

Sametime
Version 9.0

Sametime 9.0
Software Development Kit
User Experience Guidelines



Edition Notice

Note: Before using this information and the product it supports, read the information in "Notices."

This edition applies to version 9.0 of IBM Sametime (program number 5725-M36) and to all subsequent releases and modifications until otherwise indicated in new editions.

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Chapter 1. Overview

IBM® Sametime® Connect release 9.0 is an extensible instant messaging platform, built upon Eclipse. Through the creation of Eclipse plug-ins, the client for Sametime Connect may be extended to provide additional applications, features, and actions appearing in the following places in the Sametime user interface:

- Applications appearing in the Contact List window
- Contact List Tools menu
- Additional icon columns in the Contact List
- Contact list action bar “More” menu
- Name/group context menu
- System tray icon menu
- Chat window layout applications and features
- Chat transcript extensions
- Notification preferences
- Branding areas

This document provides user interface design and interaction guidelines for designers and developers building plug-ins to extend IBM Sametime releases 7.5 through 9.0. This guide is intended to help ensure consistency across plug-ins, but is not intended to be a lesson in user interface theory or design best practices. Following the recommendations in this guide will ensure that designs are implemented in a consistent manner with the existing IBM Sametime Connect interface, as well as plug-ins built by other developers following these guidelines.

Figure 1 illustrates the primary areas of the main contact list window. The guidelines refer to some of these areas.

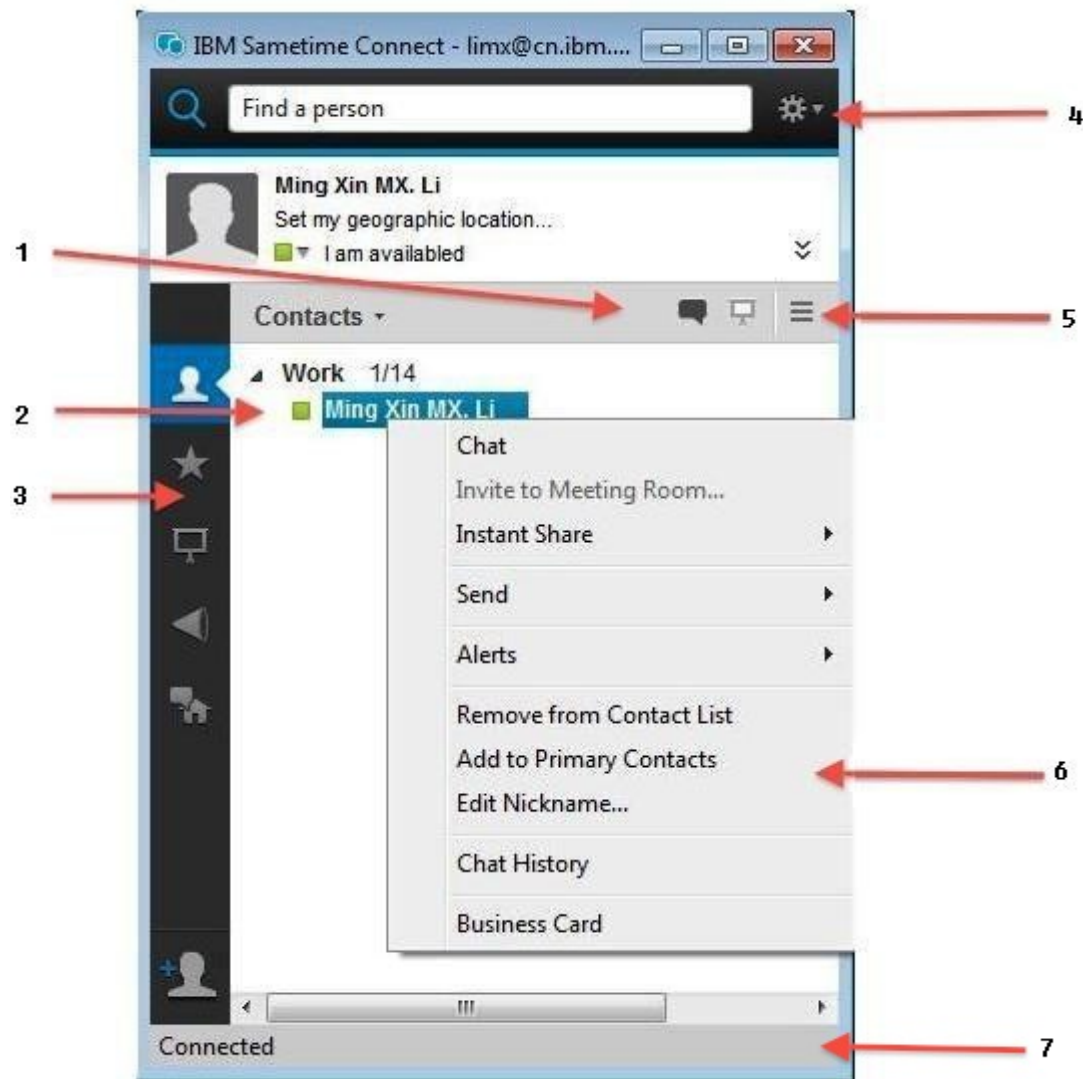


Figure 1: Contact List Window

Key:

1. Action bar
2. Contact name and status icon
3. Navigation bar
4. Actions and Preferences (Gear) Menu
5. More options menu
6. Context menu
7. Status bar

Figure 2 illustrates the primary areas of the chat window. The guidelines refer to some of these areas.

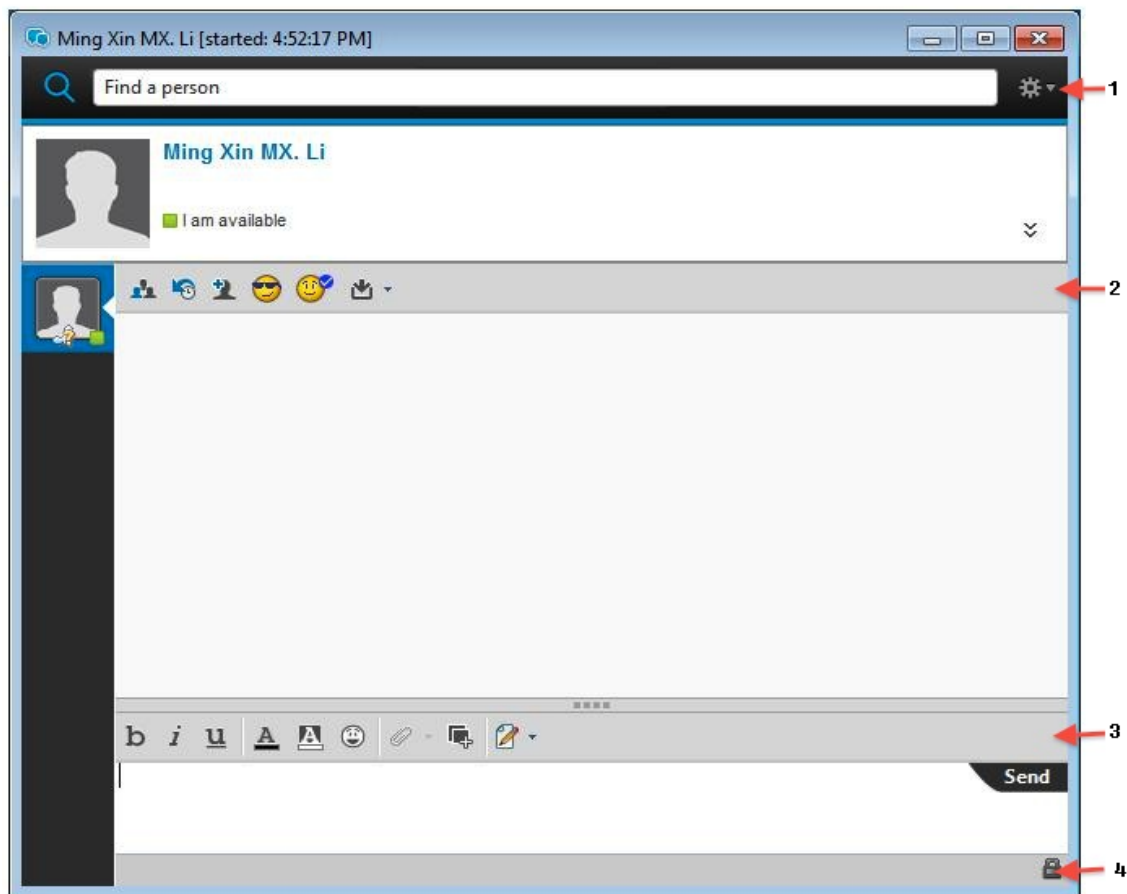
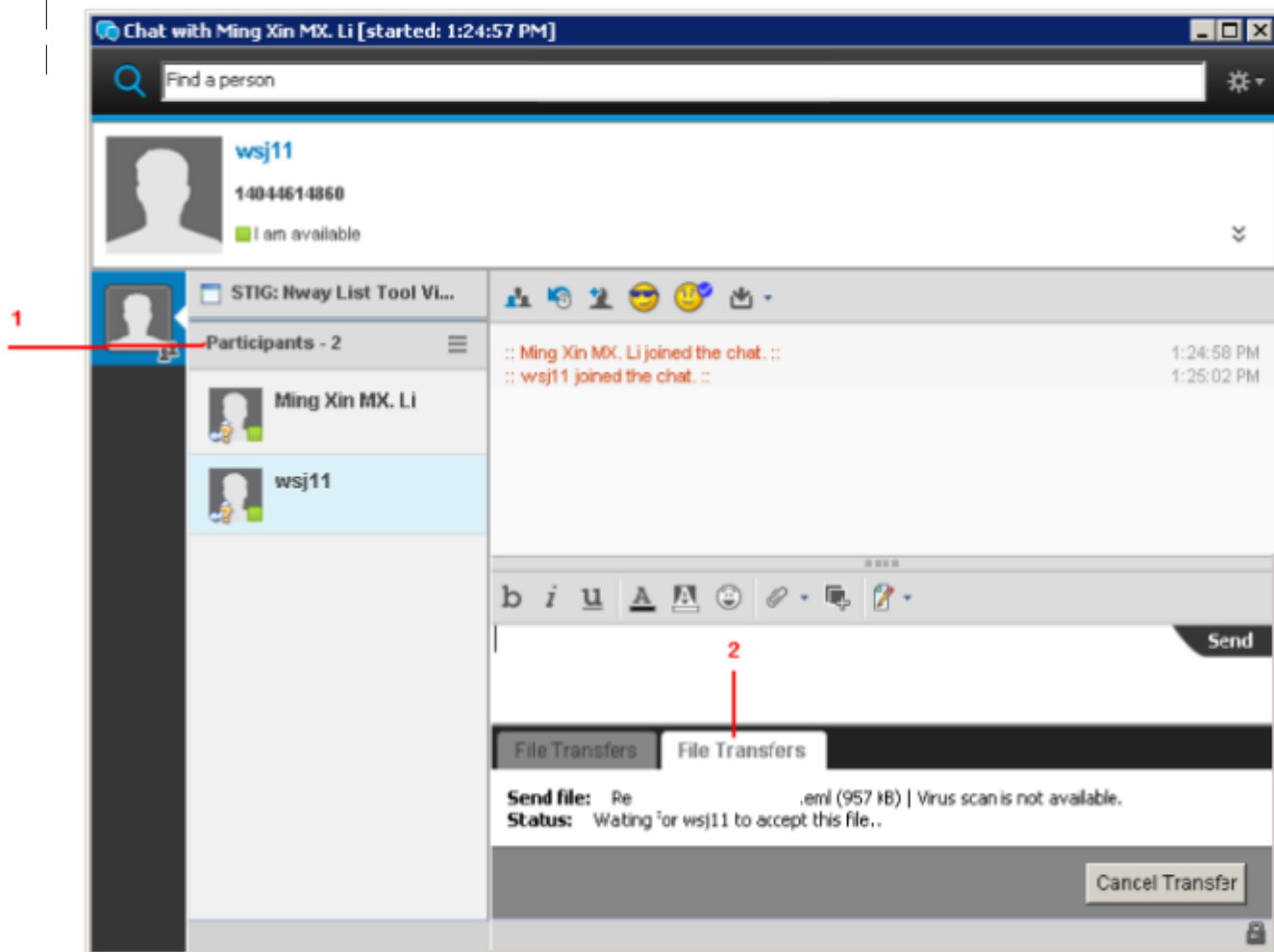


Figure 2: Chat Window View 1

Key:

1. Actions and Preferences (Gear) Menu (Extensible)
2. Action bar
3. Message tool bar (an action bar)
4. Status bar

Figure 3 illustrates additional extension areas of the chat window. The guidelines refer to some of these areas.



Other Resources

IBM Sametime Connect is based in part on Eclipse. Eclipse has interface guidelines of its own. The IBM Sametime Connect guidelines are specific for business applications for end-user clients (as opposed to Integrated Development Environments - IDEs). If you cannot find a guideline in this document, refer to the Eclipse guidelines. We strive to make these guidelines agree where possible. The areas of deviation are due to the nature of the client or the end user (developer, administrator or end user).

You can find the Eclipse Design Guidelines at:

<http://www.eclipse.org/articles/Article-UI-Guidelines/Contents.html>

Chapter 2. User Experience Guidelines

Contact List Window Application Panels

Plug-ins can add new application panels (“mini apps”) to the Contact List window. Each panel has:

- A 16 x 16 pixel icon in the title bar
- A title
- A data area

The format and layout of a panel depends mostly upon the content.

However, each should follow a few simple guidelines:

- Panel content should have a consistent "inner" margin of 4 pixels on all 4 sides.
- The panel can have a toolbar if it makes sense. If it has one, the toolbar must go directly under the title bar.
- The nature of the interaction within each tab depends on the kind of data. That is;
 - RSS and similar feeds should look and act "Web-like" (with underlined links where single clicking accomplishes an action.)
 - Other data might have a more traditional graphical user interface (GUI) interaction/feel.
 - Some data might just be textual information.
 - Some data might be in a table or grid layout.
- If data does not fit on one line of the panel, that data can truncate or wrap, depending on the nature of the data; the plug-in designers/developer must decide this based on the nature of the information.
- Vertical scroll bars can be used.
- Do not provide horizontal scroll bars; the data should truncate or wrap, or users must make the Contact List window wider.

Chat Window Extensions

Application Panels

Plug-ins can add application panels to the left side of the chat window. The participant list of a multi-party chat is an example of how these panels appear. The Contact List Window Application Panel guidelines described above apply to these panels.

Plug-ins creating new application panels on the left of the chat window (see figure 3) should do so when the intention is to have a persistent component that needs to be present for the duration of the chat. The plug-in should define a panel name and 16 x 16 icon, if it contributes to this space.

Components that are intended to display temporarily should not use this mechanism, and should be created in chat window transitory tabs instead.

Extension Tabs

Plug-ins can add additional tabs appearing on the top right of the chat window, above the user information of the chat transcript area. See Figure 3, item 2. When a plug-in adds to this area, the chat transcript/compose area appears in one of these tabs, and the new plug-in appears as another. For example, if a larger application area is desired, where the user can alternate between the application and the chat, then a plug-in could write a new tab component, and the chat transcript would appear in an adjacent tab.

Plug-ins creating new tabs on the top right of the chat window should do so when the intention is to have a persistent component that needs to be present for the duration of the chat. The plug-in should define a tab name (no icon) if it contributes to this space.

Components that are intended to display temporarily should not use this mechanism, and should be created in chat window transitory tabs instead.

Pop-up Extensions

Plug-ins can contribute to the space below the message compose area in the chat window. See Figure 3, item 3. The file transfer interface is an example of this. A plug-in may contribute to this space as well. If two or more components are active in this space at a time, they appear in tabs, ordered left to right by the first one to open in that space. If two tabs are present in the space, and one tab is closed via an action within the tab component, or the component automatically ending, the remaining component switches to display without a tab.

Plug-ins contributing below the message compose area of the chat window should do so when the intention is to have a temporary component that needs to be present for a limited time to perform a specific action or event, such as the file transfer feature's use of this space. The plug-in should also define a tab name (no icon) if it contributes to this space, in the event that two components operate in this space at the same time.

Components that are intended to display for the duration of the collaboration should not use this mechanism, and should be created in left side application panels, or chat window persistent tabs instead.

Contact List Icons

Icon columns can be added to the Contact List window to display additional icons provided by your plug-in. For example, your plug-in may be able to detect if a user has telephony capabilities, and you may wish to show icons to indicate various states for a user's telephony status (such as "available to call" or "on the phone".)

These icons should have alt (hover) text and be no larger than 16 x 16 pixels.

Customized Branding Areas

Custom branding can be applied to the interface in the following locations:

- Contact list window, as shown in Figure 1
- Chat window: to the right of the user information (business card) as shown in Figure 2
- Log in window: top of window

The branding areas can be controlled programmatically, therefore layout can be defined so that images appear in a specific position relative to the overall window, on top of a background color or background image. This should be considered for the Contact List, since this window can be resized by users. If the intended branding is to have an image near the left or right border of the Contact List branding area on top of a background color, even if the user resizes the area, then it should be coded so that the images appear in that relative position, rather than creating a single image that includes the side images and the background color. This will allow the area to look as intended if users resize the area. Similar layout coding should be applied to the log in window since it may appear in different widths on different operating systems.

The following guidelines describe the recommended maximum and minimum sizes for the branding areas and images.

Contact List window:

- Top position: maximum icon width of 256 pixels, maximum area height of 26 pixels.
- Bottom position: maximum image width of 256 pixels, maximum area height of 32 pixels.
- Note that this area may become wider if users expand the window. Therefore code the layout for this case.

Chat window:

- Maximum area or image width of 92 pixels, maximum area or image height of 64 pixels.

Log in window:

- Maximum image width of 393 pixels, maximum area height of 42 pixels.
- Note that this area may become wider on different operating systems. Therefore code the layout for this case.

Capitalization

The guidelines are to use Headline-style capitalization or sentence-style capitalization as follows.

Headline-Style Capitalization

- Use Headline-style capitalization for the following:
- Menus and menu items
- Tooltips*
- Command buttons (push buttons)
- Titles, including:
 - Title bars
 - Window titles
 - Dialog box title bars
 - Tabs

Headline-style capitalization means capitalize the first letter of each word except for articles such as:

- a
- an
- the

and short prepositions (5 or fewer letters) such as for, in, of, on, to etc. when these prepositions are between two words. (For example, in Save As... and Save as Draft... “As” is capitalized in the first instance because it is the last word.)

Do not include ending punctuation.

* Sentence-style capitalization can be used for tooltips requiring a longer phrase or description, as opposed to a simple label.

Sentence-Style Capitalization

Use sentence-style capitalization for all labels in a window or dialog box. This includes labels for the following:

- Check boxes
- Radio buttons
- Group box (or group bar) titles
- Simple text fields
- Status bar message extensions

Sentence-style capitalization means capitalize the first letter of the first word and any proper nouns such as Lotus.

Figure 4 shows an example of sentence-style capitalization in the labels, and headline-style capitalization on the button.

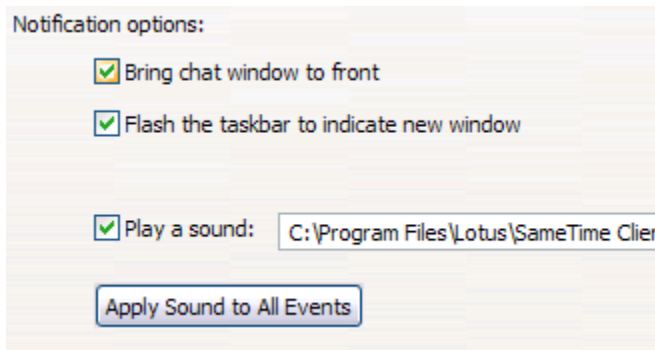


Figure 4: Use sentence-Style capitalization in field labels

Punctuation

General Punctuation

Put a colon at the end of labels for controls in a form or dialog, as shown in Figure 5.

Terminate full sentences (such as those in error messages) with the appropriate punctuation, such as a period, exclamation point or question mark, except for full sentences used in check boxes and radio buttons.

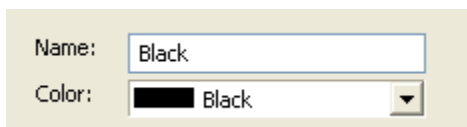


Figure 5: Use colons after labels

Ellipses

Ellipses are three periods added to the end of a string of text in menu actions or buttons. Use Ellipses when the action or button causes a dialog window to open for further user input prior to completing the task, such as “Print”, which opens a window to select a printer.

Ellipses are not required when performing a task requiring a response to a confirmation window. Ellipses are not required for actions resulting in new window for an event where the window is the place the event is carried out, such as "chat".

Menu Bar – Tools Menu

Plug-in applications may add actions to the Tools menu in the menu bar of the Contact List or the chat Window. These actions may be added to other places as well (such as buttons, or context menus) within the application. We recommend actions be added only to the Tools menu to avoid conflicts when integrating with other IBM products in the future such as IBM® Notes®, however Eclipse allows additions to any menu as well as the addition of entire menus.

Making a feature “available from the menu items” includes when a menu item launches a dialog box in which that feature has properties or preferences.

Make the features available by using both:

- Global menu actions in the Contact List window
- Other menu contributions

Table describing Global menu actions and Part-associated set.

Global Menu Actions	Global menu actions, such as those in the Edit menu of the Contact List window can be thought of as "context free", meaning they can be used from any context. These are “retargetable” so that your application retargets menu items such as Cut, Copy, and Paste for application-specific purposes. These may be used by applications appearing in the Contact List window, but not by chat window or Chat History window plug-ins.
Part-Associated Action Set	Other menus will be part-associated action sets, meaning that if the view associated with those menus is not in focus, those menu items should not be displayed.

New Actions should be placed in groupings of similar actions within the Tools menu. Separator lines should be used to distinguish groupings of like actions within the Tools menu.

Mnemonics

Mnemonics are underlined accessibility keys, which appear in the main window menus and dialog windows when users press the Alt key to display the underline. Pressing the mnemonic character selects the item and places it in focus.

Dialog Window Mnemonics

Dialog windows should display mnemonic characters on input field labels, tabs and buttons. The mnemonics should display upon pressing the ALT key, or upon the start of using the TAB key to move between the UI elements in the dialog. When a dialog is navigated in this manner, a border appears around the element in focus.

Specify a mnemonic on the first letter of the first primary noun or verb in the label, rather than an adjective or adverb. If the first letter is already in use by another mnemonic, use the first letter of the next primary word. If no additional words are available, use the next consonant in the primary noun or verb. If the next consonant is used, try the following consonant, and so forth.

If you run out of consonants, use the first vowel, then the next vowel, etc. Letters may be reused if necessary. When this occurs, each press of the mnemonic letter selects the next item in the menu using the letter. This behavior cycles from top to bottom of the menu, then repeats.

Table listing mnemonics for common action buttons.

Button	Mnemonic	Notes
OK	None	Maps to Enter key, no underlined character
Cancel	None	Maps to Esc key, no underlined character

Change...	h	
Browse...	r	
Finish	F	
Apply	A	
Done	D	
Close	C	
Next	N	
Back	B	
Add	d	
Edit	E	
Remove	R	
Move Up	U	
Move Down	D	
Restore Defaults	D	

Menu Mnemonics

The IBM Sametime Connect menus are extensible, however we recommend adding only to the Tools menu. This will help ensure more seamless integration of your plug-in with future releases of IBM Notes as well. Additions to this menu should apply mnemonics according to the same scheme as for dialog windows.

Use the first letter of the first primary noun or verb in the label, rather than an adjective or adverb. If the first letter is already in use by another mnemonic, use the first letter of the next primary word. If no additional words are available, use the next consonant in the primary noun or verb. If the next consonant is used, try the following consonant, and so forth.

If you run out of consonants, use the first vowel, then the next vowel, etc. Letters may be reused if necessary. When this occurs, each press of the mnemonic letter selects the next item in the menu using the letter. This behavior cycles from top to bottom of the menu, then repeats.

The following tables list the existing menu mnemonics.

Contact List Menu Mnemonics

Table listing Contact List File Menu Mnemonics (Menu Mnemonic: F).

Menu item	Mnemonic	Details
New	N	Pull right menu
Open Chat History...	O	
Log In	L	Pull right menu

Cancel Log In	C	
Log Out	g	Pull right menu
Manage Server Communities...	M	
Import Contact List	I	Pull right menu
Export Contact List	E	Pull right menu
Preferences...	P	
Exit	x	

Contact List Edit Menu Mnemonics (Menu Mnemonic: E)

The Edit menu also lists existing shortcut keys, which are combinations using the CTRL key and another key to perform an action.

Table listing Edit menu mnemonics.

Menu item	Mnemonic	Details
Edit Nickname...	N	
Rename Group...	G	
Cut	t	CTRL+X performs action
Copy	C	CTRL+C performs action
Paste	P	CTRL+V performs action
Remove from Contact List	R	

Contact List View Menu Mnemonics (Menu Mnemonic: V)

Table listing Contact List View menu mnemonics.

Menu item	Mnemonic	Details
Show	S	Pull right menu
Panels	a	Pull right menu
Online Only	l	
Groups Alphabetically	p	
Contacts Alphabetically	b	
Short Names	N	

Always on Top	T	
Expand/Collapse	x	Pull right menu
Server Communities	C	Pull right menu
Show Group Content...	e	

Table listing Contact List Tools Menu Mnemonics (Menu Mnemonic: T).

Menu item	Mnemonic	Details
Set Availability	S	Pull right menu
Edit Status Message	E	Pull right menu
Clean Contact List...	l	
Privacy Lists...	v	
Invite to Chat...	C	
Invite to Meeting Room...	o	
Create Call Invitation...	t	
Refresh Person Info	f	
Send	n	Pull right menu
Alerts	A	Pull right menu
Meetings	M	Pull right menu
Screen Capture...	r	
Plug-ins	g	Pull right menu

Table listing Contact List Help Menu Mnemonics (Menu Mnemonic: H).

Menu item	Mnemonic	Details
Help Topics...	H	
Submit Feedback...	F	
Support	t	Pull right menu
About IBM Sametime...	A	

Chat Window Menu Mnemonics

Table listing Chat Window File Menu Mnemonics (Menu Mnemonic: F).

Menu item	Mnemonic	Details
Open Chat History...	O	
Save Chat As...	S	
Print...	P	
Preferences...	r	
Close	C	ESC performs action

Chat Window Edit Menu Mnemonics (Menu Mnemonic: E)

The Edit menu also lists existing shortcut keys, which are combinations using the CTRL key and another key to perform an action.

Table listing Chat Window Edit Menu Mnemonics.

Menu item	Mnemonic	Details
Cut	t	CTRL+X performs action
Copy	C	CTRL+C performs action
Paste	P	CTRL+V performs action
Clear All	A	Del performs action
Select All	S	CTRL+A performs action
Text Properties...	x	

Table listing Chat Window View Menu Mnemonics (Menu Mnemonic: V).

Menu item	Mnemonic	Details
Show	S	Pull right menu
Emoticons	E	
Datestamps	D	
Timestamps	T	
Show Popup Area	P	

View Received Files	V	
---------------------	---	--

Table listing Chat Window Tools Menu Mnemonics (Menu Mnemonic: T).

Menu item	Mnemonic	Details
Set Availability	S	Pull right menu
Edit Status Message	E	Pull right menu
Video Call	d	
Call	l	
Create Call Invitation...	t	
Invite to Meeting Room...	M	
Send	d	Pull right menu
Invite Others...	I	
Add to Contact List...	t	
Check Spelling Automatically	g	
Check Spelling...	p	
Insert	n	Pull right menu
Prevent Transcript Save	r	

Table listing Chat Window Help Menu Mnemonics (Menu Mnemonic: H).

Menu item	Mnemonic	Details
Help Topics...	H	
Submit Feedback	F	
About IBM Sametime....	A	

If a plug-in/feature is disabled by the administrator, then all of the menu items associated with that feature must be hidden.

Context Menus

You can add actions to the following object context menus:

- Contact names
- Group names

New actions should be placed in groupings of similar actions within a menu. Separator lines should be used to distinguish groupings of like actions within a context menu.

Action Bars

Action bars appearing at the top of the Contact List window and in the message compose area of the chat window provide quick access to commonly-used actions or commands. Commands added to the action bar must be repeats of items on the menu bar (or something in a dialog box that you get to from a menu item).

New actions added to an action bar follow a vertical separator line. Additional vertical separator lines may be used to group like actions together.

Ideally, all action bar items fit on the visible area of the action bar. However, if they do not, an “overflow” button appears automatically, and the actions that are available but off screen are listed in a dropdown. All icons should have Alt (mouse hover) text defined to explain the action for accessibility, and for the overflow dropdown.

Action Bar More Menu

A “More” menu appears in the Contact List action bar to contain secondary actions. The purpose of this menu is to help reduce clutter amongst the icons in the action bar. Add frequently used collaboration icons to the action bar. Add infrequently used actions to the More menu.

Offline Experience for the Client Window

If a user chooses to work offline, some of the data in some of the applications might not be available. Each contribution needs to take care of what happens inside the panel when a user is working offline.

If the data is NOT available offline, the title bar and all data and controls inside it must be disabled.

Preferences

Users must be able to access Preferences from the Actions and Preference Gear menu. You can also allow users to access the Preferences menu from a context menu item, link, or button in given situations, which will display the appropriate set of preferences.

Ensure that your preferences pages do the following:

- Use the preferences UI to expose any plug-in-specific preferences.
- Add to the existing Preferences tree.
- Add multiple preference pages for the same plug-in under a single parent node for the plug-in.
- When users chooses Preferences (whether through a menu item, a button or a context menu), the preferences for the application with focus are displayed. (The tree should be automatically scrolled to that application, if necessary.)
 - For example, if the “Acme Customer relationship management” solution has been integrated, and that application has focus when the user clicks Preferences, then the Acme preferences get opened in the preferences column and the first page of preferences is displayed.
- The top of each preferences page has a banner. Make the label on the banner a REPEAT of the words that are selected in the left-hand tree.
- Use group boxes to separate areas, if you feel that grouping is necessary. Group box headings should use sentence-style capitalization. See section 2.5 Sentence-Style Capitalization.

- Begin each preferences page with a sentence providing an overview of what the user can do.
- Put a colon after field labels; follow the capitalization and punctuation guidelines.
- Always provide the "Restore Defaults" and "Apply" buttons in the lower right. You can add other command buttons as necessary.

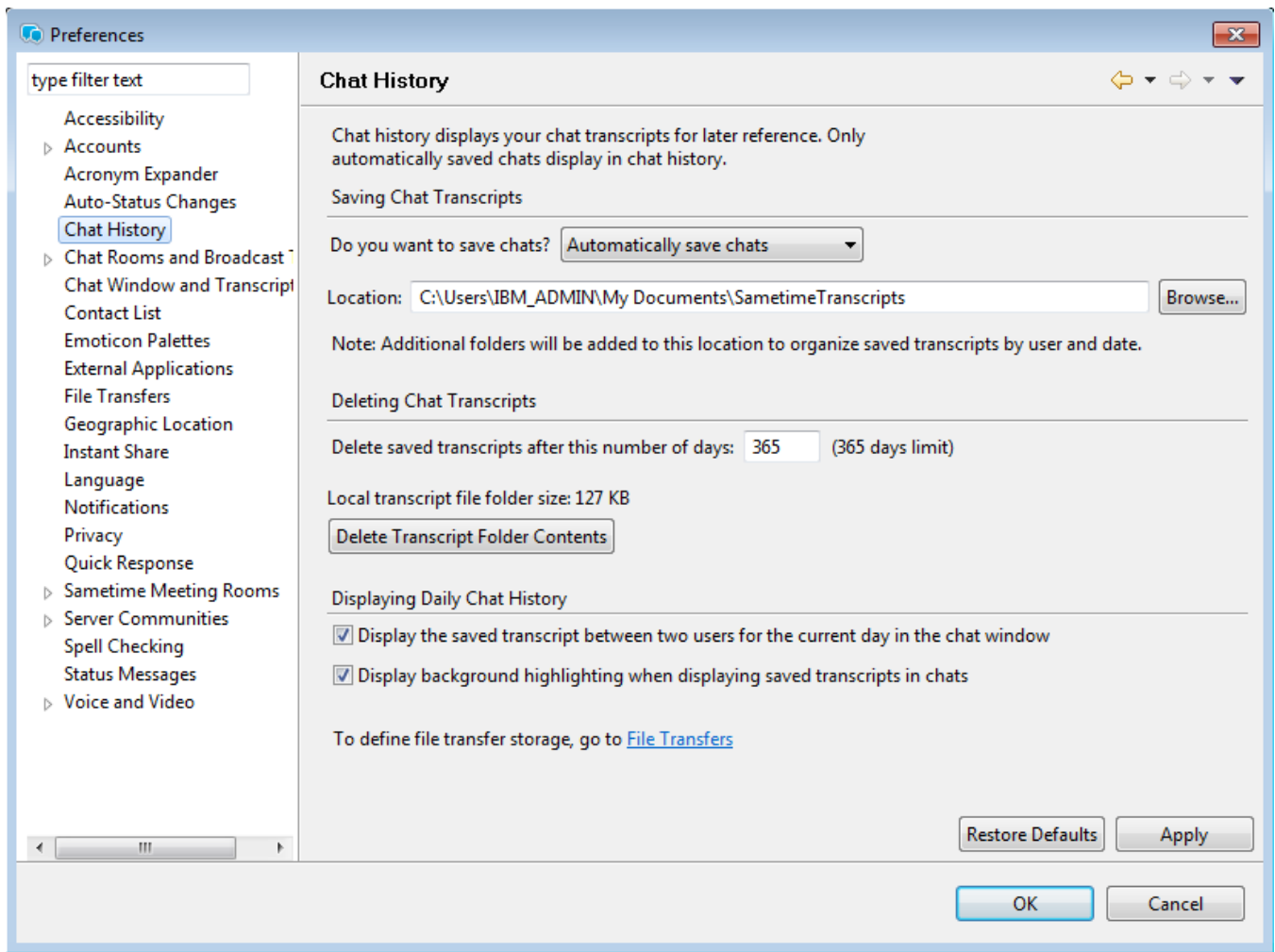


Figure 6: Example Preference Page

Status Bar

Text added to the status bar in the Contact List window and the chat window should use sentence-style capitalization. See section 2.5 Sentence-Style Capitalization. Realize that text added to this bar should be of a transient nature, and not intended for permanent display. Other plug-ins and Sametime write messages to the status bars. New status bar messages from a plug-in or event overwrite whatever message is displaying at the time.

Developers can contribute icons to the status bar via a plug-in. Status bar icons should be no larger than 17 x 17 pixels.

Error Messages – Info, Warning, Error

When it is feasible, use the “standard message dialogs” from `MessageDialog, org.eclipse.jface.dialogs`.

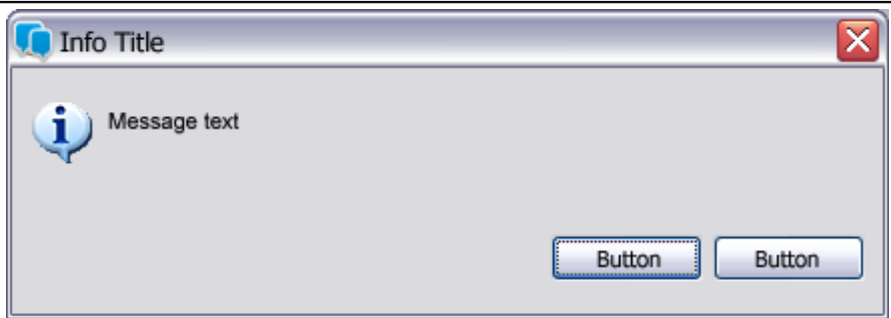
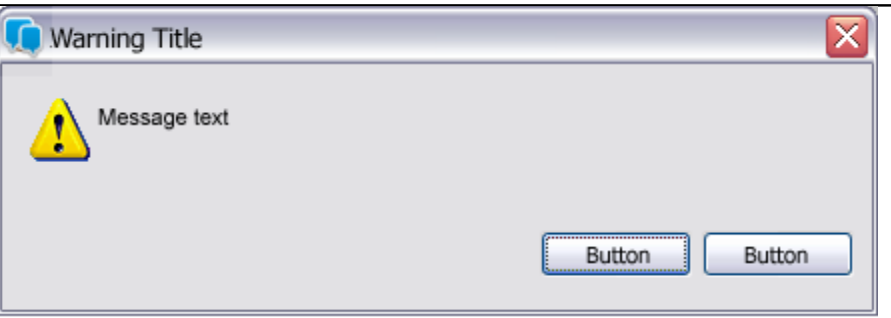
However, be prepared to create custom message dialog boxes if the situation calls for more or different command actions.

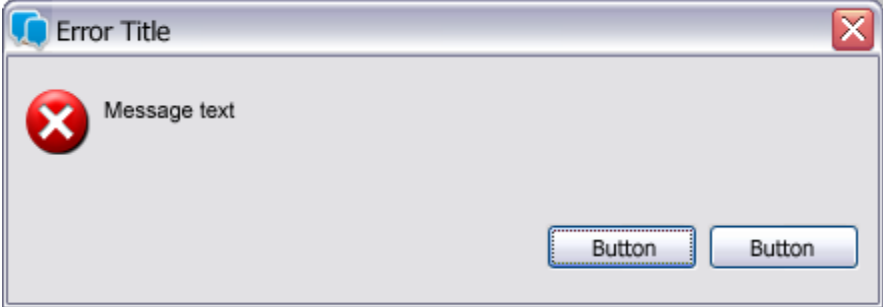
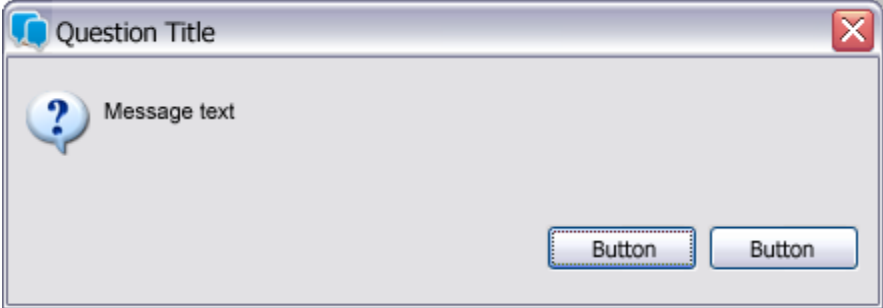
General Guidelines for Error Messages

- The title on all message boxes should include the name of the application or plug-in.
- The first line or sentence must say what went wrong. Use full sentences and sentence punctuation.
For example, “The message is not addressed to anyone.”
- The second line or sentence must tell the user what to do about it, using a full sentence and sentence punctuation. Whenever possible, include guidance about what to do next.
For example, “Type the names of one or more recipients for this message.”
- Avoid the use of error message numbers, if possible. If you **MUST** have a message number, put it at the end of the message.
- Each error message must make a sound when it is displayed. This is for accessibility reasons. Use a default system beep.
- Error messages can be modeless or modal.
 - A modeless error message allows the user to continue to interact with the application, for example, open other documents.
 - A modal error message requires that the user respond to the error dialog box before continuing to use the application.

Specific Message Types

Table listing specific message types.

In this condition	Sample
<p>Information</p> <p>To provide information about the results of a command. Users can acknowledge the message only.</p> <p>Information messages are often modeless. However, use your judgment about whether the user needs to respond to the message before being allowed to interact with the rest of the application.</p>	 <p>The sample information message box has a title bar with a blue icon and the text 'Info Title'. The main area contains a blue information icon and the text 'Message text'. At the bottom right, there are two buttons labeled 'Button'.</p>
<p>Warning</p> <p>Alerts the user to a condition which requires a decision before proceeding. Warning messages are often used to warn the user of potential data loss if they complete an action.</p> <p>In many cases you will have to ADD buttons here to support the Yes, No, and Yes, No, Cancel Conditions.</p>	 <p>The sample warning message box has a title bar with a blue icon and the text 'Warning Title'. The main area contains a yellow warning icon and the text 'Message text'. At the bottom right, there are two buttons labeled 'Button'.</p>

<p>Warning messages are usually MODAL; that is, the user must respond before continuing to interact with the application.</p>	
<p>Critical</p> <p>Informs the user of a serious problem that prevents them from continuing their work.</p> <p>Critical error messages are always modal.</p>	
<p>Question</p> <p>Use to ask the user a question, related to something other than the result of an explicit action. For example, for an automatic notice asking the user to perform a task, such as installing an update.</p>	

Chapter 3. User Experience Checklist

Use the following checklist to ensure that your plug-in will be consistent with the existing IBM Sametime Connect interface and any other plug-ins built by developers following this guide.

- Interface text adheres to capitalization guidelines
- Interface text adheres to punctuation guidelines
- Mnemonics exist for all menu additions
- Mnemonics exist for all input field labels, tabs, and buttons in dialog windows
- Menu and button actions have ellipses (...) at the end of the text string if the action opens a dialog box for further user input prior to completing the task
- Separator bars are used in menus and action bars to separate groups of like actions
- Interface icons have Alt (hover) text describing the action or intended indication
- Contact List and chat window application panels have titles and a 16 x 16 pixel icon
- Contact List and chat window application panels have an inner margin of 4 pixels
- Actions in menus appear disabled if not available
- Plug-ins adding components that can appear as tabs in the chat window interface provide a tab title
- Actions that refer to a preference open the Preferences window to the appropriate preference page
- Error dialog boxes appear in one of the following three forms: Error, Warning, or Critical
- General consistency in terminology is achieved (same words are used to refer to the same action appearing in different places, etc.)

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