Wireframing with Your Team in Mind

Making Wireframes Usable

User Focus 2012 October 19, 2012



Presented By: Jason Kolaitis E-mail: jason@kolaitis.com Web: Kolaitis.com

Introduction

Audiences

Questions

Recap

Introduction

Who am I?



EDUCATION

The George Washington University

• Masters of Science in Information Systems Technology

Syracuse University

 Bachelor of Science in Information Management and Technology

RECENT CLIENTS

Commercial

 National Geographic, American Diabetes Association, MWV & Markel Corporation

Government

• FBI, DLA, US Army, DoD & Arlington County

Jason Kolaitis

User Experience Designer & Strategist at Celerity

- User Centered Design (UCD) & usability advocate
- Significant portal & intranet design experience
 - UX lead for National Geographic, DLA & FBI projects

What We'll Cover

- How this presentation came about
- Quick overview of wireframing
- Best practices, tips & tricks, and recommendations when creating wireframes for:
 - Project Team
 - Back-End Developers
 - Front-End Developers
 - Visual Designers
 - User Experience Designers
 - Project Managers
 - Training & Documentation Specialists
 - Clients & Stakeholders
 - Quality Assurance Engineers
- Questions
- Recap

How Did This Presentation Come About?

- When I first started my UX career many years ago I realized my wireframes weren't that beneficial.
- Bad wireframe design led to project confusion.

	Search	▶ Client Login
Logo	Pł	noto/Tagline Graphic Treatment
Home Company Solutions	Services News & P	ublications Contact Us
Home Page Message		Coupons Subscribe Latest News
Offer(s)		

What Not To Do...

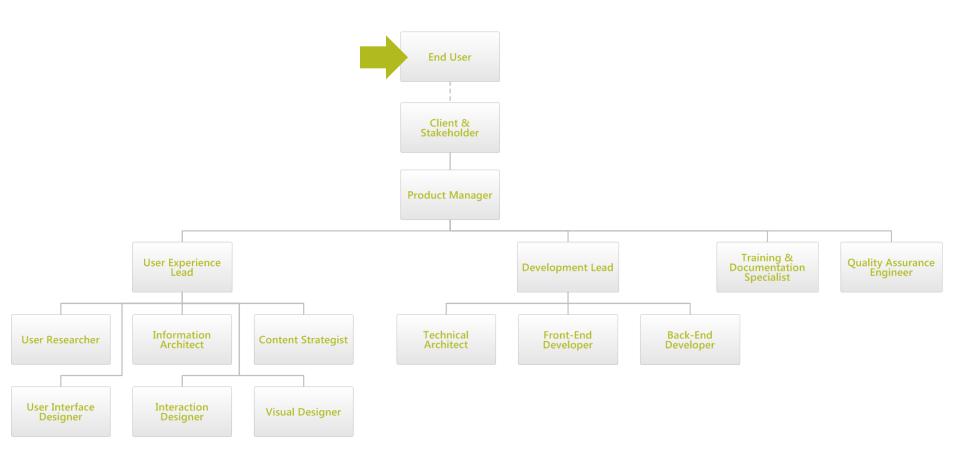
What is Wireframing?

• Wireframes help architect holistic designs by mapping out functionality, page structures, design elements, interaction sequences and navigation before heavily investing in any kind of development.





Who Are We Designing For?



Introduction

Audiences

Questions

Recap

Audiences

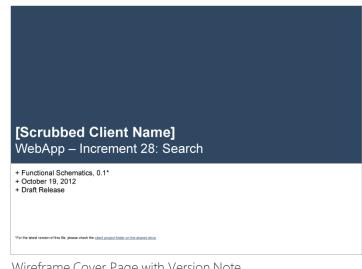


Project Team How They Use Wireframes: To gain consensus on what will be developed so meaningful discussions

can occur.

Project Team

- Ensure all team members know where to access the most recent working copy AND latest stakeholder/client approved copy of the wireframes.
 - Add a simple note like "Please login to http://dev.clientname.com/wireframes for the latest version..."
- Include revision history or some form of detail as to what was last modified.



Wireframe Cover Page with Version Note

[Scrubbed Client Name] WebApp – Increment 28: Search

- + Functional Schematics, 0.1*
- + October 19, 2012
- + Draft Release

Table of Contents

Cover	1	
Table of Contents	2	
Primary Screens	3	
Home	4	
Home Cont.	5	
News & Events	6	
Our Organization	7	
Resources	8	Updated
Community	9	
Life & Career-Employee Benefits & Support	10	
Secondary Screens	11	
RSS Feeds	12	
RSS Reader	13	
RSS Reader Settings	14	
Blog All Listings	15	
Blog Postings	16	
Blog Post	17	
Blog Creation	18	
Blog Post Story	19	
Blog Post Story Review	20	
News	21	
Events	22	
Events-Details (Attend)	23	
Events-Details (RSVP)	24	
Events-Register [Interaction Sequence]	25	
Events-Confirmation Email	26	
Directory Landing	27	
Search w/ Results	28	Updated
Employee Profile	29	Updated
Employee Profile Cont.	30	opuateu
Employee Profile (Interaction)	31	
Employee Profile Languages Modal Window	32	
Employee Profile Contact Modal Window	33	
Employee Profile Availability Modal Window	34	
Employee Profile About My Role Modal Window	35	
Employee Profile Work Experience Modal Window	36	
Employee Profile Interests Modal Window	30	
Employee Profile Currently Working On Modal Window	38	
Employee Profile Skills Modal Window	39	
Employee Profile Education Modal Window	40	
Employee Profile Professional Memeberships Modal Window	41	
Employee Profile Board Memberships Modal Window	42	
Employee Profile Favorite Links Modal Window	43	
Employee Profile New Photo Modal Window	44	
Department Landing	45	
Department Landing Spotlight Graphic [Interaction Sequence]	46	

Resources Screens	47	
Resources-Navigation Options	48	
Resources-IS&T & Helpdesk	49	
Resources-Forms & Templates	50	
Resources-Policies, Procedures & Guidelines	51	
Resources-Brand, Marketing & Image Support	52	
Resources-How Do I(FAQs)	53	
Resources-How Do I(FAQs) Subpage	54	
Resources-Google Sites	55	
Resources-Facilities Management	56	
Resources-Editorial & Research Tools	57	
Resources-Calendars	58	
Resources-Calendars (Future State)	59	
Resources-Calendars (Future State)	60	
	61	
Resources-Library (Future) Life & Career Screens		Marris
	62	New
Life & Career-Welcome to NG	63	New
Life & Career-Pay, Perks & Benefits	64	New
Life & Career-Employee Resources	65	New
Life & Career-Health, Wellness & Safety	66	New
Life & Career-Life Events	67	New
Life & Career-Learning & Career Development	68	New
Life & Career-Alumni & Retirement	69	New
Supplemental Screens	70	
Wallpaper	71	
Wallpaper Details	72	
Settings-Wallpaper Image	73	
Settings-Wallpaper Image Preview	74	
Newsletter	75	
Weekly News Summary Email	76	
Notifications	77	
Inline Errors	78	
Modal Warnings & Confirmations	79	
Notifications	80	
Alert Bar	81	
Login	82	
Login (Visual Workflow)	83	
Login (Logical Workflow)	84	
Login	85	
Username/Password Front End Validation	86	
Incorrect Username/Password (Interaction Sequence)	87	
Forgot Username	88	
Forgot Osername Forgot Password/Email (Interaction Sequence)	89	
Change Password/Email (Interaction Sequence)	90	

Prepared by: Jason Kolaitis

Version: 1.9 Date: 10-Tu-2012

jkolailis@celerity.com Page: 2 of 90

Change Log

News Changes in SiteMap v0.9

High Level Sitemap

- Renamed Employee Community to Community
- Removed Events from Resources
- Renamed Training to Training, Learning & Education under Resources
- Renamed Editorial to Editorial Support under Resources
- · Renamed Staff Personals to Staff Personals & Discussion Forums under Community

News Changes in SiteMap v0.8-0.8.1

News & Events

- Renamed ngNow to News and Events
- · Added Events as a more robust/complete area, Events are now strictly located here.
- · Blogs Moved to this area from Community.
- RSS Feeds made a major item within this area (was minor before, at least a 4th level item.)
- Added back "NG In The News & The Press Room"

Our Organization

- Added Activemap access to this area
- · Renamed Divisions, Teams and SIGs to "Divisions and Working Groups".

Resources

- Added Activemap to this area as a Business Tool.
- Added Employee Orientation to Employee Support

Always on Screen

- · Embedded Quicklinks and Webapps into the navigation bar.
- · Updated this area to indicate linkages and to be more accurate with what the bar can actually do.

Community

- · Renamed Employee Community to "Community". People who are not employees may be given access.
- Removed Blogs, placed them under News & Events

News Changes in SiteMap v0.7

ngNow

- Renamed 1.1 ngNow to News & Events
- Removed 1.1.4 RSS Feeds
- Removed 1.1.5 ngNow-Requests, Submissions & Story Ideas
- Placed 1.1.3 Blogs under Employee Community

Our Organization

Move 1.2.7 Employee Community to primary level navigation item (formally ng+)

ngKnowledge

- Placed 1.3.1 Library under Resources
- Placed 1.3.3 Policy, Procedures & Guidelines under Resources
- Removed the remaining items and entire the 1.3 ngKnowledge section

Always on Screen

Removed 1.5.3 ng+ Collaboration Toolbox

Resources

- Added Policies, Procedures & Guidelines as 1.4.1.7
- Added Library as 1.4.8

Employee Community

- Added Blogs as sublevel item
- Added Blogs as sublevel item
- Renamed 1.1.3.1 Employee Blogs to Department Blogs
- Rename 1.1.3.2 ng+ Archive to C-Level Blogs

News Changes in SiteMap v0.6

ngNow

- Changed 1.1.3.3 Micro Blogs to ng+ Archive
- Removed 1.1.3.1 Corporate Blogs
- Changed 1.1.4 RSS to RSS Feeds

Our Organization

- Removed 1.2.7 Employee Community (Moved to Resources)
- Changed 1.2.1.2 Mission and Values to Mission & Values
- Changed 1.2.6.1 Internal Job Postings to Internal Jobs
- Changed 1.2.6.2 External Job Postings to External Jobs

ngKnowledge

- Change title of section 1.3 from Knowledge to ngKnowledge
- Changed 1.3.2.6 NGT Programs to NGT Programs (STARS)
- Changed 1.3.4 Media to Media Archive

Resources

- Changed 1.4.2.1 from HQ Meeting Places to Meeting Spaces
- Change 1.4.2.2 from HQ Training to NG Training
- · Added Employee Community, formally 1.2.7 and all subsections
- Added 1.4.6.14 Helpdesk under Business Tools
- Removed 1.4.2.8 [Departments] Calendars
- Renamed 1.4.3.8.1 Book a Meeting to Reserve a Room and placed it under 1.4.2.1 Meeting Spaces

Always on Screen

No Changes

Envisioned by: 📀 celerity



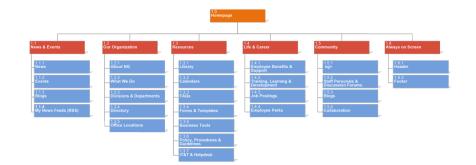
Back-End Developers

How They Use Wireframes: As a discussion point regarding technical feasibility early in the project.

Once finalized, as a blueprint so they can rapidly and accurately develop a usable system.

Back-End Developers

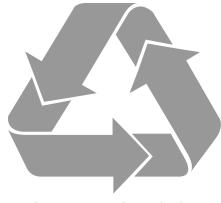
- The greatest beneficiaries of wireframes are the back-end developers.
- Present wireframes to developers early and often.
- Provide as much of a full, all encompassing sitemap as possible.
- Match links in the annotation call outs to exact page names in the sitemap.



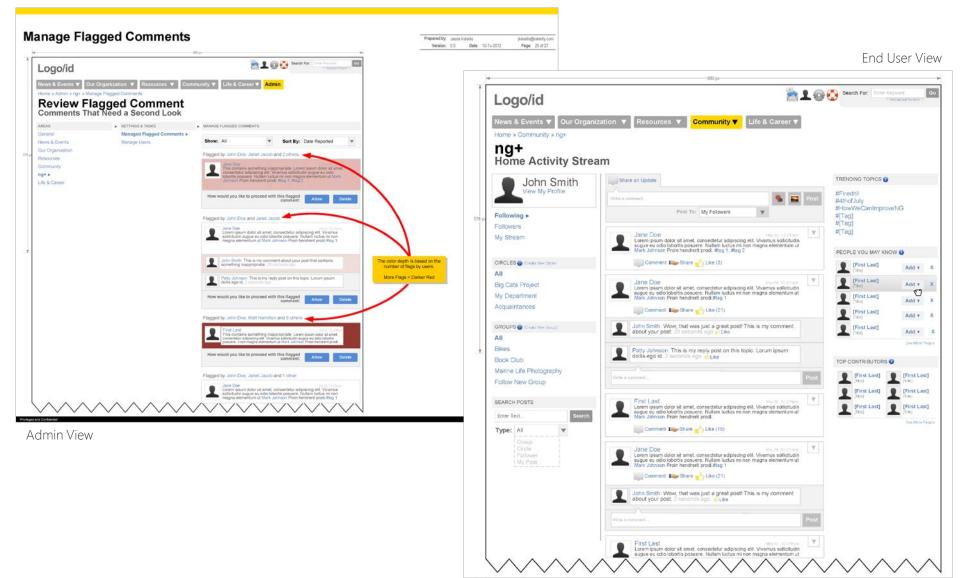
Example Intranet 1st & 2nd Level Page Structure

Back-End Developers

- To streamline development efforts, start thinking in terms of reusable components, controls and templates.
- If a screen can be displayed in multiple different formats, (e.g. modal vs. normal page view), design the elements to be universal and generic.
- Need as much information upfront as possible to reduce rework and code bloat.



Reduce, Reuse, and Recycle Elements





Front-End Developers

How They Use Wireframes: To understand system behaviors, interactions, and responsive design choices.

Front-End Developers

- They need to know break points (if any) for responsive designs.
- Need to know which sections are going to be rearranged, hidden and visible at each break point.
- Architect out the experiences for all applicable devices initially not as an afterthought.



Potential Supported Devices and Breakpoints Table

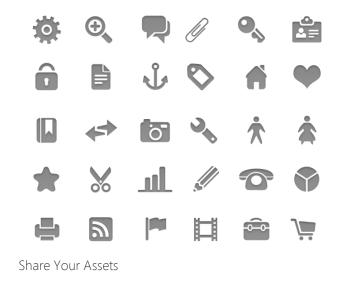
Device	Layout Widths
Large display	1200px and up
Default	980px and up
Portrait tablets	768px and above
Phones to tablets	767px and below
Phones	480px and below



Visual Designers How They Use Wireframes: To translate basic design elements into visually stunning design compositions.

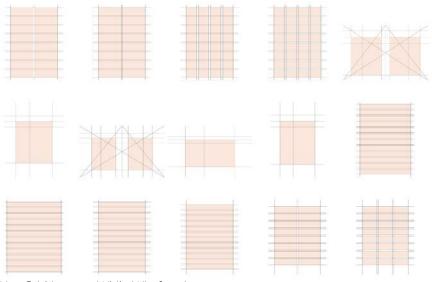
Visual Designers

- Work with your designer and know not to overstep your role.
- Don't limit their creativity wireframe as a minimalist.
 - Allow them to do what they do best.
- Let them know what areas can be played around with and what can't be fiddled with.
- Any supplemental visual assets such as specialty icons/glyphs, client logos, client styles guides, etc. need to be passed along.

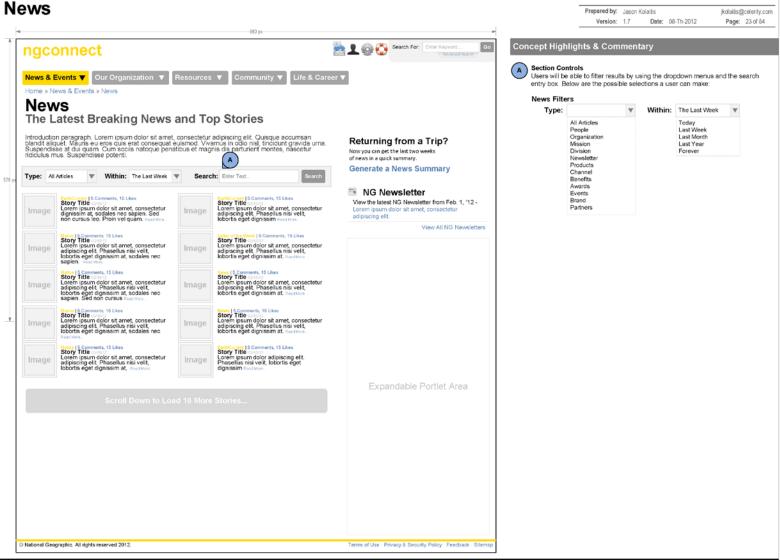


Visual Designers

- Need accurate page ratios/dimensions so they can accurately translate the layout into proper image dimensions, and appropriate page padding/gutters.
- Design with a grid system the closer page layout dimensions resemble real world system dimensions, the better.
- This will hopefully alleviate any surprises as to why the end system didn't match up to the original architecture outlined in the wireframes.



Use Grid Layouts While Wireframing



Privileged and Confidential





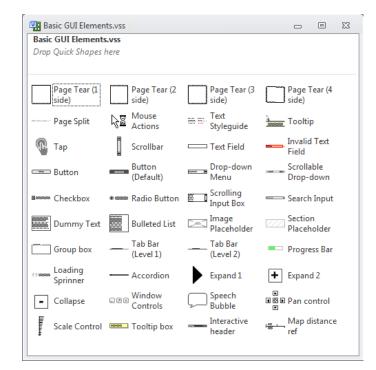
User Experience Designers

How They Use Wireframes: Use wireframe source files to help collaboratively design with you.

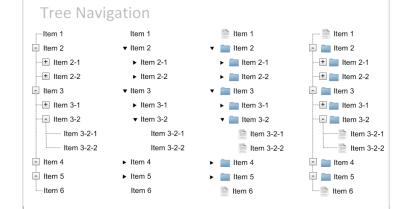
Additionally, they need to take your work and build upon it for future projects.

User Experience Designers

- When working with multiple UX designers on a project be sure to assign a owner to the wireframe.
- Adopt a common wireframing application within your organization so components are reusable and everyone can access them.
- Adopt a standard way to wireframe within your organization.



Wireframing Stencils



Item Pagination

Pictures 1 - 15 of 33	∢ ∢ ► ∢		Pictures 1 - 15 of 33	First Prev Next Last
Pictures 16 - 30 of 33	4 4 + 4		Pictures 16 - 30 of 33	First Prev Next Last
Pictures 31 - 33 of 33	◀ ◀ ▶ ▶		Pictures 31 - 33 of 33	First Prev Next Last
Pictures 1 - 15 of 33	First ┥ Prev ┥	▶ <u>Next</u>	▲ Last	
Pictures 16 - 30 of 33	<u>First</u> ◀ <u>Prev</u> ◀	▶ <u>Next</u>	Last	

Search Pagination

1 <u>2</u> <u>3</u> <u>4</u> <u>5</u> <u>6</u> <u>7</u> <u>8</u> <u>9</u> **►** <u>Next</u>

Prev ◀ 1 2 3 4 5 6 7 8 9 ► Next

Prev ◀ 1 2 ... 14 15 16 ... 22 23 ▶ Next

Alphanumeric Filter Links

Breadcrumbs <u>Main Category</u> > <u>Topic</u> > <u>Sub Topic</u> > Node Name



Project Managers How They Use Wireframes: To view high level

How They Use Wireframes: To view high level features and functionality to reduce scope creep and ensure the project will be delivered on time and within budget.

Project Managers

- They typically view wireframes at higher level to ensure the project is on the right track.
- Include an *Overview* commentary section on each functional schematic wireframe.

Share Your Design Thoughts and Reasoning

 It should explain at a high level what business case is being met and why it's being developed.

First Login

Prepared by: Jason Kolaitis jason.kolaitis.ctr@bta.mil Version: 0.1 Date: 10-We-2012 Page: 10 of 15



Overview

Customize User's Dashboard on First Login

Customization if often a common problem with users. Unless it's obvious to the user that they can customize content and how to do so, users often don't take the time to make changes. Thus on first login, users will be presented with this option to quickly become accustomed to the portal and its features.

The first time users login in the portal users will be presented with a setup screen to select the content they would like to see under the "My DISS" view of the dashboard. Based on functional access control users will only be able to select content that falls under their user group category. For example security officers will have different portles available than human resource personnel.

Functional Notes

A Select Content

Users will be displayed a list of available portlets based on their functional access. Users will be able to select the content they would like to add by clicking the appropriate radio button. Users may only add one content item at a time.

B Select Location

After selecting the content they desire, they must then selection where they want that content located. Portlets will come in varying widths; some content will display in narrow portlets, wide portlets while other may have variable widths (can fit in either narrow or wide areas). Depending on the portlet width (dependent on the selected content) some radio buttons may become inactive to represent that certain portlets may only be placed in certain areas.

Links/Actions

Add Content Button

Upon clicking on the "Add Content" button the portlet selection will be saved and the portlet will still be visible so users can setup additional portlets.

2 Cancel Button

(3)

Returns the user back to their page with no action taken.

Finished Button

Returns the user back to their page with all of their actions saved and applied to the portal dashboard. Users will still have the option to modify their selections at any time by selecting the "Customize" link located in the right hand side of the portal header.



Training & Documentation Specialists

How They Use Wireframes: As the basis for creating formal documentation such as training manuals and podium based presentations.

Training & Documentation Specialists

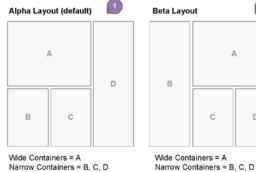
- They want annotations.
 - High-level overviews and lowlevel task instructions = Goodness
- They typically use wireframe screen shots as image placeholders until they can grab actual screen shots of the final system.

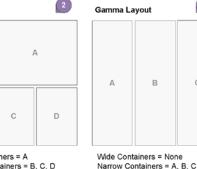


Great Training Materials Begins with Your Documentation

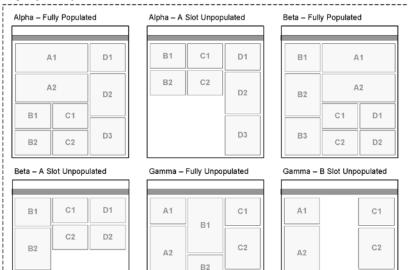
Prepared by: Jason Kolaitis jason.kolaitis.ctr@bta.mil Version: 1.0 Date: 10-Tu-2011 Page: 12 of 44

Dashboard - Layout/Templates

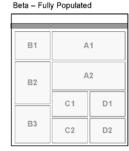




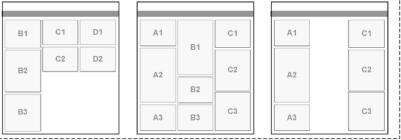
Page Layout Samples



A3



Gamma - B Slot Unpopulated



C3

B3

Concept Highlights & Commentary

The purpose of the examples at left is to present the different dashboard template layout alternatives that are anticipated for the enterprise portal. Additionally, the notes below document and discuss both the functional purpose of and behavioral aspects behind each of the layout options.

About Lavouts

С

The portal dashboard presents the user with a number of discreet content items. These content items, which we call portlets, are essentially blocks of HTML code that sit on the page. These blocks are encapsulated by larger containers that hold one or many blocks in position. The portlets themselves generally have no defined width, relying instead on the properties of the containing bucket to constrain their proportions and position them on the page.

In the example at left the A, B, C, and D sections are containers, while the individual blocks in the samples at the bottom are representative of portlets on a page. A guick comparison should make it clear how a page has a few containers, but that those containers may hold multiple portlets.

Container Dimensions

While containers have defined widths, their height is defined by their content. What we mean by this is that the content items (portlets) are the only reason the containers occupy any vertical space at all.

If you look at the unpopulated samples provided at left you'll notice that certain containers seem to "disappear" when they are unpopulated. This is by design... the container is still present and can have content items assigned to it (in which case it would suddenly have vertical height once again), but it is essentially invisible when devoid of content.

Portlet Positioning

At its most basic portlet positioning is a combination of the width definition for a given container (where the portlet appears) and the portlets that are placed above and below it on the page. Basically portlets push each other around vertically depending on the height of the contained or presented content, with the height of the items above a portlet dictating how far it will appear down the page.



Alpha Layout

The default display format, this layout provides a wide portlet container or display area at the top left of the dashboard with two narrow columns below it and a third narrow column to the right of it. The purpose of this layout is to provide the user with a "detailed" application view section (the wide display area) accompanied by a number of auxiliary standard narrow portlet display areas. This is the core template intended for the first phase of the Enterprise Portal.

Content Positioning

In the Alpha layout wide format portlets can only be displayed in the wide portlet display area (top left, "A" position) and may not be positioned in a narrow contained due to format constraints. However, narrow portlets can be moved to this display area if the user would rather view them in a wide format.

Empty Containers

When a container is empty its lateral space is reserved, but it ceases to have any height. As a result when the "A" container's portlets are removed the two narrow layouts positioned below it circh up, aligning with top of the right column. The "A" container is still there, however, it has no height within the display.

Beta Layout

Essentially identical to the Alpha layout, the Beta layout swaps the position of the "A" wide container, positioning it at the top right of the display instead of the top left. This is meant to provide the user with a flexible alternative to the default top left position of the Alpha layout, and allows the user to prioritize smaller portlets in the top left position. As with the Alpha layout the primary use of this layout option is for displays with wide "critical" or more informative portlet display requirements. Behavioral and functional details are identical to the Beta layout.

Gamma Layout

The final layout option provides a more basic, standard three-column display. This layout has no wide display option, and instead provides just an identical collection of three narrow columns for the user to position portlets within. This layout is intended to be used for views where there are no application focused or data intensive display requirements. Functionally and behaviorally this layout is identical to the preceding ones. However, given the lack of a wide display area wide portlets cannot be viewed or added to this template.

B3



Client & Stakeholders

How They Use Wireframes: As a way to understand the project expectations of what's to come and sometimes even as the basis for writing requirements.

Clients & Stakeholders

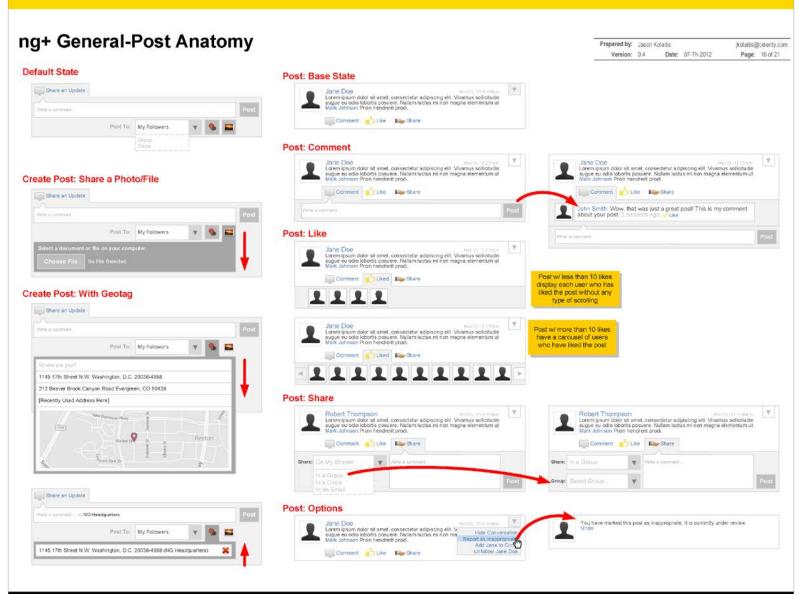
- Use wireframes to sell concepts and features to both the product owner and their peers and to help generate buzz and feedback around the office.
 - This set of "Conceptual" wireframes shouldn't use any technical jargon but rather include supplemental commentary to help introduce ideas and concepts to the organization.
- Wireframes help provide the grand vision of the system and allow everybody to get on the same page.
- Makes writing requirements much easier since there is a visual representation to go off of.

Clients & Stakeholders

- Wireframes are a great way to do requirement gathering so ensure the designs you present are always your best.
- Wireframes set client expectations of what's to come.
- Clients sometimes get very confused when presented with lorum ipsum.
- Clients expect to see behaviors and states.

Bacon ipsum dolor sit amet strip steak ham hock beef ribs capicola shoulder meatloaf kielbasa biltong bresaola frankfurter shankle sirloin. Doner t-bone fatback pork kielbasa brisket, sirloin tenderloin drumstick. Doner cow rump chuck pancetta, bresaola short ribs ham. Boudin salami pastrami prosciutto pork chop brisket turkey ground round pancetta venison short loin tongue ham hock swine doner. Salami capicola turkey, pork doner turducken jowl pastrami bacon sirloin venison chuck. Pork ham hock t-bone drumstick pork belly rump. Jowl bacon sirloin chuck frankfurter ground round.

If you must use Ipsum...use the bacon variety





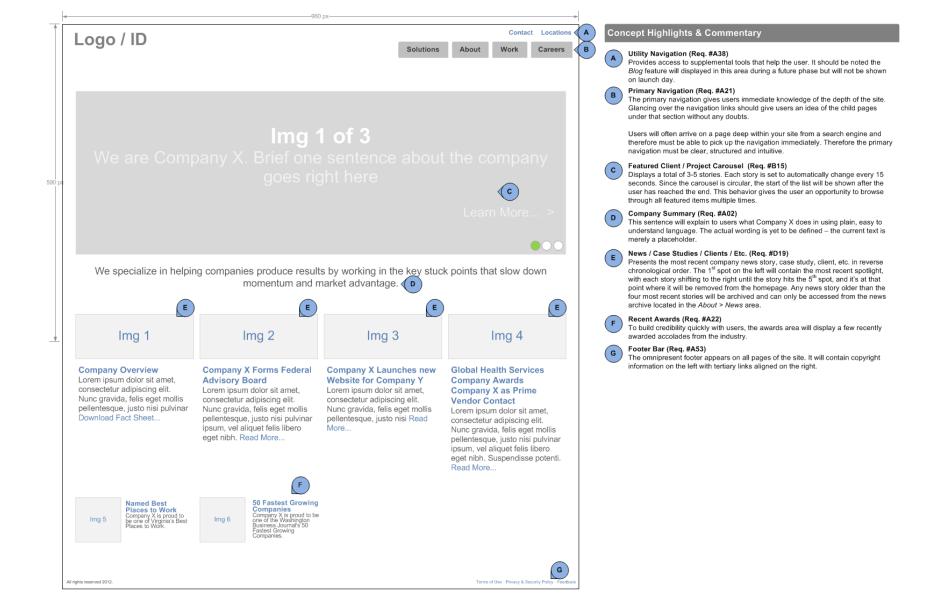
Quality Assurance Engineers

How They Use Wireframes: To compare the end state system with what was originally designed and signed off on.

Quality Assurance Engineers

- Sometimes use wireframes as a form of a System Requirement Specification (SRS) document.
- In the annotations, refer to specific requirements #'s to easily map features to requirements.
- Detailed explanations on how the system should function help ensure the end state is up to par.





Introduction

Audiences

Questions

Recap

Questions



Introduction

Audiences

Questions

Recap





- Let team members know where to find the latest wireframes and what was last changed.
- Always develop a sitemap.
- Start thinking in terms of reusable components, controls, templates and responsive designs.
- Don't limit a visual designer's creativity.
- Design with a grid layout.
- Adopt a common wireframing tool/method within your organization
- Annotate your wireframes and map features to system requirements.
- Use real content, not lorum ipsum.
- Wireframe with your team in mind!



Thank You!

Presented By: Jason Kolaitis
E-mail: jason@kolaitis.com
Web: Kolaitis.com

