Integrating User Interface Design Specifications

Keith Instone @keithinstone

Internet User Experience, July 19, 2012
http://iueconference.com/
Hashtag: #iue12

http://instone.org/iue-integui

Jason Blackwell

Jason Blackwell 1st

Usability Specialist at IBM

Ithaca, New York Area | Computer Software

Current	**Human Factors Engineer** at **IBM, CIO Office** **Senior Usability Specialist** at **IBM**
Past	Usability Specialist at IBM Global Services
Education	Wichita State University State University of New York at Binghamton

Design and adoption of social collaboration software within businesses

Full Text: PDF

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2009 Article

- Extended abstract

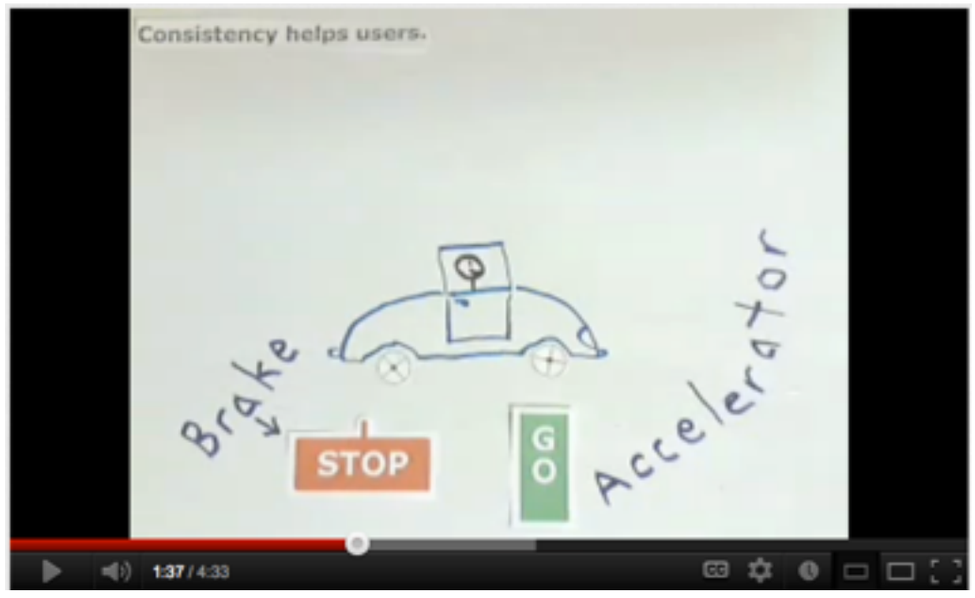
Bibliometrics

- Downloads (6 Weeks): 9
- Downloads (12 Months): 71
- Citation Count: 0

Why follow design standards?

"A short, silly, amateur, and hopefully fun video on how following your company's web design standards might be useful to you.

A nod to all the (better and more professional) whiteboard videos that have gone before, and another nod to anyone who has found themselves defending standards."



http://www.youtube.com/watch?v=24uuzlaZlfM

Discussion: The video

- Design standards are a set of rules, guidelines and examples that specify the appearance of a user interface
  - Code guidance, Pattern Library
  - People who create & maintain the standards
  - Restrictive, Lots to learn, Too much work
- Consistency helps users
- It will save YOU pain
- It will save you time & money
- Upgrades are easier

My agenda
(subject to change)

- Flash back to 2006, "challenges ahead"
- Actual changes
  - Types of UI specs
  - Governance
  - Broadening scope & *integration*
  - Business case & redesign
- Initial free-lance experience

Who cares? Why care?

- Speed up the design process
- Create more consistent experiences
- Save your company money
- Still leave room for innovation

ibm.com

ibm.com re-design & standards

Internet User Experience 2006
February 21, 2006
Ann Arbor, Michigan, USA

Keith Instone & William Smith
IBM > ibm.com > User experience design
instone@us.ibm.com
designguy@us.ibm.com

http://instone.org/iue2006-ibm

7

2006 Agenda

- **Design evolution of ibm.com**
  - Focus on “recent” “One Experience” redesign
- **Role of standards in the evolution**
  - Standards site
  - Relationship with other standards
  - Business as usual
  - Evolution from text to tools to embedded

8

ibm.com standards
About ibm.com standards
Page elements
• General requirements
Page types
Rich media
Online applications
Portlets
Globalization
Writing for ibm.com
Standards references
Standards tools
Standards A-Z & topics indexes

Page elements by region

Right column region

Before adding these page elements, you must review the general requirements.

Click on a page region for more information about its elements.

1 Masthead region
2 Left navigation region
3 Content space region
4 **Right column region**
5 Footer region

Right column elements

Bullet treatments
How to use bullets with links, non-linked text, and unordered lists.

PDFs & resources
Text-based information assets embedded on a page.

Buttons
Small graphics used to indicate actions or steps within those actions.

Prices
When to add prices to a page, and how to format them.

Color palette
Required colors for ibm.com pages, their links, subheads, and text, etc.

Printable version
Enables a visitor to print the currently displayed page.

Column grids
Accepted variations for how text flows on a page.

Promotion module
Used to highlight a timesensitive ibm.com offering.

Cross links
Links to content in a separate business unit area of ibm.com.

Ready to buy module
Used to transition the user from a product page to a commerce page.

External links
Links to sites outside of ibm.com.

Right column link list
Used for links to related content, positioned for

Container generator

Edit

Use this form to generate content container code conformant with OneX/V14 standards. The "Subhead text" field is required. You must follow all standards for subhead bars & outlines.

Width 443 pixels (use in main column)

Colors Title | Title | Title

Subhead text* Internet User Experience 2006

Content text needs, technical standards, user interface guidelines, information architecture, navigation, visual design and legal requirements on both the recent redesign of ibm.com and the ongoing improvement of the web user experience.

Update

Preview and code

Internet User Experience 2006

The presenters will discuss the influence of cross-company standards, marketing needs, technical standards, user interface guidelines, information architecture, navigation, visual design and legal requirements on both the recent redesign of ibm.com and the ongoing improvement of the web user experience.

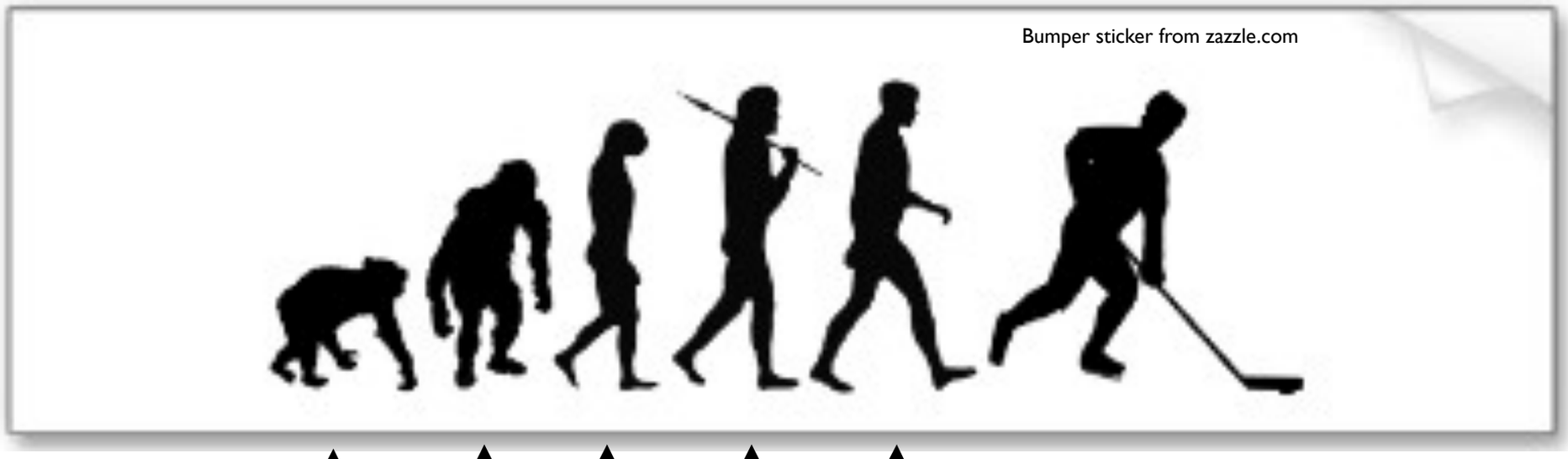
```
<table border="0" cellpadding="0" cellspacing="0"
width="443">
<tr>
<td class="v14-header-2">Internet User Experience
2006</td>
</tr>
<tr>
```

2006: Challenges ahead

- **Embedded standards, not published standards**
  - Centralized projects to save money and improve the UX
- **Adaptive experience**
  - The Holy grail of a fully integrated web site
- **Modular user interface (& functionality) design**
  - From page design to “portlet” design
  - Reused in many contexts
- **Web 2.0**
  - Standards and guidelines for syndicated content, blogs, wikis, Ajax, etc.

10

Evolutionary view



Some orgs
Hostility and/or cluelessness

Freelance 2012
Something written down
No process to manage, yet

IBM.com 2006
Published UI standards (web site)
Policies to enforce, process to manage
People devoted to develop & maintain

IBM Web 2012
Collaboration platform
Interaction design
Across (a few) devices & platforms

Future
Integrated across all touch points (products, web, ...)

11

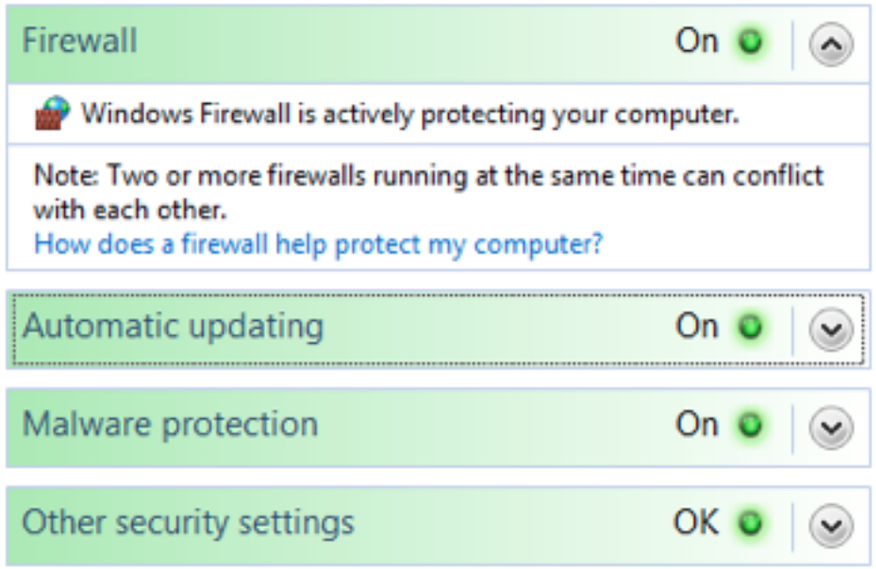
2006-2012:

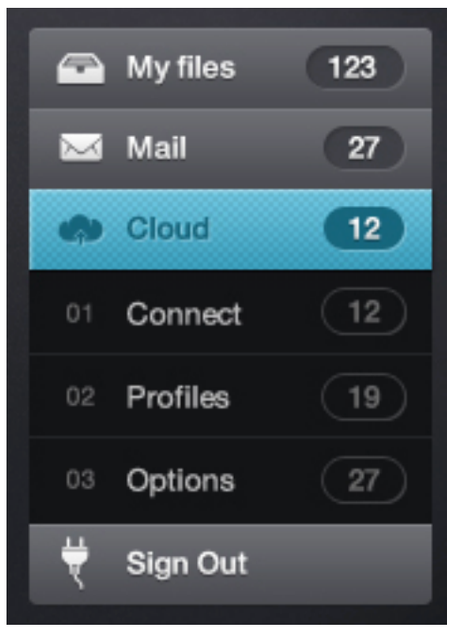
UIs are a lot more complicated

- Web grew up beyond hypertext: interaction design matters (& touch)
  - Desktop flashbacks
- Harder to explain UI with text & static images
  - Prototypes
- Device (re) explosion
  - Smart phones, tablets, ...

2006-2012:

UI elements are harder to describe



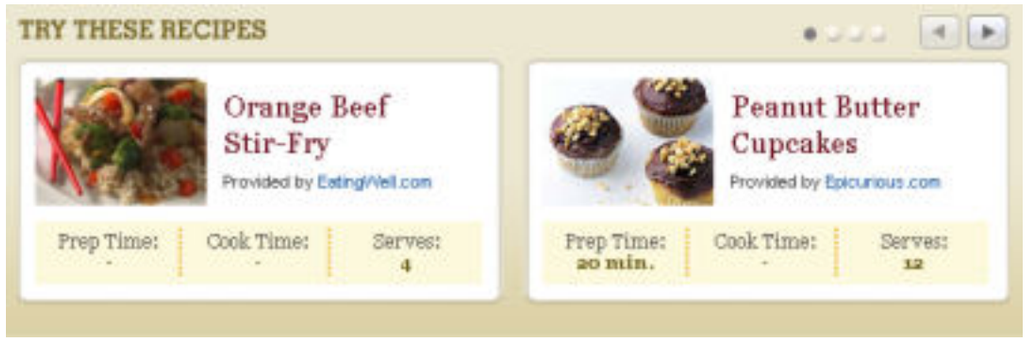


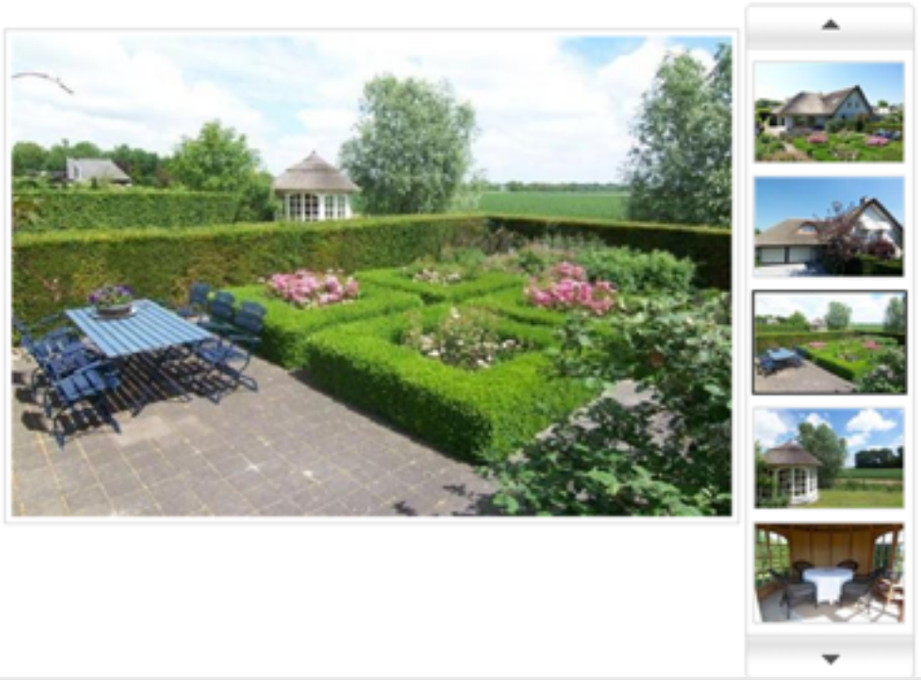
Accordion? Show/hide?

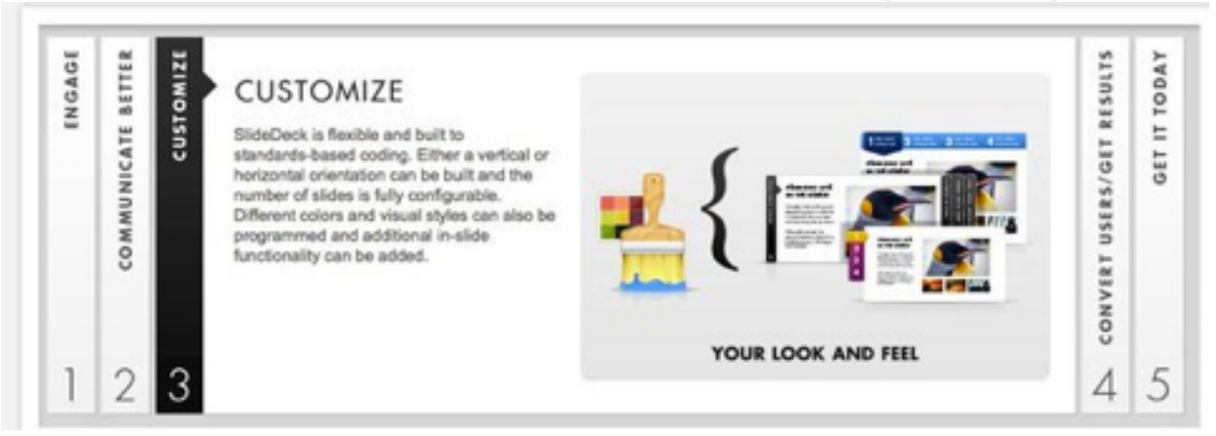
Twisties? Disclosure Triangles? Chevrons?

2006-2012:

UI elements are harder to describe



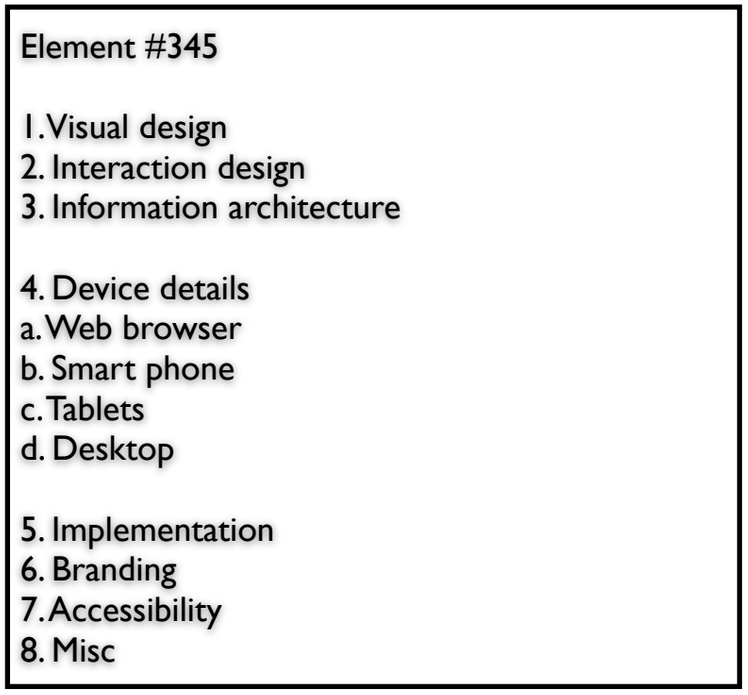


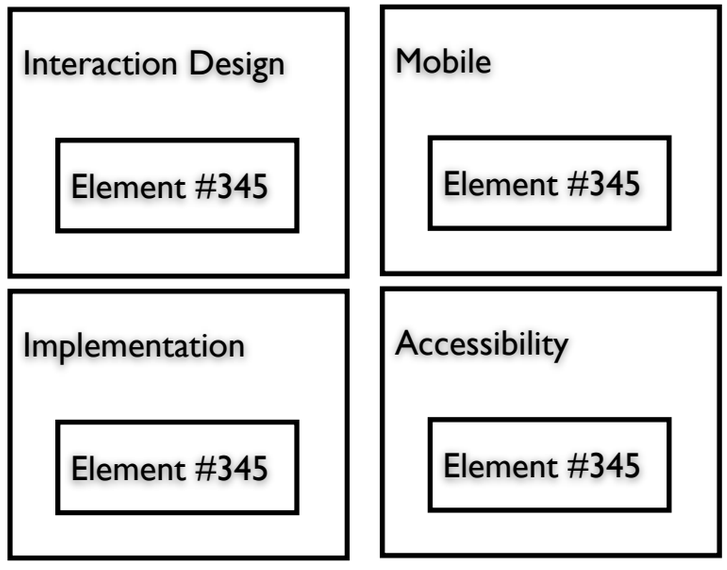


Carousel? What are the names of all of the pieces?

2006-2012:

UI specs are harder to organize





- Do you separate the interaction design of an element from the visual design?
  - Probably not, you add "how it behaves" to "how it looks"
- Do you write separate specs for each device/platform (web, desktop, smart phone, tablet, ...)?
  - Probably, if "mobile" is a separate project
- Do you write separate accessibility, branding, implementation, etc. specs?
  - Probably, unless you are a glutton for punishment

2006-2012:
Governance: From Compliance to Collaboration

- Older (IBM) model: Compliance
  - Central team, Devoted resources, Rules
- Newer (IBM) model: Collaboration
  - Merged with UX design team, Tools > Rules (looser), DIY if engaged with community
  - Collaboration platform = Wikis, Discussions, Content management, Voting, Workflow (from draft to accepted/rejected to standard)
- Why change?
  - Lay-offs, Technology, Business "innovation"
- Challenges
  - Culture ("tell me what to do" vs. "whatever I want to do anyway"), Trust & control, Financial, Priorities

2006-2012:

Broadening of scope (step 1)

Element	InTRAnet	InTERnet	Combined
Left navigation	•Optional •3 levels •Related links •Highlighted page •Older CSS	•Required •2 levels •Related links •Highlighted page •“Up” link •Newer CSS	•Optional •3 levels •Related links •Highlighted page •“Up” link •Newer CSS
Breadcrumbs	•Top of content • “>” hard coded •Optional	•Top of content • <LI> with CSS •Optional	•Top of content • <LI> with CSS •Optional
Footer	•Does not exist	•Footer bar •Service to update bar	•Rich footer (service) •Footer bar, service
...			

File Edit View History Bookmarks

Lotus Connections Home Profiles Communities Apps Gardner Raynes Settings Help Log Out

Getting Started Updates Widgets All Connections Search

Home Customize

Status Updates

- News Feed
- Notifications
- Discover
- Saved

My To-Do List

You have no to-do items

Create To-Do Items

Recommendations

A List Apart: Articles: In Defense of Eye Candy
5 related tags
1 related person

A cognitive analysis of tagging
7 related people

Delivering A High-Performance AJAX Web Service Broker :: Johnvey

Status updates

View updates from the people you are following or who are in your network. You can also update your own profile status.

Show: My Network and People I'm Following

Gardner Raynes **Working on Connections Home** Today 11:35 AM Clear

What are you working on right now?

Glenn Cloud Just Now

Working at home

Add Comment

Betty Heinz Yesterday 9:46 PM

Vivamus dignissim libero vel feli

Add Comment

Steve Cho Aug 20

Elit sollicitudin et mollis est mattis

Add Comment

Betty Heinz wrote on the board of Steve Cho Aug 20

Vivamus dignissim libero vel feli!

Add Comment

Diana Maroni Aug 20

fringilla quam pretium laoreet http://www.zetabank.com

Add Comment

Glenn Cloud Aug 20

pretium vehicula!

18

2006-2012:

Broadening of scope (step 2)

Element	"Web (pages)"	"Software products"	Integrated
Left navigation	•Web page type	•Simple (web page type) •Explorer/desktop type •Special case types	•Merge web page types •Describe other types •Describe when to use each type
Breadcrumbs	•Web page type	•Web page type •Path type	•Merge into a single type
Footer	•Web page type	•Web page type •Application type	•Merge web page types •Describe application type •Describe when to use each type
...			

2011:
Business case: UI specs as part of a Redesign

- "Happy Birthday, IBM, let's do a Redesign to celebrate"
  - Intranet: way overdue
  - Internet: maybe needed, maybe not
- UI integration already underway, so tag along
  - Design & code once, re-use [Time, money, Consistency]
  - Best of intranet, internet, add new things [Innovation]
  - Build a common technical infrastructure [Strategic]
  - Single team to manage both [Money]
- Ahead of the game for total IBM integration

2012 Freelance

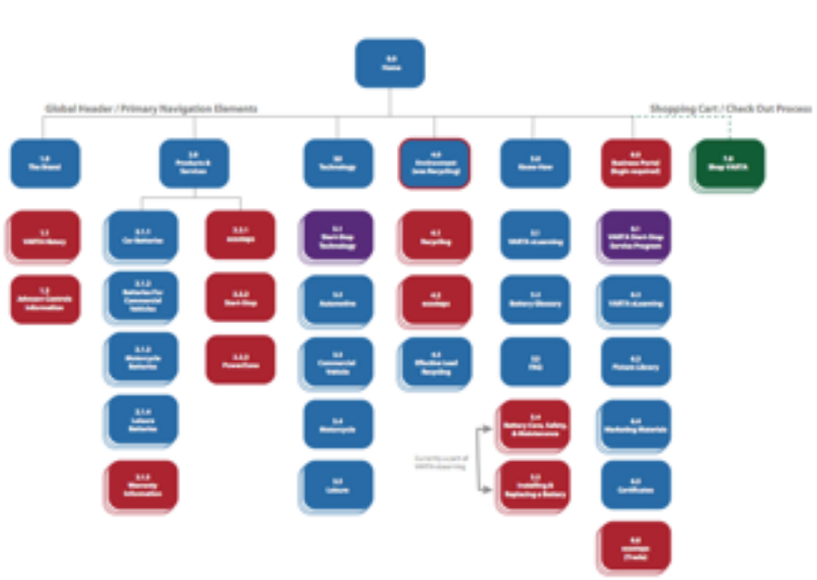
“Global Information Architecture Guidelines”

- General principles
  - Simplicity & consistency
  - Brand guidelines
  - Look and feel
  - Technology
  - Copywriting
  - Social media
  - Mobile
  - ...
- Page Layouts
  - Masthead
  - Navigation
  - Body content
  - Content modules
    - Tabs
    - Tables
    - Forms
    - ...
  - Examples

21

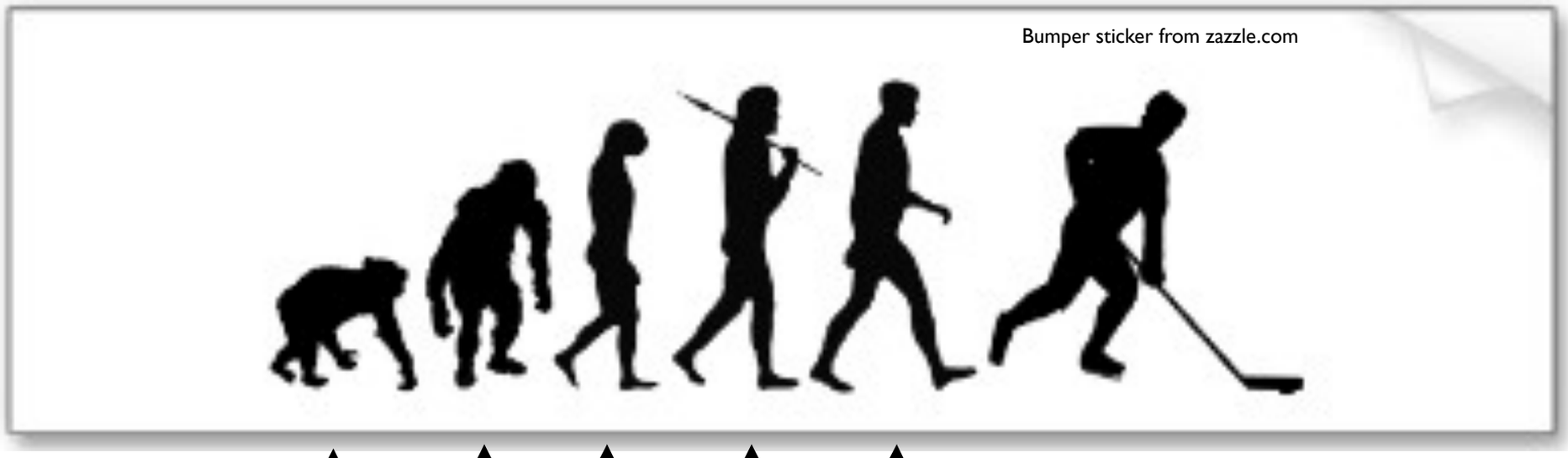
2012 Freelance

Working by brand/site (vs. by template, widget, ...)



	Home	About the Brand	Products	Services	Tech-nology	Support	Environ-ment	Enthusiast	Business Portal	Shop & Buy	News	Contact	
VARTA	0.0 Home	1.0 About	3.0 Products		2.0 Technology	4.0 Support		6.0 Enthusiast	8.0 Business Portal	7.0 Buy OPTIMA	5.0 News & Events	9.0 Contact Us	
Johnson Controls	0.0 Home	1.0 The Brand	2.0 Products	3.0 Services	4.0 Technology	6.0 Know How	5.0 Environment		7.0 Business Portal	9.0 Shop VARTA	9.0 Press & News	10.0 Contact Us	11.0 Downloads
Heller	0.0 Home	1.0 The Brand	2.0 Products	3.0 Services	4.0 Technology	5.0 Product Support	6.0 Environment		7.0 Business Portal	8.0 Buy Heller	9.0 Heller News	10.0 Contact Us	

Recap, Discussion



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Notes, questions from the presentation

- Style guides (just how it looks) vs. code libraries
- W3C/technical standards + UI standards
- Maturity: most were 1/2 step between Freelance 2012 & IBM 2006
- Device UI standards (like iOS)
- *Many more good questions and comments, but I cannot remember them all!*

Tweets, edited (by @crfarnum)

- Design standards not equal to patterns
- Great video about the value of design standards: http://m.youtube.com/watch?v=24uuzlaZlfM
- Start high level, like color palette, high level page templates, later widgets and components.
- Should go hand in hand with code standards.
- Important success factor- how you share them. Via a site? If so it had better have a good IA.
- In Keith's practice in '06, 3 people were dedicated to maintaining the design standards and site(!!!)
- Governance- important to define how it works. Compliance -> Collaboration

Thanks!

@keithinstone

http://instone.org/iue-integui

keith2012@instone.org

to continue the discussion