

Standard Screen Patterns v3.0 January 17, 2009

by Theresa Neil

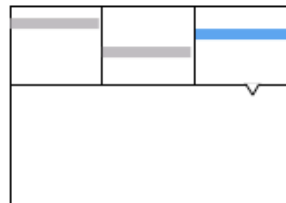
Patterns are broadly applicable solutions for general problems. Contrast this with:

- Guidelines: specific rules
- Principles: underlying conceptual framework for guidelines

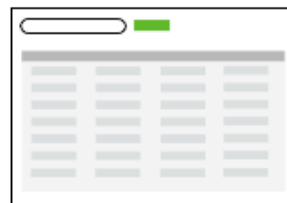
Patterns aid in the application of abstract solutions to concrete problems. Think of them as solution templates. Standard screen patterns for enterprise software and productivity web applications:



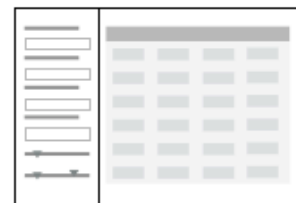
Master/ Detail



Column Browse



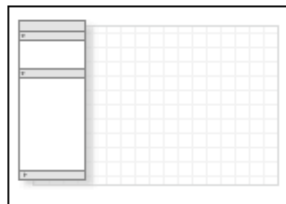
Search/ Results



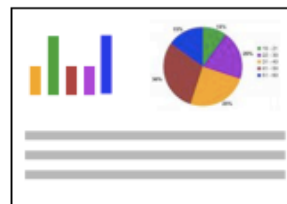
Filter



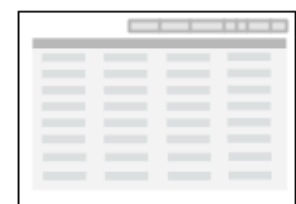
Form



Palette/ Canvas



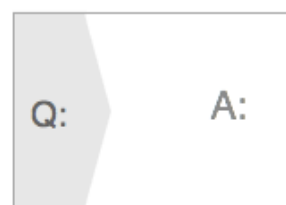
Dashboard



Spreadsheet



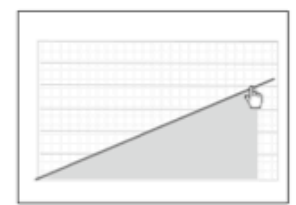
Wizard



Question & Answer



Parallel

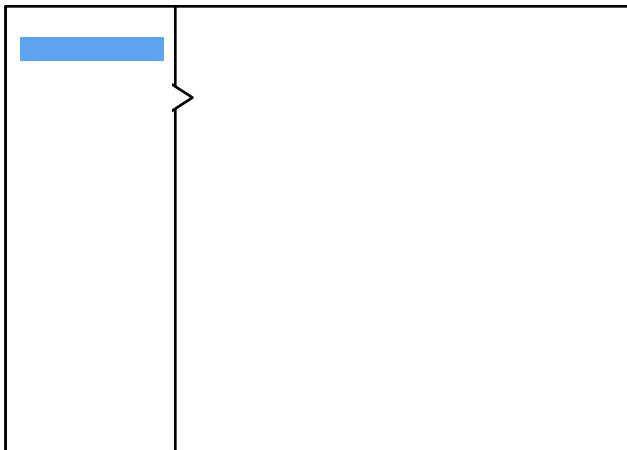


Interactive



Blank

Master/Detail



Vertical

Master/Detail screen pattern can be vertical or horizontal. Ideal for creating an efficient user experience by allowing the user to stay in the same screen while navigating items.

The master pane is typically comprised of:

- List on left
- Tree on left
- Accordion on left
- Table on left

The detail pane can include a:

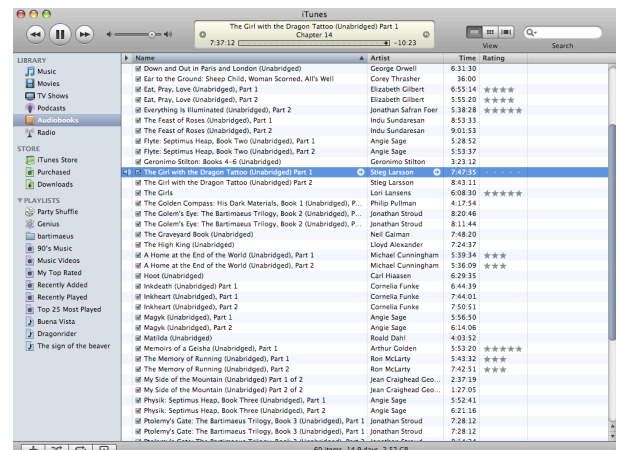
- Text description
- Thumbnails
- Table
- List
- Graphs or charts
- A form

Best practices

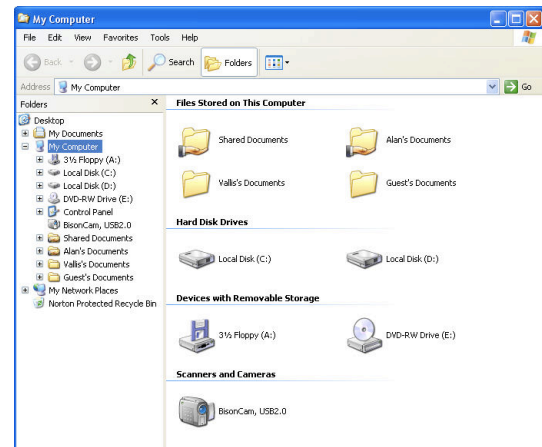
Include quantity in the master pane, ex. Inbox (34).

Use standard list, tree or table actions if using these components on the left (add, remove, rename, drag/drop...).

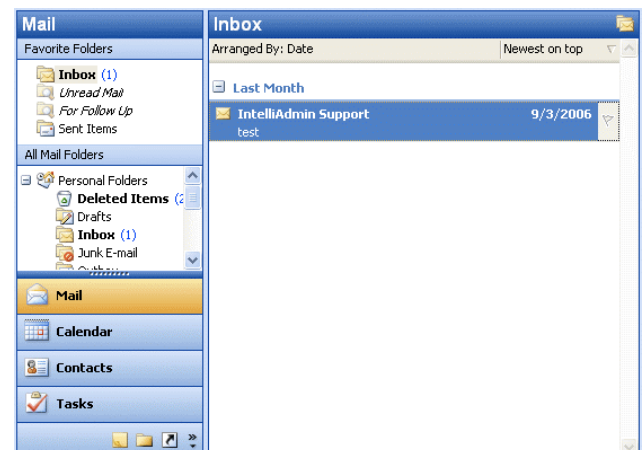
Don't use tabs in the master or detail pane.



List on left- iTunes

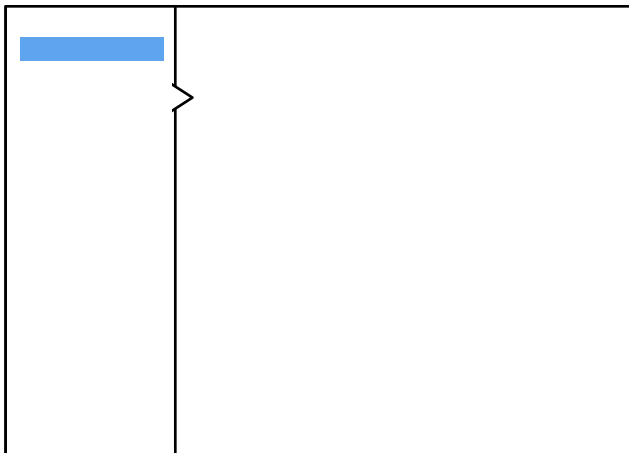


Tree on left- Windows Explorer



Accordion on left- Outlook

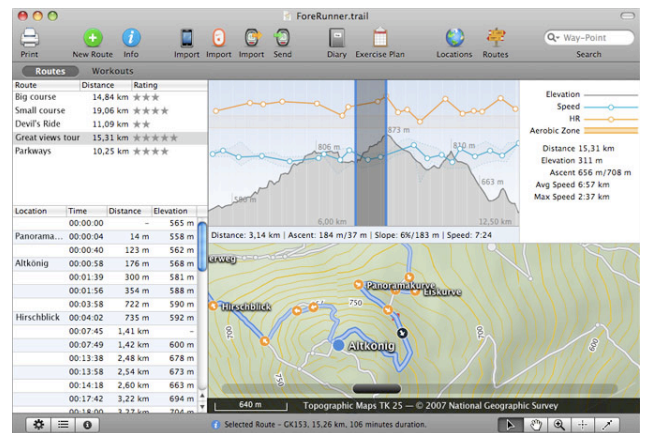
Master/Detail (cont.)



Vertical

Customers & Jobs		Transactions		Customer Information		Reports for this Customer	
View: Customers Jobs Transactions		Customer Name: All In One Foundations		Contact: Phone: All Phone		• QuickReport	
+All In One Foundations		Customer Type: All In One Foundations		Billing Address: 1700 LUNGLIN LN		• Open Balance	
+Baugh, Adam		Balance Total: 2,652.59		REG: 1709 Interval		• Open Estimates	
+Blummett, Apt		386.31		Fax: FAX # 821-0963			
+Cochran, Christy an...		-560.19		Email:			
+Creative Plant Design		-353.20		Terms:			
+Cheserret, Anne		340.83		Price Level:			
+Eclectic		97.89					
+Grader, Joe		206.01					
+Hrilly, Stacy		249.54					
+Landscape Design an...		1,071.86					
+Fromhold, Margaret		131.03					
+Garden Works		75.00					
+712 Windong		75.00					
+Great Outdoor Lan...		163.03					
+Herb, Rob		219.40					
+Hildebrand, Gary an...		2,162.20					
+Crestland		1,375.00					
+Skyview		585.00					
+Swenson		202.20					
+Higens, Sean		50.00					
+King, Carl		193.64					
+Lambert, Liz		377.38					
+Lambert, Corporation		86.30					
+Marchant, Lucie		114.34					
+McSpadden, Raymo...		252.12					
+Mc		1,751.22					
+Worwood		1,751.22					
+Hage, Steve		4,598.50					
+Hedham, Scott and ...		1,122.75					

Table on left- Quick Books

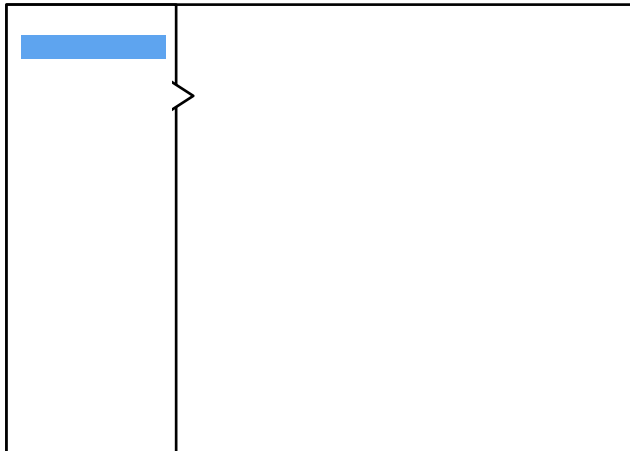


List on left, graphs on right- Trail Runner

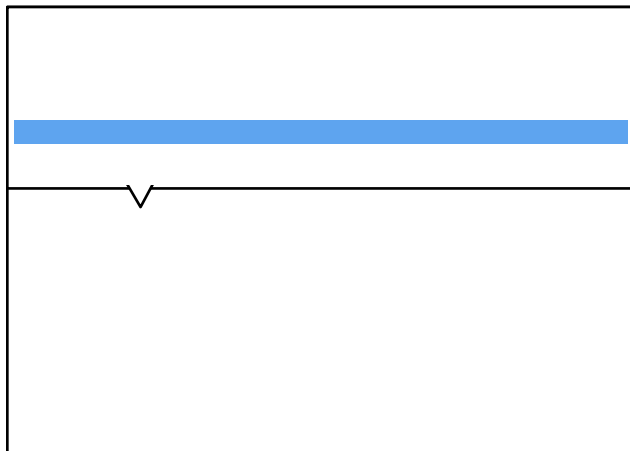
CONTACTS	
Search: <input type="text"/>	
Sort: <input type="text"/> Last Name	
Antony Campitelli antony@laszlomail.com	first name Kent last name Libbey title company
Kent Libbey kent@laszlomail.com	Email primary kent@laszlomail.com work
Laszlo Team laszlomailfeedback@laszlo.com	Phone home cell work
David Temkin david@laszlomail.com	Address home work
	IM IM
	Personal
<input type="button" value="+"/> <input type="button" value="+"/> <input type="button" value="Delete"/> <input type="button" value="Cancel"/> <input type="button" value="Save"/>	

Master list on left, editable form on right- Laszlo WebTop beta

Master/Detail (cont.)



Vertical

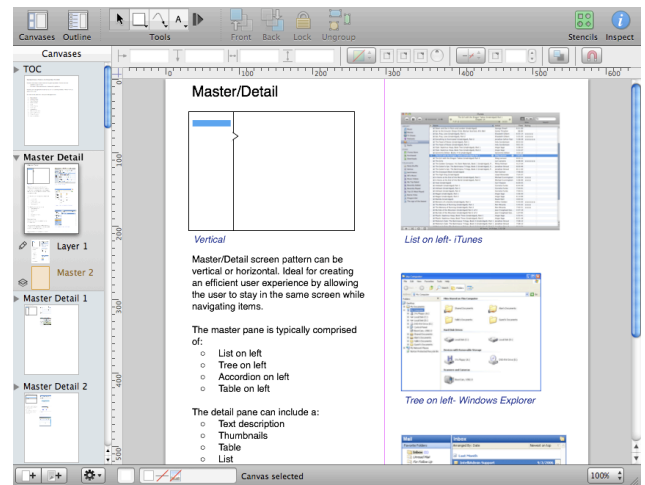


Horizontal

Horizontal layout is a good choice when the user needs to see more information in the master list than just a few identifiers, ex. subject or description

Best Practices

Don't use the bottom pane as an extended area for editing table fields. Use the Spreadsheet pattern or a light weight layer for editing.



*Thumbnails on left- selected screens
details on right- OmniGraffle*

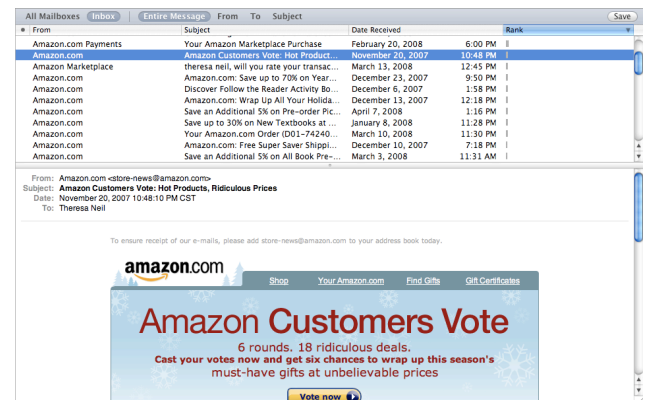
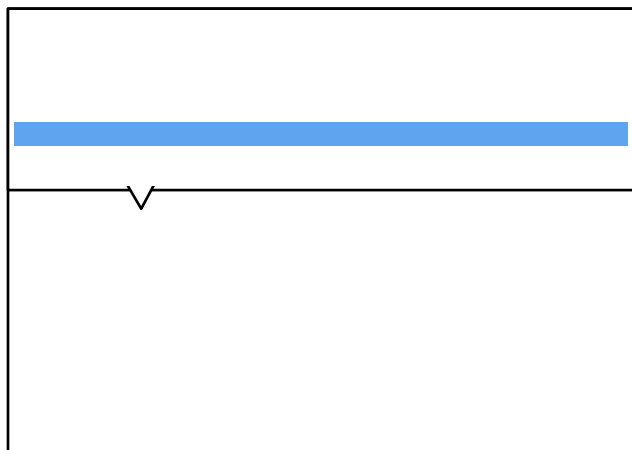


Table on top- Mac Mail

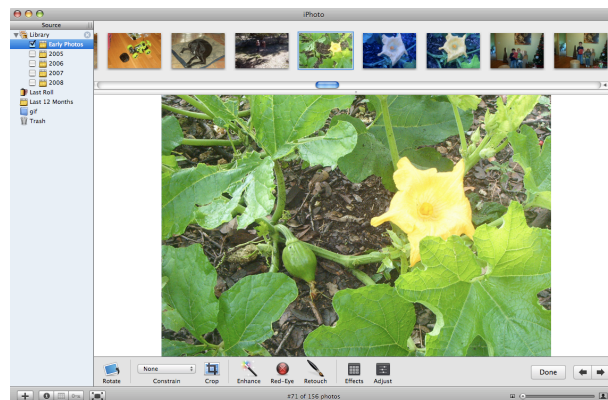


*Objects on top, hover to see details
below- Firebug*

Master/Detail (cont.)



Horizontal



Thumbnails on top, selected thumbnail's detail below- iPhoto

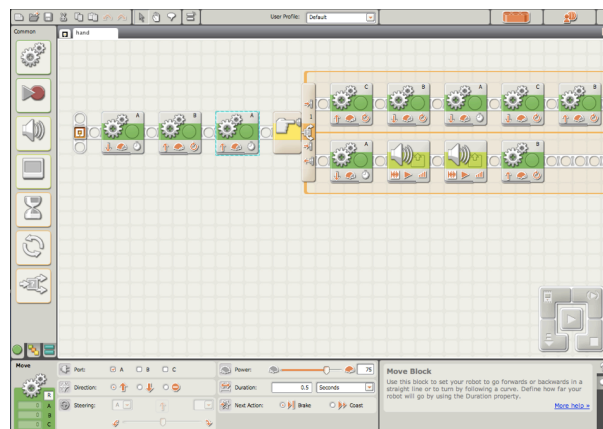
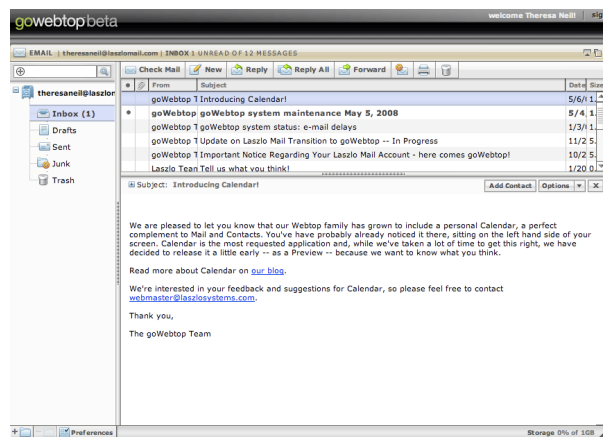
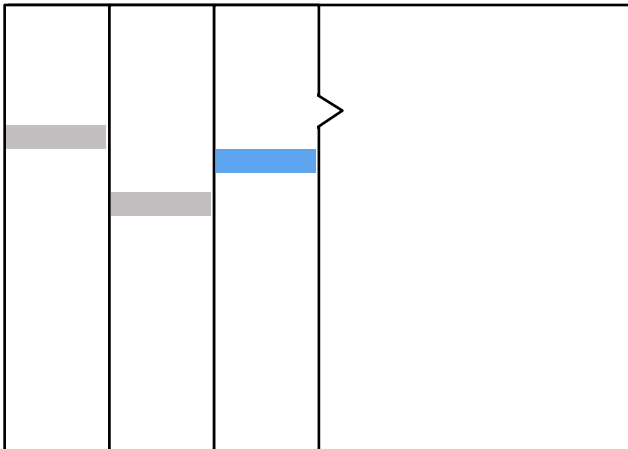


Diagram on top, selected object's properties below- Lego Mindstorm



List of messages on top, selected message's details below- goWebTop beta by Laszlo

Browse



Vertical

The Browse screen pattern can be vertical or horizontal. Ideal for creating an custom user experience by allowing the user to start from various entry points and navigate to the item(s) they are interested in.

Vertical variations typically offer a:

- List on left
- Divided list on left
- Tree on left
- Accordion on left

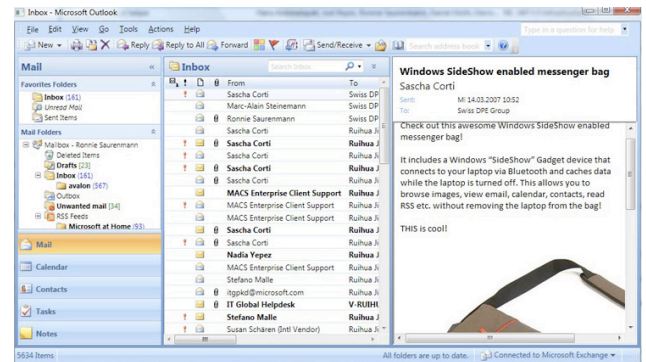
Typically 3-4 columns. Should always include a Search at the global level.

Best practices

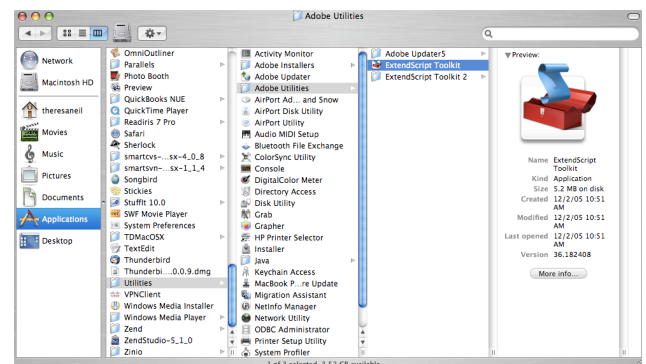
Only show items in the first column that have children.

Include quantity with the labels if it provides value for browsing.

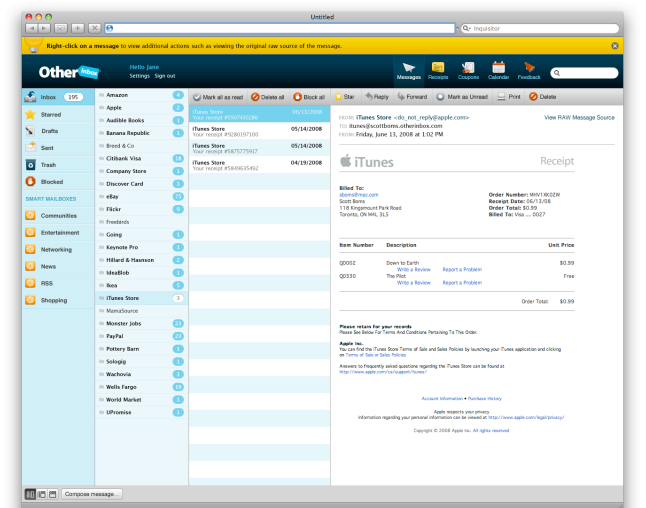
Many products that use this pattern provide an alternate interface for navigating, like a tree, thumbnail or table view.



Accordion with two additional fixed vertical columns- Outlook

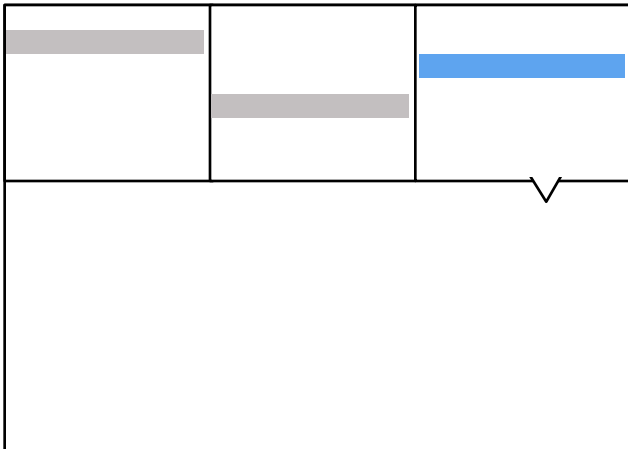


Unlimited vertical columns- Apple



Four fixed vertical columns- OtherInbox

Browse (cont.)



Horizontal

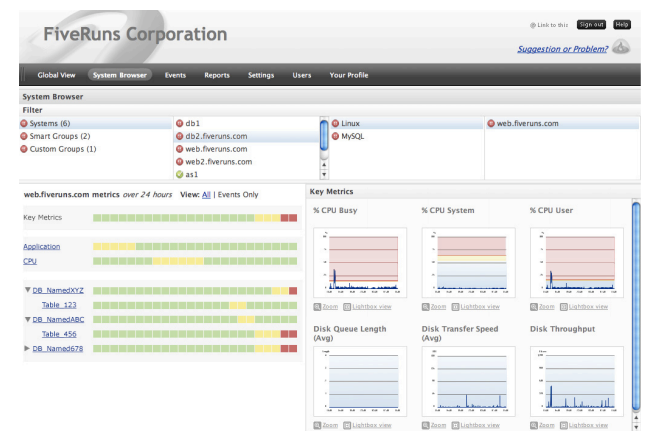
The horizontal layout is a good choice when there are few items in each refine column (less than 20) and the detail pane has tabular or graphical content.

Genre	Artist	Album	
All (2 Genres) Audiobook Spoken Word	All (29 Artists) Angie Sage Annie Proulx Arthur Golden Carl Haasen Chelsea Handler Corey Thrasher Cornelia Funke David Sedaris Diane Setterfield Elizabeth Gilbert George Orwell Geronimo Stilton	All (1 Album) My Side of the Mountain (Unabridged)	
<div></div>			
Name	Artist	Time	Rating
Gerónimo Stilton: Books 4-6 (Unabridged)	Gerónimo Stilton	3:23:12	
The Girl with the Dragon Tattoo (Unabridged) Part 1	Stieg Larsson	7:47:15	
The Girl with the Dragon Tattoo (Unabridged) Part 2	Stieg Larsson	8:43:11	
The Girls	Lori Lansens	6:08:30	*****
The Golden Compass: His Dark Materials, Book 1 (Unabridged), P...	Philip Pullman	4:17:54	
The Golden's Eye: The Bartimaeus Trilogy, Book 2 (Unabridged), P...	Jonathan Stroud	8:20:46	
The Golden's Eye: The Bartimaeus Trilogy, Book 2 (Unabridged), P...	Jonathan Stroud	8:11:44	
The Graveyard Book (Unabridged)	Neil Gaiman	7:48:20	
The High King (Unabridged)	Lloyd Alexander	7:24:37	
A Home at the End of the World (Unabridged), Part 1	Michael Cunningham	5:39:34	***
A Home at the End of the World (Unabridged), Part 2	Michael Cunningham	5:36:09	***
Hoot (Unabridged)	Carl Haasen	6:29:35	
Inkdeath (Unabridged) Part 1	Cornelia Funke	6:44:39	
Inkheart (Unabridged), Part 1	Cornelia Funke	7:44:01	
Inkheart (Unabridged), Part 2	Cornelia Funke	7:50:51	
Magyk (Unabridged), Part 1	Angie Sage	5:56:50	
Magyk (Unabridged), Part 2	Angie Sage	6:14:06	
Matilda (Unabridged)	Roald Dahl	4:03:52	
Memories of a Geisha (Unabridged), Part 1	Arthur Golden	5:53:20	*****
The Memory of Running (Unabridged), Part 1	Ron McLarty	5:53:32	****

Refine across the three columns- iTunes

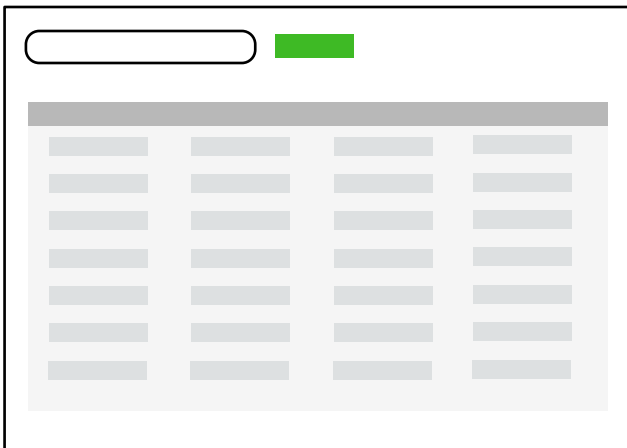
Genre (8 items)		Artist (8 items)		Album (8 items)	
All	Alternative & Punk	All	Andrew Clements		Dragon Rider
Classical	Cornelia Funke				Dragon Rider 7
Electronica/Dance	Elizabeth George Spare				Findle
Latin	Jonathan Stroud				Tales Of A Fourth Grade Nothing
	Judy Blume				Tales Of A Fourth Grade Nothing 1
	McMurry, Larry				Telegraph Days 01
					The Amulet Of Samarkand (Disc 1)
					The Amulet Of Samarkand (Disc 2)
Title	Time	Artist	Album	Genre	Rating
Chapter 1 Nick	5:20	Andrew Clements	Findle	Books & Spoken	★★★★★
Chapter 10 Freedom Of The Press	5:39	Andrew Clements	Findle	Books & Spoken	★★★★★
Chapter 2 Mrs. Granger	5:52	Andrew Clements	Findle	Books & Spoken	★★★★★
Chapter 100 Freedom Of The Press	3:43	Andrew Clements	Findle	Books & Spoken	★★★★★
Chapter 3 The Question	3:43	Andrew Clements	Findle	Books & Spoken	★★★★★
Chapter 11 Extra Extra Read All About It	2:26	Andrew Clements	Findle	Books & Spoken	★★★★★
Chapter 12 Airwaves	5:44	Andrew Clements	Findle	Books & Spoken	★★★★★
Chapter 4 Word Detective	4:03	Andrew Clements	Findle	Books & Spoken	★★★★★
Chapter 120 Airwaves	4:41	Andrew Clements	Findle	Books & Spoken	★★★★★
Chapter 5 The Report	4:55	Andrew Clements	Findle	Books & Spoken	★★★★★
Chapter 102 Airwaves	4:56	Andrew Clements	Findle	Books & Spoken	★★★★★
Chapter 50 The Report	6:00	Andrew Clements	Findle	Books & Spoken	★★★★★
Chapter 6 The Big Idea	5:27	Andrew Clements	Findle	Books & Spoken	★★★★★
Chapter 13 Ripples	2:58	Andrew Clements	Findle	Books & Spoken	★★★★★
Chapter 14 Inside Nick	7:13	Andrew Clements	Findle	Books & Spoken	★★★★★
Chapter 7 Word Wars	2:53	Andrew Clements	Findle	Books & Spoken	★★★★★
Chapter 15 And The Winner Is...	6:16	Andrew Clements	Findle	Books & Spoken	★★★★★
Chapter 8 Mightier Than The Sword	6:24	Andrew Clements	Findle	Books & Spoken	★★★★★
Chapter 9 Chess	7:24	Andrew Clements	Findle	Books & Spoken	★★★★★

Same as iTunes, but each column can be customized- Songbird



Four columns for browsing from different starting points- FiveRuns

Search/Results



Simple

The Search screen pattern can range from very simple to quite advanced. Ideal for creating an efficient user experience by allowing the user to navigate directly to an item or set of items meeting specific criteria.

Results are typically displayed as a:

- List
- Table (editable or read-only)
- Thumbnails
- Map

Search will return the data either:

- Sorted by default
- Grouped by default

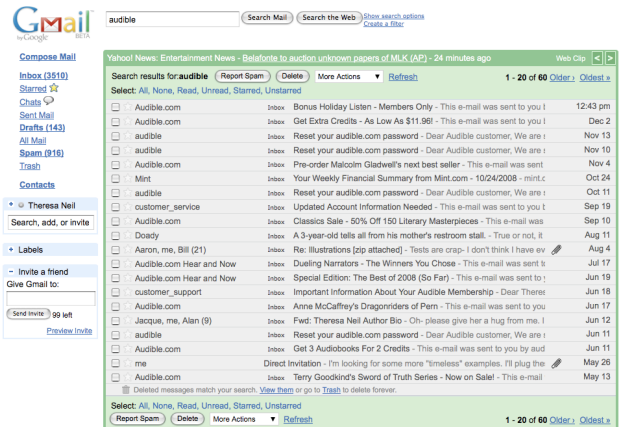
Additional search criteria/refine functionality is typically offered after the initial search results are displayed.

Best practices

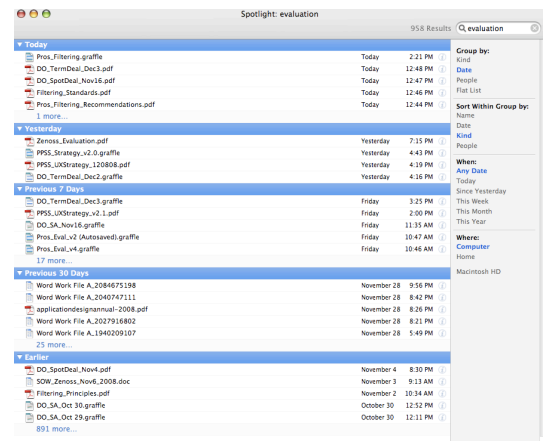
Offer a single search field that, by default, includes "key words".

Allow an easy (one-click) way to clear the search field.

Show the results in the same screen.



Simple search, default sort by date- Gmail



Pre-grouped search results- Mac Spotlight

'audible'		Total Amount	\$161.75	Search Results	11
<div>Edit Multiple Edit Rules <input type="text" value="audible"/> Search Clear</div>					
<input type="checkbox"/>	Date	Description	Category	Amount	
<input checked="" type="checkbox"/>	DEC 02	Audible.com	Books	-\$14.95	
<input type="checkbox"/>	NOV 18	Audible.com	Books	-\$14.95	
<input type="checkbox"/>	OCT 18	Audible.com	Books	-\$14.95	
<input type="checkbox"/>	SEP 29	Audible.com	Books	-\$14.95	
<input type="checkbox"/>	AUG 15	Audible.com	Books	-\$14.95	
<input type="checkbox"/>	JUN 20	Audible.com	Books	-\$14.95	
<input type="checkbox"/>	MAY 18	Audible.com	Books	-\$14.95	
<input type="checkbox"/>	APR 18	Audible.com	Books	-\$14.95	
<input type="checkbox"/>	MAR 18	Audible.com	Books	-\$14.95	
<input type="checkbox"/>	MAR 18	Audible.com	Books	-\$12.25	
<input type="checkbox"/>	FEB 18	Audible.com	Books	-\$14.95	

Showing 25 50 100 transactions
Export all 11 transactions

Simple search, tabular results- Mint

Search/Results (cont.)



Advanced

Advanced search is typically required in enterprise applications.

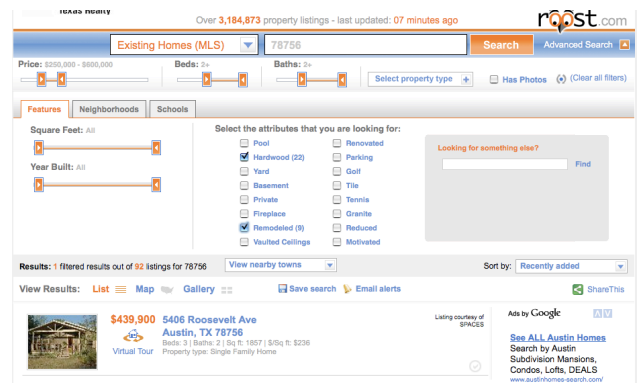
Advanced search usually includes the functionality to do one or more of these:

- Specify more criteria
- Build a custom search (and save it)
- Scope the search
- Save the search criteria
- Save the search results
- Build a list from multiple search results

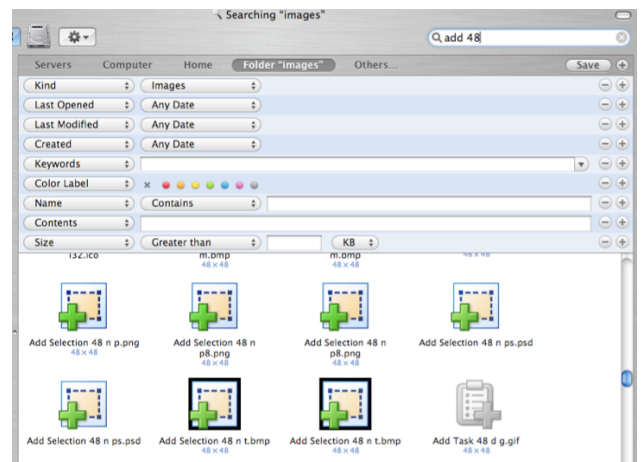
Best practices

Provide advanced search criteria in the same screen, not a pop-up or separate screen.

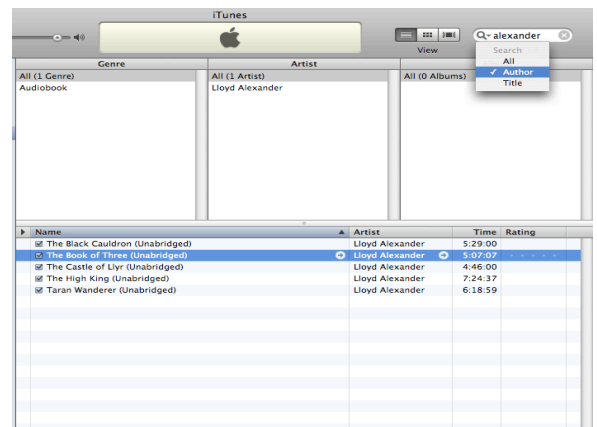
Don't force the user to pre-scope the search, but offer it as an optional feature if it's a requirement, ideally a drop down in the search field (like iTunes) instead of a listbox next to the field.



Simple search with advanced criteria in collapsible panel- Roost



Advanced search by adding criteria - Mac OS X



Scope search- iTunes

Search/Results (cont.)

Advanced

*Saved search **criteria**- Sabre*

*Search and save one or more of the **results**- Audible*

*Search and build a list from results
(of multiple searches)-Songza*

Refine Dataset



Vertical

The Refine Dataset screen pattern can be vertical or horizontal. Ideal for creating an efficient user experience by allowing the user to refine a set of known data, or further refine search results.

Refine panels typically utilize one or more of the following components:

- text field
- slider
- checkboxes
- listbox
- alternate listbox UI
- date range picker

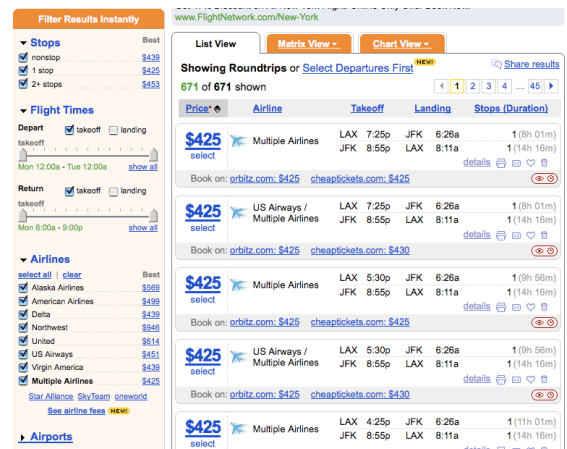
Best practices

Ideally the filters dynamically refine the result set (no submit button). An inactivity timer can be used.

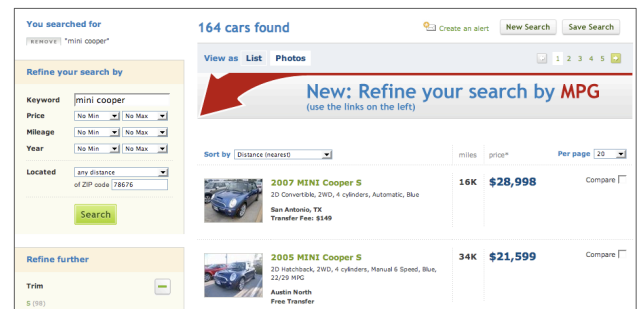
"Clear all filters" button should be prominent.

Multiple collapsible panels on the left should be avoided.

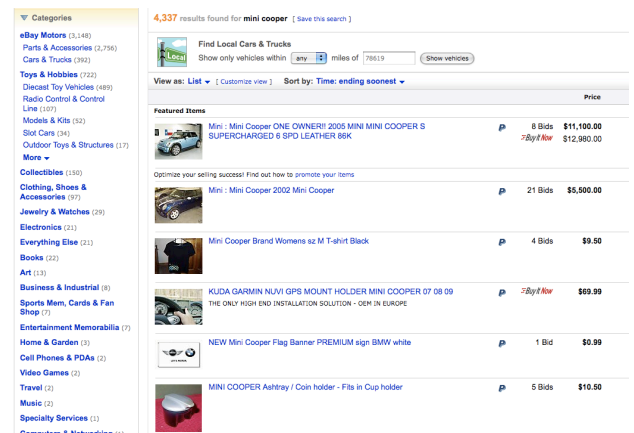
<http://looksgoodworkswell.blogspot.com/2008/02/pattern-refining-search.html>



Live filter- Kayak

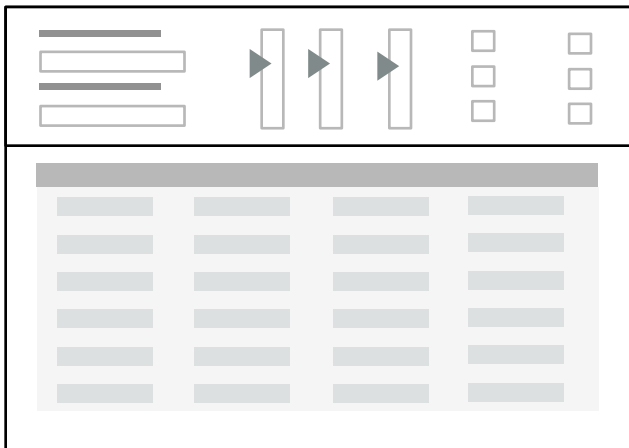


Submit to refine search- Carmax



Filtering by category- eBay

Refine Dataset (cont.)



Horizontal

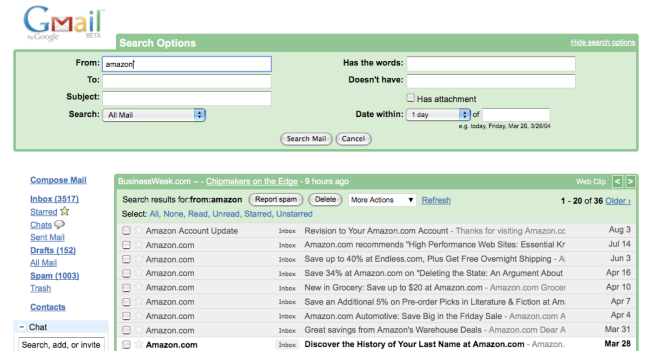
The horizontal layout provides the advantage of more horizontal space for wide result sets. This works nicely for expanding an advanced search below a simple search field, yet above the result set.

Roost and Omio are experimenting with tabbed sections for different types of criteria. However, this makes it impossible to see all the filters currently applied.

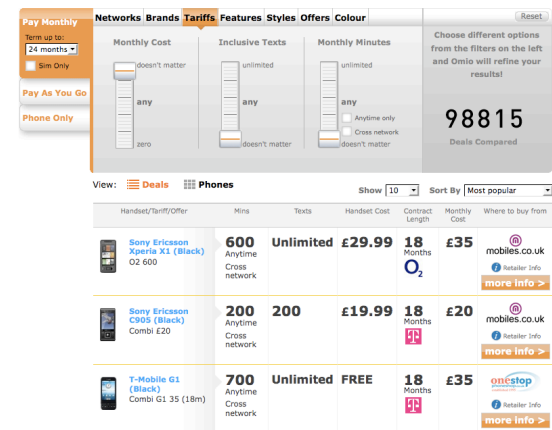
Best practices

If the user has refined the data to the point of no matching results, clearly provide feedback and recovery options.

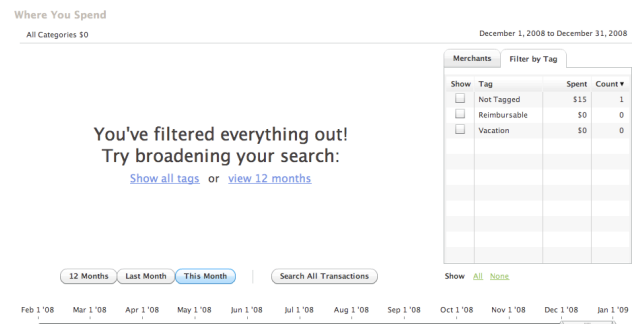
Don't provide a feature for saving a set of refinement filters. This can be taken care of with the Search (advanced search) pattern.



Refine options above, results below- Gmail



Tab top filter options- Omio



Provide feedback and recovery message when no results are found- Mint

Forms

Any Form screens should be approached with a solid understanding of usability and design best practices. Refer to "Web Form Design: Filling in the Blanks" by Luke Wroblewski for reference.

Best practices

Use a one-column left aligned layout (always!)

Place labels on the top or left; be consistent through the entire product.

Left align the command button.

Group related fields with subtle shading.

Clearly mark required fields.

Provide clear feedback for actions.

Provide clear error messages and help. Refer to "Defensive Design for the Web" by 37signals.

Single column layout- eBay

Grouped fields w/ thin rule, light background

Single form for entering an viewing multiple sets of contact information- Leukemia & Lymphoma Society

Forms (cont.)

Billing Address:

First Name Last Name

Address

Town/City State Zip Code

Country

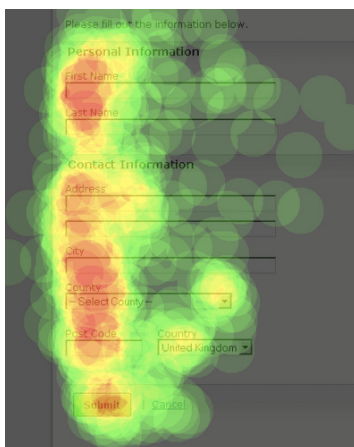
US

Daytime Phone Ext.

Evening Phone

Top labels- Apple

Research



Eye-tracking image, heat map. Use left aligned command button.

First Name:

Last Name:

Email: We don't spam

Password: 8 or more characters

Re-enter Password:

Country:

Postal Code: eg: 34043 Only your region will be public, not your postal code

I am currently: ☒ employed ☐ a business owner ☐ looking for work ☐ working independently ☐ a student

Company:

Title:

Industry: Choose the industry that best describes your primary expertise

Education: (optional)

Dates Attended: to Current students: enter your expected graduation year

[Join LinkedIn](#)

Side labels, right aligned- Linked In

Advantage:
Adjacent Label and corresponding Input field

Advantage:
Rapid Processing

Label

Longer Label

-- Select Value --

Even Longer Label

One More Label

☒ Value 1 ☐ Value 2

Primary Action

Disadvantage:
Increased vertical space

Disadvantage:
Reduced readability

Advantage:
Adjacent Label and corresponding Input field

Label

Longer Label

Even Longer Label

One More Label

☒ Value 1 ☐ Value 2

Primary Action

Advantage:
Reduced vertical space

Please correct the fields marked in red.

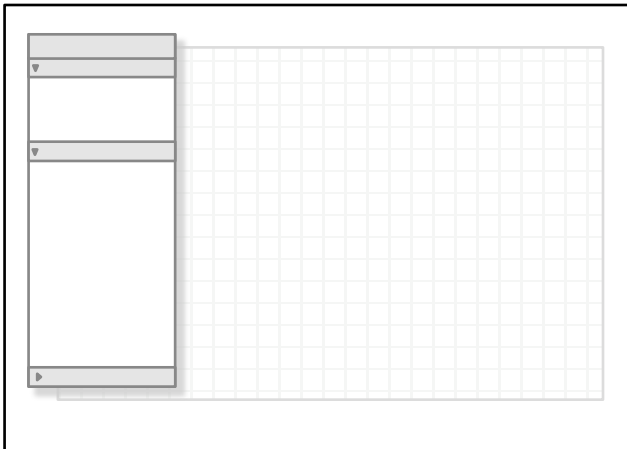
[View all payment options](#) [Continue](#)

Pay with Two Credit Cards

Card #1 Details	Card #1 Amount
Card Type <input checked="" type="radio"/> AMEX <input type="radio"/> DISCOVER <input type="radio"/> MASTERCARD <input type="radio"/> VISA	Enter the maximum amount to charge to this card \$ 1260.41
Card Number <input type="text"/>	
Expiration Date <input type="text"/> / <input type="text"/>	
Security Code <input type="text"/> What is this?	
<input checked="" type="checkbox"/> Save this credit card information	
Card #2 Details	Card #2 Amount
Card Type <input type="radio"/> AMEX <input type="radio"/> DISCOVER <input checked="" type="radio"/> MASTERCARD <input type="radio"/> VISA	Estimated amount that will be charged to this card \$0.00
Card Number <input type="text"/>	
Expiration Date <input type="text"/> / <input type="text"/>	
Security Code <input type="text"/> What is this?	

Good error message- Apple

Palette/ Canvas



The Palette/ Canvas screen pattern is seldom the right pattern to apply, but it is the only pattern for documenting or creating:

- linear or non-linear processes
- flow diagrams
- screen layouts
- any design/diagram with physical size constraints

Best practices

Provide a clear "blank state" message for getting started.

Include templates.

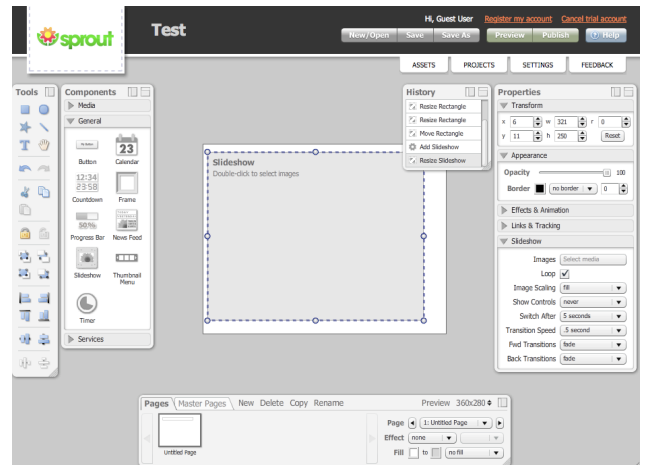
Create a dock-able object palette.

Organize objects in the palette by type, most used should be always visible.

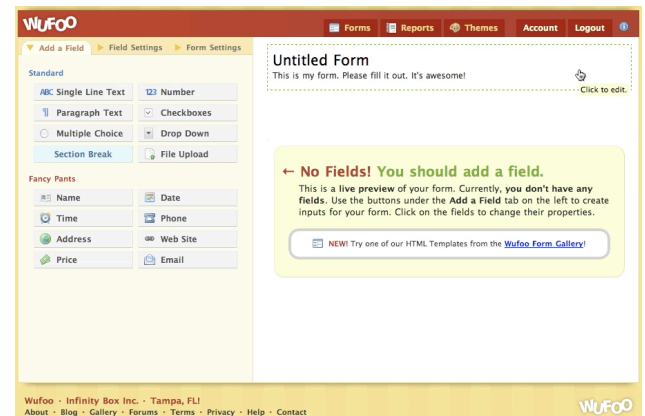
Offer a grid option visible and for "snap to".

Provide undo and redo functionality.

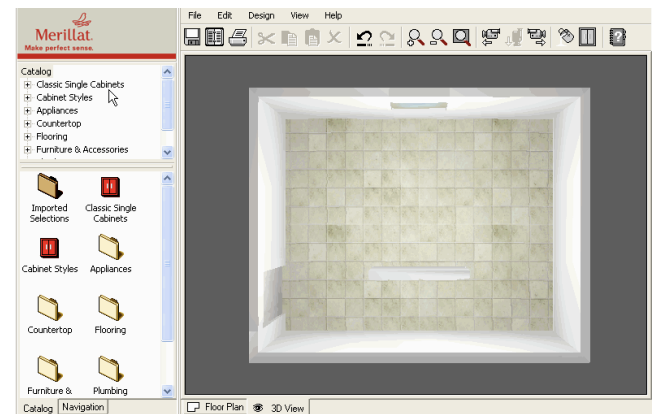
Provide a project management space for canvases (so canvases can be grouped, copied, edited, deleted..).



Floating palettes and toolbars- Sprout

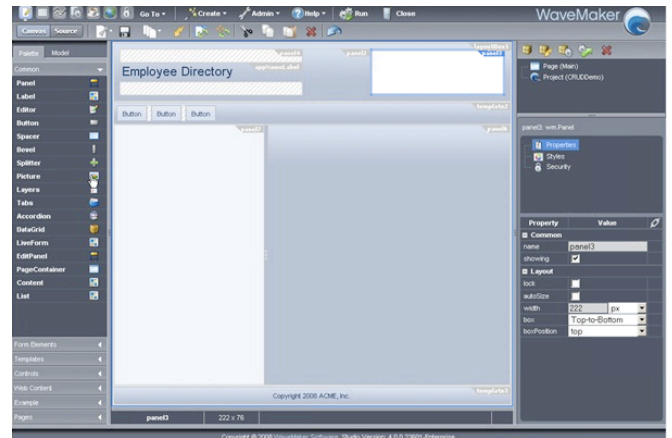
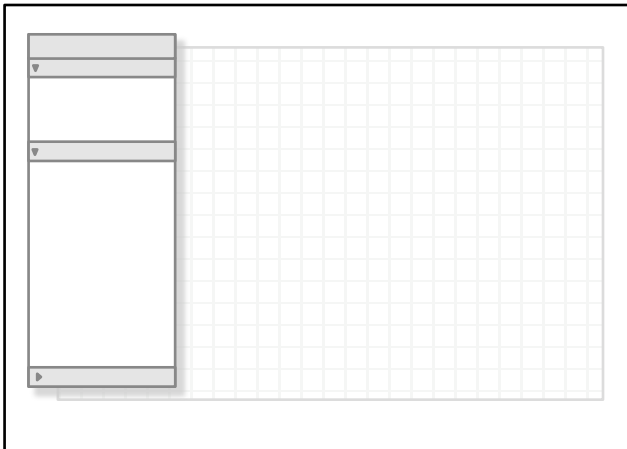


Fixed palette- Wufoo

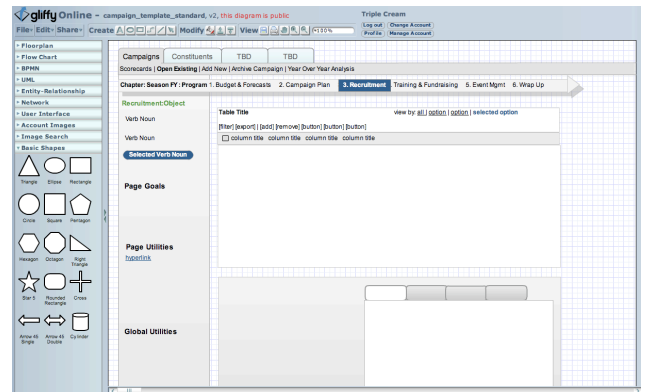


Catalog selection (top) drives palette options (below) - Merillat

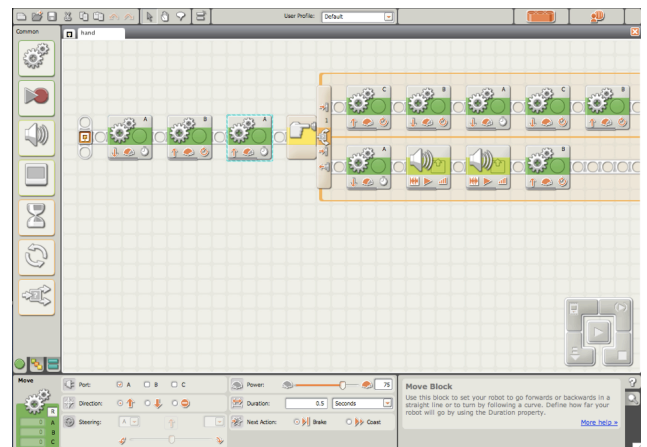
Palette/ Canvas (cont.)



*Complex palette/canvas application-
Wavemaker*

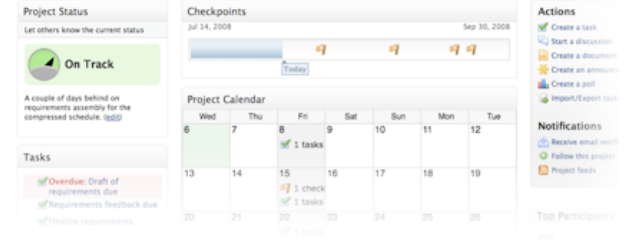
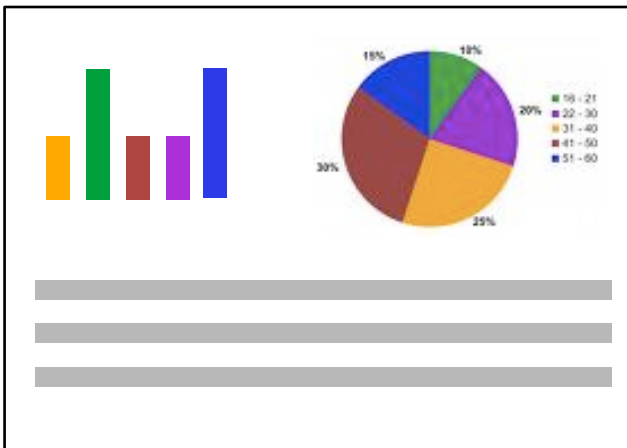


Accordion palette, resizable- Gliffy



*Simple palette with fly-out options-
Lego Mindstorms*

Dashboard



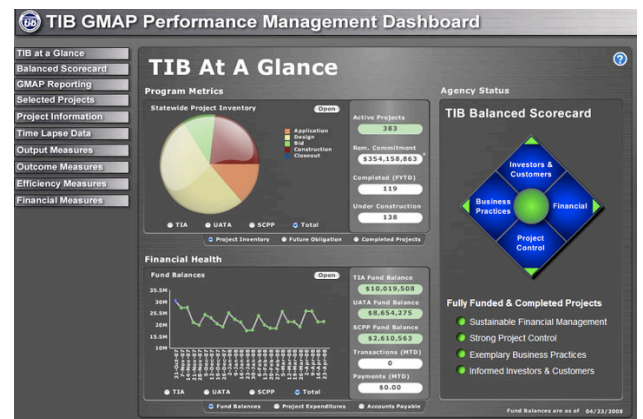
*Succinct display of key metrics -
Clearspace*

Dashboards are a grossly abused screen pattern. A good dashboard will provide:

- key information at a glance
- real time data
- easy to read graphics
- clear entry points for exploration

This is typically not achieved by displaying a single screen of metrics (either in a big table, or just a bunch of graphs).

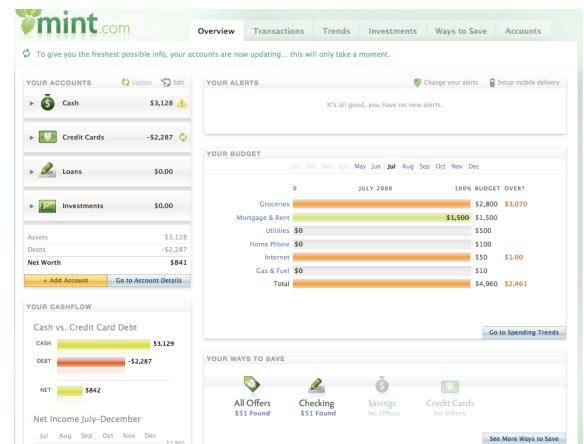
Providing a high degree of customization is no substitute for user research and testing.



*Fully evolved dashboard for showing
how tax dollars are used-
Washington State Transportation
Improvement Board*

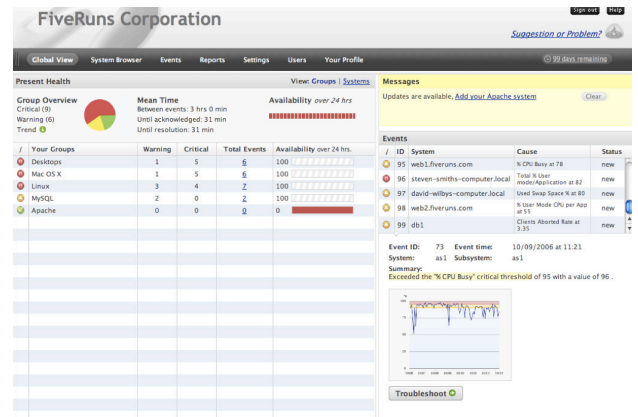
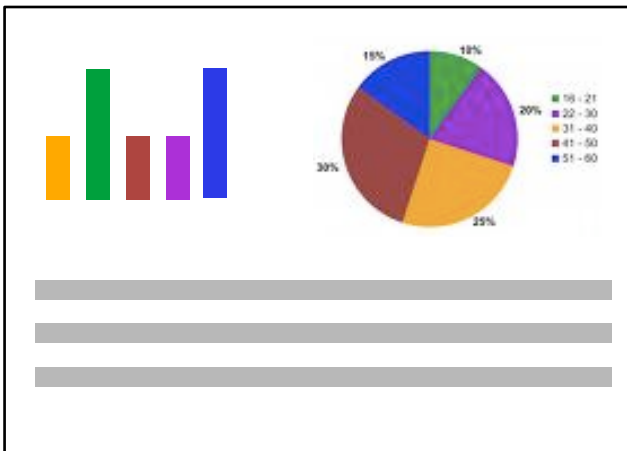
Design Best Practices

1. Chose data to be displayed
2. Confirm with actual users
3. Get rid of half of it
4. Reconfirm remaining elements with users
5. Chose components and layout, create 3-4 variations to test
6. Revise completely- nothing is sacred but the data

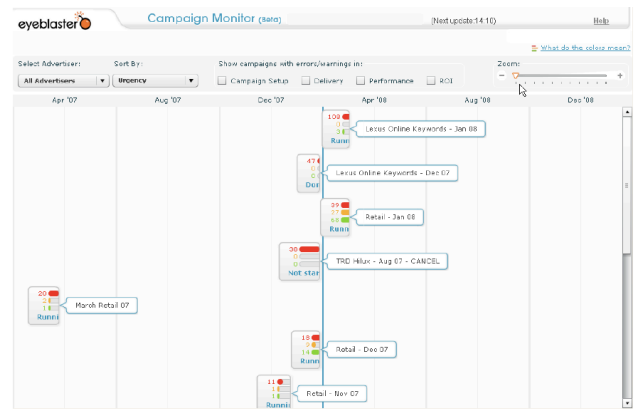


*Key metrics, as well as high level
goals clearly displayed- Mint*

Dashboard (cont.)



Red, yellow and green shows system administrators exactly where the problems are- FiveRuns

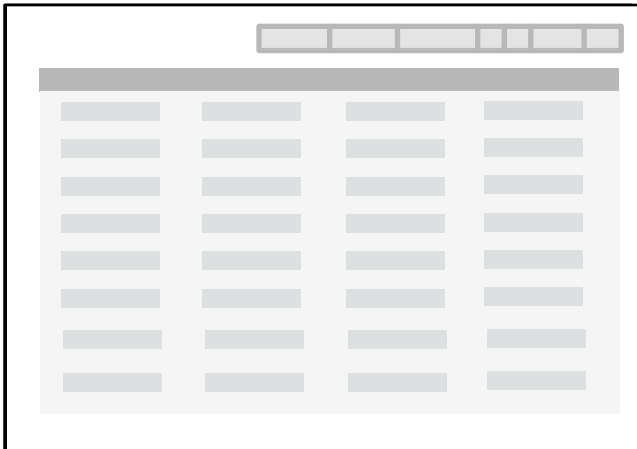


Red highlights the account managers to the underperforming campaigns- Campaign Monitor



Customer specific dashboard- would be even better with a roll-up view- FaceOut

Spreadsheet



The Spreadsheet screen pattern is ideal for creating an efficient user experience by allowing the user to easily scan, edit and enter information (in bulk).

The Spreadsheet should provide the following functionality:

- standard table features like sort, hide/show columns, rearrange columns, group by (if applicable)
- global level undo/redo
- add, insert, delete row
- keyboard navigation
- import and export

Best practices

Visually differentiate between editable tables (no zebra stripes) and read-only tables (use zebra stripes) in the product.

Indicate which columns are editable, calculated, and/or required.

Don't overload rows or cells with interaction- one click for edit is all you get.

Hide the cell editors until the row or cell is selected.

Provide error messages upon saving, not at a cell level.

My Library

My current device is: imac g5 Program Type: All Program Types
 My preferred audio format for this device is: Edit devices Purchased within the: All
[Learn more](#) about devices & sound compression format. Show 20 items per page

Search MyLibrary:

Items: 1 - 20 1 2 3 4 5 Next Page

Date Purchased	Title	Author	Rate Audio	Program Length	Audio Format / File Size	Download	Listen
12/18/2008	American Gods (Unabridged), Part 1	Neil Gaiman	★★★★★	7 hrs and 17 mins	4 / 104 MB 3 / 52 MB 2 / 28 MB	✓	Download It
12/18/2008	American Gods (Unabridged), Part 2	Neil Gaiman	★★★★★	6 hrs and 44 mins	Format 4 / 96 MB (Change)	✓	Download It
12/18/2008	American Gods (Unabridged), Part 3	Neil Gaiman	★★★★★	6 hrs and 11 mins	Format 4 / 89 MB (Change)	✓	Download It

Inline editing- Audible

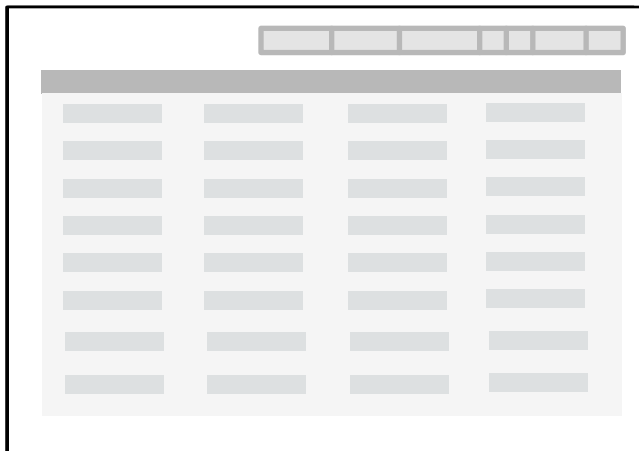
Urgency	Date	Time	Title
2	31/12/2006	09:35:47 AM	The internet is broken
2	31/12/2006	09:35:47 AM	The internet is broken
4	26/07/2006	03:09:00 PM	My cup holder is not working
3	17/07/2006	04:21:24 PM	Blank Screen
3	17/07/2006	04:21:24 PM	Blank Screen
1	06/07/2006	04:12:16 PM	I can't print
1	06/07/2006	04:12:16 PM	I can't print
2	06/07/2006	15:06:10	Should I open this email?
2	06/07/2006	15:06:10	Should I open this email?
3	06/07/2006	03:04:34 PM	The ring came off my pudding can

Cell level inline editing, good for tweaking, not heavy data entry- TableKit

Last Name	First Name	Blackboard Stu	Blackboard Res	Final Paper	Total
Churchill		-	-	100.00	100.00
Connery		-	-	0.00	0.00
Cooper	Alice	-	-	85.00	85.00
da Vinci	Leonardo	-	-	92.00	92.00
Faulkner	William	✓	47.50	79.00	126.50
Filmore	Millard	✓	47.50	47.50	47.50
Franklin	Benjamin	-	-	81.00	81.00
Frost	Robert	-	-	0.00	0.00
Gandhi	Indira	-	-	0.00	0.00

Row editing, custom editors- Blackboard Sciences

Spreadsheet (cont.)



Constituents Teams Events Meetings Funds Full Screen							
Search advanced							
Name	Chapter Office	Campaign Role	Team	Event	Event Role	Priority	Event Status
Mark Andrews	Greater San Francisco	Event Participant	East Bay Run Team	Disney Marathon	Participant	Standard	Registered
Wendy Brummet	Greater San Francisco	Event Participant	East Bay Run Team	Disney Marathon	Participant	Standard	Registered
Danyell Doome	Red Wood Wine Ctry	Event Participant	Tri Team	Lavaman Triathlon	Participant	Standard	Registered
Sarah Dumas	Greater San Francisco	Event Participant	East Bay Run Team	Disney Marathon	Participant	Standard	Registered
Alise Guilliam	Greater San Francisco	Coach	Tri Team	Lavaman Triathlon	Support Staff	Standard	Registered
Private Hudson	Red Wood Wine Ctry	Event Participant	Tri Team	Lavaman Triathlon	Participant	Standard	Registered
Marissa Kurland	Greater San Francisco	Event Participant	East Bay Run Team	Disney Marathon	Participant	Standard	Registered
Johnny Leake	Greater San Francisco	Event Participant	East Bay Run Team	Country Music Marathon	Participant	Discount	Registered
Staci Massey	Greater San Francisco	Event Participant	East Bay Run Team	Disney Marathon	Participant	Standard	Dropped
Matthew McMillan	Greater San Francisco	Mentor	East Bay Run Team	Disney Marathon	Support Staff	Standard	Dropped
Amber Melvin	Red Wood Wine Ctry	Event Participant	Red Wood Run	Country Music Marathon	Participant	Standard	Registered
Jennifer Mull	Red Wood Wine Ctry	Event Participant	Red Wood Run	Wildflower Marathon	Participant	Standard	Dropped
Andrew Needlem	Red Wood Wine Ctry	Event Participant	Red Wood Run	Country Music Marathon	Participant	Standard	Dropped
Brandi Rhodes	Greater San Francisco	Event Participant	Tri Team	Lavaman Triathlon	Participant	Discount	Registered
Louis Rodriguez	Greater San Francisco	Event Participant	Tri Team	Lavaman Triathlon	Participant	Standard	Dropped
Ashlee Simpson	Greater San Francisco	Event Participant	Tri Team	Lavaman Triathlon	Participant	Discount	Registered
Frank Thomas	Greater San Francisco	Event Participant	Tri Team	Lavaman Triathlon	Participant	Discount	Dropped
Fred Thompson	Greater San Francisco	Event Participant	East Bay Run Team	Jamba Juice Marathon	Participant	Discount	Dropped
Brian Trickson	Greater San Francisco	Event Participant	East Bay Run Team	Country Music Marathon	Participant	Standard	Registered
Kevin Ty	Greater San Francisco	Mentor	East Bay Run Team	Country Music Marathon	Support Staff	Standard	Dropped
Sarah Usher	Greater San Francisco	Event Participant	East Bay Run Team	Country Music Marathon	Participant	Standard	Dropped
Lawrence Uts	Greater San Francisco	Event Participant	Tri Team	Lavaman Triathlon	Participant	Discount	Registered
Frank Xavier	Greater San Francisco	Coach	Tri Team	Lavaman Triathlon	Support Staff	Discount	Registered
Jim Zappa	Red Wood Wine Ctry	Mentor	Red Wood Run	Country Music Marathon	Support Staff	Standard	Registered

Editable table provides easy data entry, tab for a new row- Leukemia & Lymphoma Society

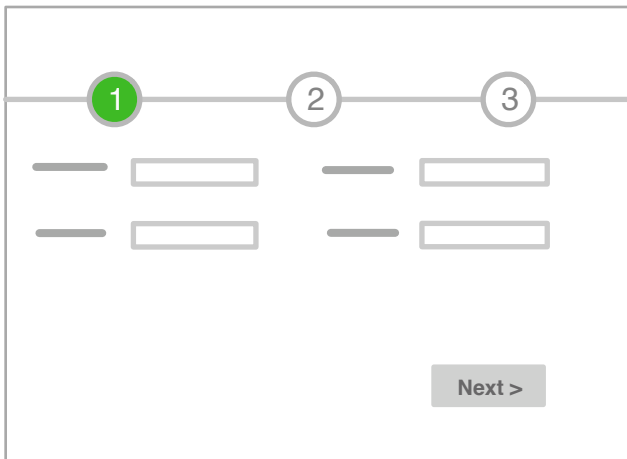
Blist							
SIMPLE TO DO							
Category	TO DO	Importance	FOCUS BY	NOTES			
FOOD	Grocery Shopping	★★★★★	06/30/2006				
FOOD	Get Gas	★★★★★	06/30/2006				
OTHER	Get Gas	★★★★★	06/29/2006	Fred Meyer is			
YARD	Shov Law	★★★★★	06/29/2006				
YARD	Pick up Dry	★★★★★	07/01/2006				
HOME	Laundry	★★★★★	07/01/2006				
FOOD	Dinner with Fam	★★★★★	07/01/2006				
FUN	Get wedding gift	★★★★★	07/15/2006				
OTHER	Shave	★★★★★	07/15/2006	Rhodes is having a			
TRAVEL	Travel plans	★★★★★	07/15/2006				
FUN	Dress for wedding	★★★★★	07/15/2006				
YARD	Plant garden	★★★★★	07/01/2006				

Ultra rich cell editing, simple and advanced- Blist

B10 fx						
A	B	C	D	E	F	G
My Machine	5'5"	Female	37 y.o.	Start Weight: 220		
Date	Weight	Amount Lost	Total Lost	To Goal (150)	x=no weight taken	
4/9/2006	220	0	0	70		
4/16/2006	220	0	0	70		
4/23/2006	217	3	3	67		
4/30/2006	215	2	5	65		
5/7/2006	x	x	x	x		
5/14/2006	x	x	x	x		
5/21/2006	x	x	x	x		
5/28/2006		5	10	60		
6/4/2006	208	2	12	58		
6/11/2006	210	0	10	60		

Excel style interface for building a fully functional spreadsheet- NumSum

Wizard/ Quick Start



The Wizard/Quick Start screen pattern is ideal for creating an efficient user experience by guiding the user through a complex or infrequent workflow.

Best practices

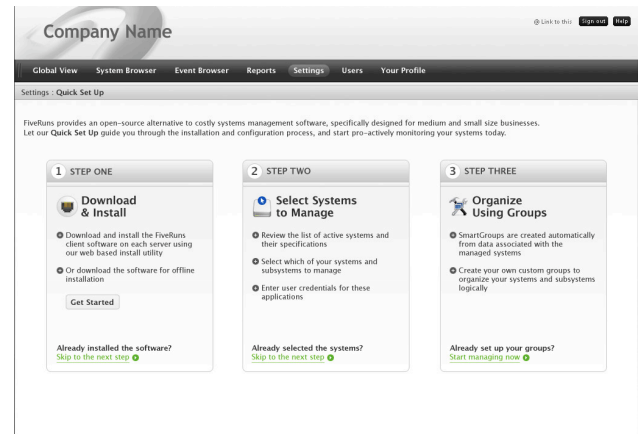
Keep the number of steps to a minimum.

If there are more than 5 steps, group them at a task level and don't number them (like Amazon's shopping cart).

Label the steps clearly, in the vernacular.

Only use this pattern for infrequent workflows: set-up, installation, troubleshooting, filing an application or complex forms, or provide an opt-out for experienced users.

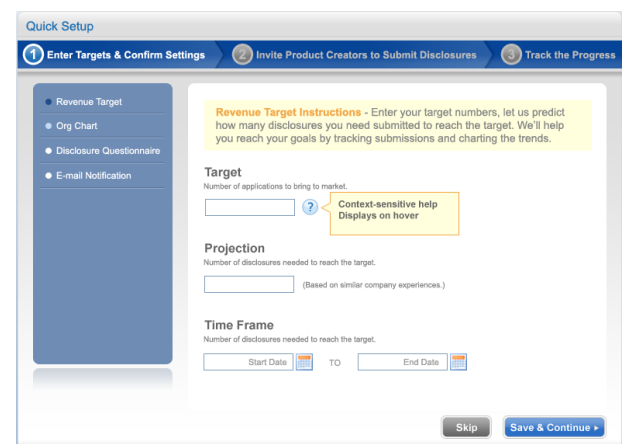
Show what step the user is currently on, allow for "back".



Quick Set Up, a one time process- FiveRuns

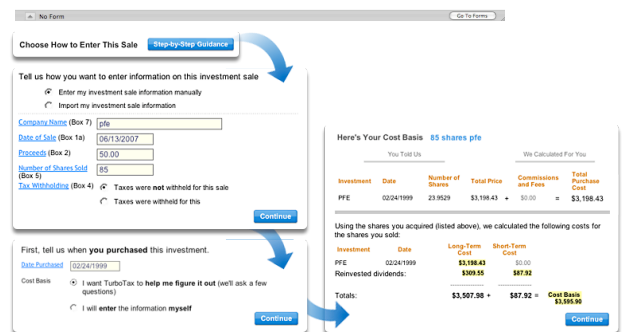
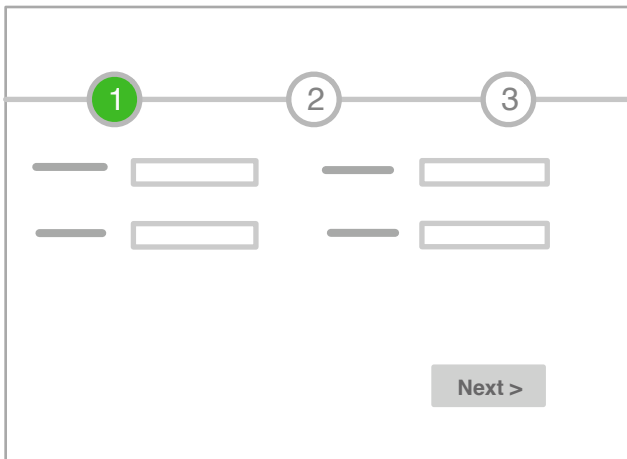


Guided wizard grouped by business functionality



Steps with sub-steps- Fluid Innovation

Wizard/ Quick Start (cont.)



Step by step guidance- TurboTax



High level tasks- no step numbers provided- Amazon



Installation wizard- Mac OS

Question & Answer

Q:

A:

The Q&A screen pattern is ideal for creating an efficient user experience by allowing the user to enter known information and receive a solution.

Q & A differs from Search in that this pattern should be used to assist users in identifying possible options or a single recommendation in an arena they are lacking expertise (health insurance, mortgages, planning, purchases)

For example, "I need to find the right mortgage." Unlike booking a flight from AUS to JFK next Friday, when I look at the results of the mortgage search, I don't have the expertise to compare the different types of mortgages. The Q & A pattern would elevate the best options based on the information I provided in the Question section.

Best practices

Allow the user to specify their goals in the Question section (live in the house for 10+ years, low deductible with a high co-pay).

Provide prioritized options with pros and cons outlined in the Answer section.

The screenshot shows a 'Which loan is right for you?' form. The 'Home price' is \$400,000.00. The 'What do you want to pay monthly' is \$3,800. The 'How long will you live there' is 7 years. The 'What is your down payment' is \$40,000. Below the form is a 'Get Answers' button. To the right, a list of loan options is shown, including 15 Year Fixed, 30 Year Fixed & HELOC, 30 Year Fixed, 7/1 ARM, 5/1 ARM, and 3/1 ARM. Each option includes a brief description and a 'See how your monthly payments could increase' link.

Formulate a question, see the best solutions- Fidelity Mortgage

The screenshot shows a 'I want to (check all that apply and click submit):' section with a list of goals. The 'Check the boxes on the left that apply to you' section is highlighted. Below the list is a 'Submit' button. To the right, a recommendation for 'Quicken Deluxe 2009' is shown, including a price of \$59.99 and a 'Learn More' link.

Q: "I want..."

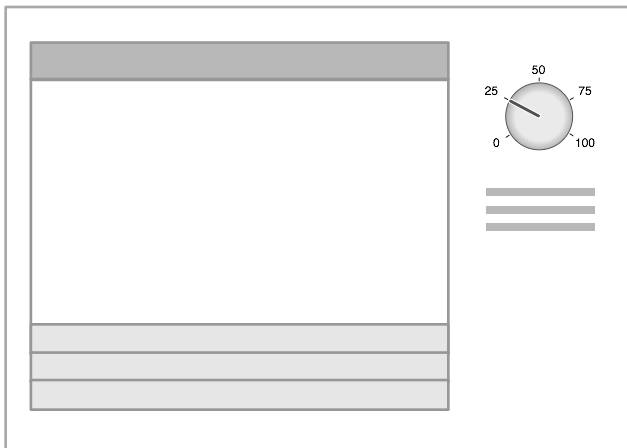
A: "you need..." - Quicken

The screenshot shows a 'PAYDOWN PLANNER' interface. The 'When do you want to pay this down?' is set to 12 Months. The 'What's your goal?' is 'Pay Off Entire Balance'. The 'What's your balance?' is \$5,000. The 'How much do you spend each month with your Discover Card?' is \$0. The 'PAYDOWN PLANNER' section shows an estimated monthly payment of \$490. The 'Estimated Future Balance by Month' section shows a bar chart of the balance over time, with a goal of \$0 by November 2009.

Enter your goal, get a plan- Discover Paydown Planner

Created by Theresa Neil 2009

Parallel Panels



Stacked

The Parallel Panels screen pattern can be stacked (showing one at a time) or unstacked (showing all at once). This pattern is ideal for organizing chunks of information that are similar or have interdependent tendencies. Efficiency is gained by keeping the user in one screen.

Ideal candidates for the stacked variation of this pattern are simple work-flows with:

- a high level, visible goal that is fed by multiple inputs
- multiple, non-sequential steps

Best practices

Run the stacked panels down the left; show the goal at the top, bottom or right of the screen.

Use contrast and padding to clearly display the stacked panels, keep them off the bottom edge of the screen.

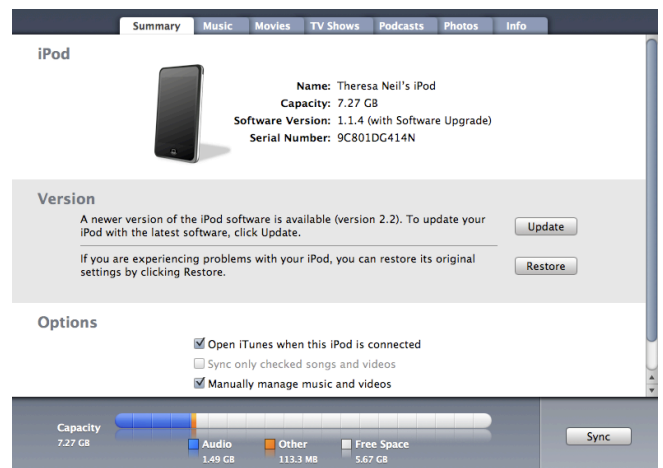
Make the whole panel clickable, not just the label.

Three to five panels work best.



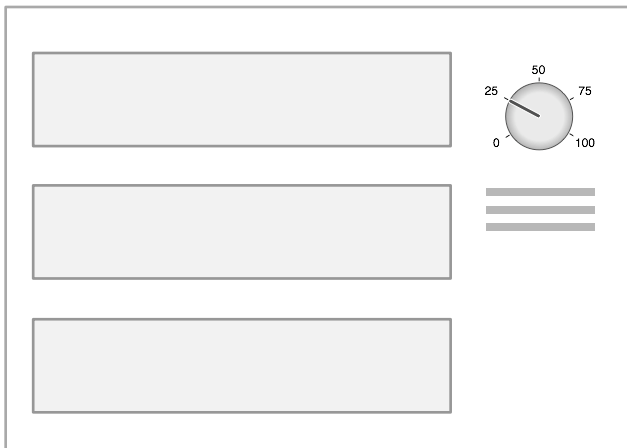
Stacked panels keeps the user in the same screen. The price is impacted by entries in each panel- TheTrain.com

Registration with multiple sections- Team in Training



Stacked panels displayed as tabs- iTunes iPod summary

Parallel Panels (cont.)



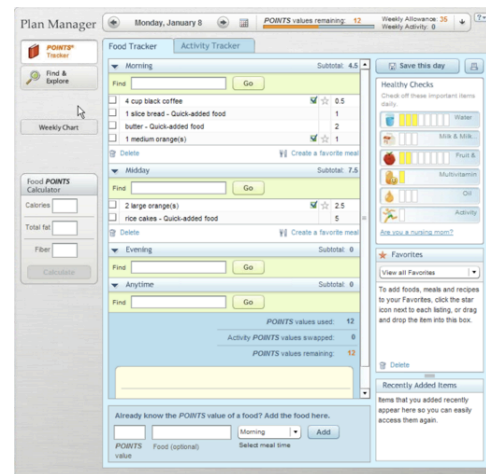
Unstacked

- The unstacked version is appropriate in:
- tools (one screen apps) that need to show all the components comprising the whole
 - dialogs- collapsible panels are often more efficient for users to navigate than tabs

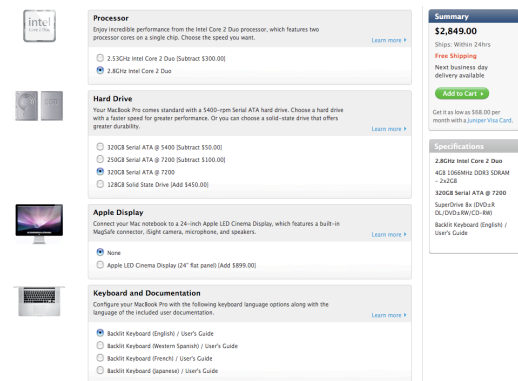
Best practices

If the panels have a hierarchal or sequential relationship, this is probably the wrong pattern. Try Master/Detail or Wizard.

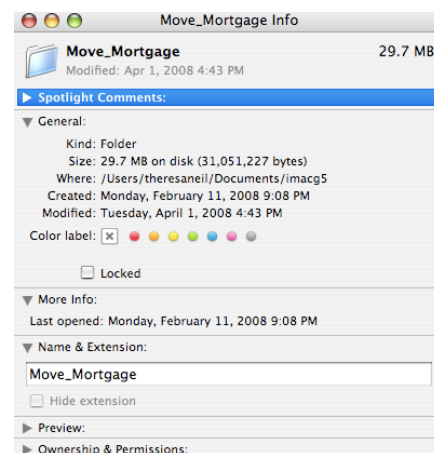
Don't nest panels.



Morning, Midday, Evening, and Anytime panels all feed into the days total points- Weight Watchers eTools



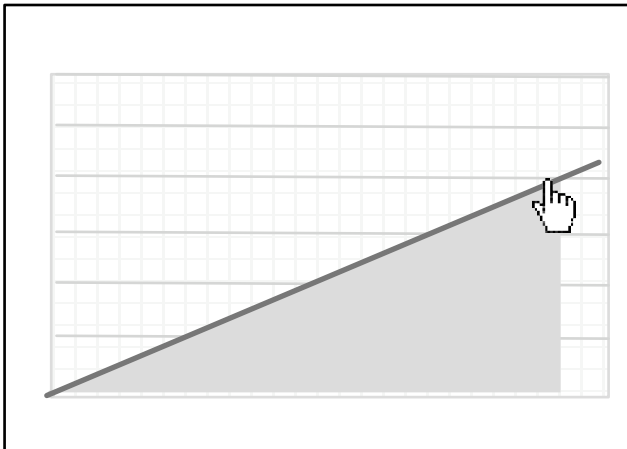
Each panel impacts the price, shown in the top right- Apple Store



Tidwell, Jennifer. 2007. Designing Interfaces: Patterns for Effective Interaction Design. O'Reilly.

Collapsible panels can be used to save space- Get Info on Mac OS

Interactive Model



The Interactive Model screen pattern is characterized by many interactive elements associated with the key object (a calendar, map, graph, chart, canvas). It is ideal for creating a user experience that is closely aligned with the user's mental model (a natural fit).

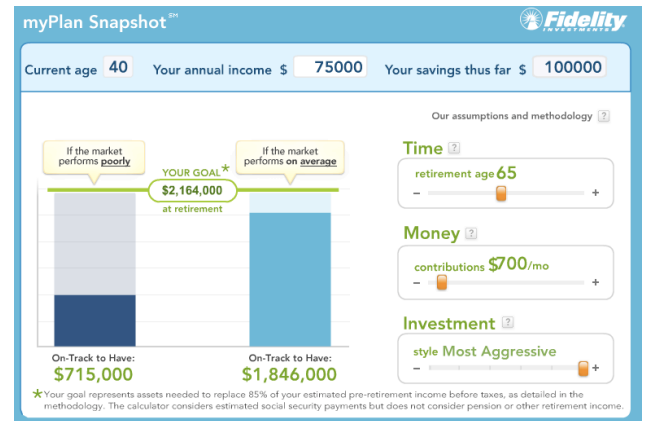
Excellent candidates for this pattern are:

- calendars
- maps
- gantt charts
- what-if scenarios (including calculators)
- WYSIWYG editors (including photo editing)

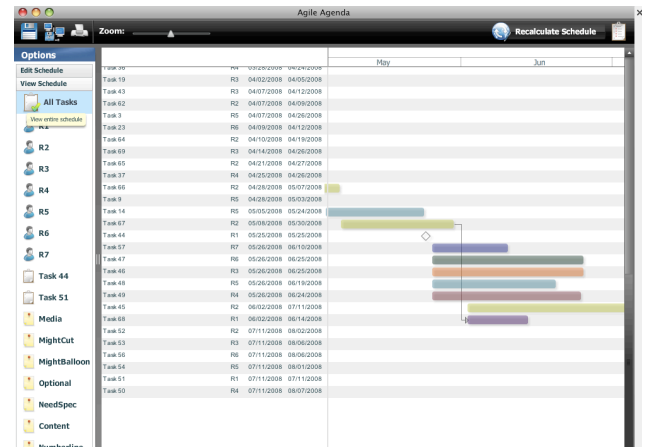
Best practices

Allow the user to quickly get at the interactive object (bulk load, a few quick questions, templates, or reasonable defaults).

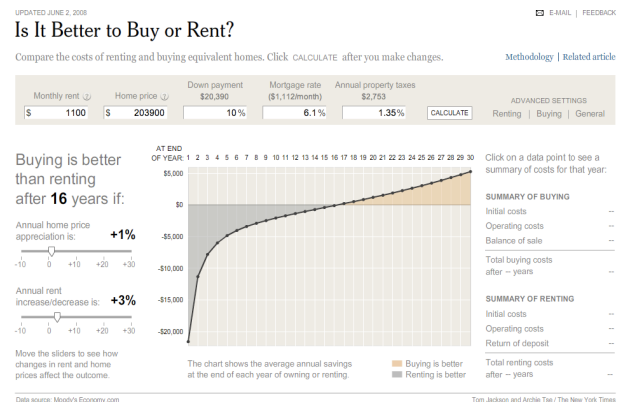
Avoid pop-ups, allow for direct interaction as much as possible, dragging, resizing, dropping, double click to create...



Retirement calculator- Fidelity MyPlan

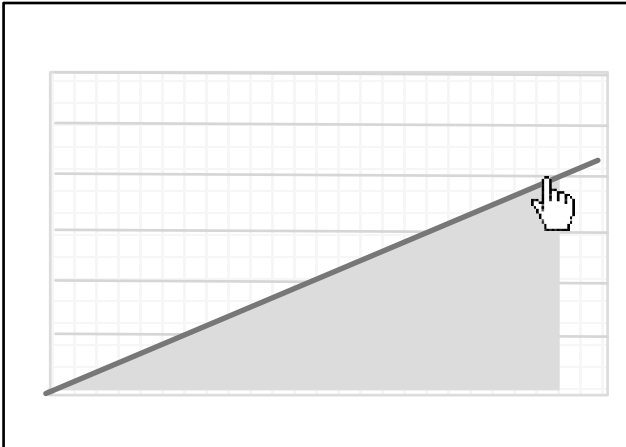


Project planning- Agile Agenda

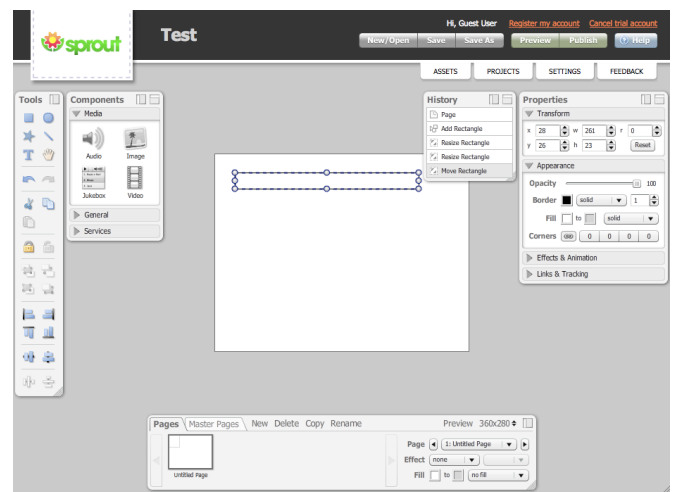


Comparison calculator- New York Times

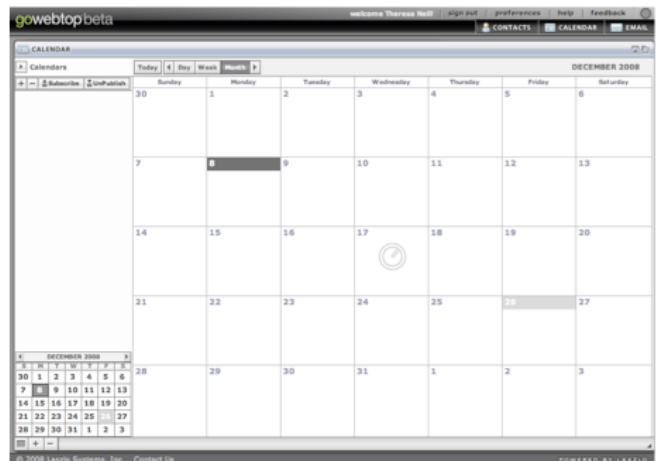
Interactive Model (cont.)



Editable calendar, click to edit, drag and drop- Google Calendar

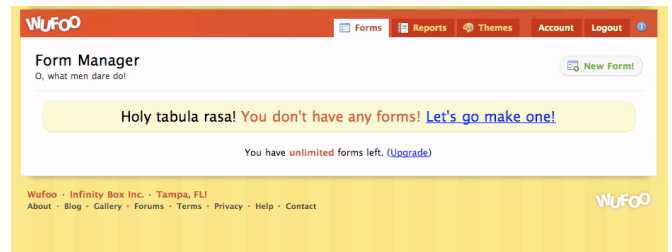
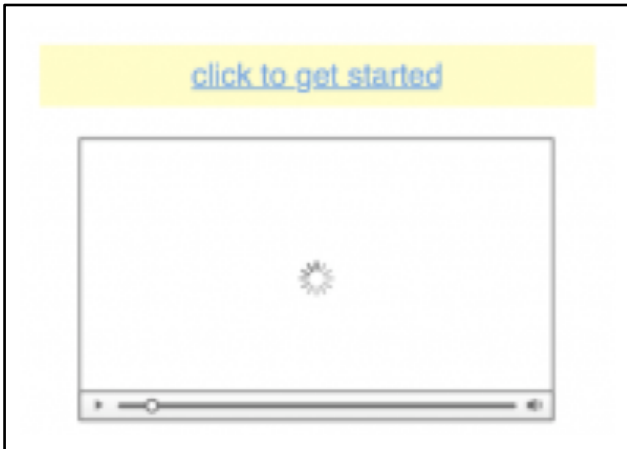


This WYSIWYG editor fits the Palette/Canvas pattern as well as the Interactive Model- Sprout

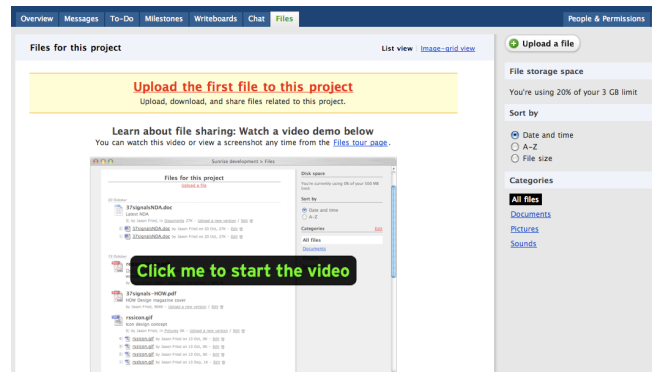


Editable calendar with filtering- goWebTop beta by Laszlo

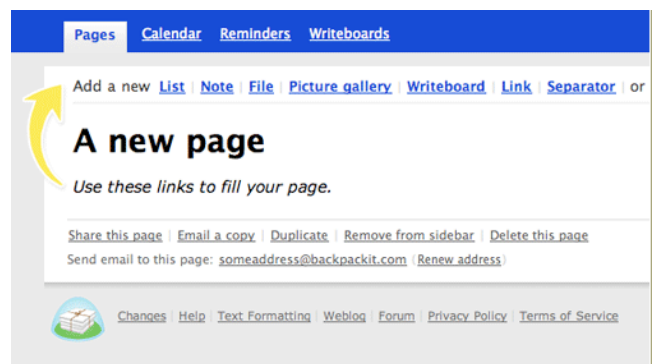
Blank State



Form manager is easy to start using with an engaging blank state- Wufoo



Message and hyperlink helps users get started using the features in Bascamp by 37signals



An arrow directs the eye to the starting spot- Whiteboard by 37signals