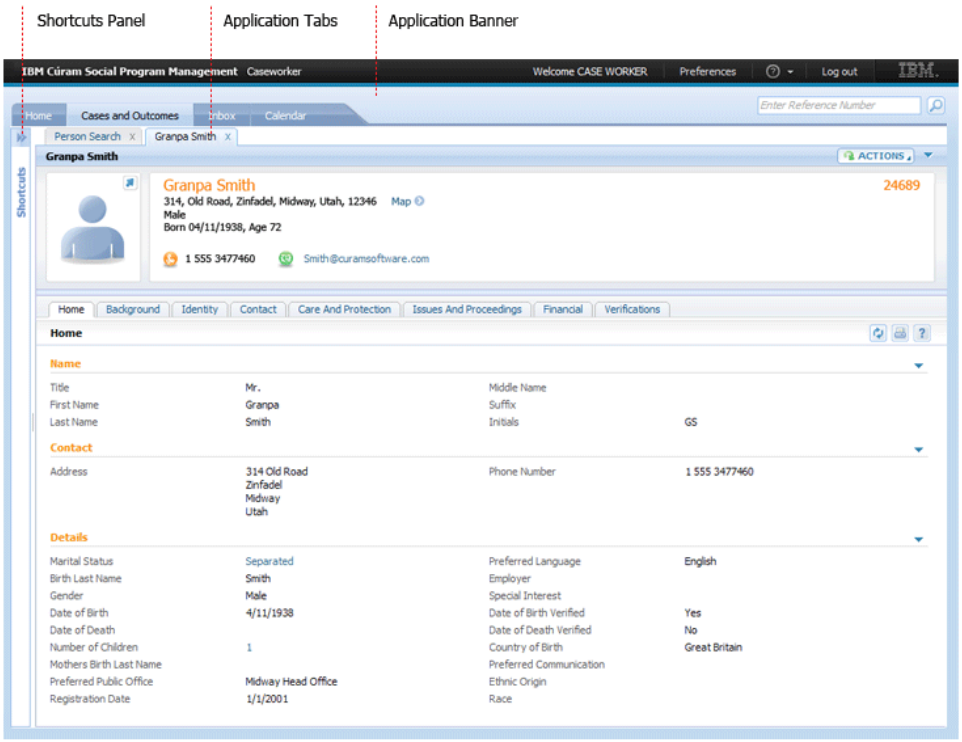

Figure 1.1 Components of the User Interface

Each of these components are described in the following chapters and form the structure on which this document is based.

The minimum resolution for viewing is 1024 x 768. When testing, the screen resolution should be set to this. Please refer to the IBM Cúram Social Program Management Supported Prerequisites document for a list of browsers on which to test the application.

Chapter 2

Application Banner

2.1 Introduction

The application banner is displayed at the top of the user interface. It contains branding and application view information along with details of who is currently logged on. The components of the application banner are:

- Application Name
- User Role Details
- Welcome Message
- Application Menu
- Application Sections
- Application Search
- IBM Logo

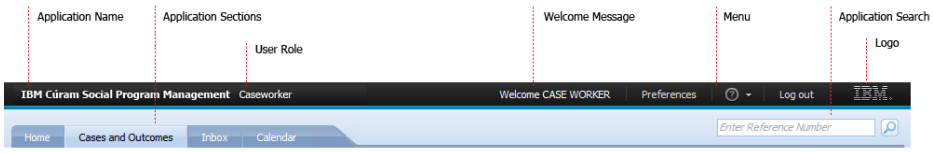

Figure 2.1 Components of the Application Banner

2.2 Application Name

This must be set to 'IBM Cúram Social Program Management' for all internal applications. Customers may change this to their project name.

2.3 User Role Details

This must be set to the name of the user role for which the application has been specifically designed. This is the name that describes the role the user is fulfilling, not an application name, e.g. Administrator rather than Administration Workspace. The user role name must use title style capitalization (e.g. Eligibility Worker, not Eligibility worker).

2.4 Welcome Message

The welcome message is located to the left of the application menu and should be followed by the name of the user that is logged in. For example, the welcome message should read 'Welcome Paul Murphy'. The user's full name should always be used, not the user's ID.

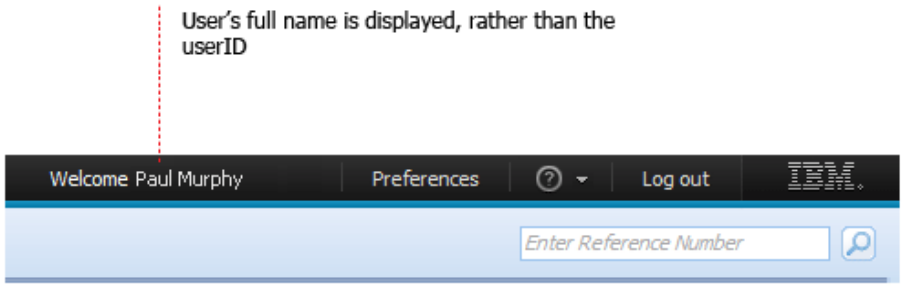

Figure 2.2 Welcome Message

2.5 Application Menu

The application menu is located on the top right of the banner. It displays the following menu items:

- Preferences
- Help
- Log Out

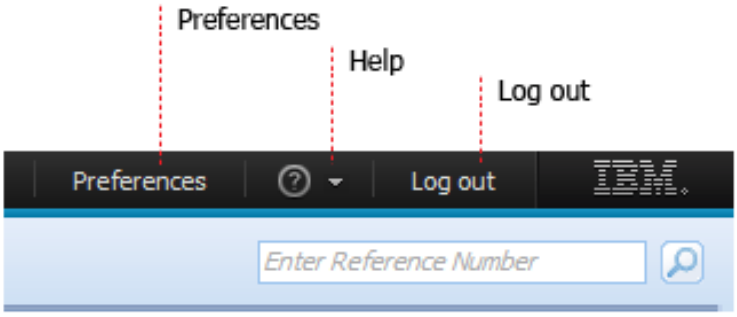

Figure 2.3 Components of the Application Menu

It is recommended that they are displayed at all times for internal agency applications.

2.5.1 Preferences

Clicking on the preferences menu item launches the preferences modal dialog. At present this modal allows the user to set their time zone. Additional content may be added to this dialog to meet the needs of a particular project.

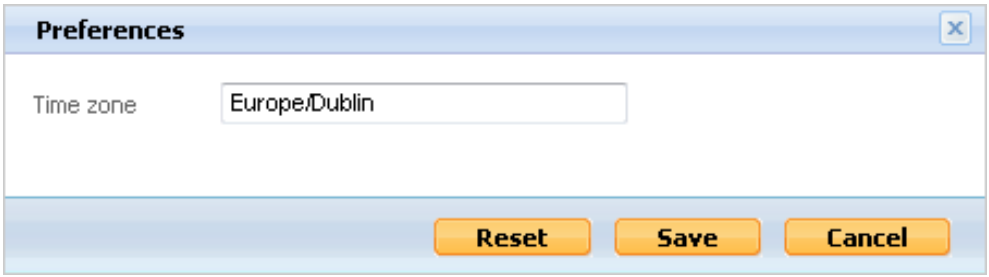

Figure 2.4 Preference Modal Dialog

2.5.2 Help

Clicking on the help icon displays a dropdown that enables the user to launch the Online Help and the About Box.

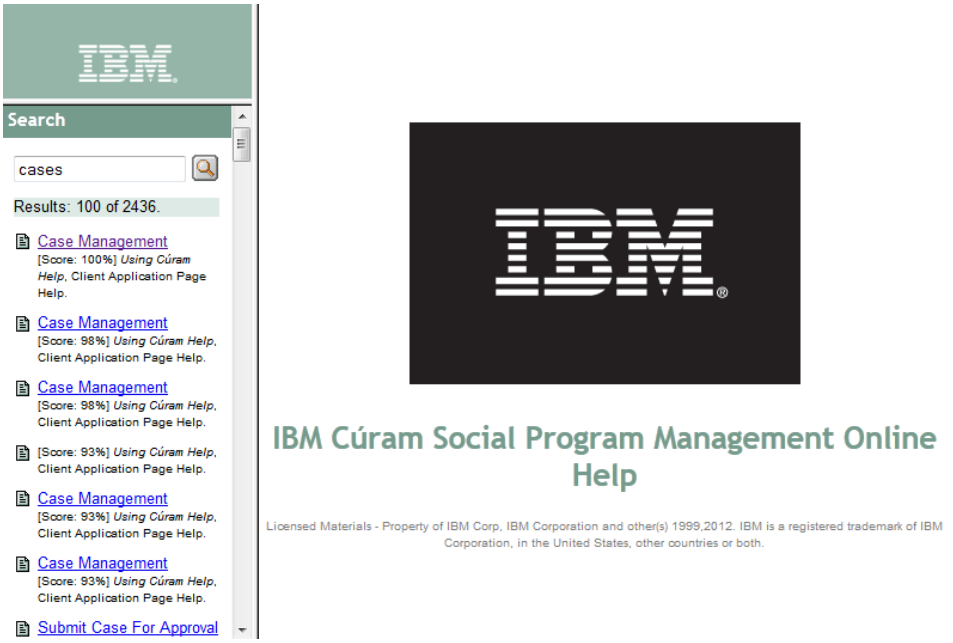

Figure 2.5 Online Help

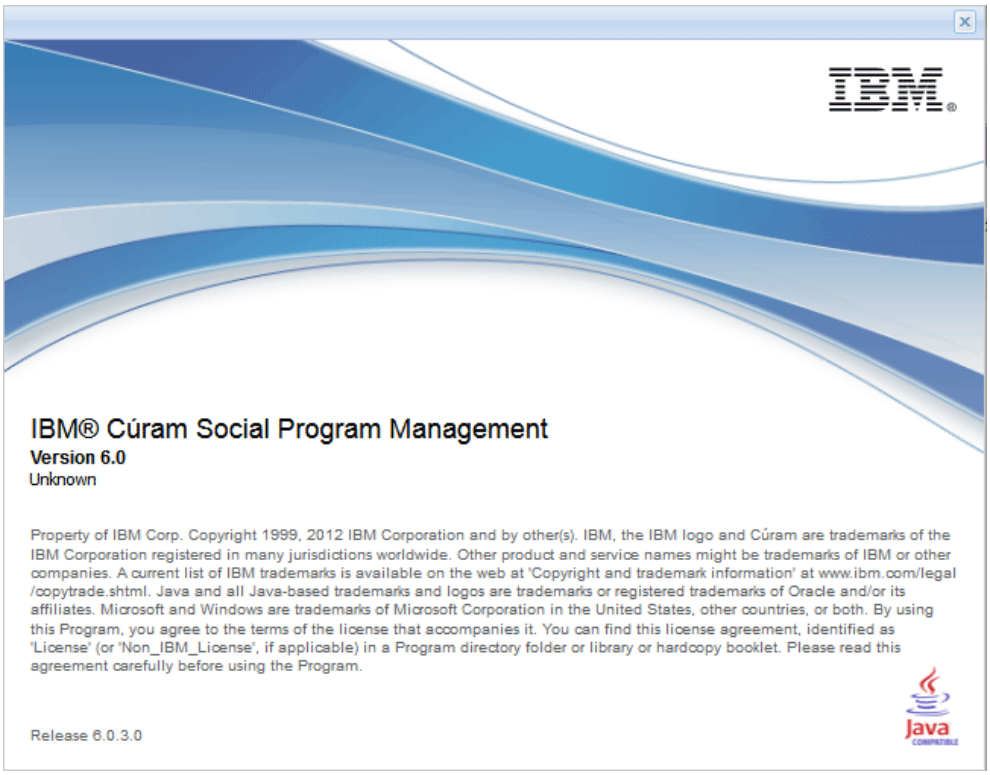

Figure 2.6 About Box

2.5.3 Log Out

Clicking on the log out menu item displays the log out screen.

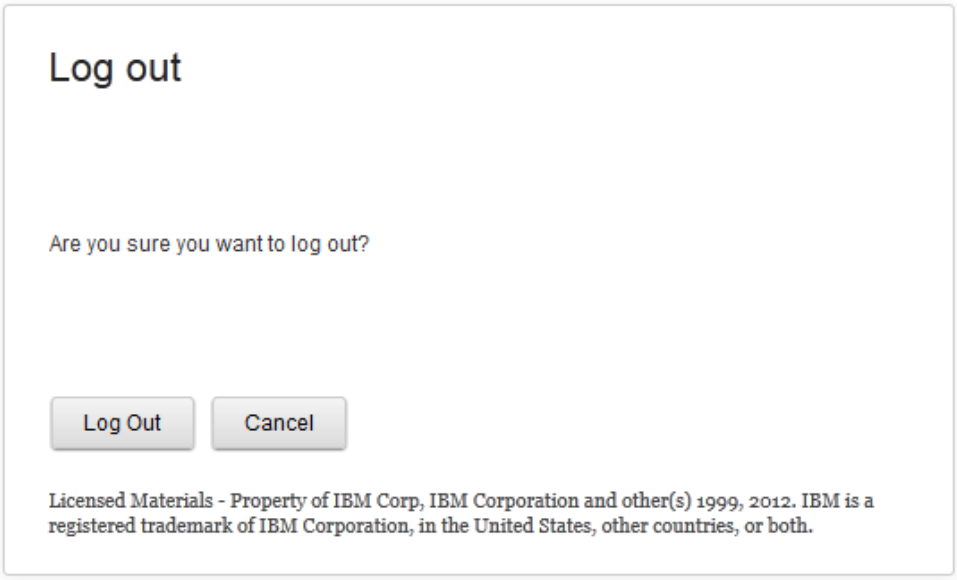

Figure 2.7 Log Out Screen

2.6 Application Section Buttons

The application section buttons are located on the bottom left hand corner of the application banner. There are five application sections:

- Home (Mandatory)
- Workspace (Mandatory)
- Inbox (Optional and Pre-Defined)
- Calendar (Optional and Pre-Defined)
- Reports (Optional)

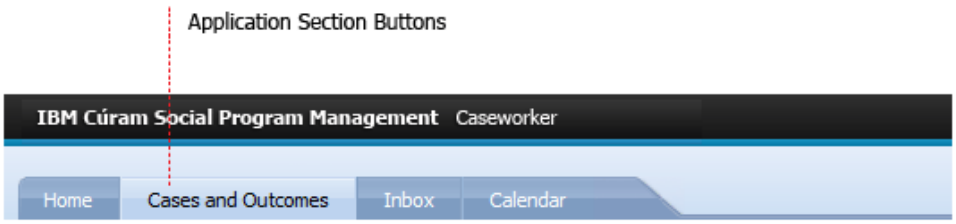

Figure 2.8 Application Section Buttons

In each application view these sections appear in the same order and with the same names. The only exception is the 'Workspace' section, as it must

have a title appropriate to the application view.

Your application must include a 'Home' and 'Workspace' section. The 'Inbox', 'Calendar' and 'Reports' sections are optional. The content and configuration of the 'Home', 'Workspace' and 'Reports' sections must be defined for your application. The content of the 'Inbox' and 'Calendar' sections are pre-defined.

The user enters an application section by clicking on the appropriate section button or by clicking a link that opens a tab in a section. The section button within which the user is working is highlighted.

2.6.1 Home

The home application section button navigates the user to the home section of the application. This section, which consists of the user's home page, is automatically displayed when the user logs in. The content of this page is defined to meet the needs of a specific user role. It should consist of a number of pods that provide the user with access to their most important and relevant activities. Upon identification of a specific item of work, the user clicks on a link to open a tab in the appropriate section.

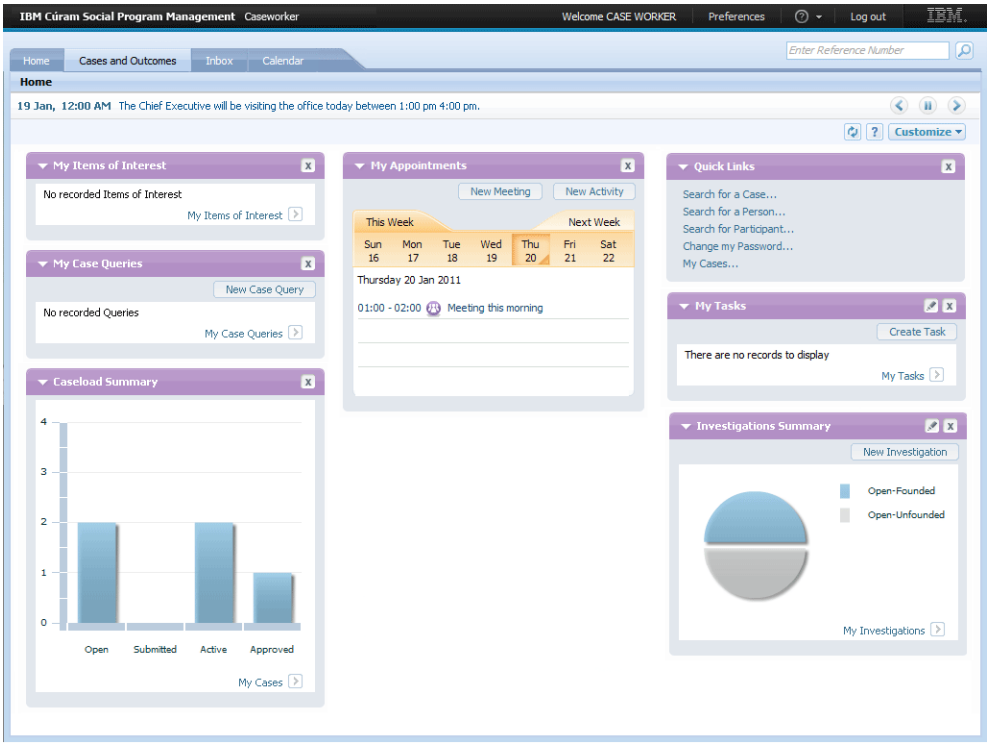

Figure 2.9 Sample Homepage

Whilst it is possible to define a shortcuts panel for the home section, generally this should not be done. A combination of the home page pods with links, and an optional action menu should be used to provide the functionality available in a shortcuts panel.

The complete functionality of the home page and pods will be described later in this document.

2.6.2 Workspace

The workspace section button navigates the user to the workspace section of the application. The title of this section should be set to something descriptive of the type of work being undertaken by the user. For example, the title of the workspace section in an application designed for eligibility workers may be set to 'Clients and Cases', or if you are an investigator it would be 'Investigations', etc. The text on this section button should use title style capitalization.

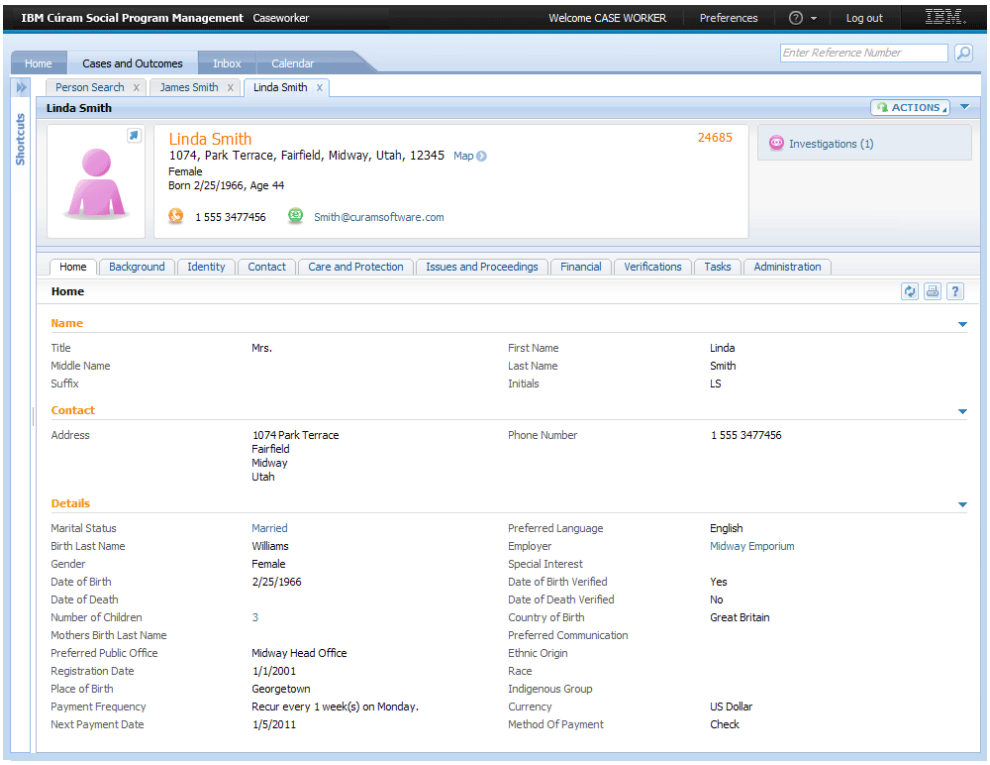

Figure 2.10 Sample Workspace Screen

The workspace area is where the principal user activities are undertaken, for example; manage cases, complete intakes, carry out investigations, etc. It can display multiple tabs and also a shortcuts panel. Once tabs are opened in this section, their display is persisted across sessions. For example, if you log out and log back in again, the tabs you had open from the previous session will still be displayed.

2.6.3 Inbox

The inbox section button navigates the user to the inbox section of the application. In this section the 'My Tasks' tab is permanently displayed. This tab allows the user to view and manage their task workload. The 'My Tasks'

tab is an anchored tab. An anchored tab has no close button and cannot be dismissed by the user.

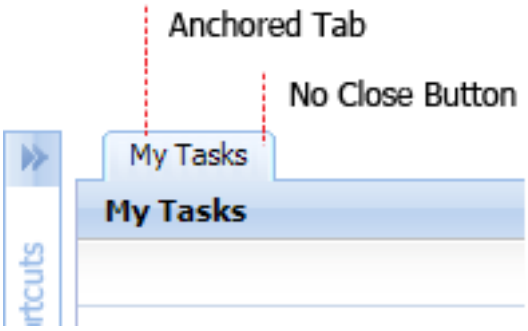

Figure 2.11 Inbox showing the 'My Tasks' anchor tab

The tab contains the tasks the user is currently working on and also any deferred tasks. The actions menu allows the user to get tasks from available tasks/work queues within the system. They can also create new tasks and set up inbox preferences.

A shortcuts panel is displayed to the left of the page. It allows the user to navigate to other parts of the inbox and also perform commonly used functions. The panel also displays the work queues the user is currently subscribed to. This allows them to find and manage tasks and also subscribe to new work queues.

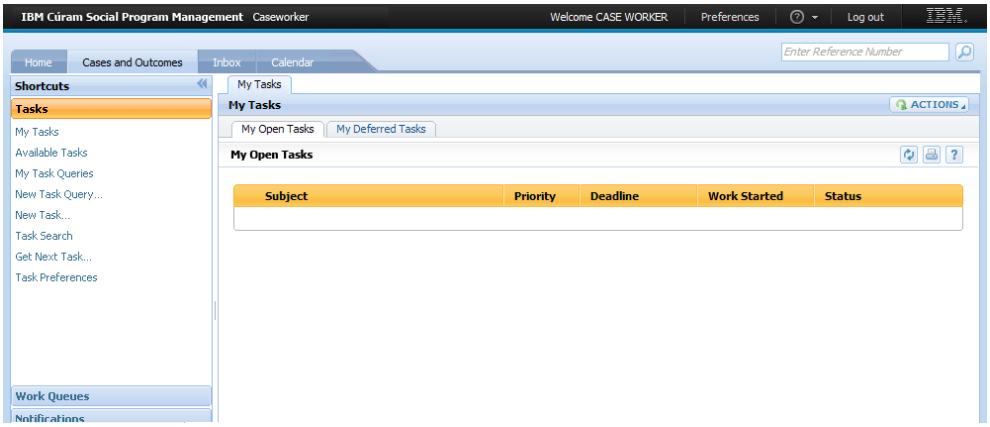

Figure 2.12 Inbox Section with the Shortcuts Panel expanded

2.6.4 Calendar

The calendar section button navigates the user to the calendar section of the application. This consists of two tabbed pages, one displaying a calendar view and another displaying a list view.

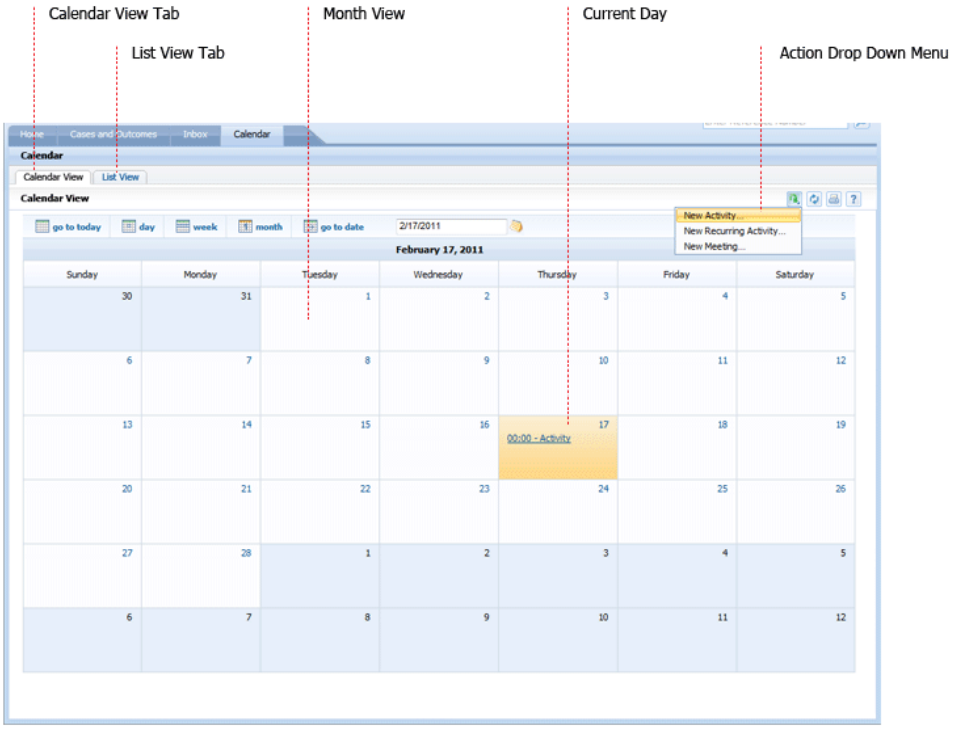

Figure 2.13 Inbox showing the 'My Tasks' anchor tab

Calendar View

By default the calendar monthly view is displayed. Calendar view buttons allow the user to decide which view they want to display (day, week or month). There is also the option to go to today's date or to a user's specified date.

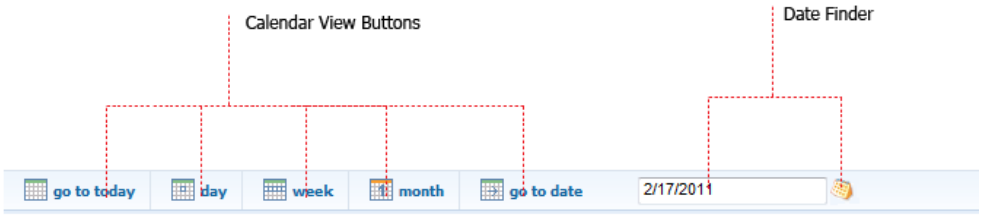

Figure 2.14 Calendar View Buttons

An action menu is displayed on the right of the title bar. This allows the user to add activities and meetings. Clicking on an item in the menu launches a modal dialog. The user can then enter the relevant information which will get displayed on the calendar.

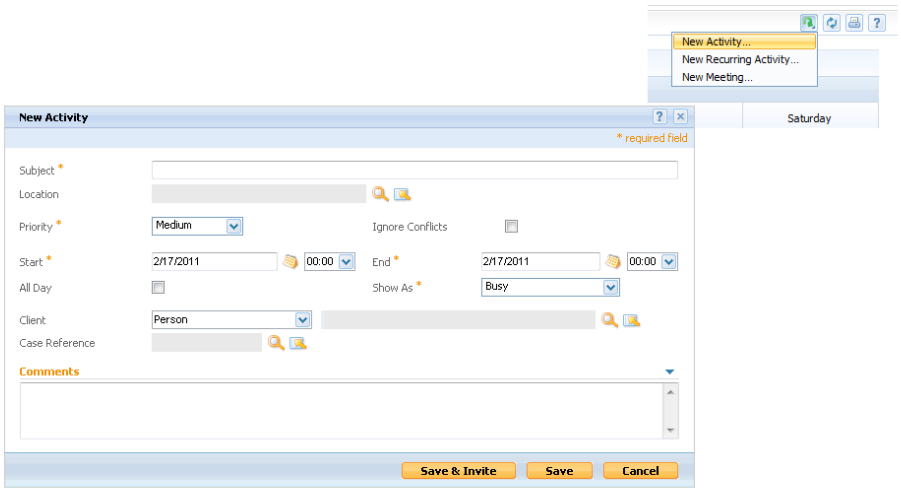

Figure 2.15 Calendar Modal Dialog

The user can populate the calendar with instances of meetings and activities. Clicking on this linked text launches a modal containing the meeting or activity information.

List View

The list view enables the user to edit activities and meetings and also record meeting minutes. These events are presented in list format, enabling the user to click on the list action menu to edit the information. The user can also add more events by clicking on the page action menu on the title bar.

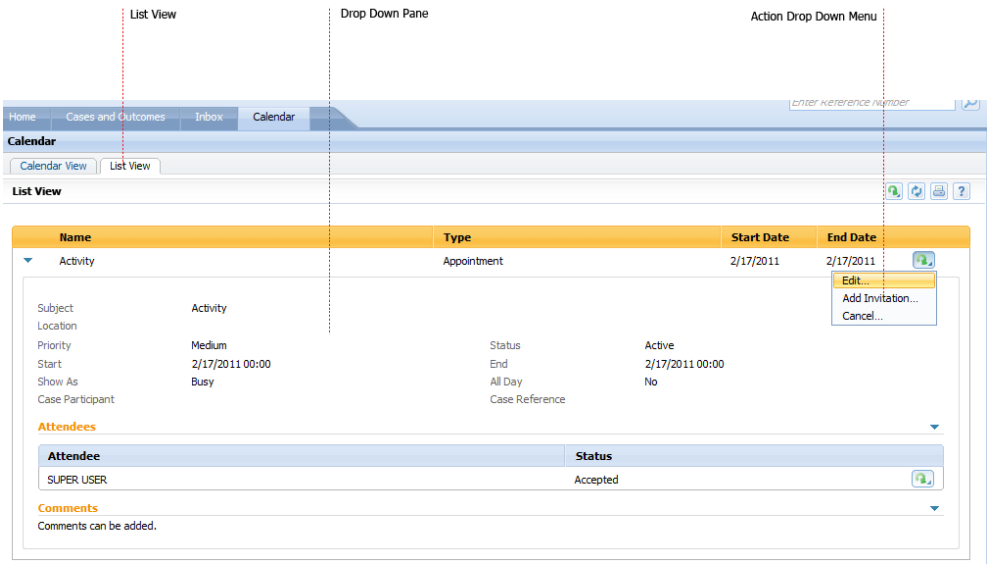

Figure 2.16 Calendar List View

2.6.5 Reports

The reports section button navigates the user to the reports section of the application. This area contains the system's reports.

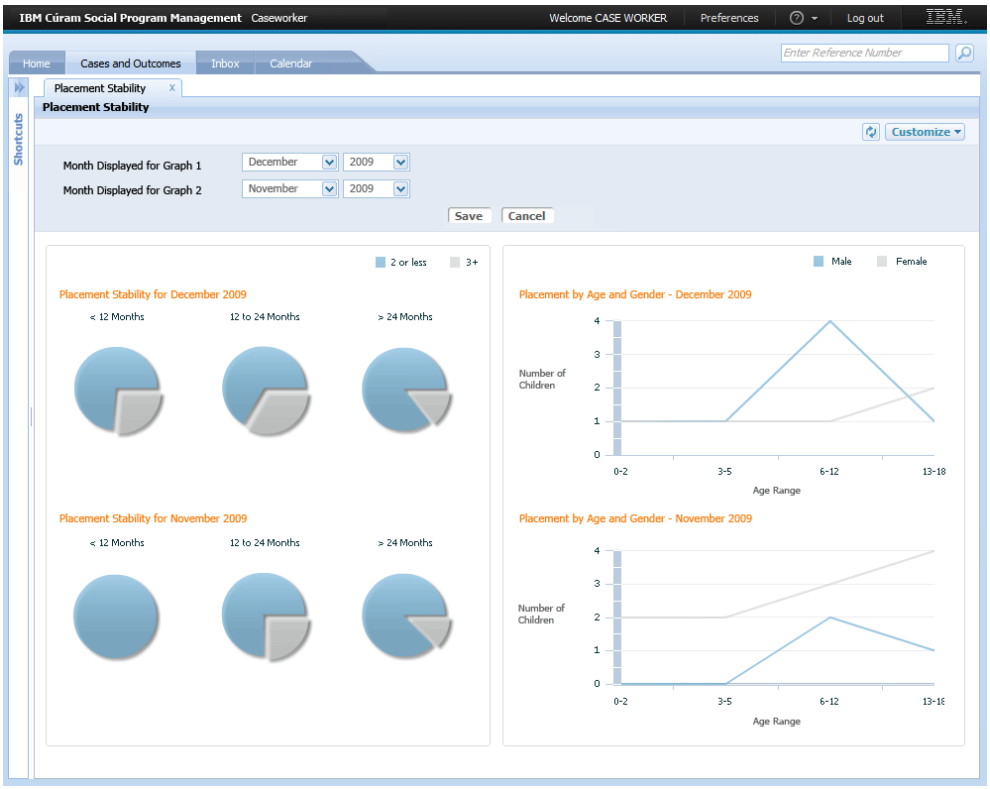

Figure 2.17 Reports Page

A shortcuts panel is displayed to the left of the screen. This enables the user to navigate to a specific report. The panel contains category buttons. Clicking on a category button displays a list of relevant reports. For example, clicking on the 'Cases' category button displays the case related reports. The user can click on this linked text to open the required report. Each link references a single report or dashboard.

2.7 Application Search

The application search is located on the right of the banner. This provides quick search functionality from anywhere within the application.

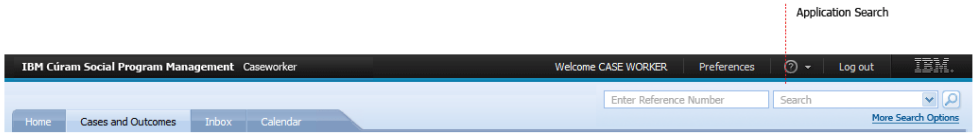

Figure 2.18 Application Search

The Application Search contains four main components:

- Application Search Text Field
  - This is used to enter the value for which the search will be executed, e.g. SSN, Case Reference etc. Default text may be specified for this field, e.g. Enter Reference Number
- Application Search Drop Down (Optional)
  - This is typically used to make the search more focused, e.g. Person, Case, etc. It may include an 'All' option, however, your search must be built to accommodate this. For example, the results list must be capable of displaying different types of business objects, e.g. People and Cases
- Application Search Button
  - This button is used to invoke the search operation
- 'More Search Options' link (Optional)
  - This is an optional link to a page which enables a more detailed search to be carried out. This page opens as a tab in the workspace section

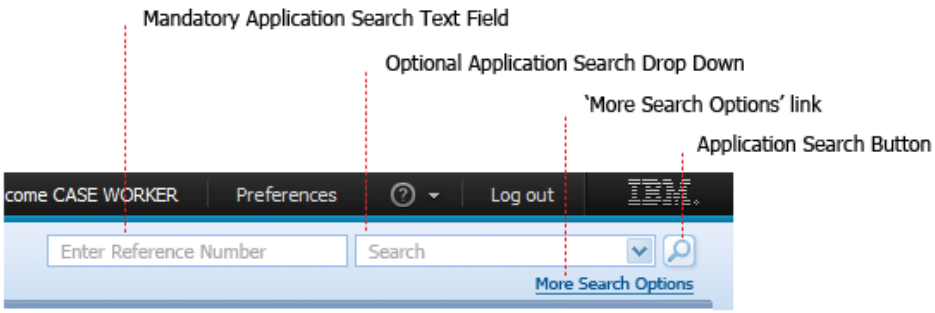

Figure 2.19 Components of the Application Search

In response to a search request a new tab containing the results is opened in the workspace section. If the user searched 'All' or if there is no filter drop down displayed then the tab displayed should be called 'Search Results'. If a single value is returned the user should be brought directly to that page rather than the search results page. For example, entering a unique case reference number should open the appropriate case tab directly.

The designer of each application view defines the appropriate search criteria for their user. The application search is an optional component of the UI as not all applications will require this function.

2.8 IBM Logo

The IBM logo is displayed on the right of the banner.

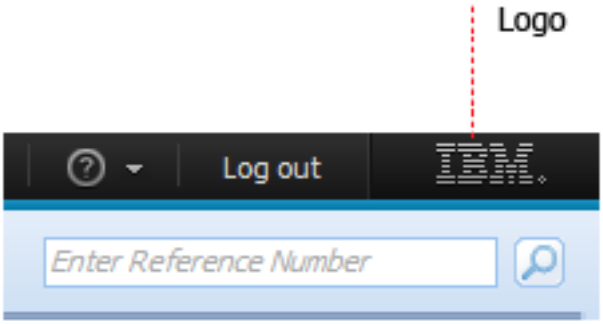

Figure 2.20 IBM Logo

Chapter 3

Application Tabs

3.1 Introduction

Application tabs form the main building blocks on which the user interface is built. They display the main content of the application and are where a user does most of their work. Typically a tab represents a significant real world business object, for example, a person or a case. Multiple tabs can be opened, however only one tab can be displayed. This tab appears in the foreground of the other tabs. A tab is launched by the user clicking a link. Most tabs are displayed within the workspace section of the application.

There are four main components of a basic tab

- Tab Title Bar
- Context Panel
- Navigation Bar
- Pages

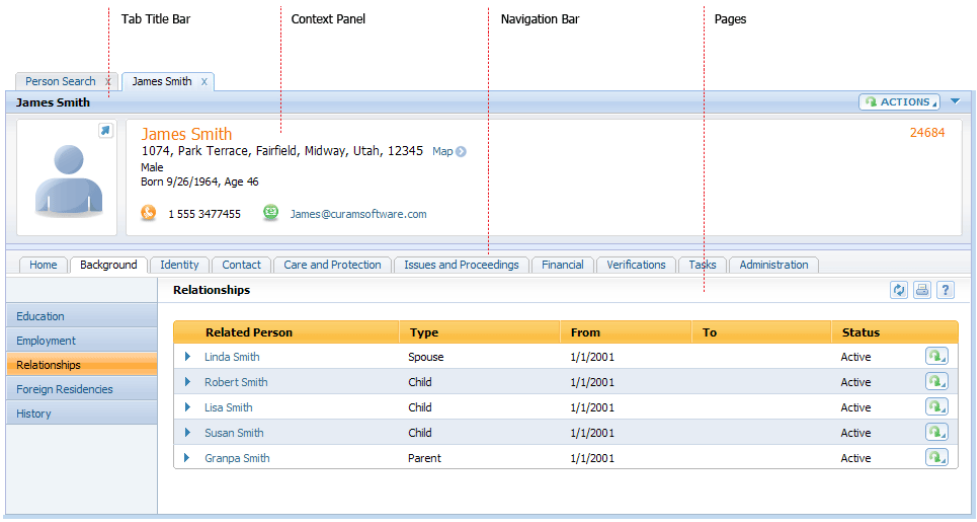

Figure 3.1 Application Tab

3.2 Tab Title Bar

The title bar is displayed at the top of the tab. It contains:

- Tab Name and Close Button
- Tab Title
- Tab Actions Menu
- Context Panel Dropdown Toggle

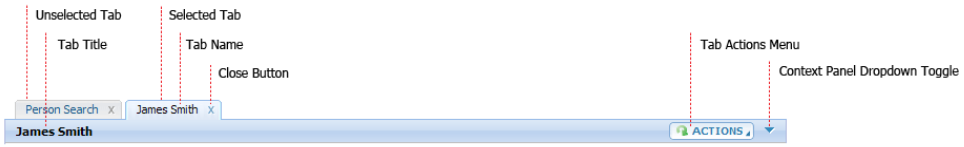

Figure 3.2 Tab Title Bar

3.2.1 Tab Name and Close button

The tab name is displayed on the tab at the top of the tab title bar. The tab name must reflect the content of the tab. If there is only one instance of a particular tab, e.g. 'My Cases' or 'Person Search', the tab name can be fixed. A tab name should be dynamic if there is more than one instance of the tab. For example with a person tab, the name should be the person name, e.g. 'James Smith', rather than 'Person'. The context of the tab should be used rather than the object name.

In certain instances it is necessary to display the object type as well as the

context for the tab, for example, 'Social Assistance (James Smith)'. Both are needed in order to identify the correct tab. When including the context on a tab name, it is preferable that the context is displayed in brackets. Use of context is only necessary in certain circumstances as the tab title does not have to be unique.

To the right of the tab name is the close button. Clicking on this button dismisses the tab. If the tab is an anchored tab the close button is hidden. Users can open as many tabs as they require. Once the number of tabs exceeds the width of the screen, scrollbars appear on the left and right.

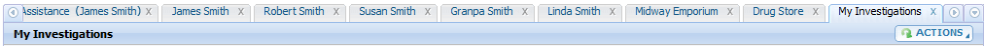

Figure 3.3 Tab Title Bar with Scrollbars

3.2.2 Tab Title

The tab title is displayed on the left of the tab title bar. The tab title must reflect the content of the tab and be the same as the tab name.

3.2.3 Tab Action Menu

The tab action menu is situated on the right of the tab title bar. Clicking on the menu button displays the tab action drop down menu. This menu displays the most commonly used actions that apply to the object.

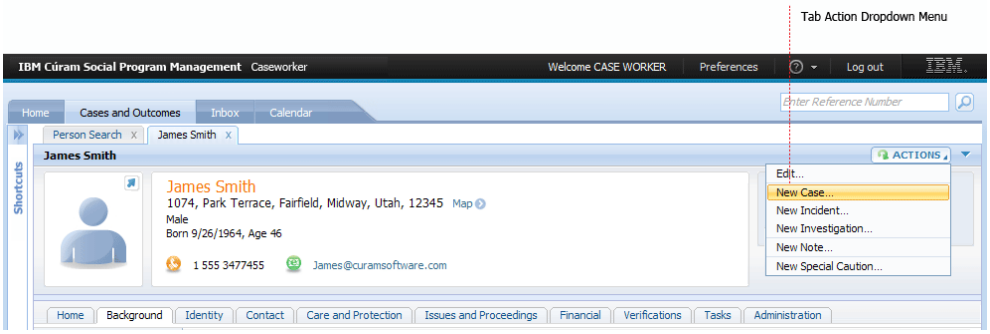

Figure 3.4 Tab Action Menu

Tab Action Menu Layout

- Use separators to group related menu items
- Edit functions should be displayed at the top of the menu
- Create functions such as 'New...' should be displayed below edit functions
- Destructive items such as 'Delete...', should be displayed at the bottom of the menu

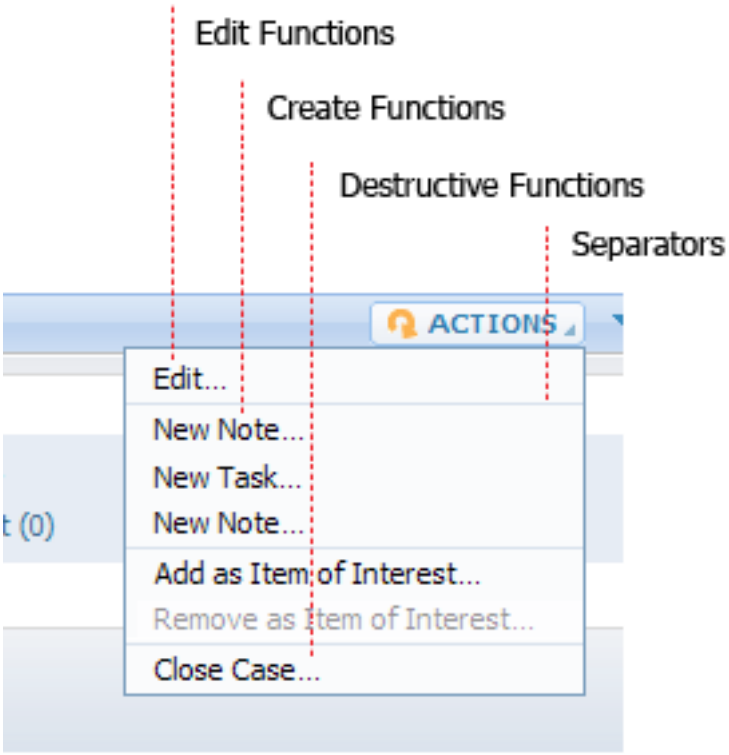

Figure 3.5 Separators and Grouping of Related Menu Items

- Where applicable, start each menu item with a verb
- Disable rather than hide menu options. Only hide the options if it is never possible for the item to appear in the menu, e.g. the component is not installed
- Use ellipses when further action is needed by the user to complete an action. These are also required for confirmation style modals. They are not required when the user does not have to do anything else to complete the action. For example, clicking a 'View' menu item opens a modal that allows the user to view data only. An ellipsis should not be used in this case

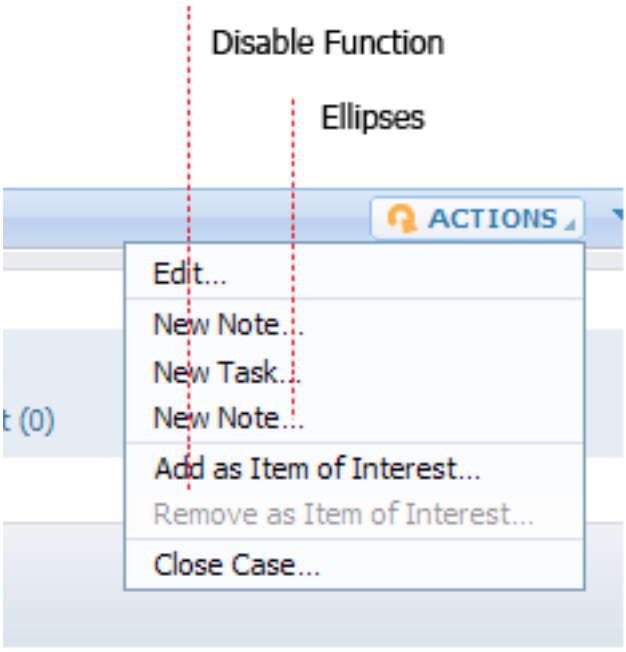

Figure 3.6 Disabled Item on Dropdown Menu

- The text of the menu should be similar to the title of the modal dialog it opens. For example, an item called 'New Case' should open a modal called 'New Case' or 'New Assistance Case'

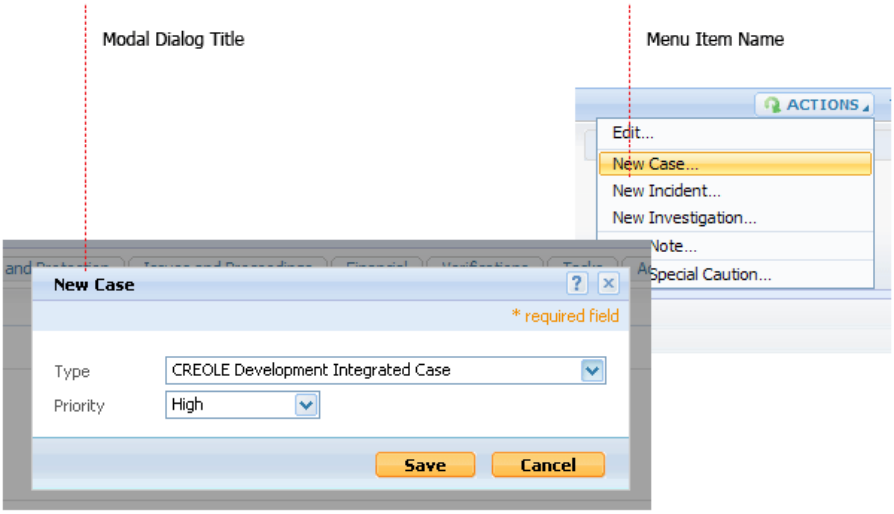

Figure 3.7 Menu Item Text the same as the Title of the Modal

- Use hierarchical menus sparingly. Only if you feel the menu is getting too large

The tab action menu should not contain items that can be accessed by navig-

ation bar tabs. When displaying a home page, the tab action menu should contain any page level actions. Page level action buttons or menus should not be present on a homepage.

3.2.4 Context Panel Dropdown Toggle

The context panel dropdown toggle enables the user to hide or show the context panel.

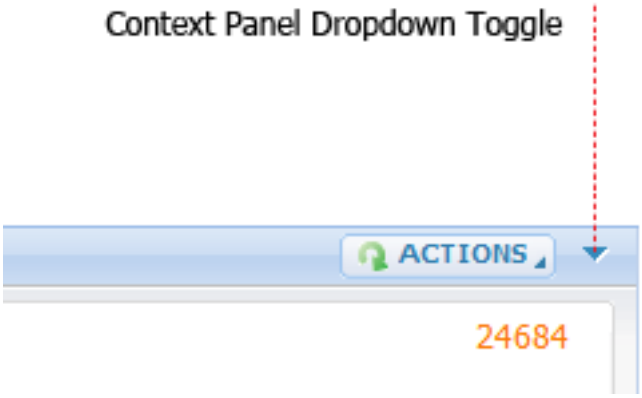

Figure 3.8 Context Panel Dropdown Toggle

3.3 Context Panels

Context panels are displayed directly below the title bar and are an optional component of the tab. As mentioned above, the user can decide to hide or show the panel by clicking on the dropdown toggle button. The context panel presents the user with the most important information regarding the object. This information gives the user a context, so that when they navigate away from the home page they still have the relevant information available to them.

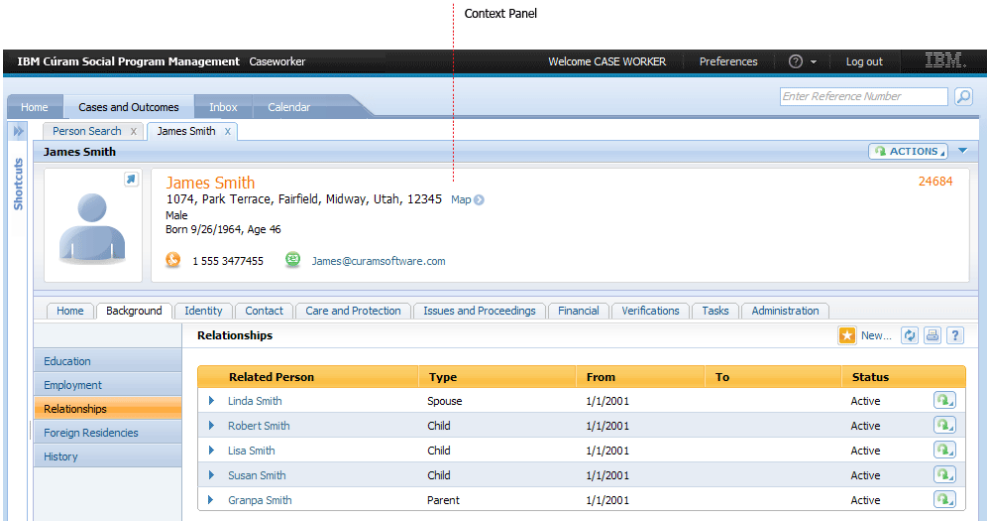

Figure 3.9 Context Panel in Interface

The design of the context panel is very flexible. As the context panel is rendered the developer is free to decide what content to display and which way to display it.

3.3.1 Context Panel Layouts

If a context panel is specified for a tab, the panel must be designed to meet the needs of that particular object. Although each context panel is designed specifically for the object represented by the tab, there are certain design standards that must be adhered to in order to maintain consistency across the application.

- Photo panels are displayed on the left
- Most information is placed in the centre white information panel
- Links are placed on a blue panel to the right of the white information panel. Graphs are also generally placed here
- Text on the context panel should not be abbreviated
- All labels and fields need an extra 30% space to allow for localisation

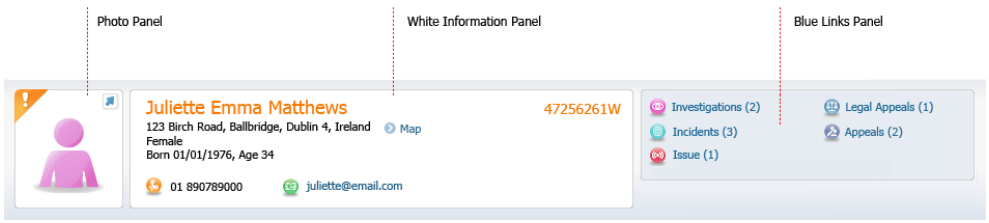

Figure 3.10 Standard Components of a Context Panel

Person Photo Panels

A common element in context panels is the person photo panel. Although each panel is designed to meet the specific needs of the object, there are some layout guidelines which should be followed:

- The special caution icon (if present) is displayed on the top left corner of photo panel. Clicking on this displays a pop up containing special caution information for the client and enables the user to access the special cautions modal window.
- The person's name is displayed above the person photo or icon. This text is a hyperlink to the person homepage. If the name is too long to be displayed in the allocated space the name is cropped and does not use an ellipsis
- The citizen context viewer (CCV) button is displayed on top right corner of photo panel. Clicking on this launches the citizen context viewer
- A photo or icon forms the main content of the photo panel. If a photo is not available an icon is displayed. These icons are gender and age specific, for example:
    - Adult female (pink adult silhouette)
    - Adult male (blue adult silhouette)
    - Young girl (pink child silhouette)
    - Young boy (blue child silhouette)
    - If the gender is not known the icon is grey. If neither gender nor age is known the icon displayed is the grey adult male
- Text can optionally be displayed under the photo/icon. The text displayed depends on the requirements of the context panel. For example, for an integrated case, the relationship to the primary client is displayed along with the age of the client. If the client is under 2 years old the age is displayed in months. If the client is deceased, the word deceased should replace the age. Ellipses appear if text is cut off in this area. Cutting off or wrapping of text should be avoided at all times
- Icons can be displayed to the right of the images. Examples of these include: incidents, investigation, assessments and sanctions

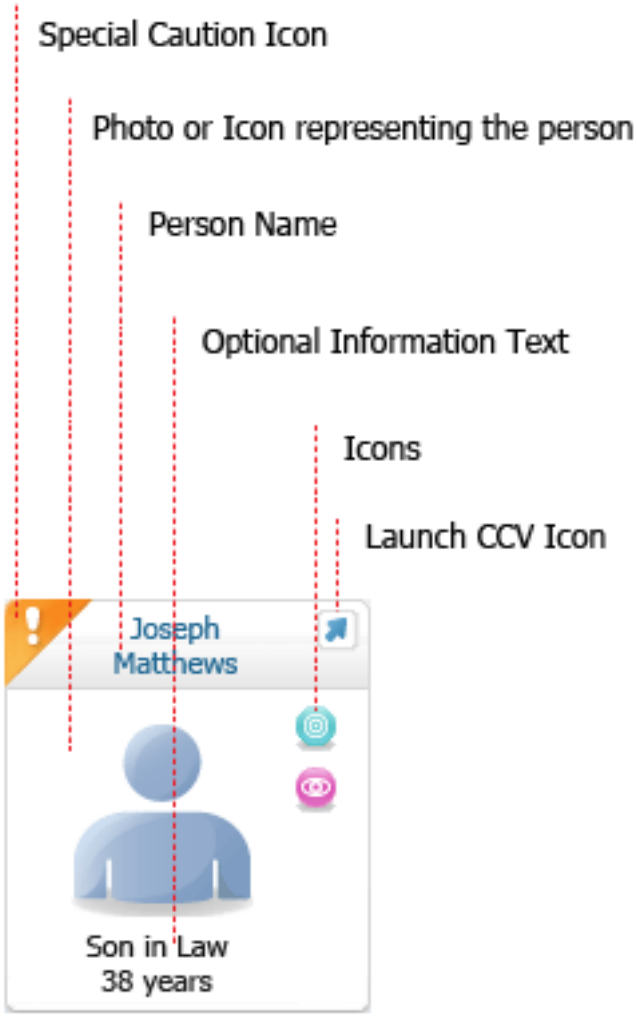

Figure 3.11 Person Photo Panel Layout

When an icon is clicked a popup is displayed showing additional information and giving the user access to the relevant page. The user can click on the close button to dismiss the popup.

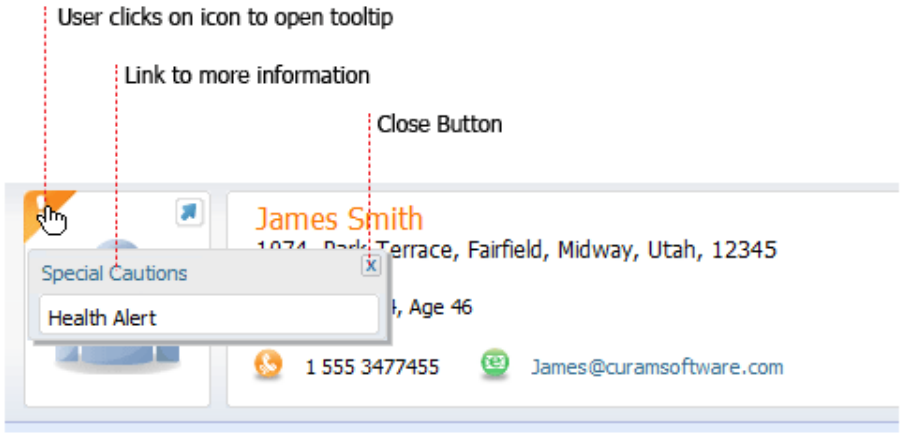

Figure 3.12 Context panel with Special Caution Popup

In certain context panels multiple photo panels are displayed together. When more than one person is displayed, the user has the ability to view information in a photo or list view. Photo and list buttons are displayed to the left of the first photo panel. These allow the user to select their preferred view. On opening the context panel, the photo view is set by default.

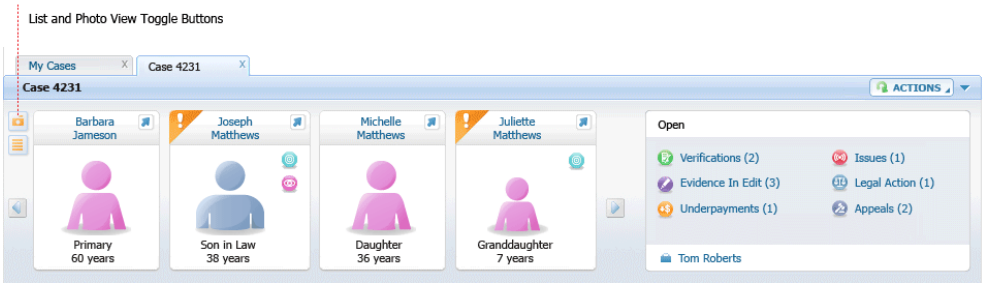

Figure 3.13 Photo View

Figure 3.14 List View

When more than one photo is displayed the list option appears. The person photo panel layout defaults to a specified width in order to accommodate the list. This must be no less than three photos wide. If only two photos are displayed this width still must be set to display at least three photos.

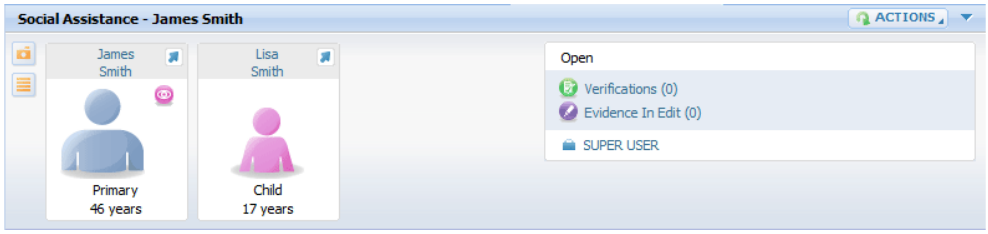

Figure 3.15 Context Panel Photo View - 2 Members

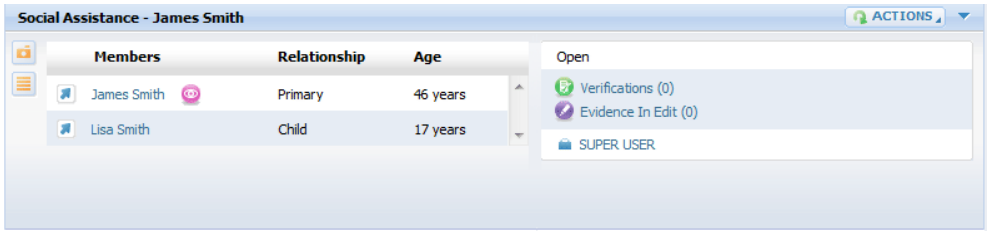

Figure 3.16 Context Panel List View - 2 Members

When the maximum space allocated for the photo panels is exceeded, scrolling arrows appear to the left and right of the first and last photo. This enables the user to scroll through the photo panels.

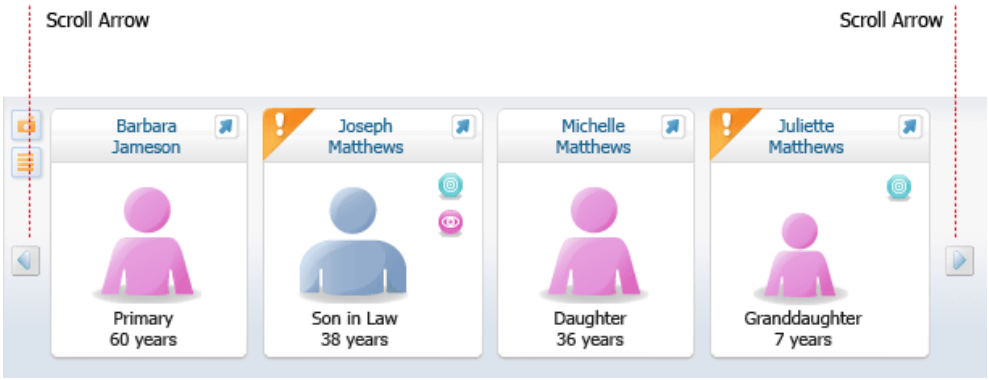

Figure 3.17 Photo Panels and Scrolling Arrows

White Information Panel

The white information panel is displayed to the right of the photo panel. The context panel name is displayed at the top left of the white information panel and the reference number is right aligned to the right of the panel. If the panel is too narrow the reference number can be displayed below the context panel name.

Consistent with the design of clusters, context panel label text is grey and value text is black. In order to correctly size the width of the columns, an extra 30% space should be added for localization to the longest label. Space should also be allocated for the margin between the label and the value.

A blue strip can be displayed along the bottom of the white information panel. This strip generally displays date related information.

Figure 3.18 Components of the White Information Panel

The design of the content in the white information panel is quite flexible. It can display columns of text and numerous icons. For example, in an employer context panel, phone, fax, email and map icons are displayed at the bottom. Or, if the white information panel is particularly wide, content can be displayed in two columns.

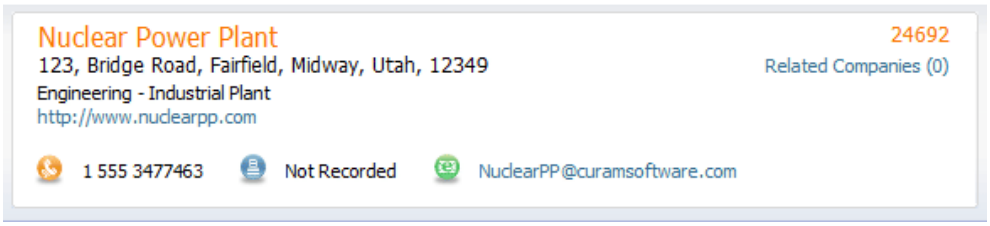

Figure 3.19 Screenshot of Employer Context Panel

Blue Links Panel

The blue links panel contains 3 components:

- White status strip
- Blue centre pane
- User details strip

Each if these components are optional, the design being based on the requirements of the tab.

The status is displayed in the white strip along the top of the panel. This status can also be displayed with or without a date. The PCR (Priority, Complexity and Rating) icon can also be displayed in this strip on the top right

hand corner. If the context panel does not contain a blue right hand panel, the status is displayed as the first label and field in the white information panel.

The blue centre of the panel contains icons and links. The number in brackets represents the amount of items associated to the object. The links can be displayed in double or single columns depending on the requirements.

The user details strip contains information about the owner of the case. Clicking on the user name launches a modal which displays more information about the user.

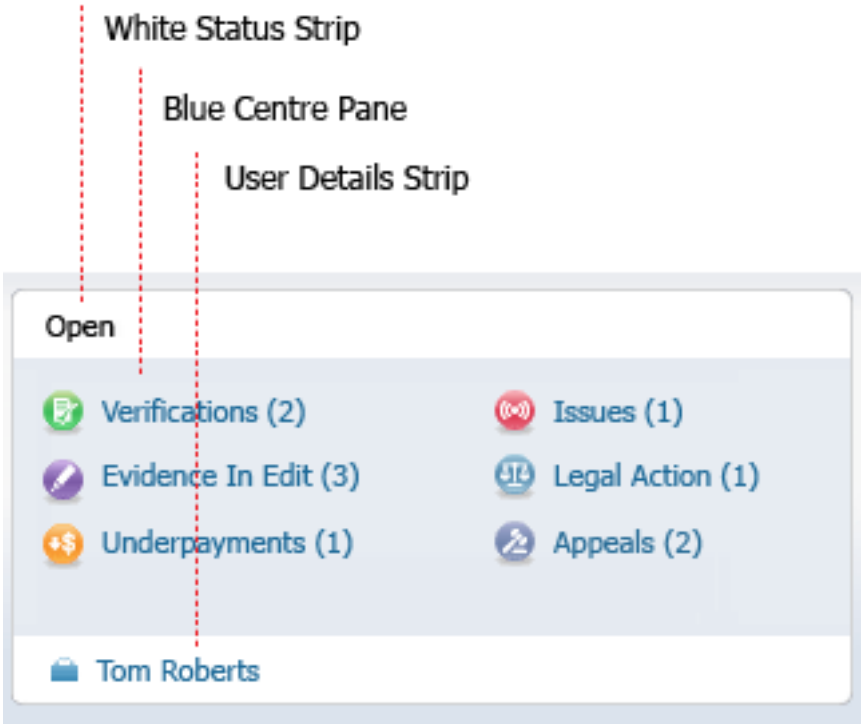

Figure 3.20 Components of the Blue Links Panel

3.3.2 Examples of Commonly Used Context Panels

As it is difficult to list a complete set of guidelines for the design of context panels, it is recommended that in order to maintain consistency you follow the patterns that have already been set out. Below are some examples of commonly used context panels:

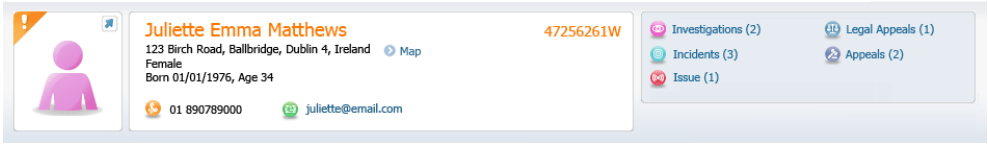

Figure 3.21 Person Context Panel

Figure 3.22 Employer Context Panel

Figure 3.23 Integrated Case Context Panel

3.4 Navigation Bar

The navigation bar is displayed below the context panel (if present) and contains the main sub navigation for the tab. A tab can display just one page or have multiple pages associated with it. If there are multiple pages associated with the tab, the navigation bar is displayed. If not, the navigation bar is not displayed.

3.4.1 Navigation Bar Tabs

Clicking a navigation bar tab allows the user to navigate through the tab pages. When the tab is launched all navigation bar tabs are displayed. Typically the first tab should be call 'Home' and be selected by default.

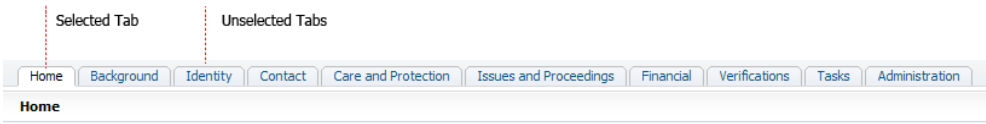

Figure 3.24 Navigation bar with 'Home' selected

If the navigation bar tab represents only one page, the name on the tab should be the same as the title of the page. If it represents a group of pages the name on the tab should describe the group of pages.

Figure 3.25 Tab representing a group of pages

Information should be organised so that the user is not overwhelmed with navigational options. Therefore, the number of navigation bar tabs on an interface should be kept to a minimum.

If the space required for the navigation bar tabs exceeds the width of the screen, a scroll bar will appear.

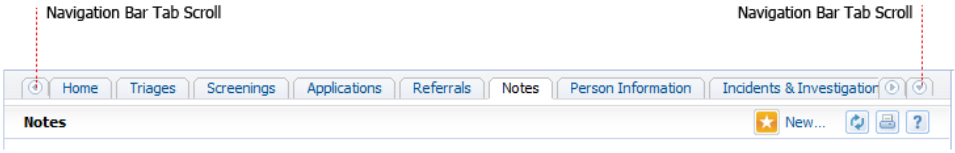

Figure 3.26 Navigation Bar with Scroll Bar

If the user cannot access a certain page or group of pages, the navigation bar tab is disabled. If the tab represents a component that the organization has not purchased, and therefore will never be able to view, then it is hidden from the user.

3.4.2 Page Group Navigation Bar

When a navigation bar tab represents a group of pages, a page group navigation bar is displayed on the left hand side of the page. The page group navigation bar contains a number of items, each linking to a page within that group.

Figure 3.27 Page Group Navigation Bar

Items within the page group navigation bar should be ordered by priority. The items that the user most commonly accesses are placed towards the top. When the user clicks on the navigation bar tab, the top page group navigation bar item will be displayed by default.

The number of items displayed in the page group navigation bar should be kept to a minimum. The text on each item should be the same at the title of the page to be displayed.

You can use the navigation bar tab name to provide context for page group navigation items. For example, in user approval checks, the navigation bar tab name is called 'Approval Checks'. The page group navigation items are called 'Case', 'Evidence', etc. rather than 'Case Approval Checks' and 'Evidence Approval Checks', etc.

Figure 3.28 Evidence Approval Checks

3.5 Tab Content Pages

Tab content pages are the main information area of the tab. As described above, a tab can display one page or have multiple pages associated with it.

Pages contain a number of components, these are:

- Page Title Bar
- Clusters
- Lists

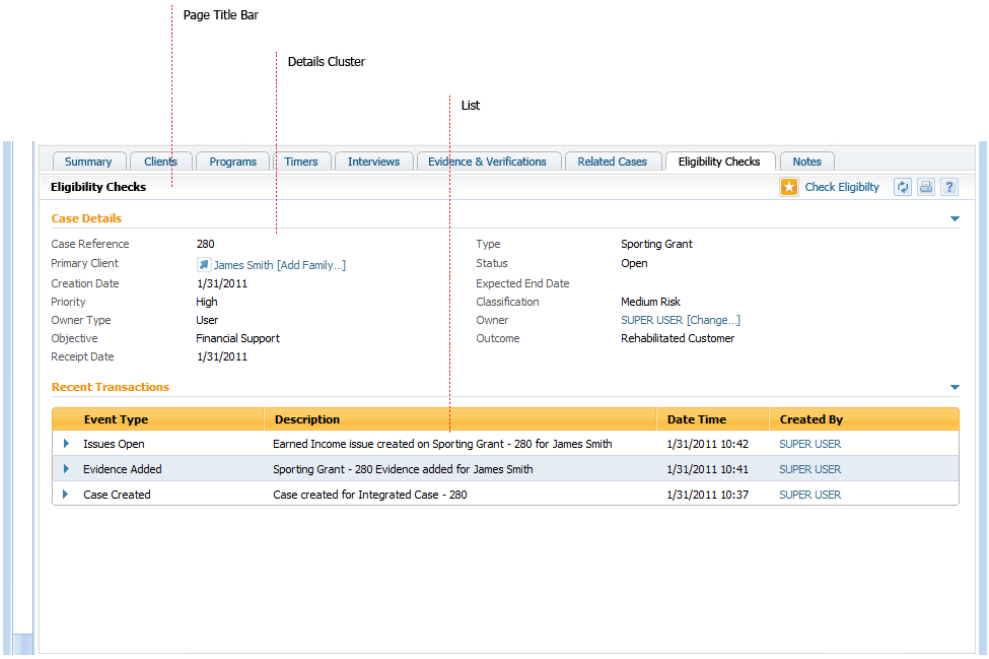

Figure 3.29 Components of a Cúram page

3.5.1 Page Title Bar

The Page Title Bar is located at the top of the page. It contains the:

- Page Title
- Page Action Buttons or Menu
- Refresh Button
- Print
- Help

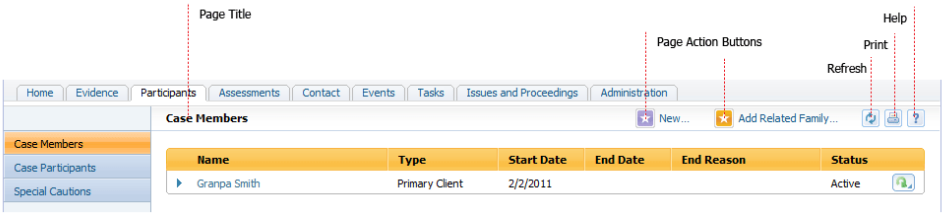

Figure 3.30 Page Title Bar Components

Page Title

The page title is displayed on the left of the page title bar. The page title should describe the content of the page and also correspond to the naviga-

tion bar tab name or the page group navigation bar item name. If the tab only contains a single page, a page title is not necessary as the name of the tab will be the same as the page name.

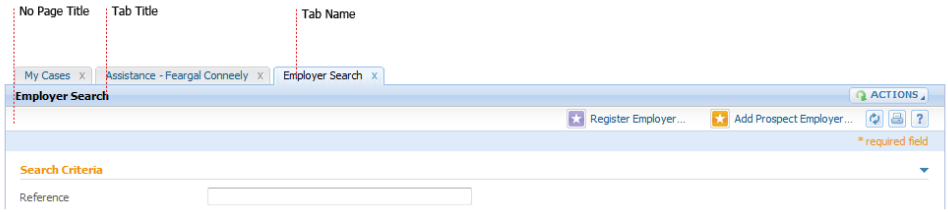

Figure 3.31 Tab with Single Page

Page Action Button or Menu

Page action buttons or menus display the main actions required for the page. When there are two or less actions on a page, these are displayed as page action buttons. If there is only one page action button an orange icon is displayed. If there are two, orange and purple icons are displayed.

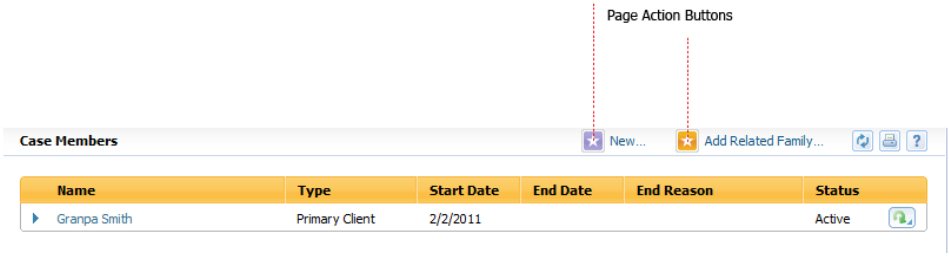

Figure 3.32 Page Action Buttons

When there are over two actions required for the page, an action menu is automatically displayed.

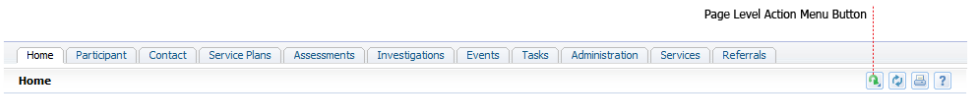

Figure 3.33 Page Level Action Menu Button

Similar to tab action menus, there is a list of guidelines that should be adhered to.

Page Action Menu Layout

- Use separators to group related menu items
- Edit functions should be displayed at the top of the menu

- Create functions such as 'New...' should be displayed below edit functions
- Destructive items such as 'Delete...' are typically the last items on the menu
- Where applicable, start each menu item with a verb
- Disable rather than hide menu options. Only hide the options if it is never possible for the item to appear in the menu, e.g. the component is not installed
- Use ellipses when further action is needed by the user to complete an action. These are also required for confirmation style modals. They are not required when the user does not have to do anything else to complete the action. For example, clicking a 'View' menu item opens a modal that allows the user to view data only. An ellipsis should not be used in this case
- The text of the menu should be similar to the title of the modal dialog it opens. For example, an item called 'New Case' should open a modal called 'New Case' or 'New Assistance Case'
- Page action menus do not support hierarchical menus.

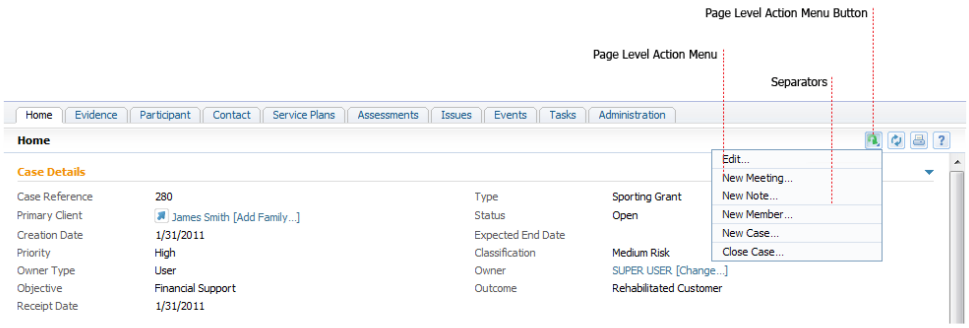

Figure 3.34 Page Level Action Menu

For a standard list page, where the items represent something for which a new item can be added, a 'New...' action button should be present. In most cases this button should not contain the item name on the action button, e.g. it should read 'New...' and not 'New Objective...'

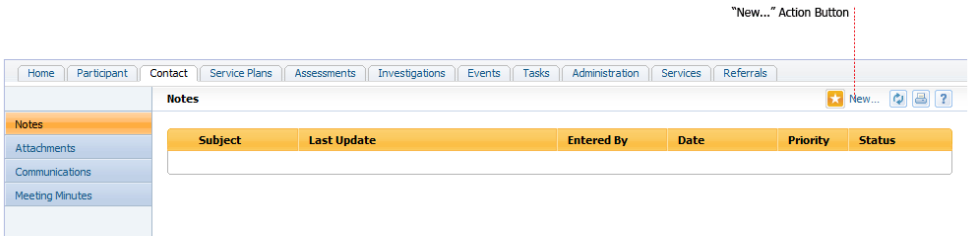

Figure 3.35 Page Level Action Buttons

Homepages do not generally have page action menus as they represent a summary of the object represented by the tab. Therefore appropriate menu items should be at the tab level.

Refresh Button

The refresh button is displayed on the left of the page title bar. Clicking on this button refreshes the content of the page.

Print

The print button is located to the right of the refresh button. Clicking on the print button launches a print modal dialog with enables the user to print the tab content page they are viewing.

Help

Help is displayed on the right of the page title bar. Clicking on the help button launches the online help for that specific page.

3.5.2 In Page Navigation

In page navigation can be optionally displayed below the title bar. This type of navigation is used when sub navigation is required for a page. For example, in the transactions page below, the user can choose to view all the transactions or just the payments issued. In page navigation is displayed to allow the user to choose which view to display.

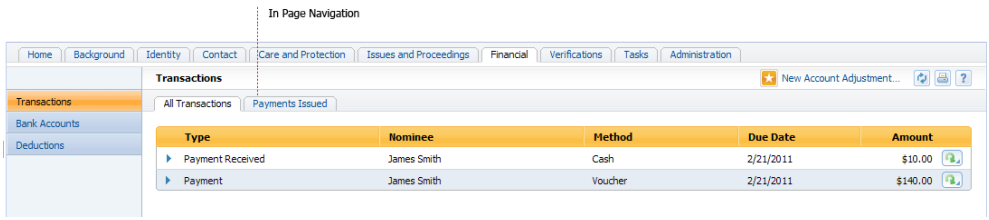

Figure 3.36 In Page Navigation

Page names and menus must remain consistent for each page within an in page navigation set.

3.5.3 Clusters

Most content within Cúram is displayed in clusters. They consist of labels and values and are the way in which information is grouped logically on the screen

Clusters are composed of:

- Cluster Title Bar
- Descriptor Text
- Field Label and Value

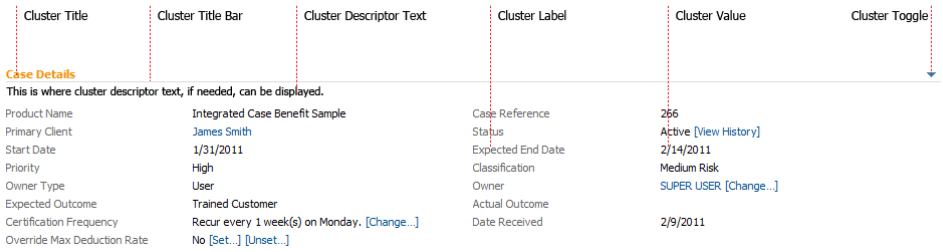

Figure 3.37 Cluster Components

Cluster Title Bar

The cluster title bar is displayed at the top of the cluster. It contains the title for the cluster and also an expand/collapse toggle arrow. The title for the cluster describes the information contained within the cluster and the toggle arrow enables the user to hide or show the cluster content.

In most cases it is recommended that you display the cluster title bar, however, it is optional. You can choose to hide the title bar if it does not give any more information or context to the user. For example, in certain pages the title of the page describes the title of the cluster; therefore there is no need to display a title cluster. Also, when there is only one cluster on screen, a title should not be displayed as the page title will describe the cluster. Cluster titles should be displayed when multiple clusters are on-screen, as it shows the logical grouping of information.

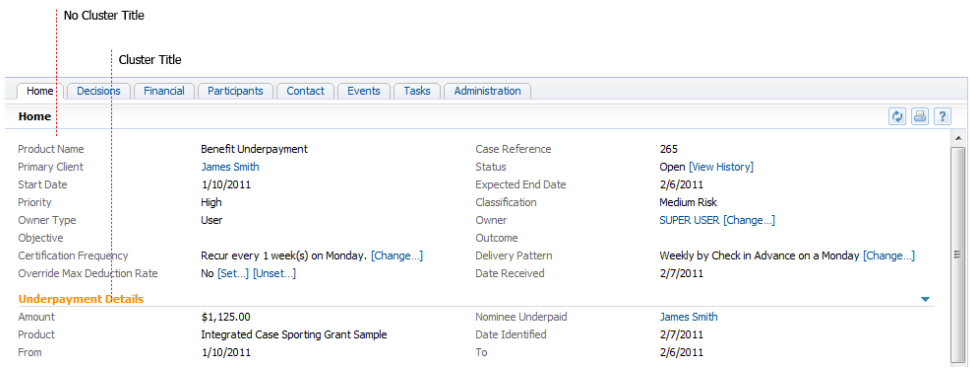

Figure 3.38 Clusters Title Bars

The expand/collapse toggle is displayed to the right of the title bar. This enables the user to hide and show the content of the cluster.

Descriptor Text

The cluster descriptor text is displayed directly underneath the cluster title bar. This text, which is optionally displayed, presents descriptive information about the cluster to the user.

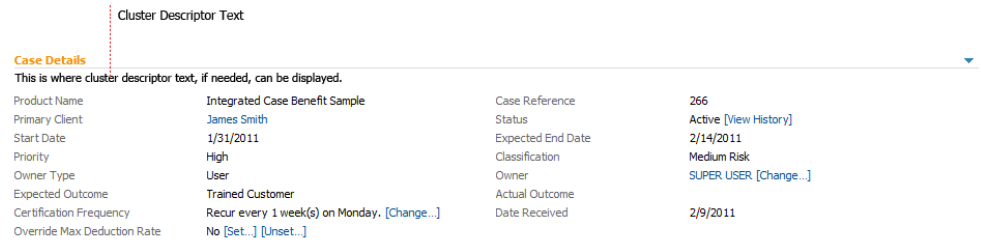

Figure 3.39 Cluster Descriptor Text

Field Labels and Values

Cluster label and value text is displayed in columns. All text is left aligned. The label text is displayed in grey and value text in black. All linked text is displayed in blue and underlines when the user rolls over it. No blue text is to be used anywhere else within the application unless it is linked text. When actions are displayed in a cluster, they should be displayed within square brackets. If this link requires further action, the text should also have ellipses, so for example, 'Change' would look like '[Change...]'.

Figure 3.40 Actions Displayed within Clusters

Text used onscreen must be concise and make sense to the user. It also must be ordered logically, for example; First Name, Surname, Date of Birth etc.

Layout out of Clusters

The layout of each cluster is dependent on the content of the cluster. Two column clusters are the most commonly used format for non editable text.

The format of editable text within clusters is more varied.

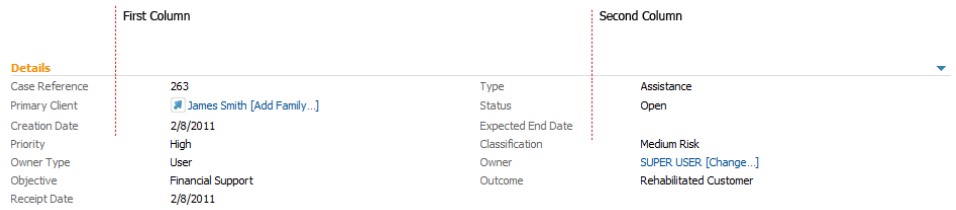

Figure 3.41 Two Column Details Cluster

If there are multiple clusters on screen they must be aligned and the same width as one another. Also, the columns within these clusters should be aligned too.

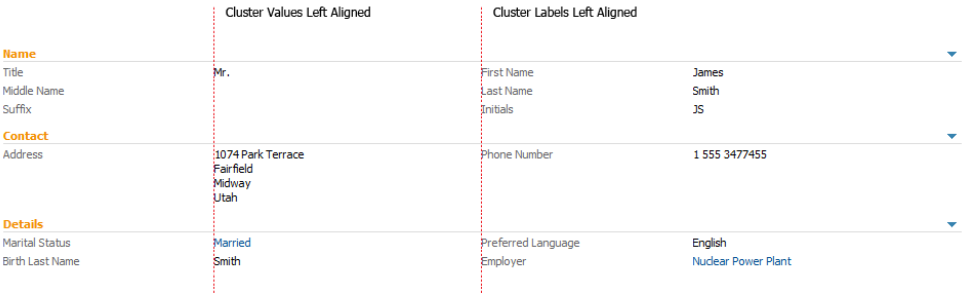

Figure 3.42 Aligned Clusters and Columns

Text wrapping within clusters should be avoided if possible. In order to do this, the display of text onscreen must be designed to the minimum resolution of 1024x768. Along with this, an extra 30% extra space must be added to the end of the text in order to allow for localisation.

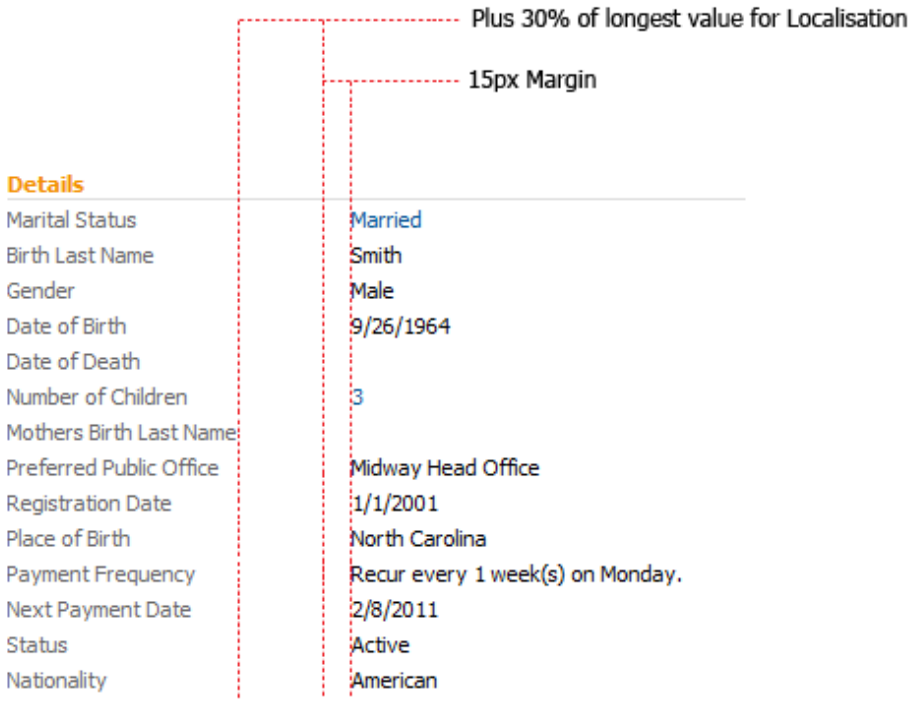

Figure 3.43 Extra spacing for Localisation

Title Style Capitalization

Title style capitalization should be used for all titles, names, labels and buttons. It should not be used for standard sentences.

The style guidelines for title style capitalization are:

- Capitalize all nouns, pronouns, verbs, adverbs and adjectives
- Capitalize the first and last words
- Do not capitalize articles (a, the) and coordinate conjunctions (and, but, for, nor, or), unless they are the first or last word

3.5.4 Lists

Along with clusters, the other main element that makes up a tab content page is the list. The list presents information in a tabular format to the user and consists of columns and expandable rows. Pages can contain one or multiple lists. Lists can also be displayed alongside details clusters and can expand to display details panels. The list is made up of a number of components, these are:

- Column Header

- List Row
- List Dropdown Pane
- List Actions Menu

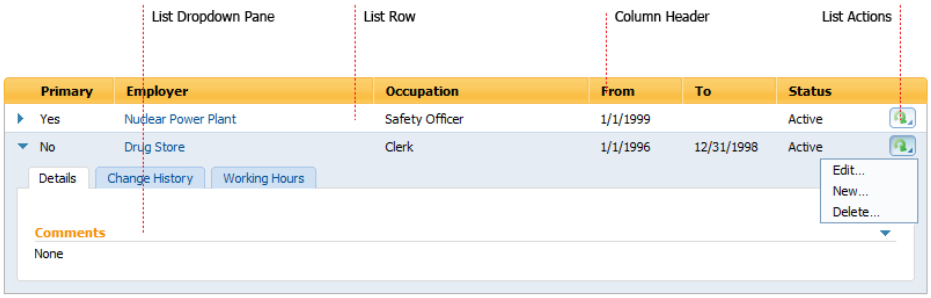

Figure 3.44 List Components

Column Header

The column header is displayed at the top of the list. The text on each column describes the content of the column below. Clicking on the column header text allows the user to sort the information by that particular column.

Ordering of Columns within a List

When designing the structure of the list, there are a number of guidelines you must follow:

- The most important information should be placed on the left side of the list. For example, if the user is viewing a list of people, the person name should be displayed first. Information on the columns should read by priority of importance across the list item
- The information should also be logically positioned, for example 'Start Date' should be followed by 'End Date'
- If a record status (e.g. closed) is displayed for a list item, this should be the last column on the list. The exception to this is when the status refers to a business status (e.g. paid)
- All information is left aligned on the list except for monetary amounts. With monetary amounts both the column title and value text should be right aligned
- In financial views monetary amounts should be the last columns in the list. If a monetary amount is present as well as record status, the amount column should be to the left of the status column. If it is a business status, the monetary column should be the last on the list

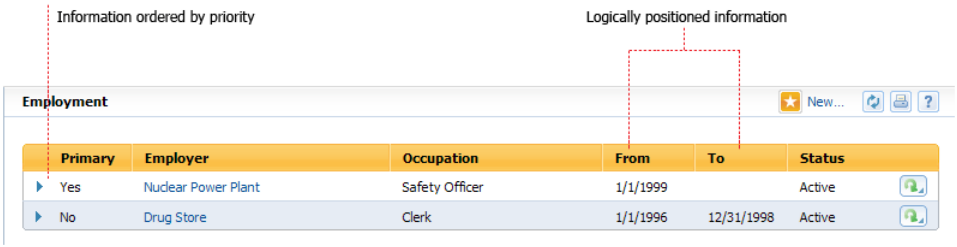

Figure 3.45 Ordering of Columns on a List

Activity	Status	Estimated Cost	Actual Cost
Bus Pass	Completed	$65.00	$65.00
Food Preparation	In Progress	$0.00	$0.00
Guitar Lesson	In Progress	$0.00	$0.00
Raj Action1	In Progress	$0.00	$0.00
test action1updated	In Progress	$10.00	$0.00

Figure 3.46 Ordering and Alignment of Monetary Amounts

List Rows

Each list row contains an item. The list item displays the most important information about the item to the user. A dropdown toggle button is optionally displayed on the left of each list row. When the user clicks on the dropdown toggle, the list row expands to display the list dropdown pane. If the list item does not contain a dropdown pane the dropdown toggle should not be displayed.

If an item on the list references an object tab, then the name of the item should be hyperlinked. Clicking on the link opens the object in a new tab. For example, if you click on a person name within a list, the person homepage will be launched in a new tab.

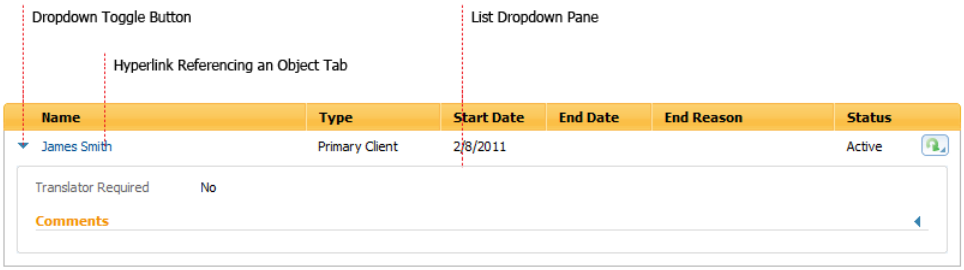

Figure 3.47 List with Dropdown Pane

List Dropdown Pane

The list dropdown pane displays the detailed information for the item. These panes can contain both clusters and lists. The content of the pane should not

repeat information already displayed on the list. In the example below, the drop down pane expands to display the comments cluster. The rest of the item information is displayed within the row.

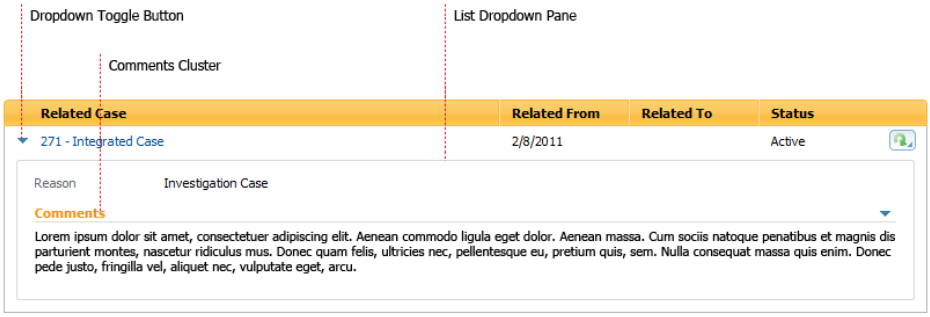

Figure 3.48 Dropdown Pane with Comments Cluster

If any of the attributes displayed in the list row are required to add context they should also be displayed in the dropdown pane. For example, if 'Start Date' is in the list but 'End Date' is not, it is better to display the 'Start Date' again in order to make the information more readable.

If there are large clusters of information on the dropdown pane, these should be broken up into separate tabs. Tabs within expanded lists function the same as 'In Page' tabs. They allow the user to navigate to specific areas of information within the context of the item being displayed. Clicking on a specific tab, highlights that tab, and brings it to the foreground

Figure 3.49 List Dropdown Pane with In Pane Navigation

The content within the dropdown pane can be rendered using custom controls specifically designed for data displayed in the page. This allows a large amount of flexibility.

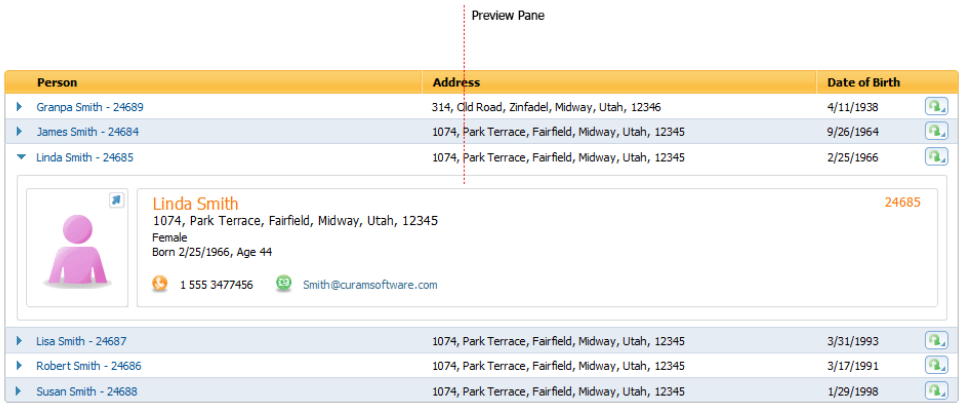

Figure 3.50 List with a Rendered Dropdown Pane

List Action Menu

Editing a list item is done via the list drop down action menu displayed on the right of the list row. The list action menu should contain all the actions associated with the list item.

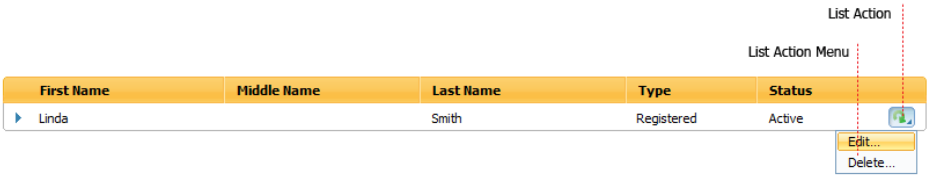

Figure 3.51 List Action Menu

List Action Layout

- Use separators to group related menu items
- When a number of actions are available, the 'Edit...' link should be displayed first. This should be followed any other edit functions, for example, 'Approve...' or 'Reject...' After these edit functions, other links such as 'New <child item>...' should be displayed
- Destructive items, such as 'Delete...', should be the last items on the menu
- Where applicable, start each menu item with a verb
- Disable rather than hide menu options. Only hide the options if it is never possible for the item to appear in the menu, e.g. the component is not installed
- Use ellipses when further action is needed by the user to complete an ac-

tion. These are also required for confirmation style modals. They are not required when the user does not have to do anything else to complete the action. For example, clicking a 'View' menu item opens a modal that allows the user to view data only. An ellipsis should not be used in this case

- The text of the menu should be similar to the title of the modal dialog it opens. For example, an item called 'Edit Record'. should open a modal called 'Edit Record'
- List actions menus do not support hierarchical menus

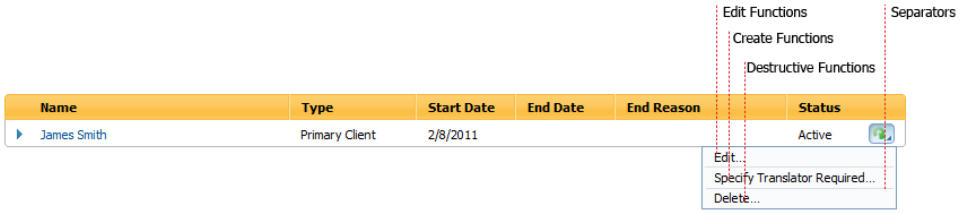

Figure 3.52 List Action Menu Layout

Clicking on an action item typically launches a modal window and allows the user to perform that action. Once the modal is closed the user is brought back to the updated list page.

Laying out Lists on Screen

If more than one list is being displayed on a page, each list must have a title displayed above it. This is needed to indicate what each list represents. If a page only contains one list then there is no need for a title, as the title of the page typically describes the content of the list.

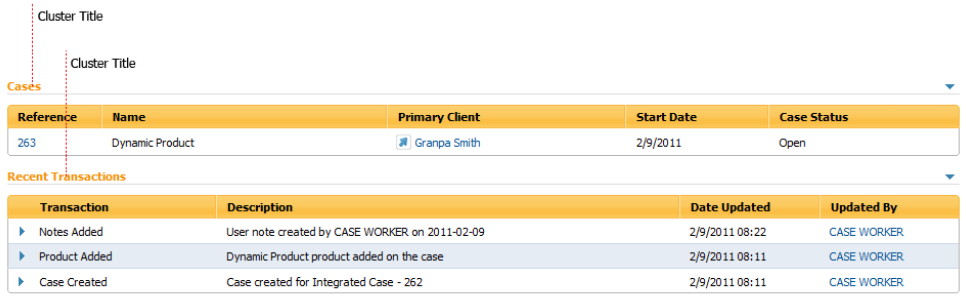

Figure 3.53 Lists with Cluster Titles

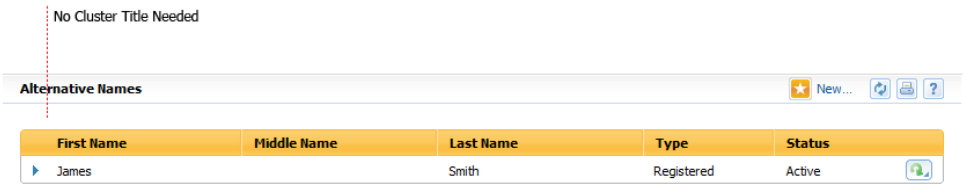

Figure 3.54 List without Cluster Titles

If two lists or clusters are displayed side by side, they should be horizontally aligned.

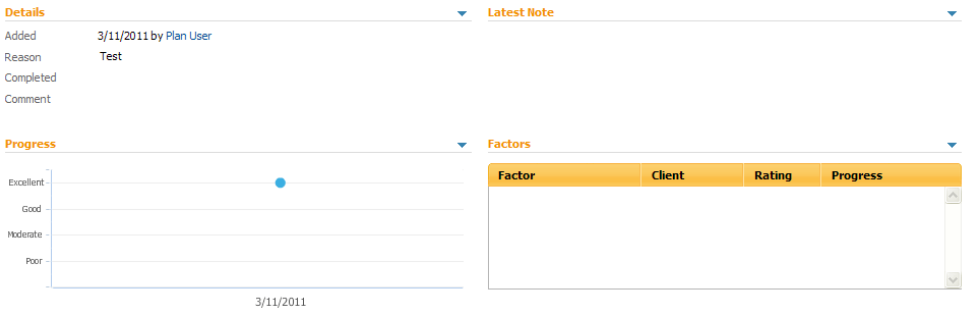

Figure 3.55 Horizontally Aligned Lists

Setting a List Height

A list height should be set if a list is part of a number of components on a page, or it is being displayed in a modal. If a page contains a list and another component, the user should be able to see the other component without having to scroll down.

The list height is used to define the height of a list. Once this height is exceeded a scroll bar will be displayed. In certain cases, where only a small number of items are expected on the list, you can decide whether to set a list height or not.

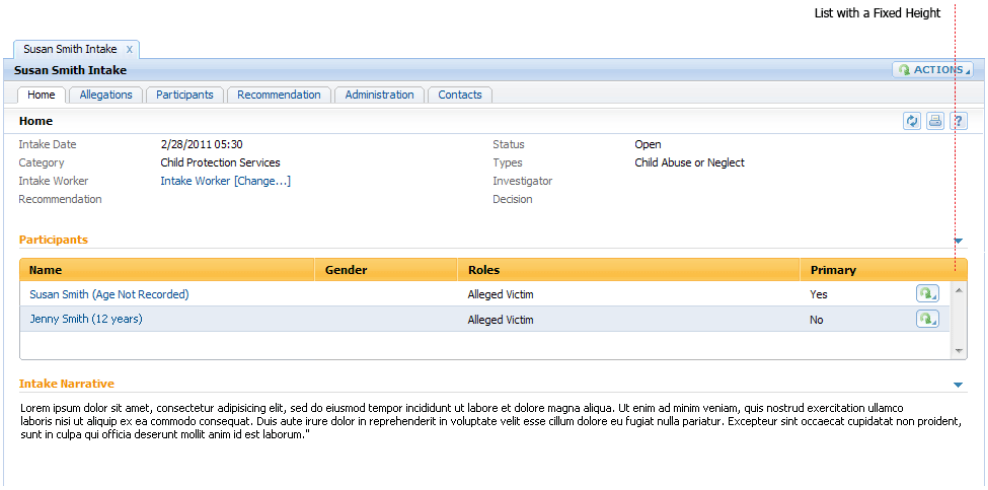

Figure 3.56 List with Fixed Height

The scroll bar is drawn beneath the column label row. When the user scrolls, the data rows are scrolled in and out of view. The column header is constantly displayed.

There are two factors to consider when setting a list height; the space available for the list and the typical number of items likely to be displayed in the list. For example, do not set a height that would display twenty items if typically there will only be two items in the list.

When a list is displayed on a modal, setting a max height is particularly important as space is limited. When the list expands, the scroll bar appears within the list rather than on the modal dialogue. Scroll bars should be avoided, if possible, on modals.

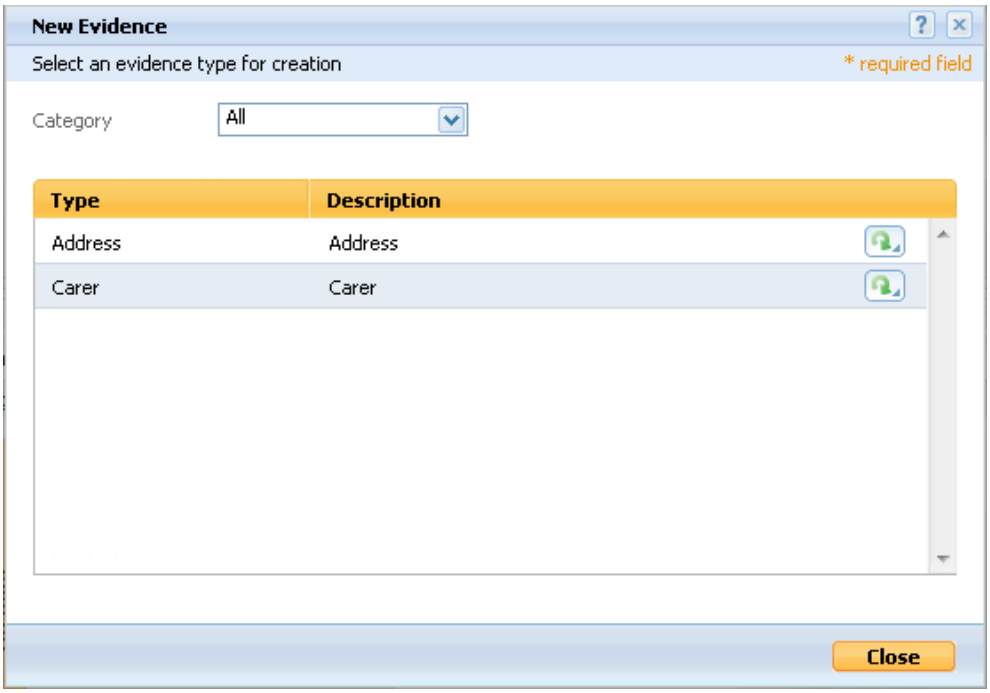

Figure 3.57 List height set in a Modal Window

Pagination

Pagination should be used when a large number of items are displayed within a list. This allows the user to scan through the list page by page. By default 15 items are displayed, however this can be configured depending on the user's requirements or the space available within the page.

Figure 3.58 Paginated list

3.6 Modal Dialogs

A modal dialog is launched whenever a user executes an action (e.g. New, Edit and Delete) or in some cases whenever a user chooses to view more information about an item. The modal is displayed in front of the page. This gives the user context. When the modal is closed the user is brought back to the page the modal was launched from.

Edit style modal dialogs should contain editable fields only. However, non-editable fields can be displayed if there is a need to provide context.

The height of the modal is set automatically and depends on the content being displayed. The width of the modal is set by the developer. The minimum recommended width is 400 pixels.

The components of the modal dialog are:

- Title Bar
- Content Area
- Button Bar

3.6.1 Title Bar

The title bar is located at the top of the modal dialog. It contains the modal dialog title, help and close buttons.

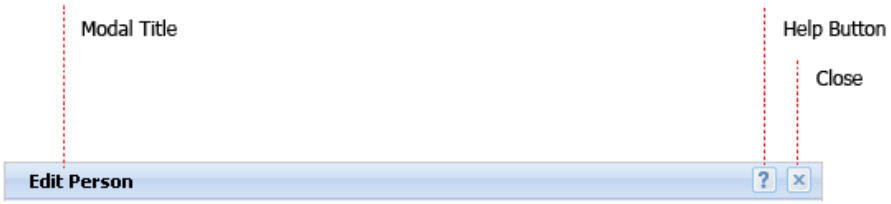

Figure 3.59 Modal Title Bar

The modal dialog title does not contain any context text. For example, it should read 'Edit Person', rather than 'Edit Person Details (James Smith)'. As the modal is displayed in front of James Smith's page the user can see the context of their actions.

The help button is displayed on the right of the bar. Clicking on this button opens a context specific help in a new browser window.

A close button is displayed to the right of the help button. This dismisses the modal window. The close button should not be the main method by which a user closes a modal dialog. A 'Close' or 'Cancel' button should always be displayed on the button bar at the bottom of the modal.

3.6.2 Content Area

A descriptor bar is displayed at the top left of the content area, beneath the modal title bar. This optionally displays additional information to help clariify the purpose of the modal. Required field indicator text is displayed on the right hand side of the bar. This text should be displayed at all times, even if no mandatory fields are displayed onscreen.

Figure 3.60 Modal Descriptor Bar

The content area consists of labels and editable fields. All labels are grey and left aligned, with each label having a corresponding field. Each field displays black text which is left aligned.

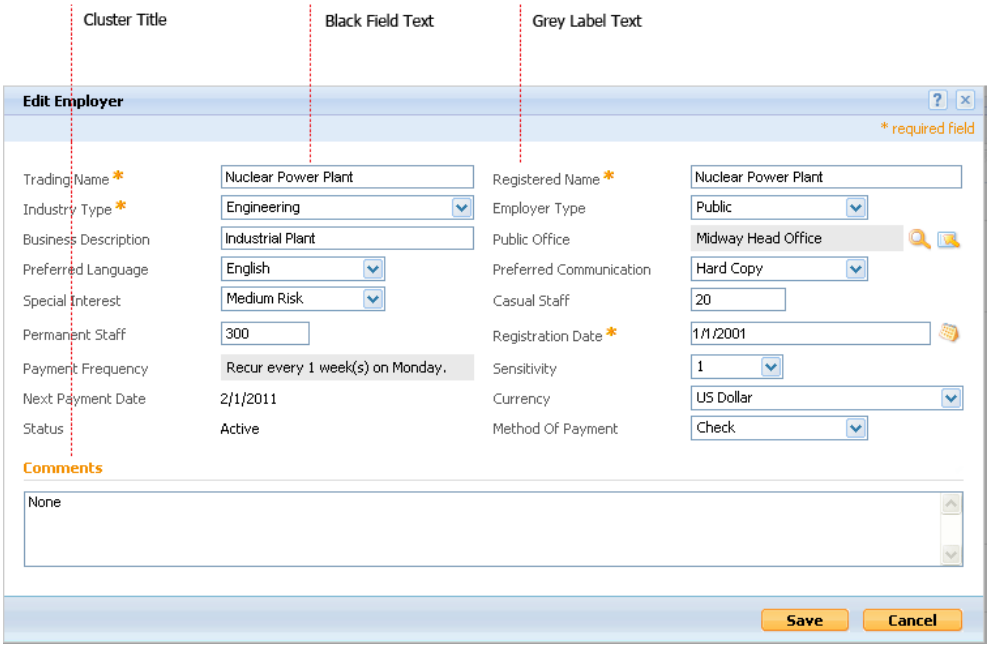

Figure 3.61 Editable Labels and Fields

Laying out the Content Area

The modal height is automatically set based on the content being displayed. When a modal reaches the maximum height set, a scrollbar appears. This maximum height is set to work with the users's resolution, so that a modal will never appear larger than the screen it was launched from. The height must be set manually if a rich text editor is present within the modal.

Modal width is set by the development team and should be based on the content being displayed. When setting a modal width there are a number of factors to take into consideration, these are:

- The width of each column is dependent on the content of the column. An extra 30% space should be added to the right of all labels and fields to allow for localization. Columns widths should be determined by taking the largest label name and adding this localization space.

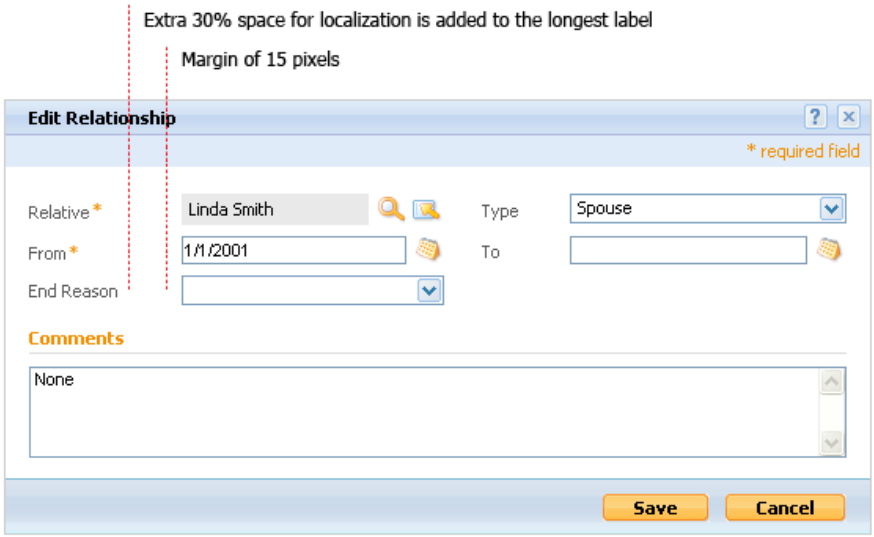

Figure 3.62 Modal Width and Localization

- Text wrapping should be avoided if possible. To ensure that no text wrapping occurs, all text displayed onscreen should be tested at the minimum required resolution of 1024x768 . Testing should be performed with the shortcuts panel collapsed

- Textbox Sizing

  - Textboxes should be sized according to the expected content. The standard sizing applied should be 100%, 60% or 30% of the column width. Textboxes can also be sized to a specific number of characters, e.g. a number of children box would be sized to fit two characters.

  - Multiline text fields should allow for four rows of text. If the text input is beyond this a scrollbar will appear

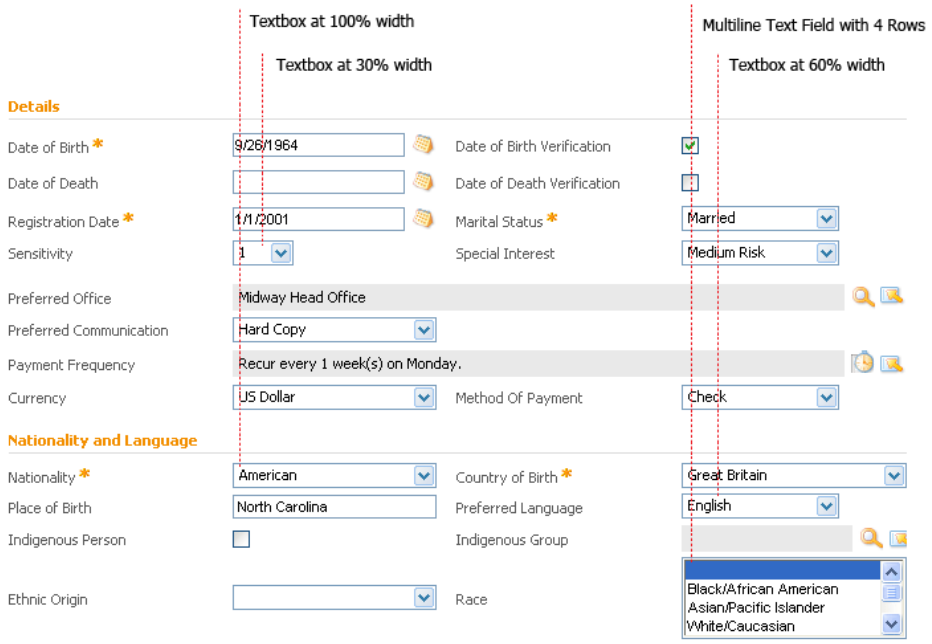

Figure 3.63 Textbox Sizing

- Structure content logically
  - Make sure all the content is structured logically and that it makes sense to the user. Avoid the use of unnecessary cluster titles
- Clear and concise terminology
  - Avoid long meandering label text
  - When creating a new element the term 'New' should be used. When modifying an element the term 'Edit' should be used
- Lists
  - All lists displayed within modals should be set to a fixed height. This is to allow the user to see all the content onscreen without a scrollbar appearing on the modal. Scrollbars on modals should be avoided if possible. The scrollbar should be inset below the column titles, so that when the user scrolls the list they will always see the context of the line items. Paginated lists should only be used if there is a significant amount of data to be returned (e.g. a search page)

Modal Layout Checklist

In order to lay out the details cluster properly, you need to complete the following three steps.

- Step 1 - Review Label Text
  - Look at the content of the cluster and make sure all the text is laid out logically. If there are labels and values that are very long, you should try to reduce them

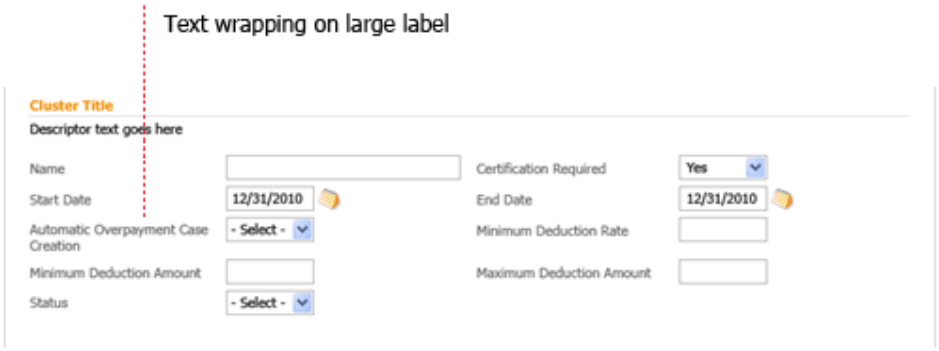

Figure 3.64 Screenshot Step1 - Before

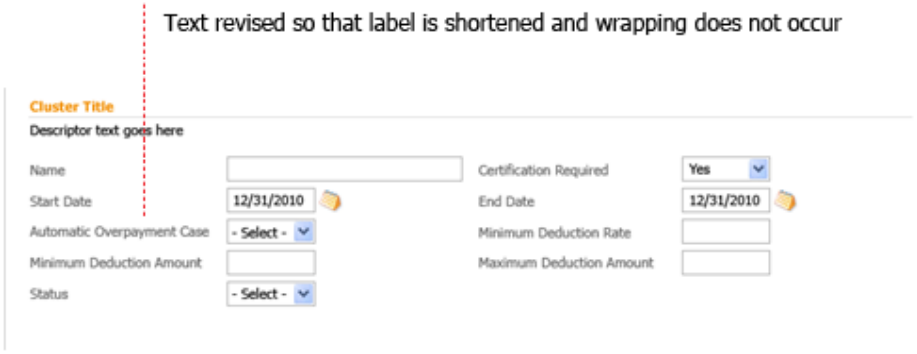

Figure 3.65 Screenshot Step 1 - After

- Step 2 - Size the column width to suit the label and value sizes
  - Look at the content of the modal to see what percentage width you should set each column. Keep in mind localization space (30% of label), the margin between label and value field, editable field widths and text wrapping

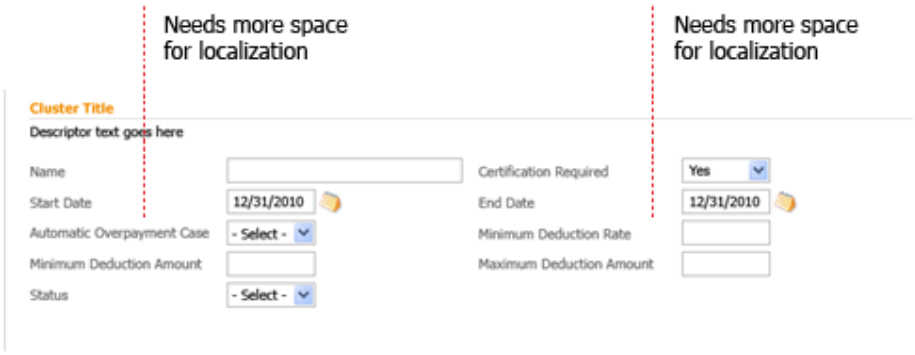

Figure 3.66 Screenshot Step 2 - Before

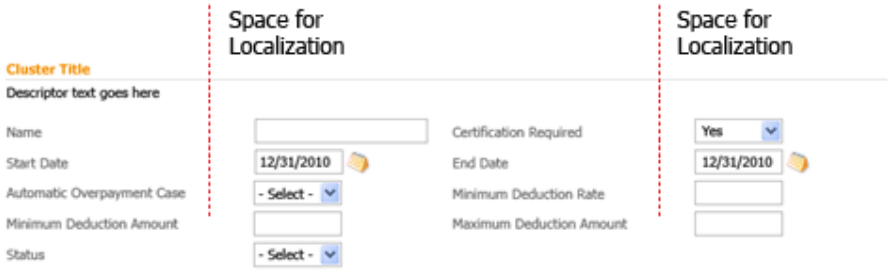

Figure 3.67 Screenshot Step 2 - After

- Step 3 - Look at the content of the screen to see if you have laid it out in the best way possible

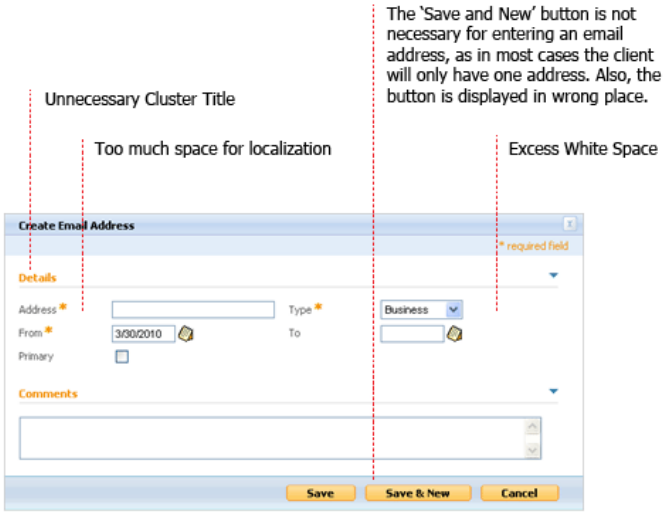

Figure 3.68 Screenshot Step 3 - Before

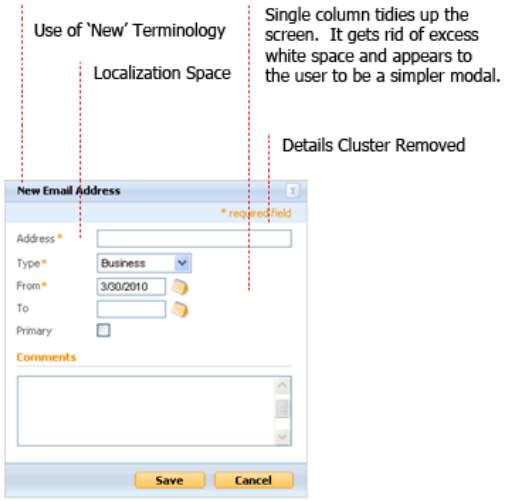

Figure 3.69 Screenshot Step 3 - After

3.6.3 Button Bar

The modal button bar is displayed at the bottom of the modal dialog window. This bar contains the main operational actions for the modal, for example 'Save' and 'Cancel'. All modal buttons are right aligned. In wizard modals these buttons are displayed both on the left and right, however for

standard modals these buttons are only on the right.

Figure 3.70 Modal Dialog Button Bar

All text displayed on these buttons must be consistent, for example:

- When editing and creating new items, 'Save' and 'Cancel' text is the standard button text
- For confirmation dialogs 'Yes' and 'No' should be used

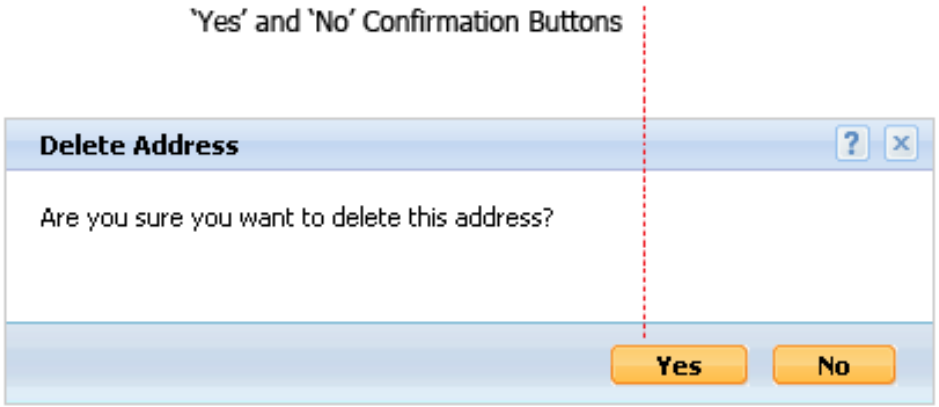

Figure 3.71 Confirmation Modal Dialog

- To dismiss a modal a 'Close' button must be displayed. 'Close' buttons are typically displayed on modals used to view information only. The 'Close' button is displayed on the right of the button bar

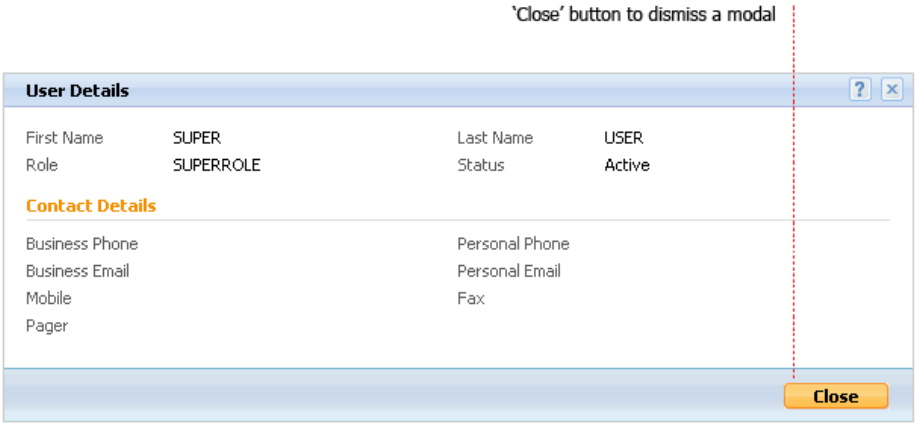

Figure 3.72 Modal Dialog with Close

If you have a 'Save & New' button this should be displayed to the left of the 'Save' button. The 'Save' and 'Cancel' buttons should always be placed together and right aligned.

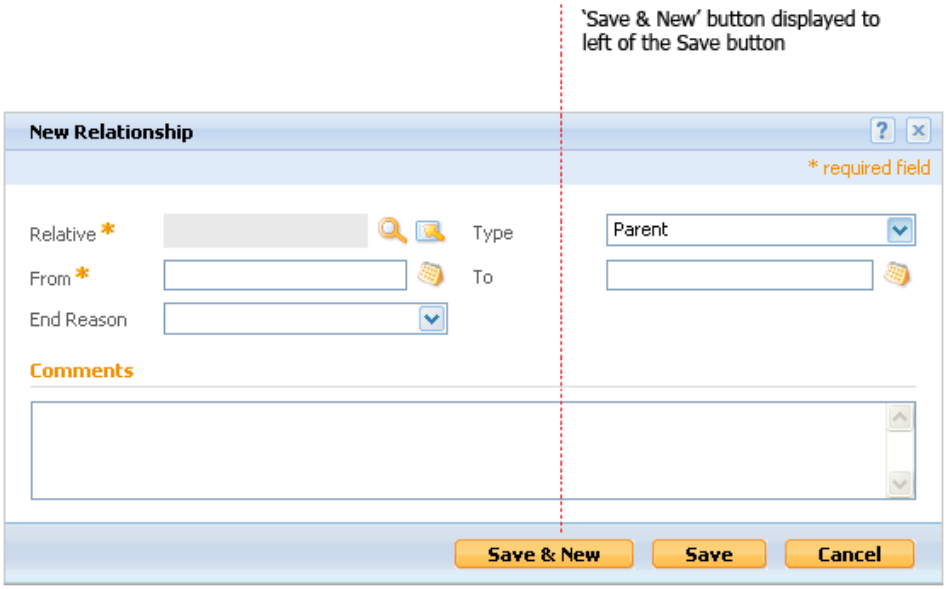

Figure 3.73 Modal Dialog with Save & New button

Modals are also used to display search functionality. On this screen, the 'Search' and 'Reset' buttons are placed on the centre of the page, below the search criteria. The search results are displayed below these buttons. A 'Cancel' button is displayed on the button bar.

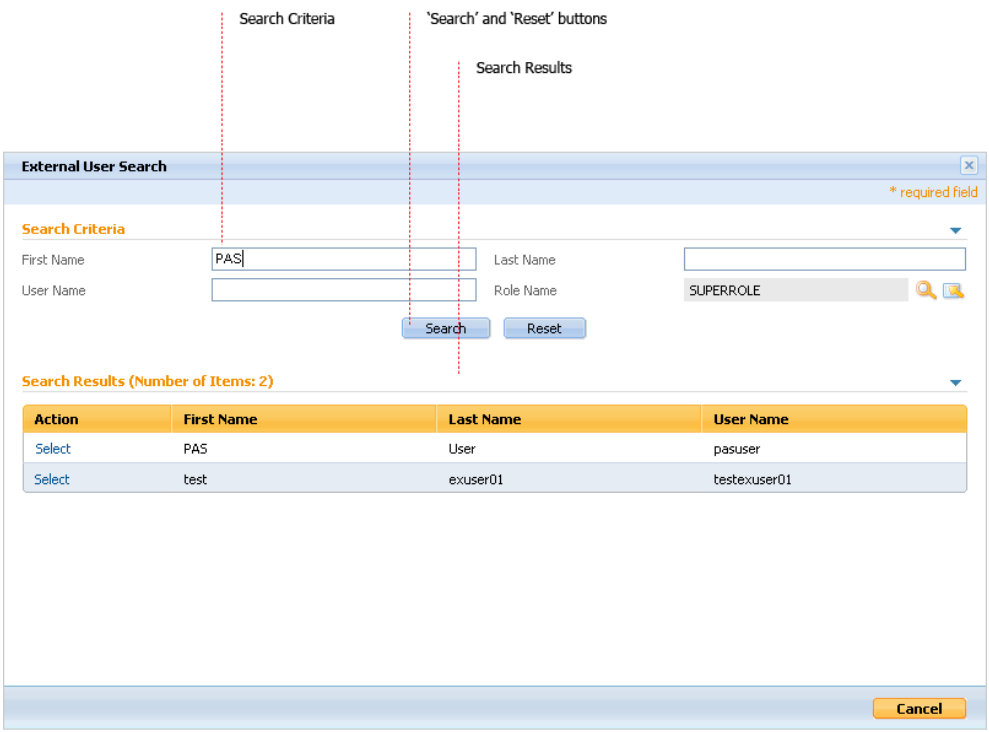

Figure 3.74 Search Modal

3.7 Wizards

Wizards are launched whenever an action or process requires multiple screens for completion. They contain a number of linear steps that the user works through in order to complete the task.

The components of the wizard are:

- Title Bar
- Progress Bar
- Content Area
- Button Bar

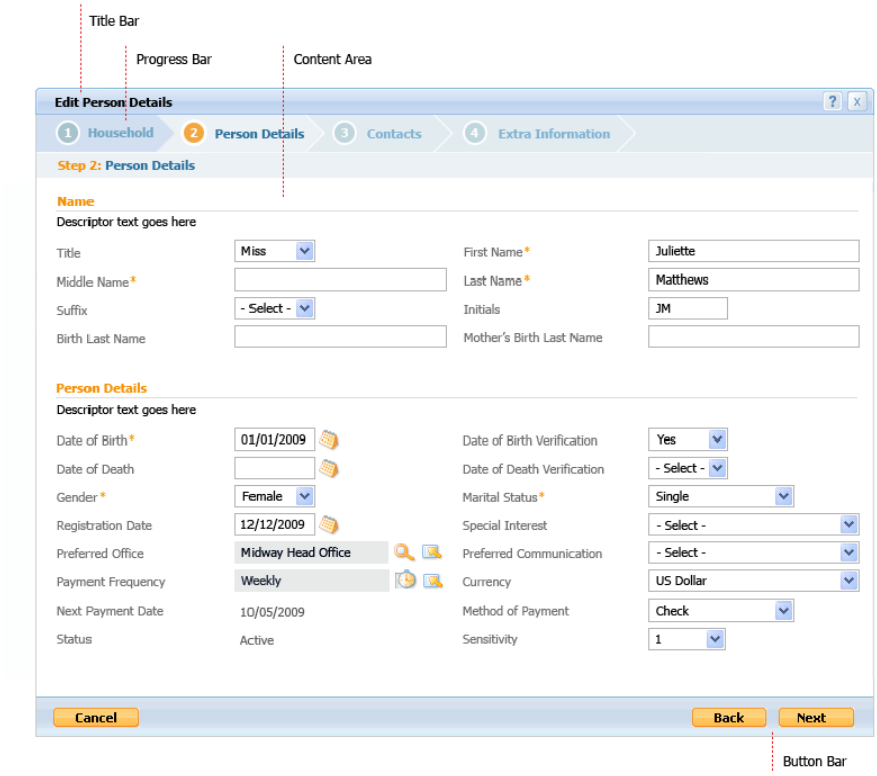

Figure 3.75 Components of the Wizard

3.7.1 Title Bar

The Title Bar is located at the top of the wizard. It contains the wizard title and the help and close buttons. As the wizard is a form of modal dialog, the title bar should appear exactly the same as the modal dialog title bar described above.

3.7.2 Progress Bar

The progress bar is displayed directly below the modal title bar. This informs the user of how many steps are in the process and what step they are currently on. The step indicator bar displays the steps the user has visited, is currently on, and has yet to visit. Below this bar, the current step title displays the title of the screen the user is accessing.

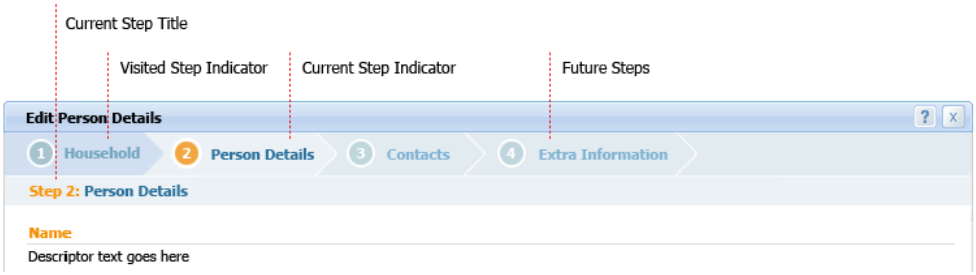

Figure 3.76 Wizard Progress Bar

3.7.3 Content Area

The content area consists of labels and editable fields and is the same as a standard modal dialog. Please refer to modal dialog content area guidelines when designing and implementing this area.

3.7.4 Button Bar

Wizards have two types of action buttons:

- Progressive - Next, Back, Finish, Save and Exit
- Dismissive - Cancel

Progressive buttons are placed on the right side of the bar, while dismissive buttons are placed on the left side of the bar.

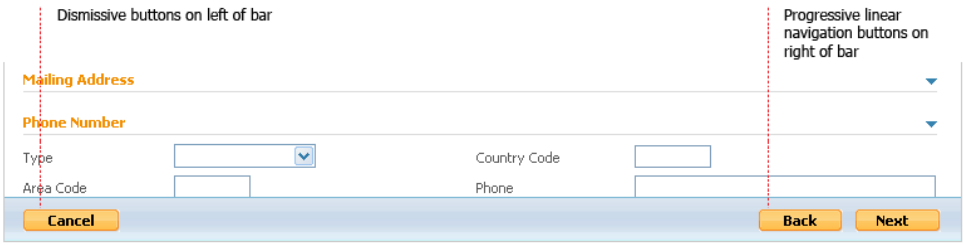

Figure 3.77 Wizard Button Bar

- The 'Next' button should be placed on the right of the bar, with the 'Back' button to the left of it
- On the last screen a 'Finish' button should be displayed instead of the 'Next' button
- If a 'Save & Exit' button is present it should be displayed to the left of the 'Back' button
- The 'Cancel' button should be placed on the left, with the 'Save & Exit' (if present) displayed to the right of it

The same terminology should be used on all buttons - 'Next', 'Back' and 'Finish' for the progressive buttons and 'Cancel' for dismissive buttons.

When stepping through the wizard the size of the modal should remain the same at all times. This size is determined by the dimensions of the largest page in the wizard. All wizard screens need to be the same size to give the impression to the user that they are stepping through multiple pages on the same screen.

Chapter 4

Shortcuts Panel

4.1 Introduction

The shortcuts panel is displayed on the left of the interface. It can be displayed in all sections of the application, however, it is recommended that it only be displayed in the 'Workspace', 'Inbox' and 'Reports' sections. The shortcuts panel contains links to commonly used actions and pages and is easily accessible by the user from any page within the section.

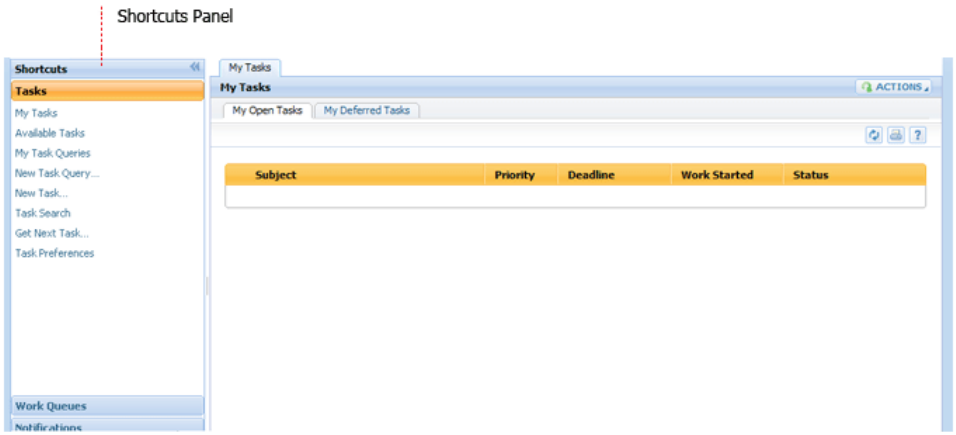

Figure 4.1 Shortcuts Panel

4.1.1 Expanding and Collapsing the Shortcuts Panel

The panel can be expanded or contracted. When the panel is contracted, the user can click on the arrow at the top of the panel to expand the panel over the tab. Once the user moves off the panel, the panel remains expanded for a few seconds and then closes automatically. If the user wants the panel to remain expanded, the pin icon should be selected. The pin icon locks the panel in place. This expands the panel and shortens the width of the tab. Once the

panel is pinned the user can drag the divider line of the panel to resize its width. To contract the panel the user must click on the contract arrow. [1]

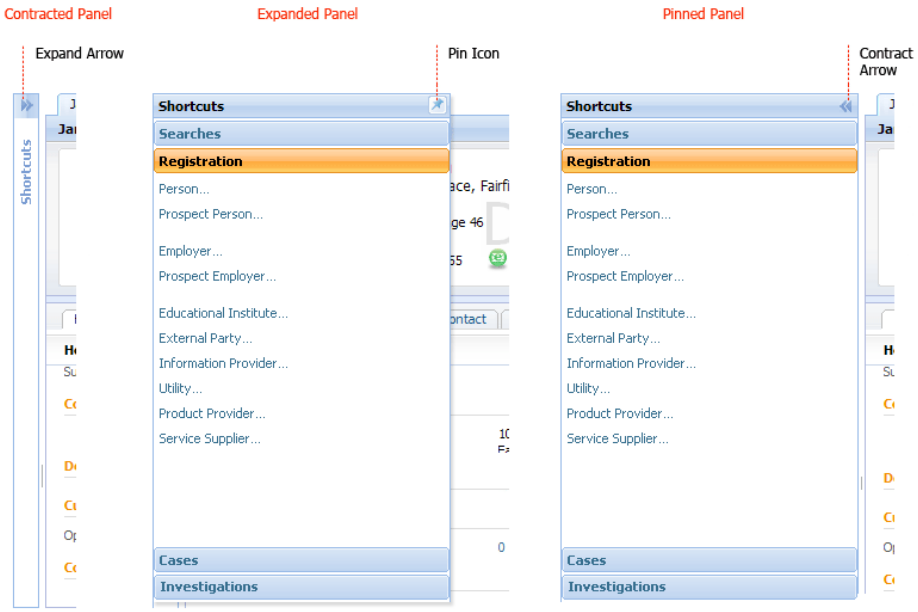

Figure 4.2 Contracted, Expanded and Pinned Panel

4.1.2 Displaying Information Within the Panel

The content of the shortcuts panel is divided up into categories. Clicking on the category button highlights the button and moves it to the top of the panel. It's associated shortcut links are displayed below. Clicking on a link opens the relevant tab, page, or modal.

Links within categories should be grouped logically. A space appears between each group to enable a user to identify different sets of links. For example, in the registration category below, person and employer type links are grouped separately as they refer to different participants. Ellipses must be used when further action is needed and are also required for confirmation style modals. They are not required when the user does not have to do anything else to complete the action.

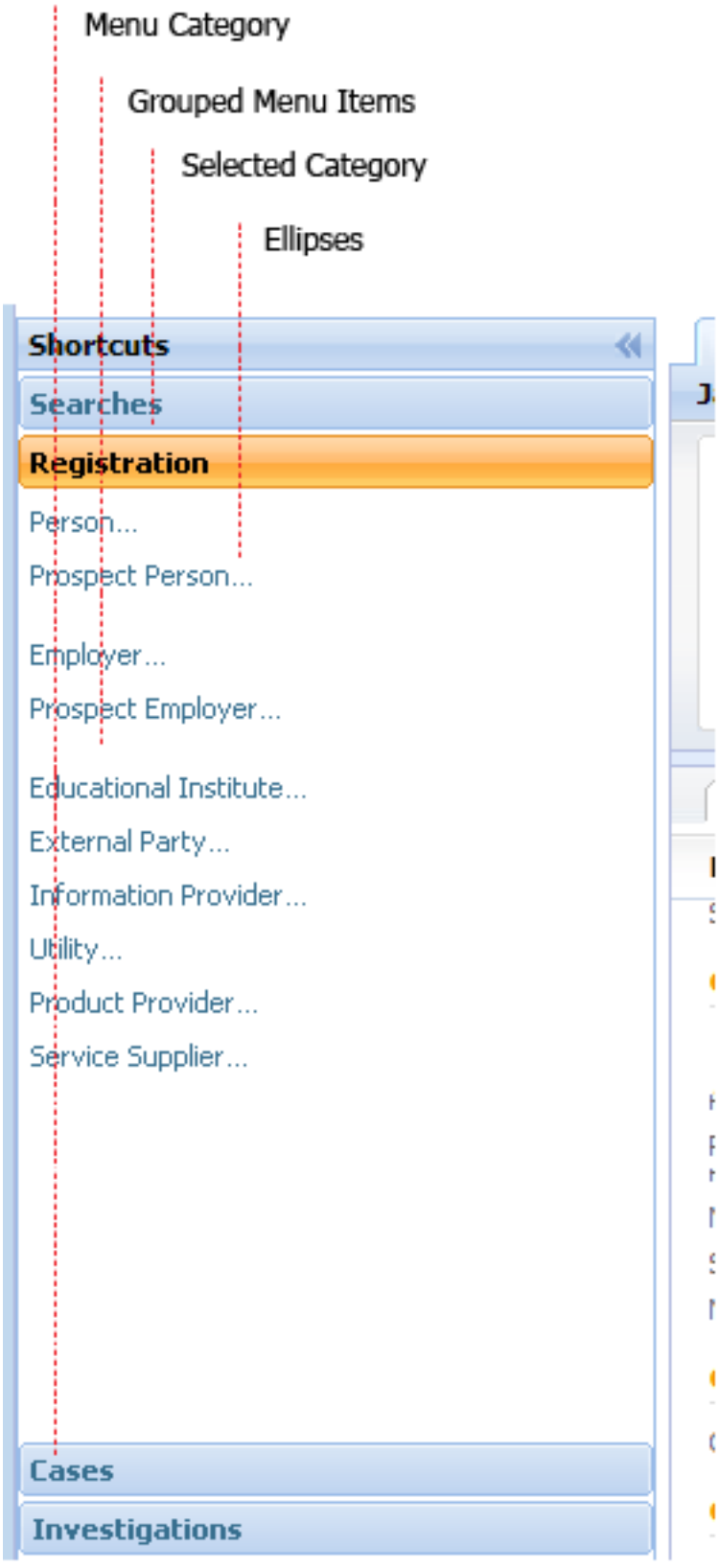

Figure 4.3 Components of the Shortcuts Panel

Notes

[1]This functionality will be available in a future service pack.

Chapter 5

Smart Panel

5.1 Introduction

The smart panel is optionally located on the right side of the tab content page. The user can expand and contract the panel using the arrow on the top left of the panel.

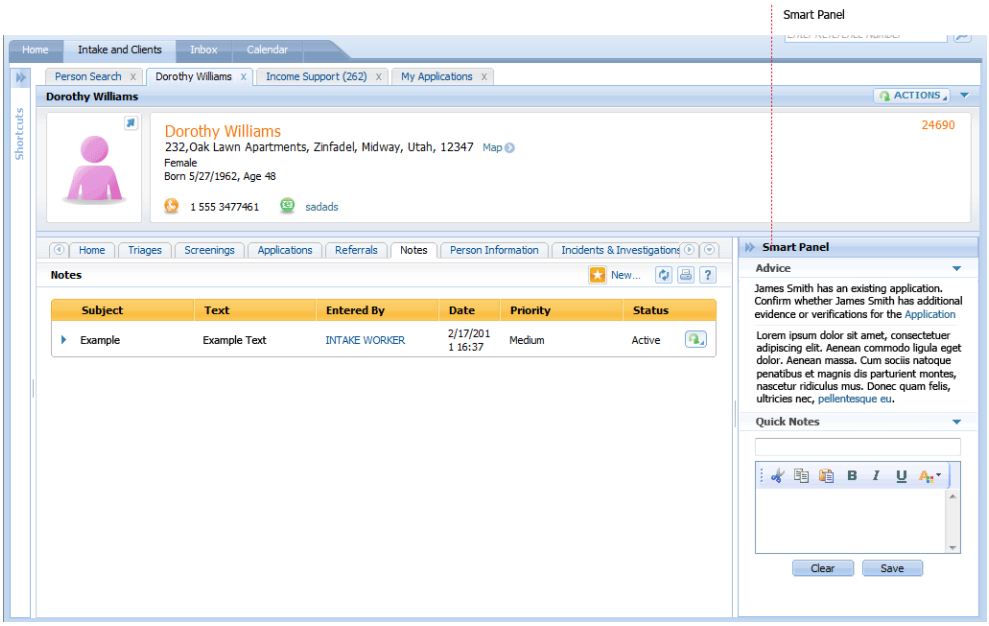

Figure 5.1 Smart Panel

The content of the smart panel is dependent on the requirements of the product being implemented. There are two components that have been designed for the smart panel, these are:

- Advisor

- Quick Notes

5.1.1 The Advisor

The advisor provides the user with context aware recommendations and suggestions for areas that require their attention. It is designed to be a helpful aid to enable the user work through the process at hand.

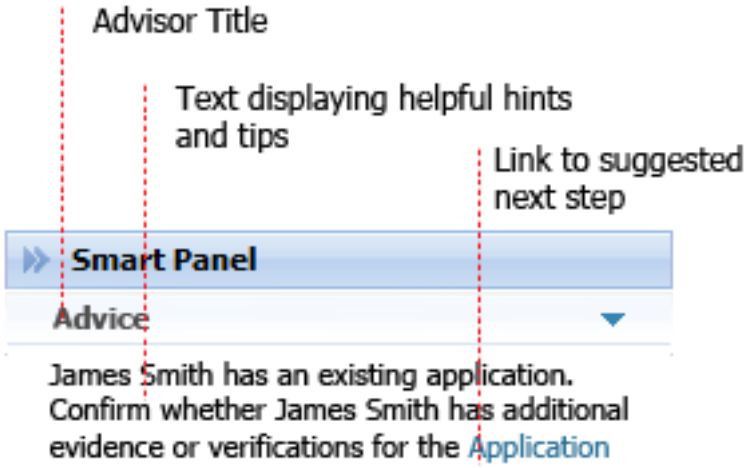

Figure 5.2 Advisor Screen

The advisor analyzes the data entered in the system, and then determines the advice that should be displayed. This advice guides the user to areas that may require their attention. The user can action advice by clicking on the hyperlink displayed within the advice item text. Also, items can be prioritized, allowing highest priority advice to be displayed first.

Renderers can be written to display advice in other ways, for example, to do lists or list clusters.

5.1.2 Quick Notes

Quick notes gives the user the ability to take notes whilst working through their task at hand. As the user works through pages, quick notes is constantly displayed. This allows the user to input and save notes at any stage. The user can collapse or expand the smart panel and it will have no effect on the content within.

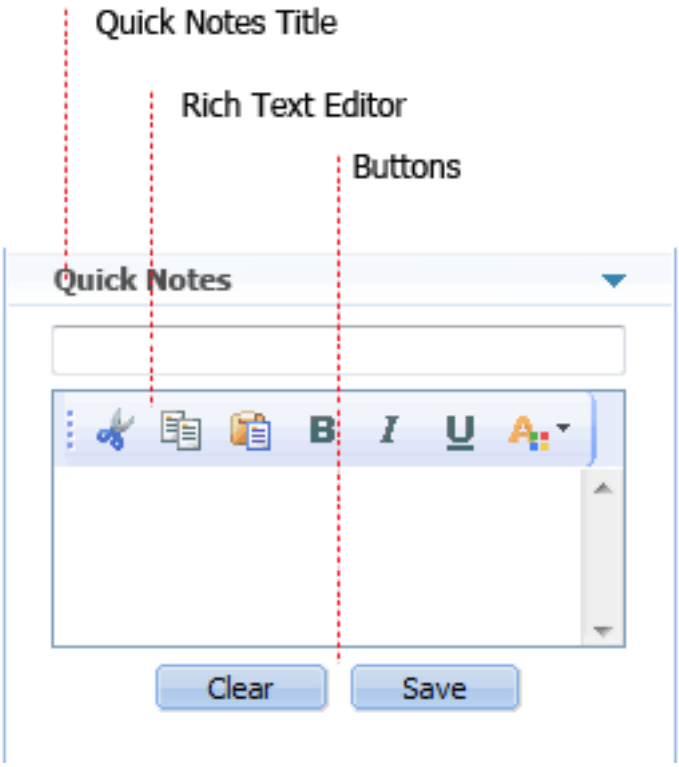

Figure 5.3 Quick Notes Panel

Chapter 6

Home Pages and Pods

6.1 Introduction

When the user logs into the application they are presented with the application homepage. This page consists of a number of pods that are designed to provide the user with access to their most important and relevant activities.

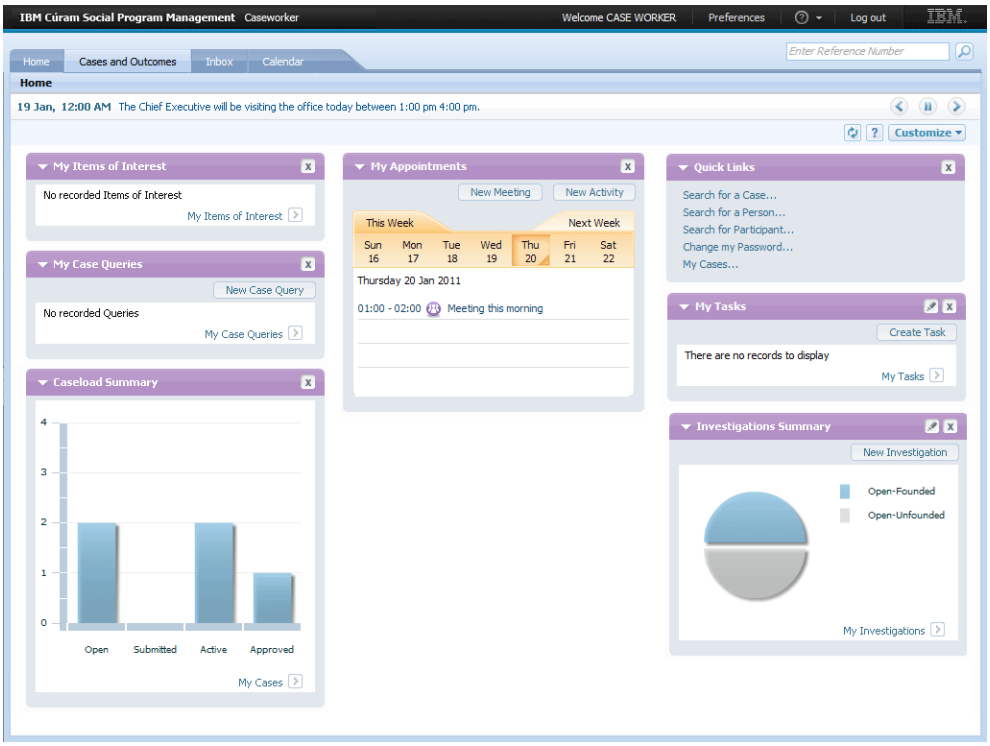

Figure 6.1 Application Homepage

6.1.1 Customizing the Home Page

Most homepages consist of customizable pods. The administration application is used to define the set of available pods. Users can then choose from the available pods which pods they wish to display on screen. Clicking on the customize button in the top right corner opens the customize panel. This panel enables the user to decide what pods they want to hide or show. The user clicks the checkboxes of the pods they wish to display and then clicks the 'Save' button to update the screen.

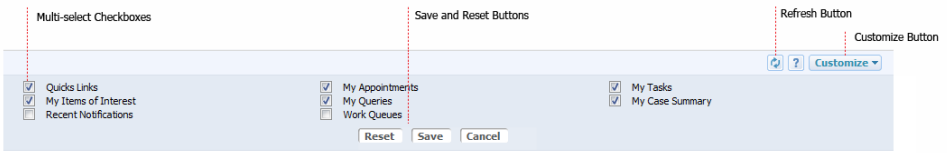

Figure 6.2 Customise Panel

A default pod layout is set for each application. This defines which pods are laid out on screen and where they are placed. There are three pods that are common to most applications. These are 'Quick Links', 'My Appointments' and 'My Tasks'. In order to gain some consistency across the application a guideline has been set as to where they should be positioned on screen.

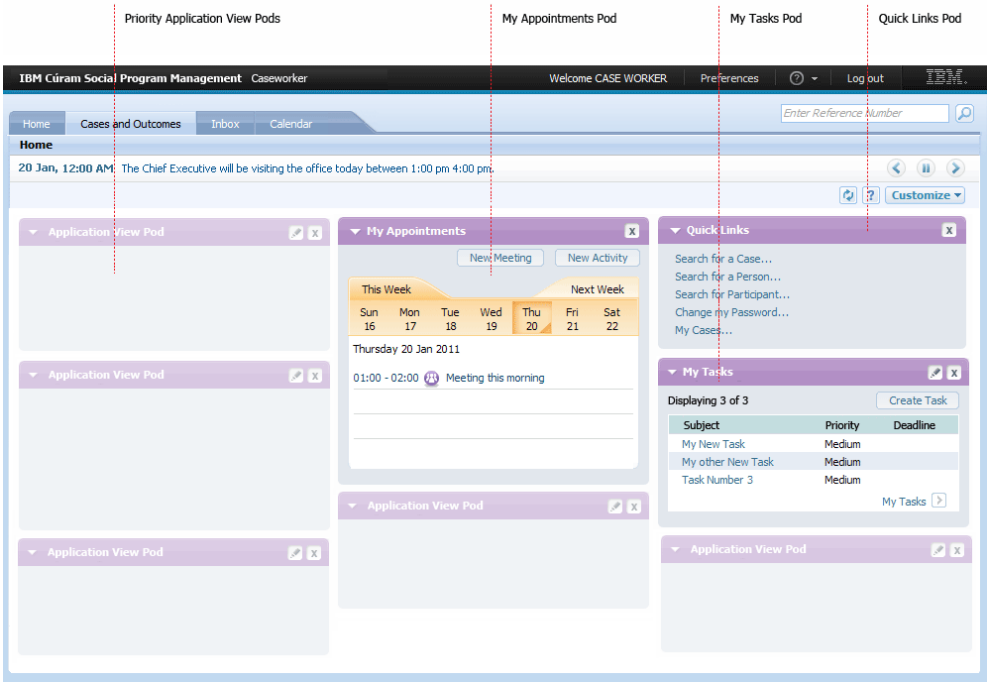

Figure 6.3 Layout of Common Pods on the Homepage

As a general rule, most important information is placed at the top left corner of the screen as this is where the user tends to focus first. The common pods are displayed in the second and third column allowing the application specific pods to be placed in the first column. The user's highest priority pods should be placed here. In general we would presume that these would be

your application specific pods, however, if for example the quick links pod is what your user would use most then you should place it here. The appointments pod should be placed in the centre of the page as this visual panel forms a good focal point of the page.

The user can drag each of the pods to their required position and can also click the close button on the pod title bar to hide that specific pod. Clicking on the 'Reset' button in the customise panel returns the home page content to its default display.

6.1.2 Pods

The content of each pod is dependent on the individual requirements and design. Examples of current content include lists, graphs and a calendar. Although the content is flexible, there are three main components of the pod:

- The Pod Title Bar
- Filter Panel
- Pod Content Area

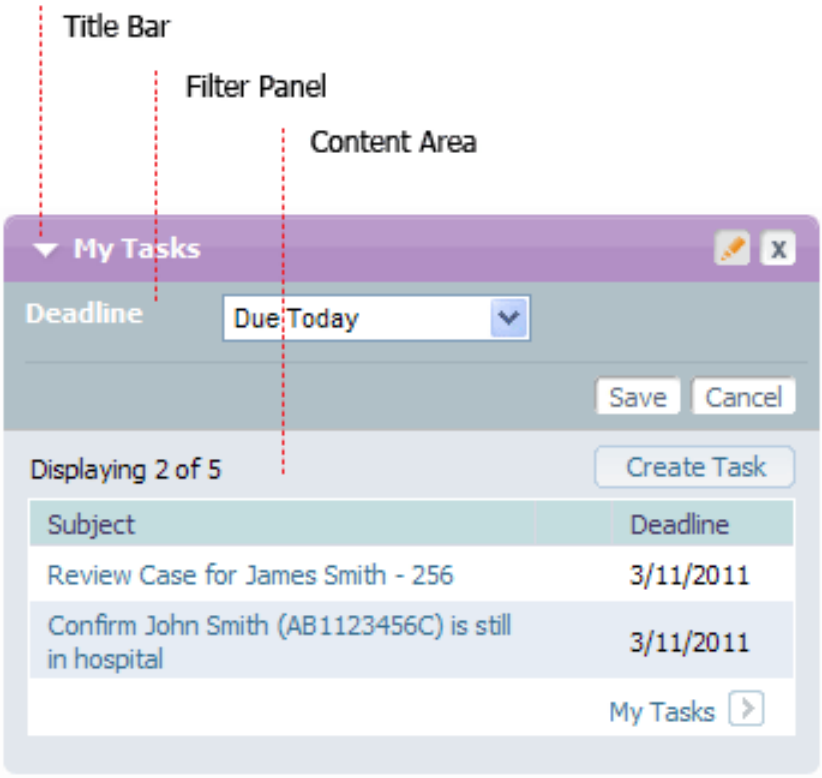

Figure 6.4 Pod Components

Pod Title Bar

The components of the pod title bar are:

- The Expand/Contract Toggle Arrow
- Pod Title
- Filter Button
- Close Button

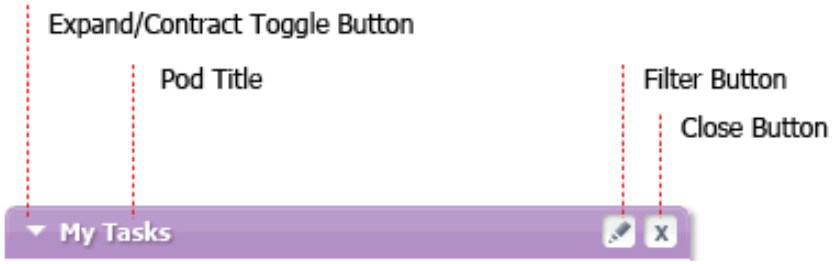

Figure 6.5 Pod Title Bar

The expand/contract toggle arrow is displayed on the left of the pod title bar. This button enables the user to expand and contract the content panel below. To the right of this button is the pod title.

On the right of the title bar are filter and close buttons. The filter button is optionally displayed, depending on whether a filter panel is present on the pod. Clicking on the filter button displays the filter panel below and enables the user to configure the data displayed in the pod. The user clicks the 'Save' button to update the content below.

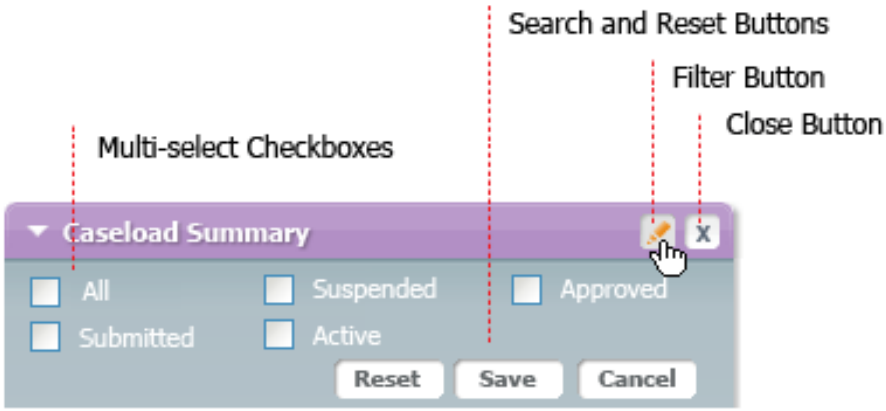

Figure 6.6 Pod Filter Panel

On the right of the title bar is the close button. Clicking on this button hides the panel.

Pod Content Area

The pod content area contains the main information for the pod. The content of this area depends upon the specific requirements of the pod. Any content that is displayed must adhere to v6 guidelines and standards; for example, allocate 30% space for localization, avoid text wrapping where possible, etc. Although the content of pods is completely flexible, in Cúram v6, most pods contain either a list or a graph.

List Pods

The list pod is designed to display a short list of items giving the user a snapshot of application content. When selecting the amount of content for this type of pod, performance must be considered. A large amount of pods containing many list items will impact the loading speed of the page. A lazy loading feature has been added to combat the feel of this; however ultimately, it is the designer's responsibility to ensure the pod page can be loaded in a reasonable timeframe.

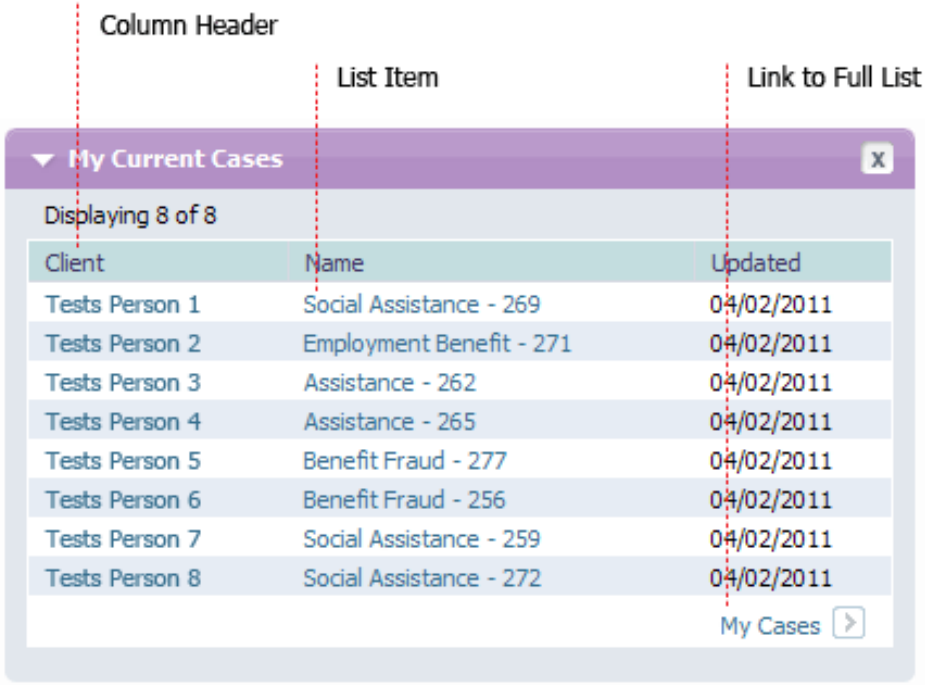

Figure 6.7 List Pod

The list itself is similar in functionality to the standard list described earlier in this document. At the top of the list on the right a 'new' button is optionally displayed. This enables the user to add new items onto the list below. Below the list a link brings the user to the page displaying the full list. This link should be available to the user at all times even if no records are being displayed within the pod.

When there are no items displayed on a list, the content area should be blank and the text 'There are no records to display' should be displayed.

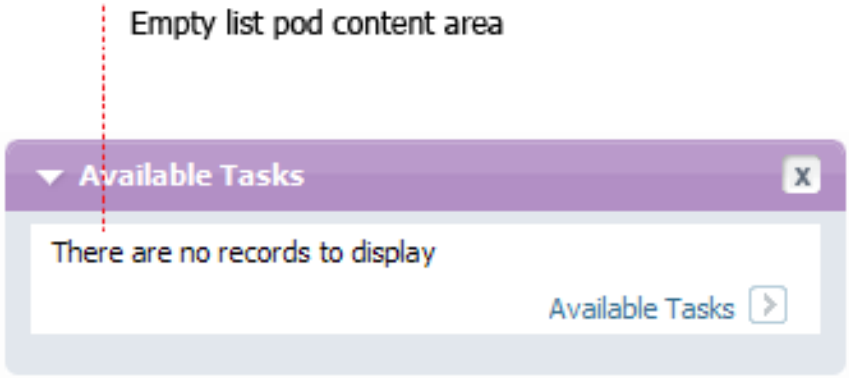

Figure 6.8 Empty List Pod

Graph Pods

Another standard pod type is the graph pod. These are flex based graphs that can display three types of graph - pie, bar or line. As space is limited in the display of these graphs there are a few guidelines that should be taken into consideration when designing a graph pod:

- The graph should be designed to fit a pod being displayed at 1024x768
- Bar charts can only be used if the X axis legend fits neatly on one line. If the text extends over the designated area in a bar chart, every alternate legend item moves to an alternate row. This can look odd and should be avoided.

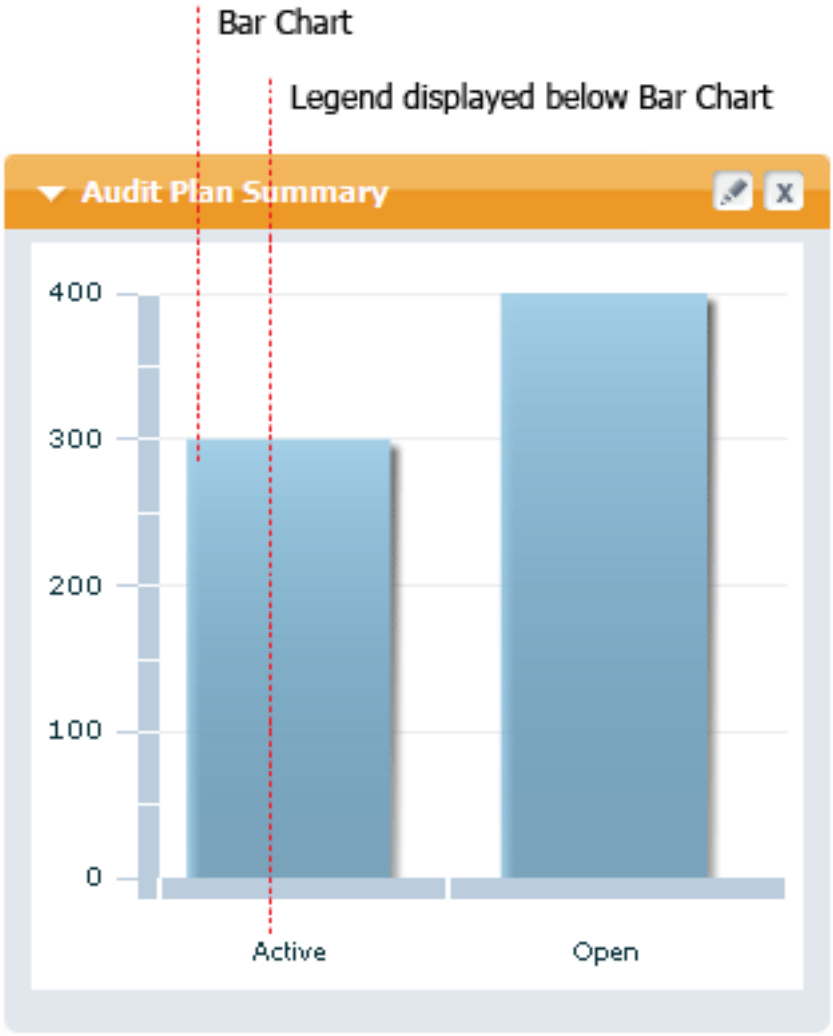

Figure 6.9 Bar Chart

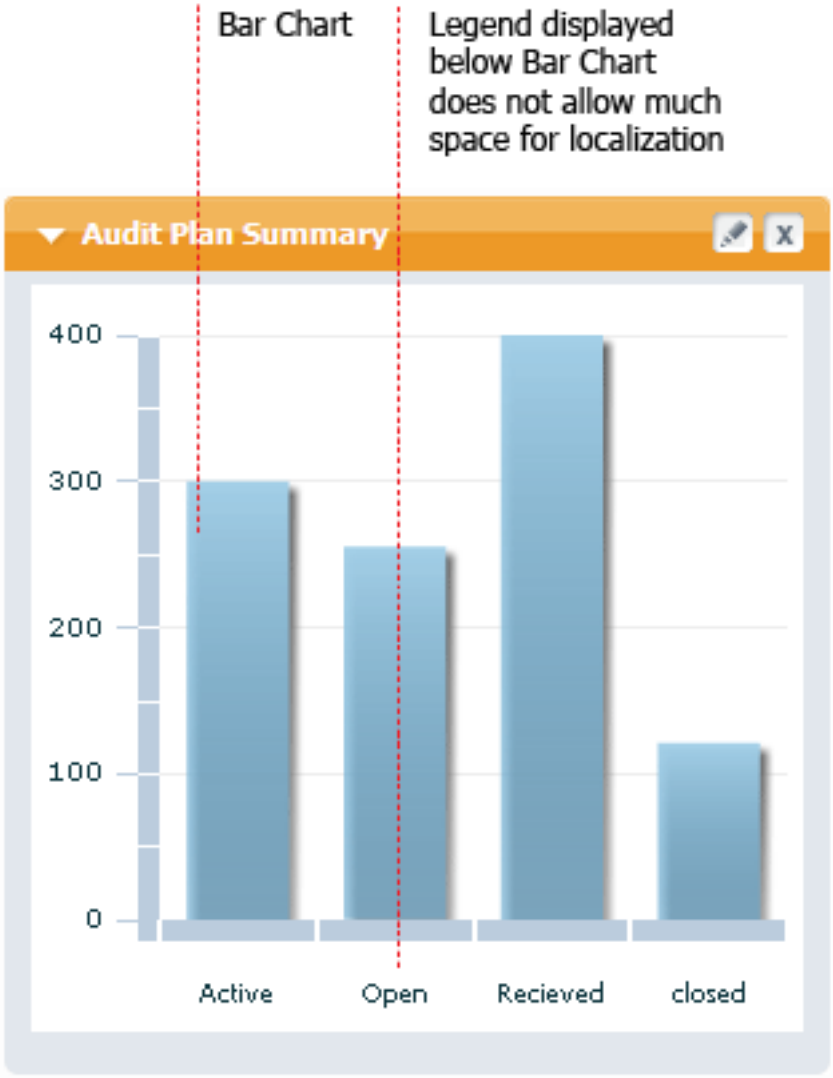

Figure 6.10 Bar Chart - Limited Space for Text

- When using a pie chart, if there are only a small number of items and all the information fits (remembering localization) then the legend can be displayed below the graph. If there are a large number of items on a pie chart the legend should be displayed to the right of the pie. In these charts when the legend text gets wider the chart gets smaller. The size of the chart reduces in order to accommodate the larger text items

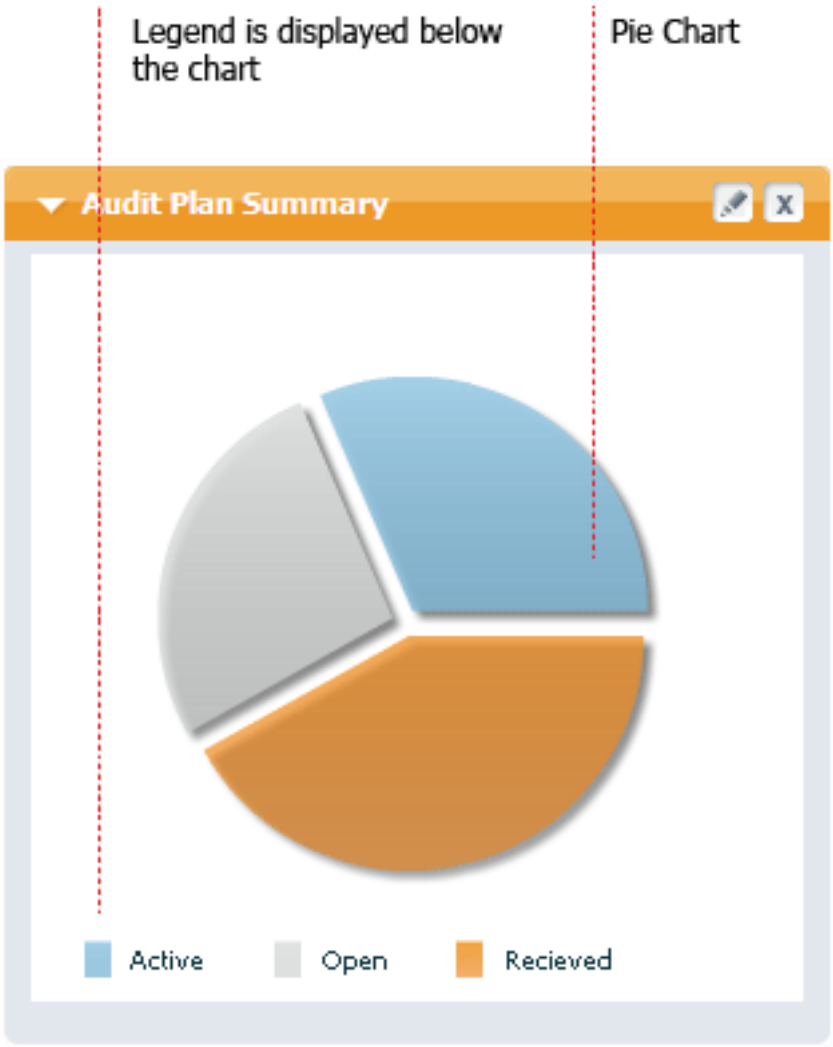

Figure 6.11 Pie Chart - Legend at the Bottom

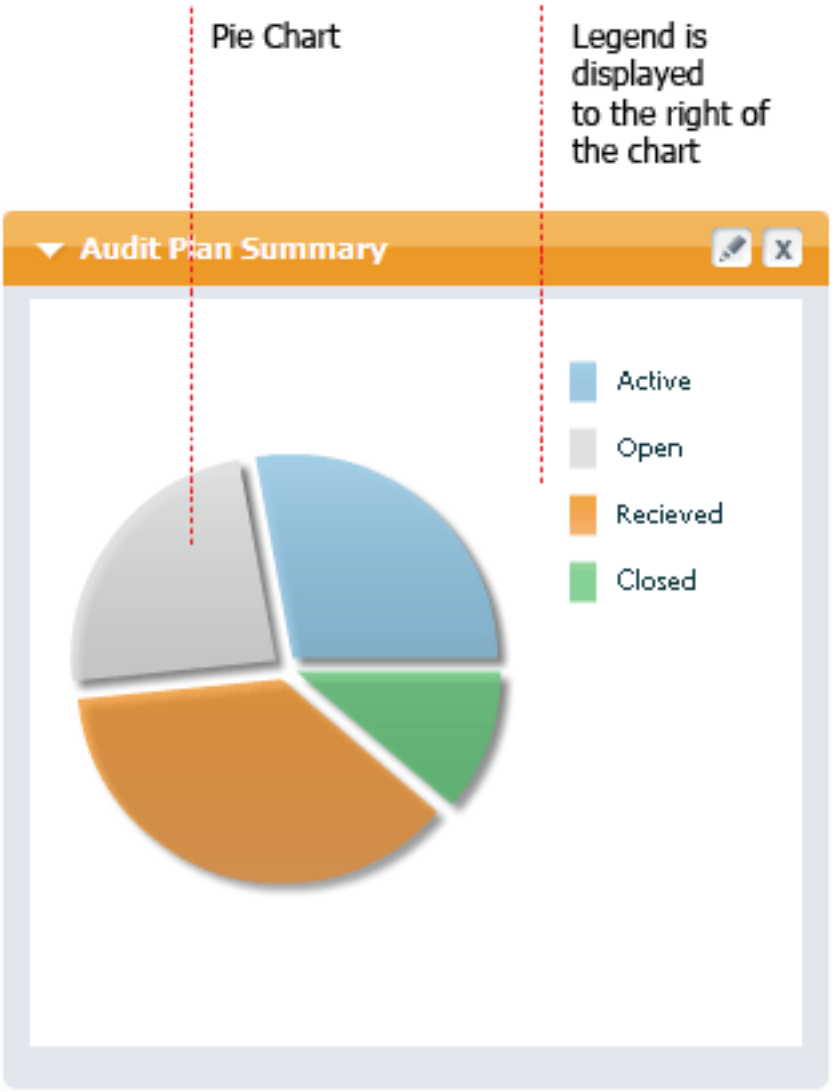

Figure 6.12 Pie Chart - Legend on the Right

The style of chart used should be dependent on the data being presented, so if the graph that you need to display does not fit within the space constraints of the pod it would be better not to display that graph in the pod view.

Appendix A

User Interface Checklist

This appendix provides a quick reference to the main components of the user interface. It also highlights common implementation mistakes.

A.1 Resolution

Optimise your design for the minimum supported resolution of 1024x768 pixels.

A.2 Use of Text

The text used within the application must always be clear and concise to the user. When labelling a button or action, the text must indicate to the user what the expected outcome will be when the object is clicked. The text must always relate to what is being displayed on the page and must make sense grammatically.

A.2.1 Text Wrapping

Text wrapping should be avoided at all times. Text should not wrap at the minimum resolution of 1024x768 with the shortcuts panel collapsed. Column widths should be sized appropriately so that wrapping does not occur.

Localization

At the end of each label and value field, an extra 30% must be added for localization space. This is added to avoid wrapping once the text is translated into a different language. This 30% space should not include the margin width.

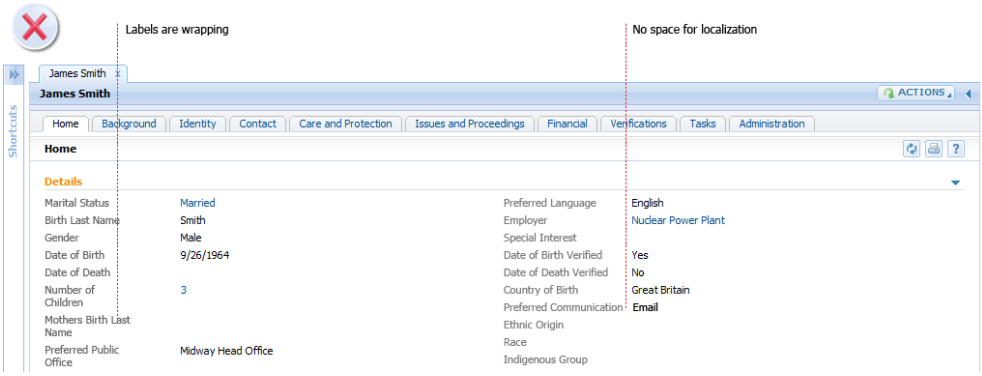

Figure A.1 Incorrect Layout for Text Wrapping and Localization Space

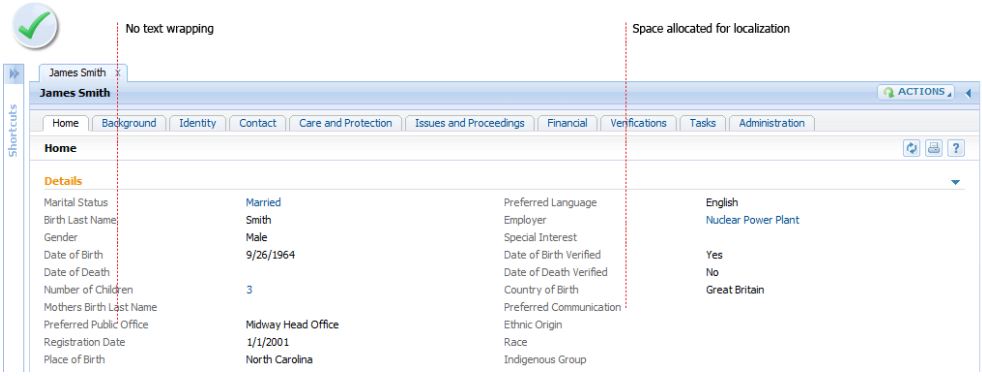

Figure A.2 Correct Layout for Text Wrapping and Localization Space

A.2.2 Blue Text

Do not use blue text unless the text is hyperlinked. All links within the application are in blue text, so if blue text is used, a user will assume that this is a link.

A.2.3 Title Style Capitalization

Title style capitalization should be used for all titles, names, labels and buttons. It should not be used for standard sentences.

The style guidelines for title style capitalization are:

- Capitalize all nouns, pronouns, verbs, adverbs and adjectives
- Capitalize the first and last words
- Do not capitalize articles (a, the) and coordinate conjunctions (and, but, for, nor, or), unless they are the first or last word

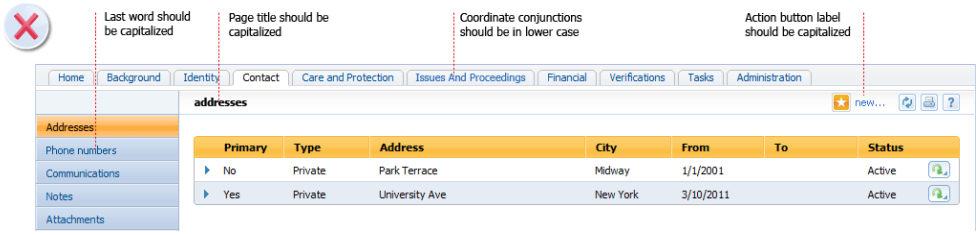

Figure A.3 Incorrect use of Title Syle Capitalization

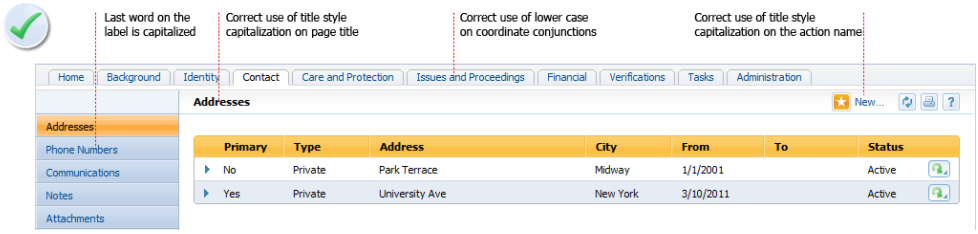

Figure A.4 Correct use of Title Syle Capitalization

A.2.4 Ellipses

Use ellipses when further action is needed by the user to complete an action. These are also required for confirmation style modals. They are not required when the user does not have to do anything else to complete the action.

A.2.5 Colons

Colons should not be displayed at the end of label text.

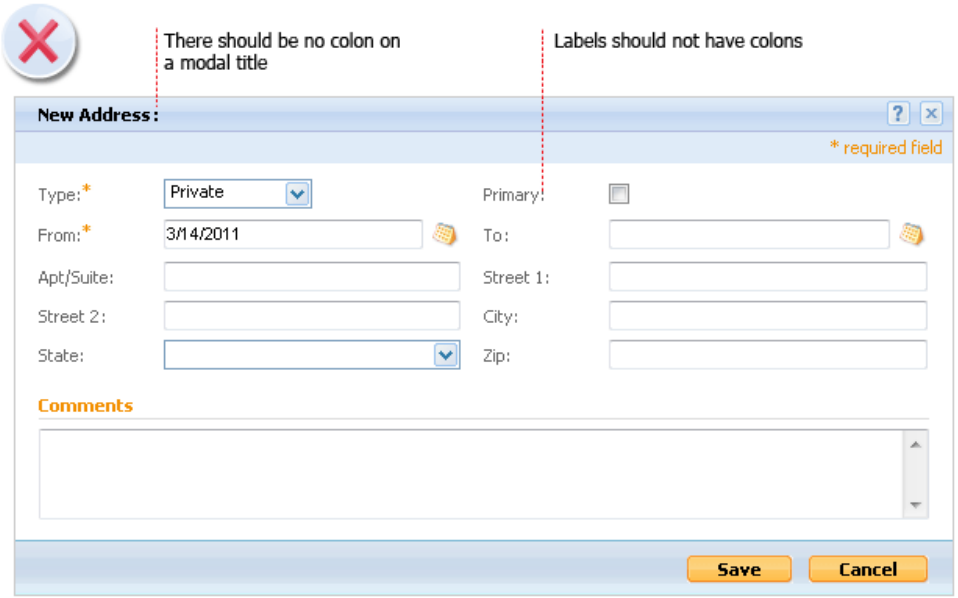

Figure A.5 Incorrect use of Colons

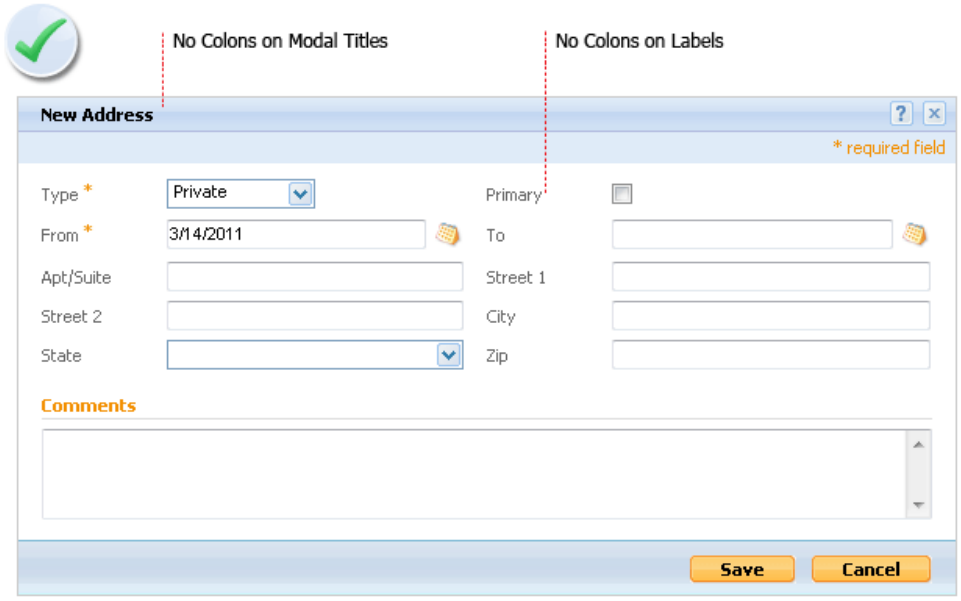

Figure A.6 Correct use of Colons

A.2.6 User Names

Display the user's full name rather than the userID.

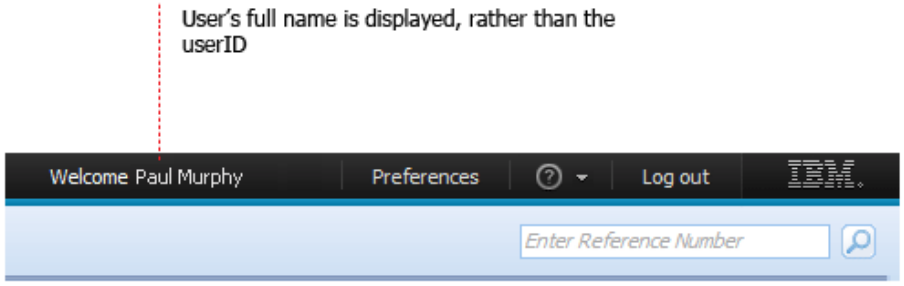

Figure A.7 Display of User's Full Name

A.3 Labeling of Tabs and Pages

The name of the tab should be the same as the tab title. The tab title must reflect the tab content. The title should be dynamic if there is more than one instance of the tab. For example, with a person tab, the title should be the person name, e.g. 'James Smith' rather than 'Person'.

A.3.1 Navigation Bar Tabs

If a navigation bar tab name refers to a single page (rather than a page group), the navigation bar tab name must be the same as the page title.

When a navigation bar tab name refers to a group of pages, the name should describe the group of pages.

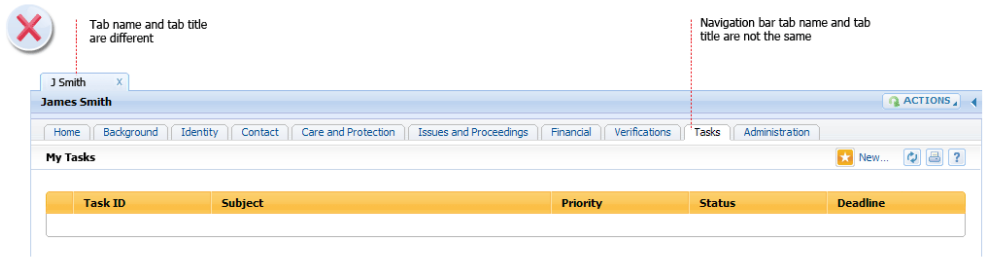

Figure A.8 Incorrect Naming of Tabs and Pages

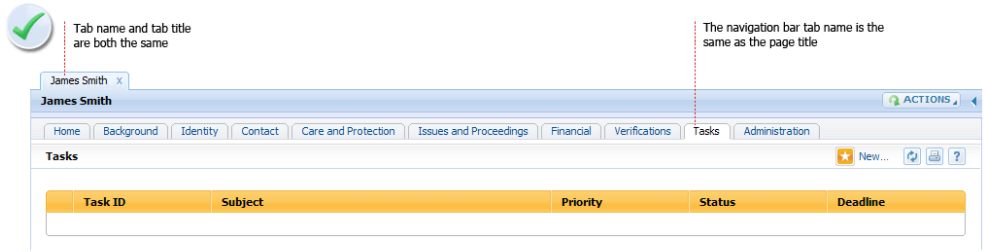

Figure A.9 Correct Naming of Tabs and Pages

A.3.2 Page Titles

If a tab contains only one page, then there is no need for a page title.

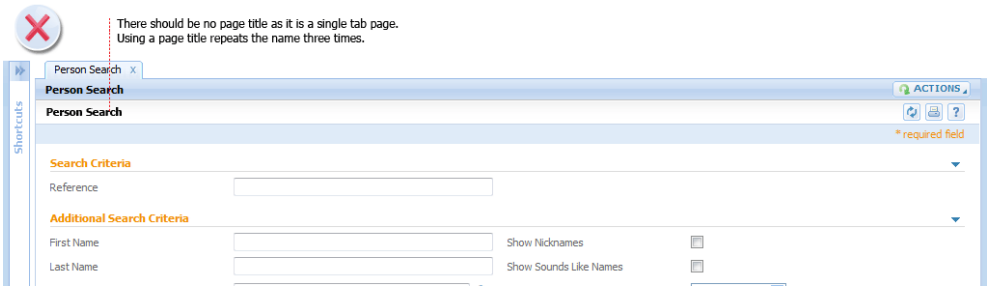

Figure A.10 Incorrect Display of Page Title

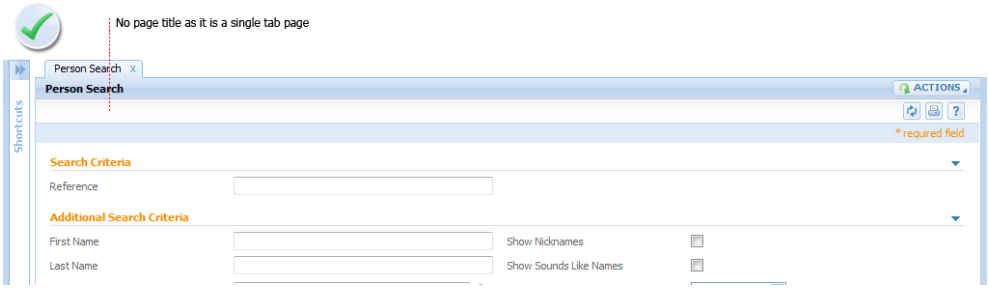

Figure A.11 Correct Display of Page Title

If a tab contains multiple pages, all pages must contain page titles. The first tab in the navigation bar is typically called 'Home'. Typically the home page should not be part of a page group

The name of a page group item and the title of the page to which it refers must always be the same.

A.4 Action Menus

There are three types of action menu. These are tab actions menus, pages actions menus and list actions menus.

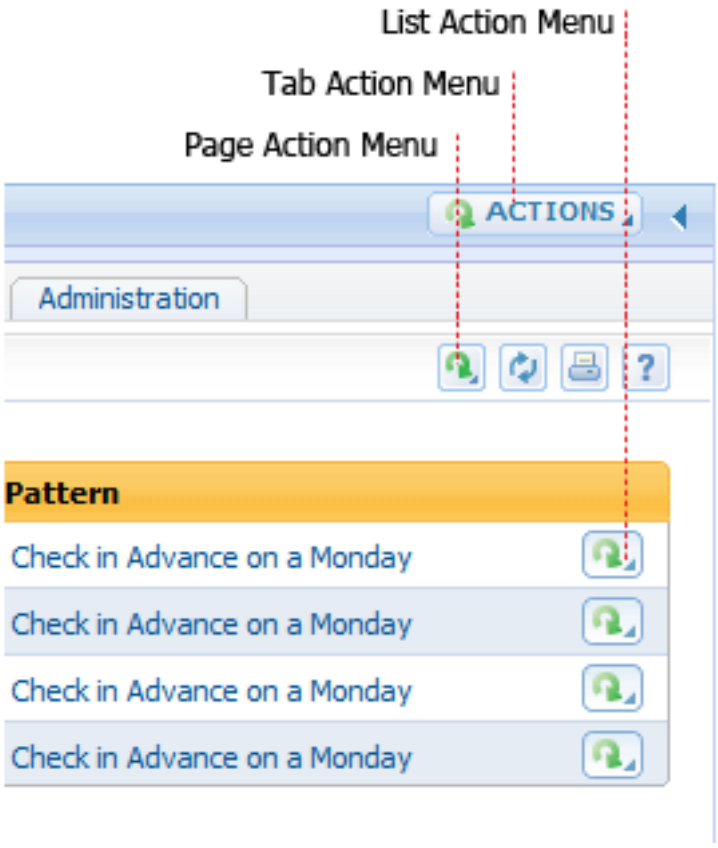

Figure A.12 Tab, Page and List Action Menus

A.4.1 Action Menu Layout

- Use separators to group related menu items
- Edit functions should be displayed at the top of the menu
- Create functions such as 'New...' should be displayed below edit functions
- Destructive items, such as 'Delete...' should be displayed at the bottom of the menu

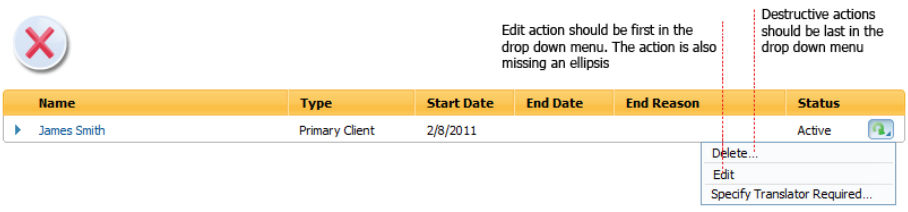

Figure A.13 Incorrect Layout of Actions on a Menu

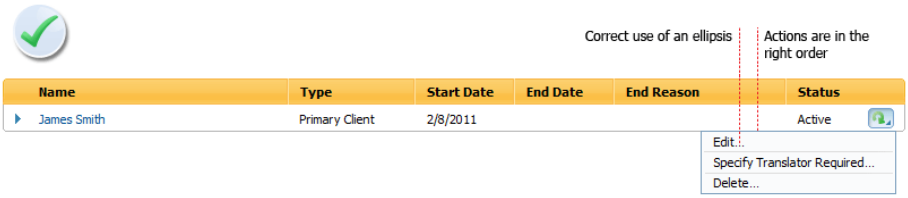

Figure A.14 Correct Layout of Actions on a Menu

- Disable rather than hide menu options. Only hide the options if it is never possible for the item to appear in the menu, e.g. the component is not installed
- Use ellipses when further action is needed by the user to complete an action. These are also required for confirmation style modals. They are not required when the user does not have to do anything else to complete the action. For example, clicking a 'View' menu item opens a modal that allows the user to view data only. An ellipsis should not be used in this case
- The text of the menu should be similar to the title of the modal dialog it opens - for example, an item called 'New Case' could open a modal called 'New Case' or 'New Assistance Case'

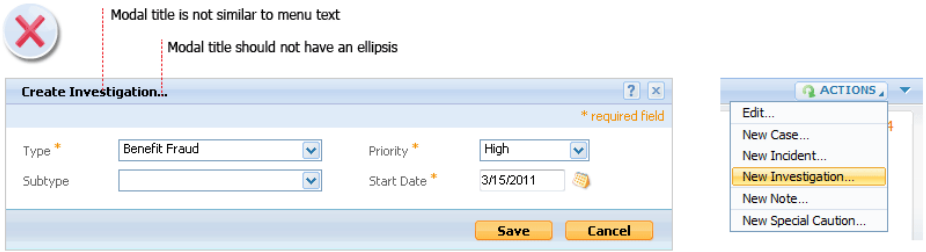

Figure A.15 Incorrect Naming of Modal and Menu Item

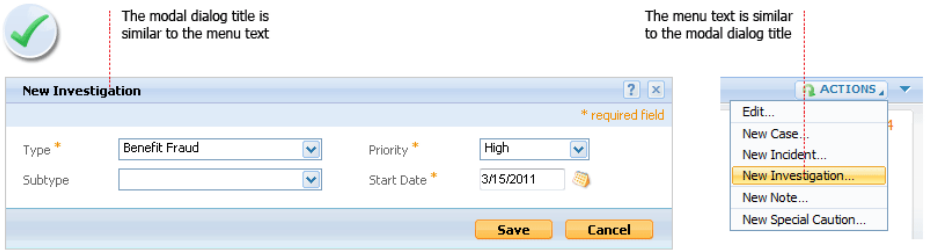

Figure A.16 Correct Naming of Modal and Menu Item

- Use hierarchical tab menus sparingly - only if you feel the menu is getting too large

A.4.2 Tab Action Menus

The tab action menu is situated on the right of the tab title bar. This menu displays the most commonly used actions that apply to the object.

The tab action menu should not contain items that can be accessed by navigation bar tabs.

A.4.3 Page Action Menus

The page action menu us displayed on the right of the title bar and contains the main actions required for the page. When there are two or less actions on a page, these can be displayed as page action buttons. If there are over two actions required for the page, an action menu is automatically displayed.

Typically homepages do not have page action menus. A homepage represents a summary of the object and therefore the appropriate menu items should be at tab level.

A.4.4 List Action Menus

The list action menu is displayed on the right of the list row. This should contain all the actions associated with the list item. Clicking on an action typically launches a modal window and allows the user to perform that action. Once the modal is closed the user is brought back to the updated list page.

A.5 Clusters and Lists

Clusters and lists are the main components of the Cúram page. They are the format by which all content is displayed in the application.

A.5.1 Clusters

Most content within Cúram is displayed in clusters. They consist of field labels and values and are the way in which information is grouped logically.

Avoid unnessary cluster titles. Do not display the cluster title if it does not give any more information or context to the user. Also, when there is only one cluster on screen, a title should not be displayed as the page title will typically describe the cluster.

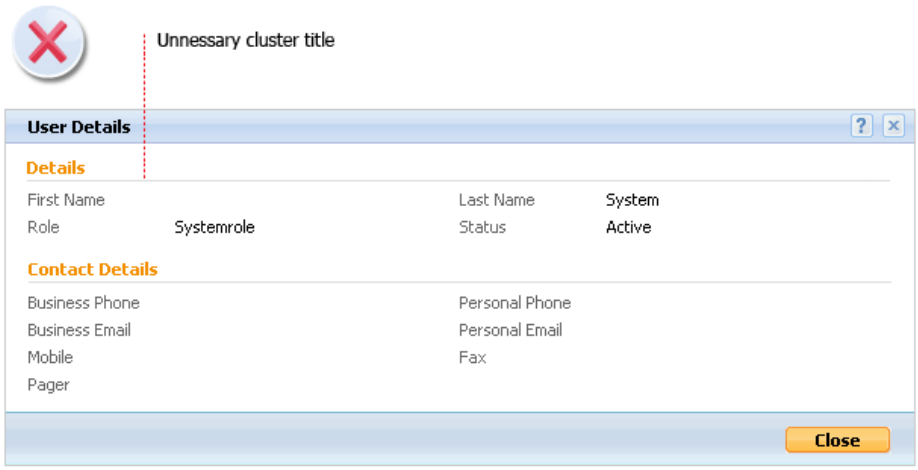

Figure A.17 Incorrect Display of Cluster Titles

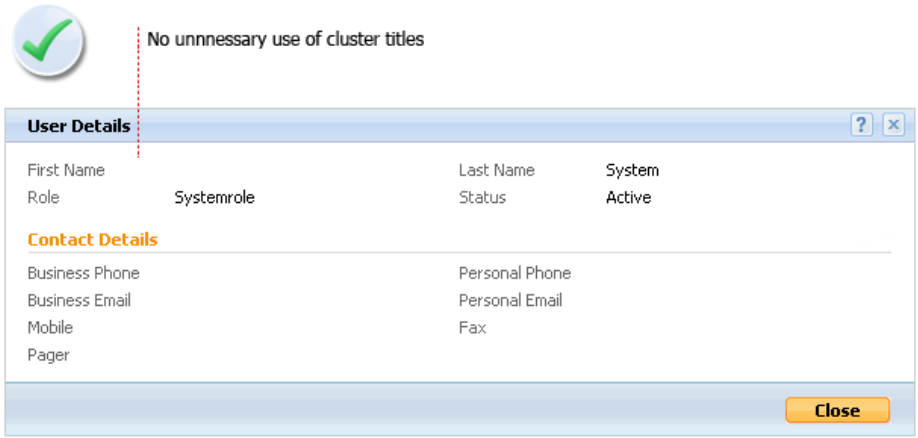

Figure A.18 Correct Display of Cluster Titles

If there are multiple clusters on screen they should be aligned and the same width as one another. Also, the columns within these clusters should be aligned too.

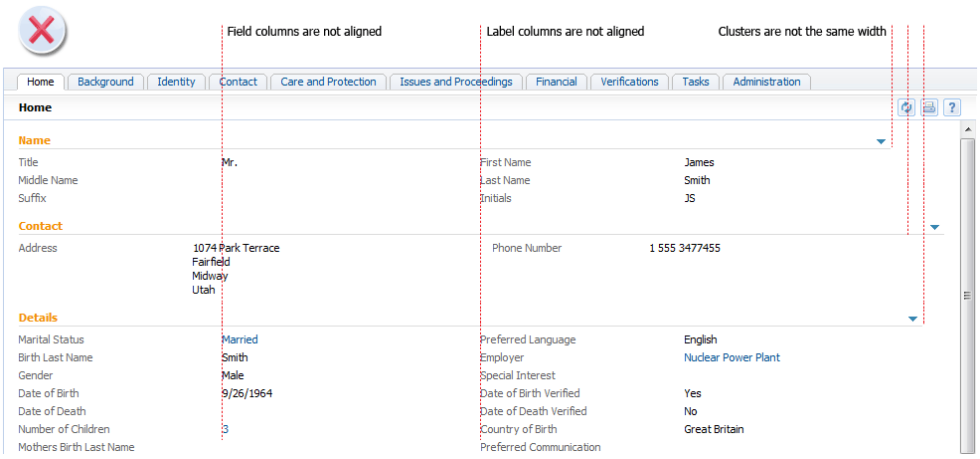

Figure A.19 Incorrect Alignment of Clusters

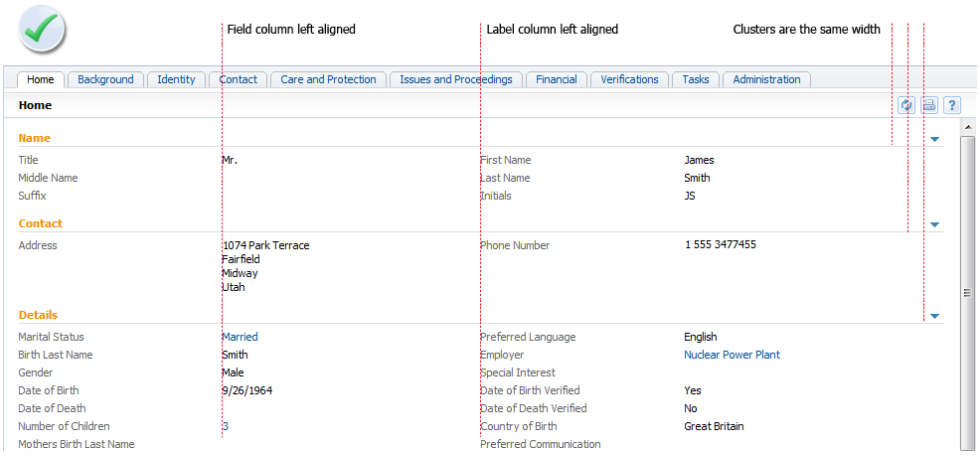

Figure A.20 Correct Alignment of Clusters

There should be no 'manage' clusters. All manage clusters should be displayed within the actions menus.

A.5.2 Lists

A list displays rows of information in table format to the user. These rows can optionally expand to display drop down panes.

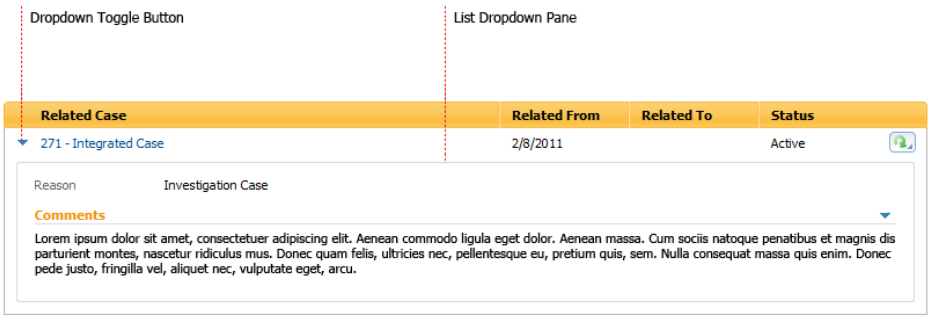

Figure A.21 List Dropdown Pane

The width of the column should be sized to the expected content. This width should also take into consideration space for localization.

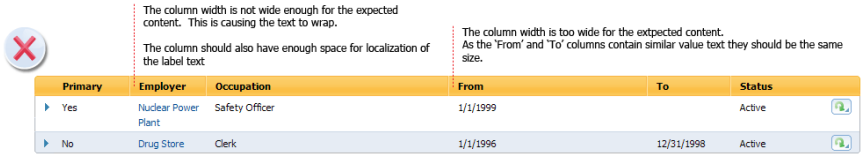

Figure A.22 Incorrect Sizing of Column Width

Figure A.23 Correct Sizing of Column Width

When designing the structure of the list, there are a number of guidelines you must follow in relation to column layout:

- The most important information should be placed on the left side of the list.
- Information should be logically positioned, for example 'Start Date' should be followed by 'End Date'
- If a record status (e.g. closed) is displayed for a list item, this should be the last column on the list. The exception to this is when the status refers to a business status (e.g. paid).

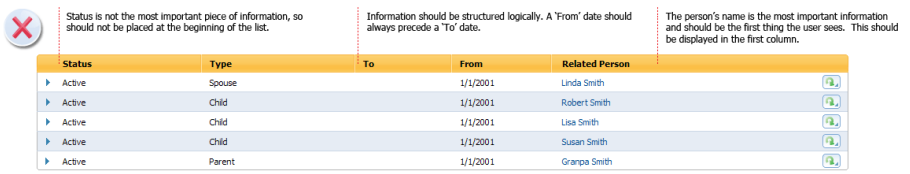

Figure A.24 Incorrect Ordering of Columns

Figure A.25 Correct Ordering of Columns

- In financial views monetary amounts should be the last columns in the list. If a record status is displayed as well, the amount column should be displayed to the left of this.
- All information is left aligned on the list except for monetary amounts. Both the column title and field text of monetary amounts should be right aligned

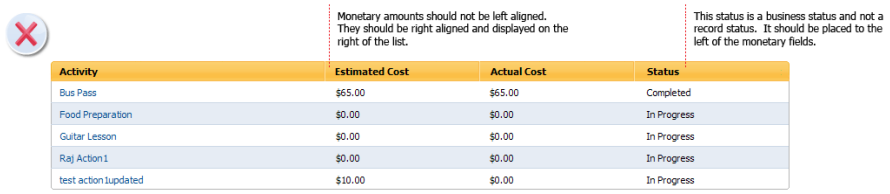

Figure A.26 Incorrect Ordering and Alignment of Monetary Columns

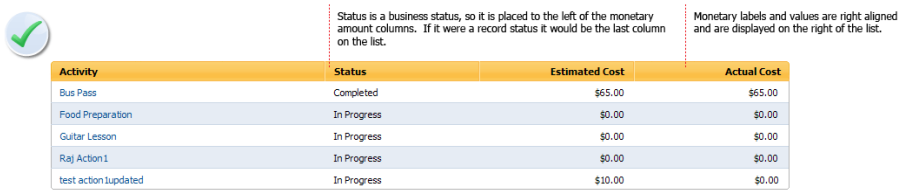

Figure A.27 Correct Ordering and Alignment of Monetary Columns

When there is only one list on screen there should be no list title.

Lists should have a defined height when they are displayed within a modal

or if displayed with other lists or clusters on a page. The height should be set according to the expected content.

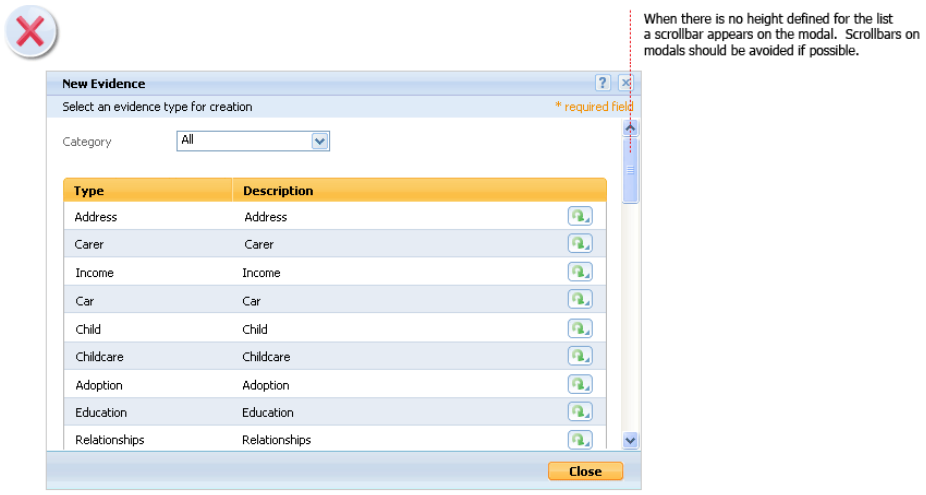

Figure A.28 Incorrect Display of a List within a Modal

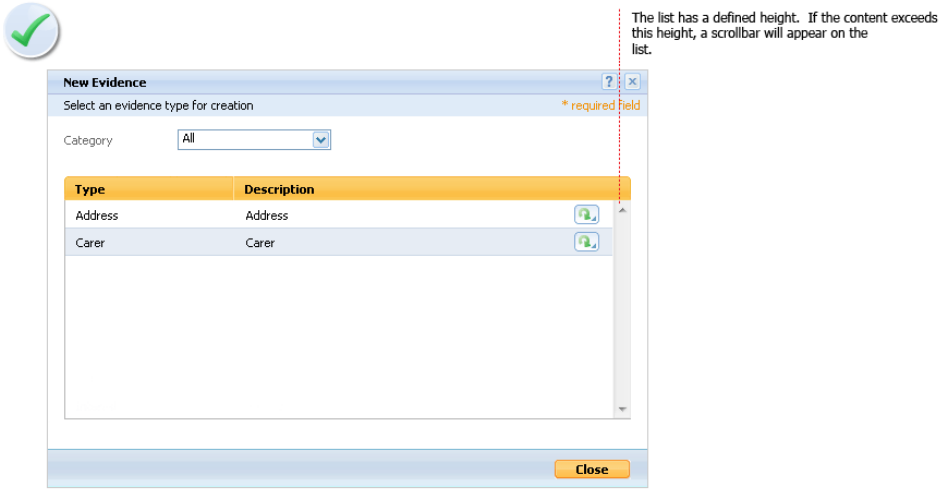

Figure A.29 Correct Display of a List within a Modal

If two lists are displayed side by side in a page, they should be horizontally aligned.

Pagination should be used when a large number of items are displayed within a list.

In a list drop down pane, do not repeat unnecessary information.

A.6 Modal Dialogs

There should be no page context on the title bar.

The width of the modal should be set based on the content being displayed. Text wrapping, textbox sizing and column widths should be taken into consideration. The minimum modal width is 400 pixels. Modal height is set automatically. When a rich text editor is present it must be set manually.

List in modals should have a defined height. Paginated lists should not be used unless a large number of items are expected.

Where possible, a modal dialog should not have a vertical scroll bar. A horizontal scrollbar should never be displayed.

A.6.1 Editable Fields

Textboxes should be sized according to the expected content. The standard sizing applied should be 100%, 60% or 30% of the column width. Textboxes can also be sized to a specific number of characters, e.g. a number of children box would be sized to fit two characters.

Multiline text fields should allow for four rows of text. If the text input is beyond this a scrollbar should appear.

A rich text editor must be at least 510 pixels wide and 460 pixels high and allow for a 15 pixel margin to the edge of the modal.

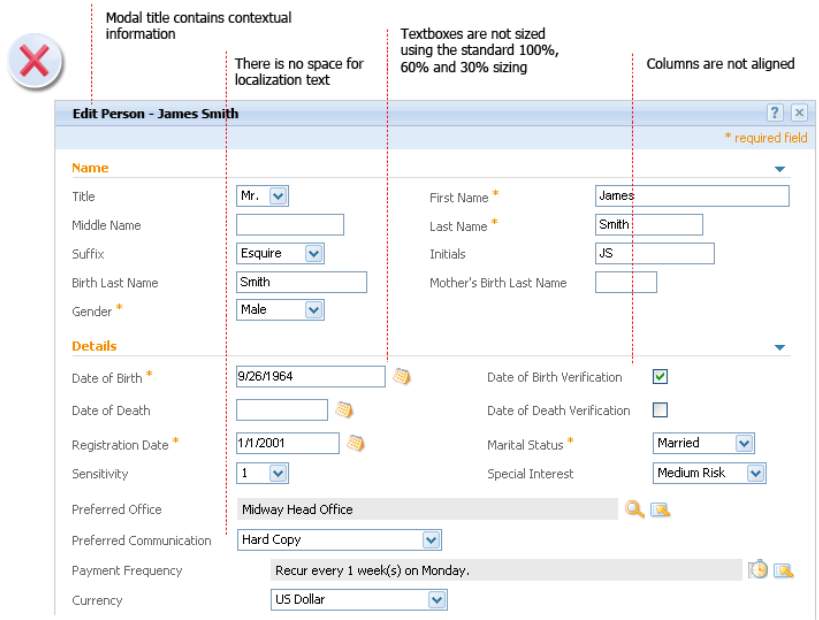

Figure A.30 Incorrect Layout of Information on a Modal

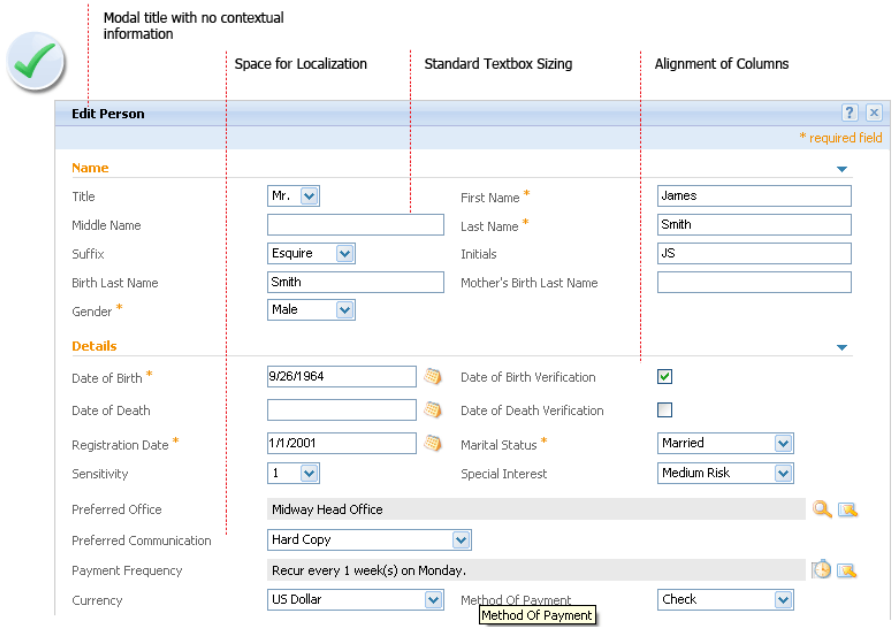

Figure A.31 Correct Layout of Information on a Modal

A.6.2 Modal Buttons

When editing and creating new items, 'Save' and 'Cancel' text is the standard button text. They are displayed on the right of the button bar.

A 'Save & New' button should only be displayed if you expect the user to create multiple items. This button should be displayed to the left of the 'Save' button.

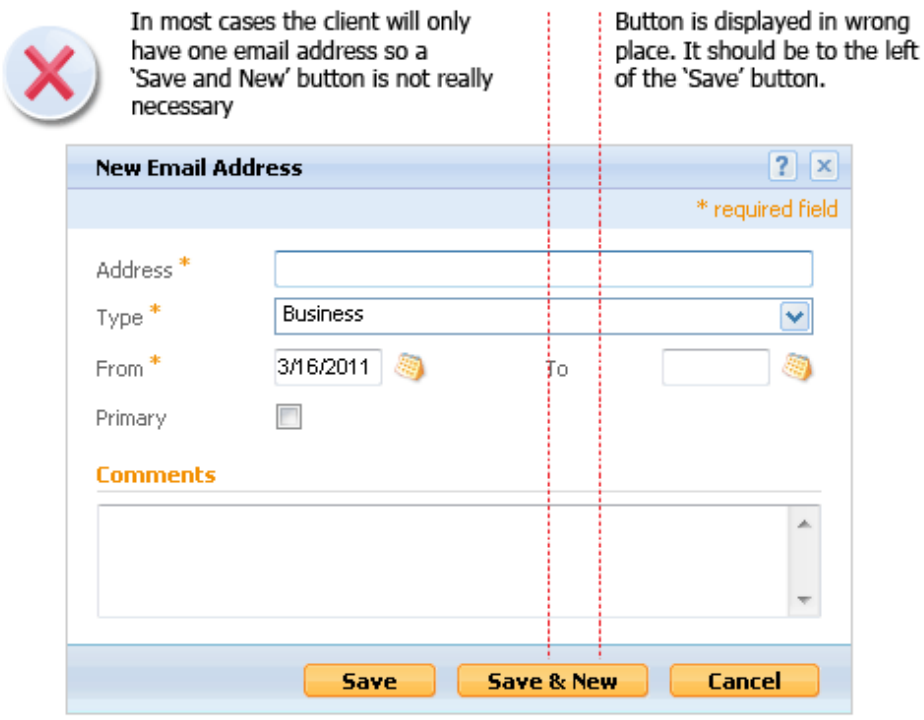

Figure A.32 Incorrect Layout of Buttons on a Modal

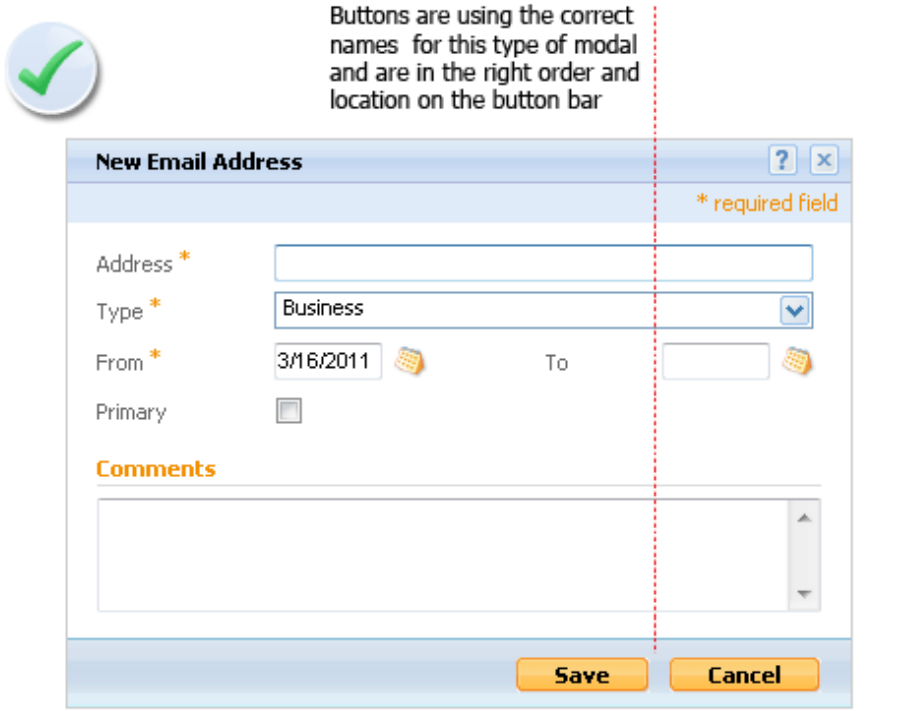

Figure A.33 Correct Layout of Buttons on a Modal

For confirmation dialogs 'Yes' and 'No' should be used

To dismiss a modal a 'Close' button must be displayed . Close buttons are typically displayed on modals used to view information only.

A.7 Wizards

General modal dialog guidelines also apply to wizards.

When stepping through the wizard the size of the modal should remain the same at all times. The size is determined by the dimensions of the largest page in the wizard.

A.7.1 Wizard Buttons

All progressive buttons should be displayed on the right and dismissive buttons on the left.

The 'Next' button should be placed on the right of the bar, with the 'Back' button to the left of it.

The 'Cancel' button should be placed on the left.

On the last screen a 'Finish' button should be displayed instead of the 'Next' button.

If a 'Save & Exit' button is present it should be displayed to the left of the 'Back' button.

A.8 Shortcuts Panel

Links within categories should be grouped logically.

Ellipses must be used when further action is needed and are also required for confirmation style modals.

Do not use verbs such a 'View' to open embedded pages. For example, display 'Service Plans', rather than 'View Service Plans'.

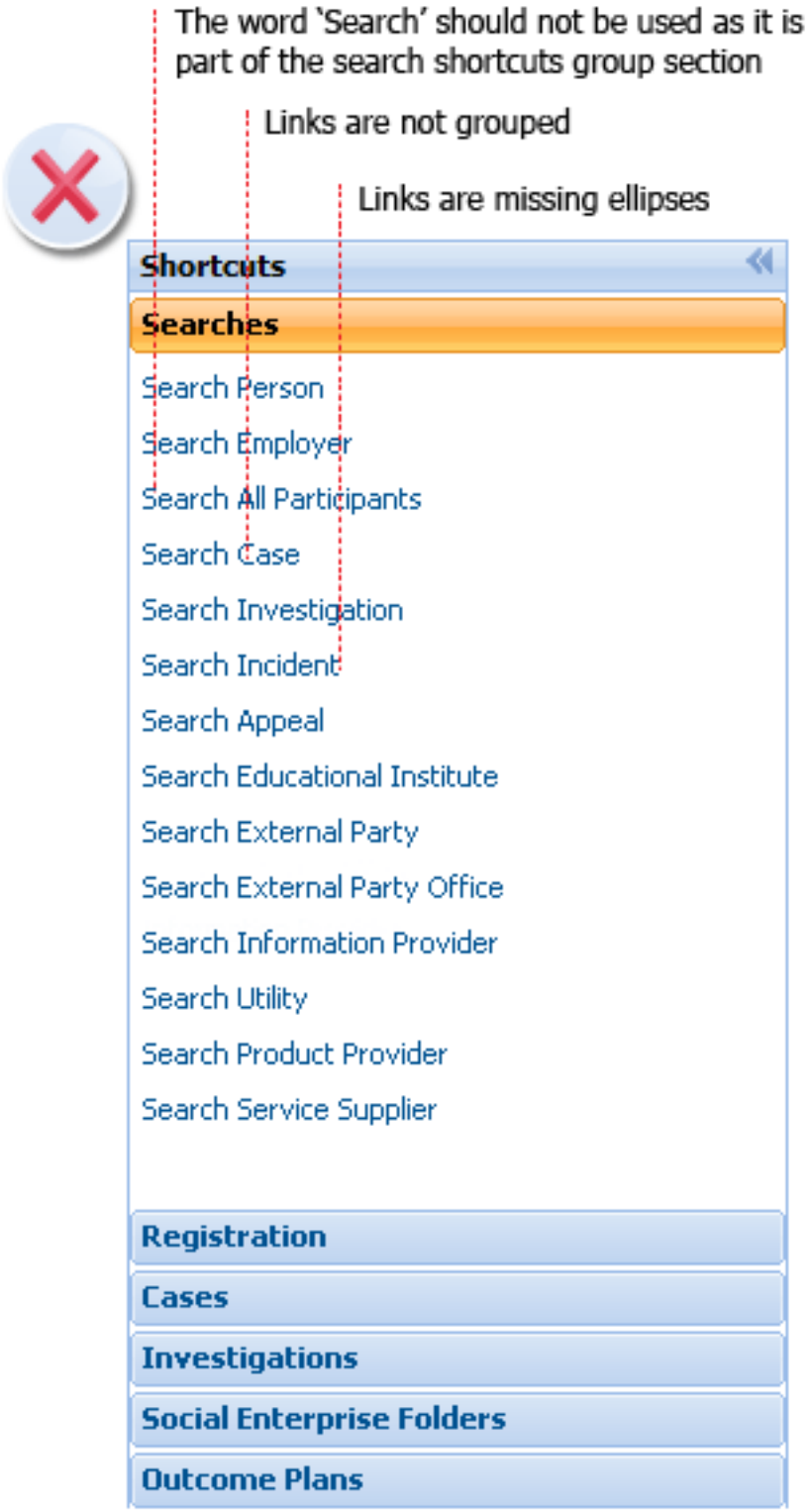

Figure A.34 Incorrect Layout of Shortcuts Content

Figure A.35 Correct Layout of Shortcuts Content

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