

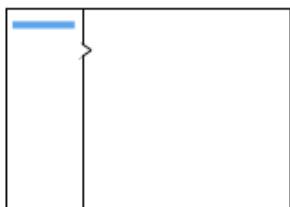
Standard Screen Patterns v3.0 January 17, 2009

by Theresa Neil

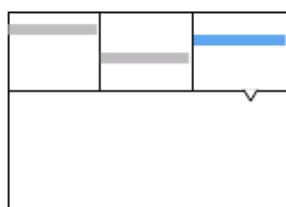
Patterns are broadly applicable solutions for general problems. Contrast this with:

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

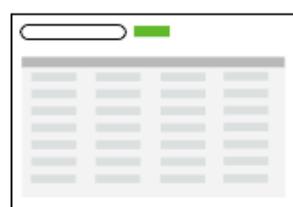
Patterns aid in the application of abstract solutions to concrete problems. Think of them as solution templates. Standard screen patterns for enterprise software and productivity web applications:



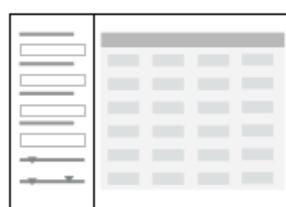
Master/ Detail



Column Browse



Search/ Results



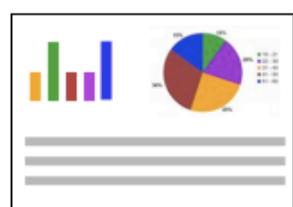
Filter



Form



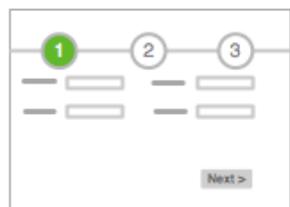
Palette/ Canvas



Dashboard



Spreadsheet



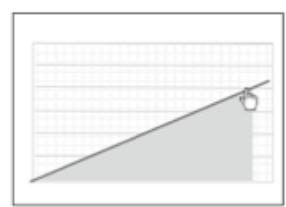
Wizard



Question & Answer



Parallel

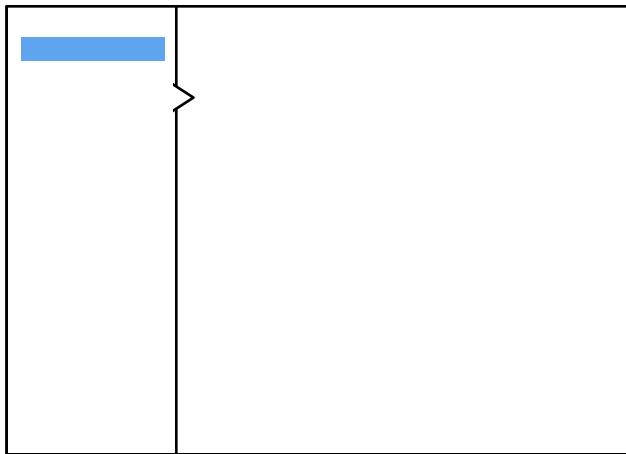


Interactive



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:

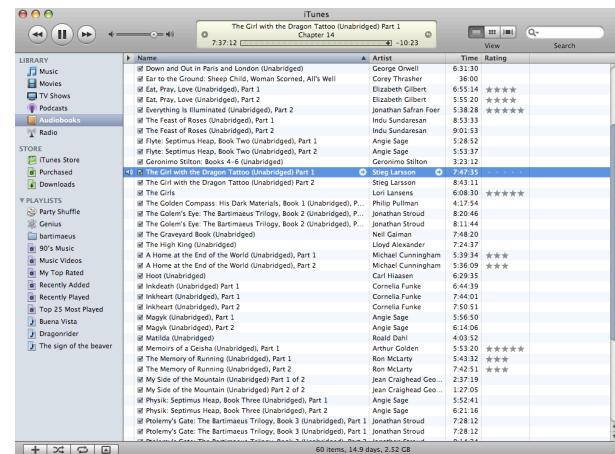
- Text description
- Thumbnails
- Table
- List
- Graphs or charts
- A form

Best practices

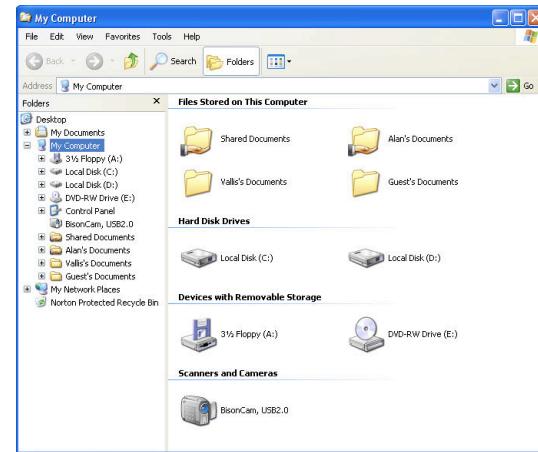
Include quantity in the master pane, ex. Inbox (34).

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

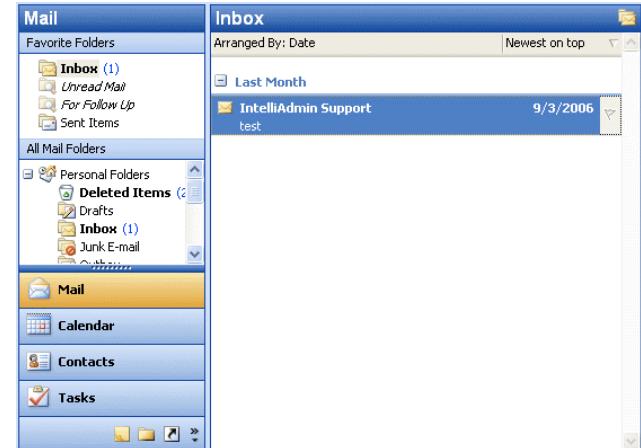
Don't use tabs in the master or detail pane.



List on left- iTunes

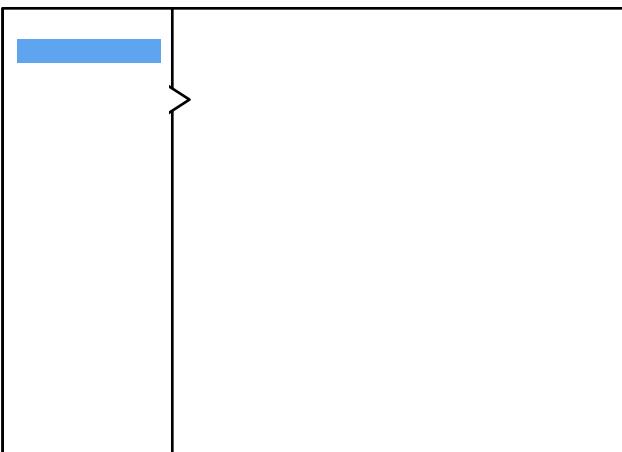


Tree on left- Windows Explorer



Accordion on left- Outlook

Master/Detail (cont.)



Vertical

Customers & Jobs	Transactions	Customer Information	Ed Customer...	Reports for this Customer														
<input checked="" type="checkbox"/> Customers with Due <input type="checkbox"/> Name <input type="checkbox"/> Balance Total <input type="checkbox"/> All In One Foundations 941.85 <input type="checkbox"/> Beugly, Adam 2,652.59 <input type="checkbox"/> Bluebonnet Apt 386.31 <input type="checkbox"/> Cochran, Christy 560.19 <input type="checkbox"/> Coker, Debbie 583.20 <input type="checkbox"/> Chemist Paint Design 349.83 <input type="checkbox"/> Cheneau, Anne 97.89 <input type="checkbox"/> Dabler, Joe 206.01 <input type="checkbox"/> Ehrlich, Shaeley 269.54 <input type="checkbox"/> Exquisite Design an... 1,071.86 <input type="checkbox"/> Fromhold, Margaret 131.03 <input type="checkbox"/> Garden Works 75.00 <input type="checkbox"/> J12 Windong 75.00 <input type="checkbox"/> Jester's Furniture Lin... 140.00 <input type="checkbox"/> Herk, Rob 235.40 <input type="checkbox"/> Hiddenland, Gary an... 2,142.20 <input type="checkbox"/> Crestland 1,375.00 <input type="checkbox"/> Skyview 585.00 <input type="checkbox"/> Swindon 202.20 <input type="checkbox"/> Higlers, Jean 50.00 <input type="checkbox"/> King, Carl 193.64 <input type="checkbox"/> Lambert, Uz 377.38 <input type="checkbox"/> Littlefield Corporation 85.00 <input type="checkbox"/> McHerter, Leanne 114.34 <input type="checkbox"/> McSpadden, Payne... 282.12 <input type="checkbox"/> Mc... 1,751.22 <input type="checkbox"/> Willowwood 1,751.22 <input type="checkbox"/> Negley, Steve 4,598.50 <input type="checkbox"/> Pechman, Scott and ... 1,122.75	<p>Customer Information</p> <p>Customer Name: All In One Foundations</p> <p>Customer Type: Company</p> <p>Company Name: All In One Foundations</p> <p>Billing Address: 1700 CONGRESS AUSTIN TX 78754 RE: 1799 Broad</p> <p>Contact: Phone: Fax: # 821-0063</p> <p>E-mail: Terms: Price Level:</p> <p>Notes: Edit Notes...</p> <p>Show: All Transactions Filter By: All Date: All</p> <table border="1"> <thead> <tr> <th>Type</th> <th>Num</th> <th>Date</th> <th>Account</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td>Invoice</td> <td>1564</td> <td>06/21/2006</td> <td>Accounts Receivable</td> <td></td> </tr> <tr> <td>Invoice</td> <td>1562</td> <td>06/25/2006</td> <td>Accounts Receivable</td> <td></td> </tr> </tbody> </table>	Type	Num	Date	Account	Amount	Invoice	1564	06/21/2006	Accounts Receivable		Invoice	1562	06/25/2006	Accounts Receivable		Edit Customer...	Old Report Open Balance Show Estimates
Type	Num	Date	Account	Amount														
Invoice	1564	06/21/2006	Accounts Receivable															
Invoice	1562	06/25/2006	Accounts Receivable															

Table on left- Quick Books



List on left, graphs on right- Trail Runner

The screenshot shows a contacts application interface. At the top, there's a search bar labeled "Search:" and a sort dropdown set to "Last Name". Below the search bar is a list of four contacts:

- Antony Campitelli**
antony@laszlomail.com
- Kent Libbey**
kent@laszlomail.com
- Laszlo Team**
laszlomailfeedback@laszlosystems.com
- David Temkin**
david@laszlomail.com

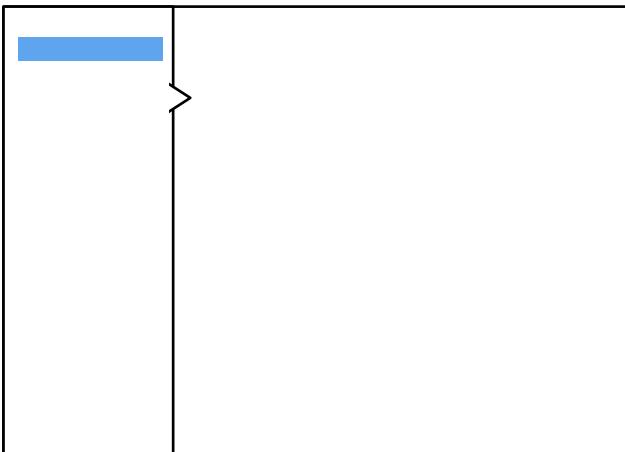
For each contact, there is a detailed view pane on the right side:

- first name**: Kent
- last name**: Libbey
- title**: (empty)
- company**: (empty)
- Email**: primary kent@laszlomail.com
- Phone**:
 - home
 - cell
 - work
- Address**:
 - home
 - work
- IM**: (empty)
- Personal**: (empty)

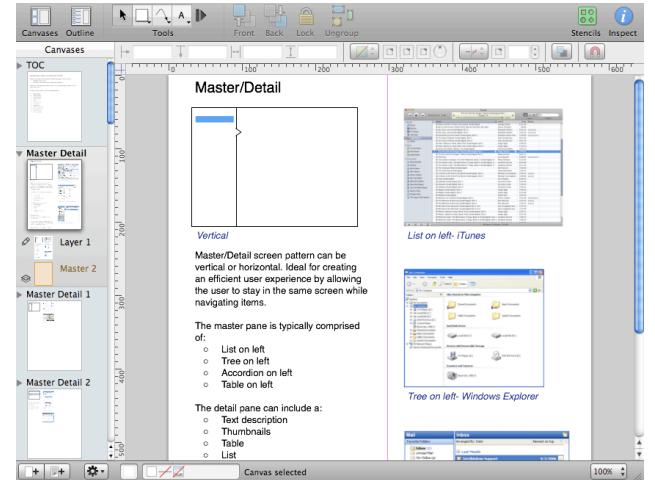
At the bottom of the application window, there are several toolbar icons: a plus sign, a plus with a circle, a plus with a square, a magnifying glass, a delete icon, and a save icon.

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

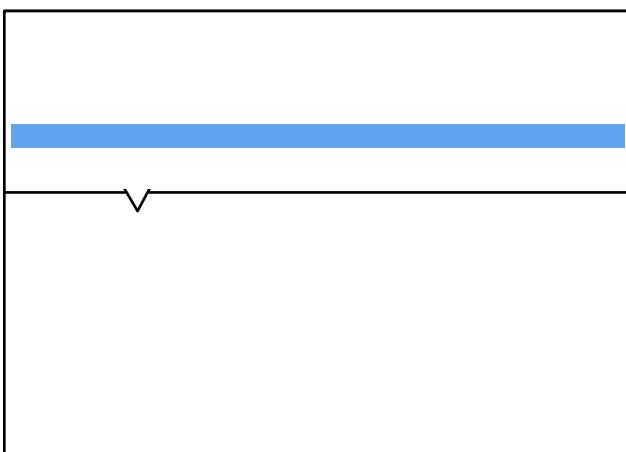
Master/Detail (cont.)



Vertical



Thumbnails on left- selected screens details on right- OmniGraffle



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.

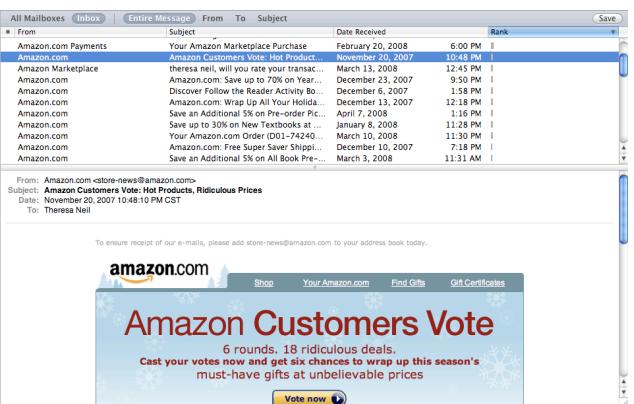
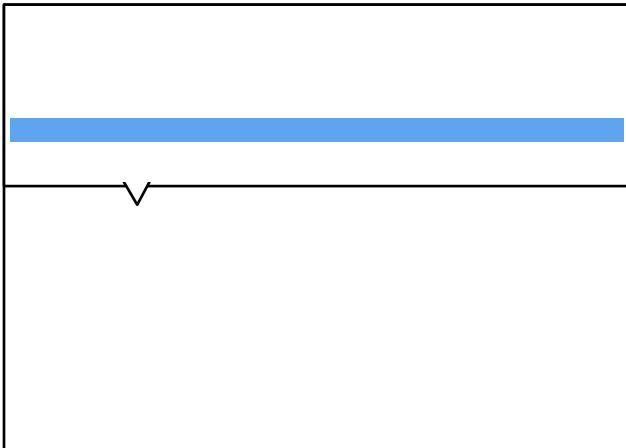


Table on top- Mac Mail

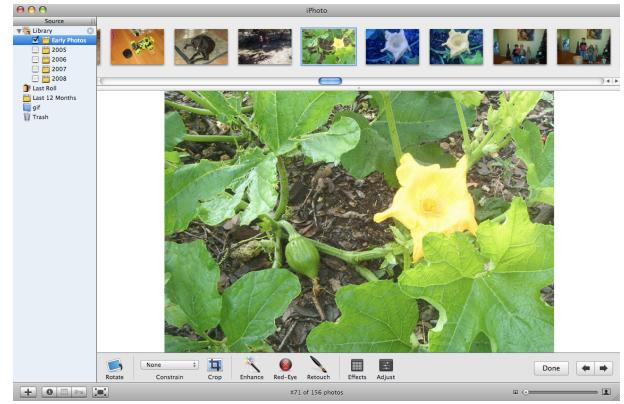


Objects on top, hover to see details below- Firebug

Master/Detail (cont.)



Horizontal



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

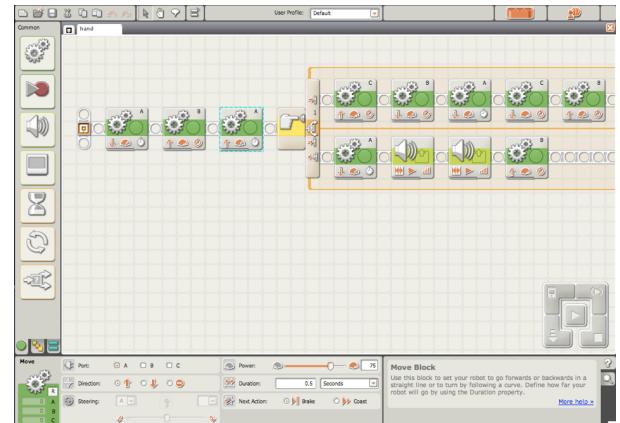
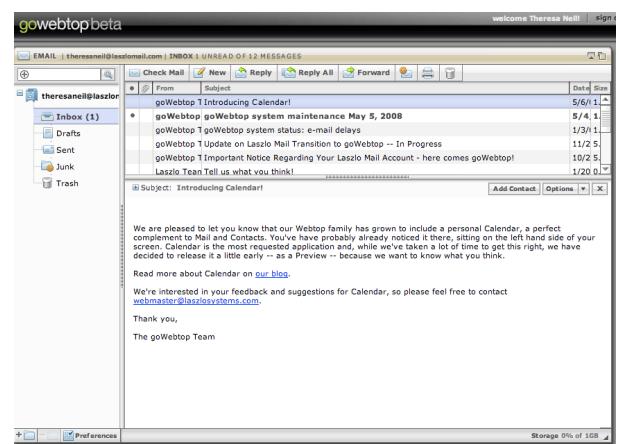
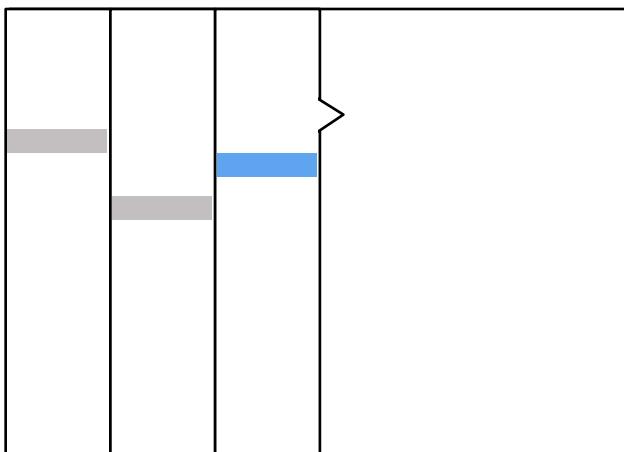


Diagram on top, selected object's properties below- Lego Mindstorm



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

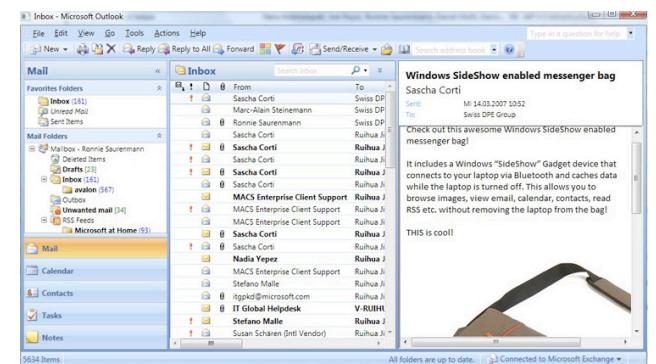
Typically 3-4 columns. Should always include a Search at the global level.

Best practices

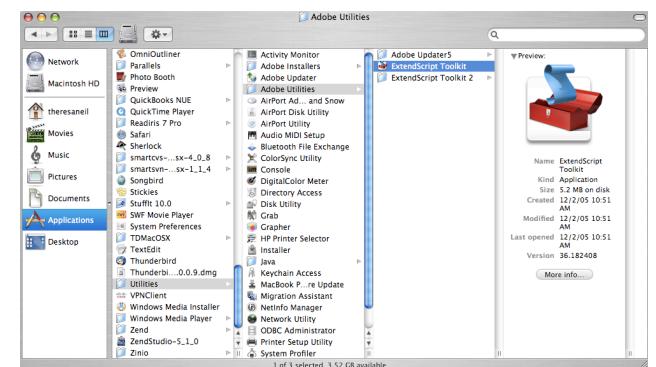
Only show items in the first column that have children.

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

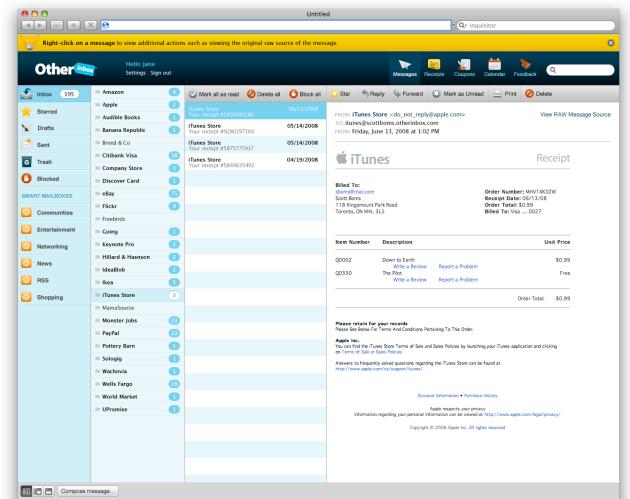
Many products that use this pattern provide an alternate interface for navigating, like a tree, thumbnail or table view.



Accordion with two additional fixed vertical columns- Outlook

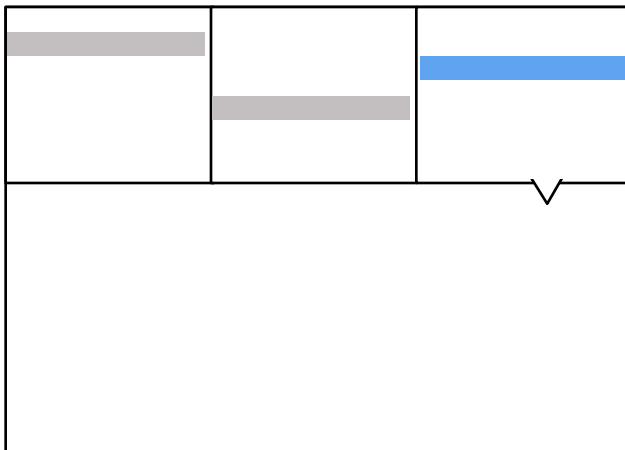


Unlimited vertical columns- Apple



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)	All (29 Artists)	All (1 Album)
Audiobook	Angie Sage	My Side of the Mountain (Unabridged)
Spoken Word	Anne Fadiman	

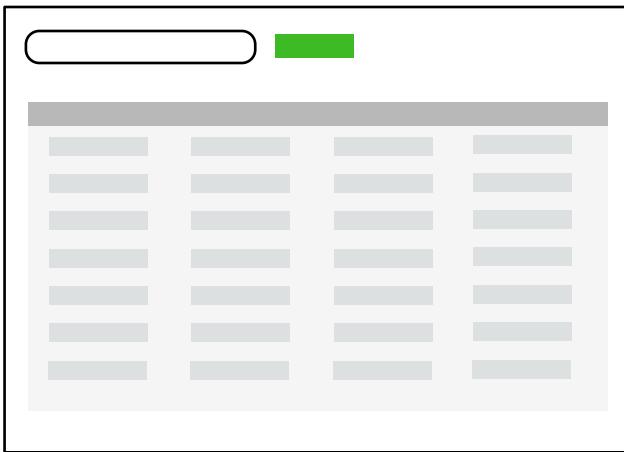
Refine across the three columns- iTunes

Genre	Artist	Album
All	Andrew Clements	Dragon Rider
Alternative & Punk	Cornelia Funke	Dragon Rider 7
Books & Spoken	Elizabeth George Speare	Frindle
Electronica/dance	Jonathan Stroud	Tales Of A Fourth Grade Nothing
Latin	Judy Blume	Tales Of A Fourth Grade Nothing 2
	McMurtry, Larry	Telegraph Days 01
		The Amulet Of Samarkand (Disc 1)
		The Amulet Of Samarkand (Disc 2)

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.

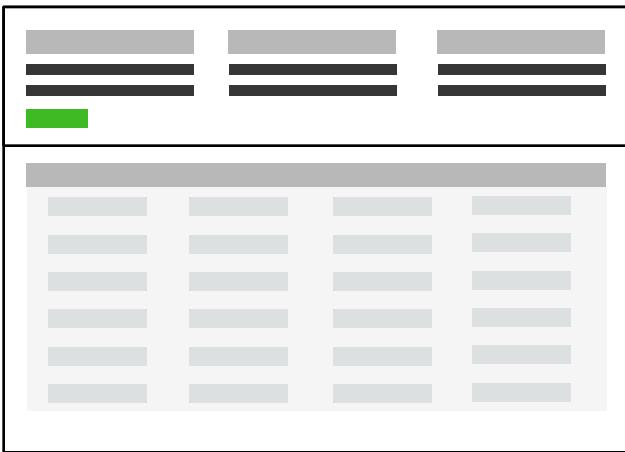
Show the results in the same screen.

Simple search, default sort by date-Gmail

Pre-grouped search results- Mac Spotlight

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.

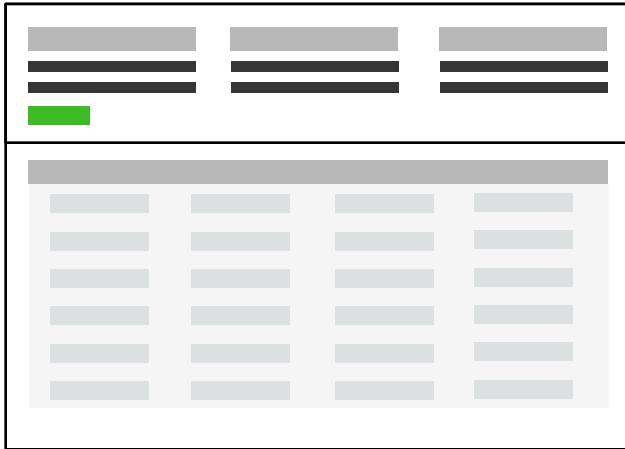
Don't force the user to pre-scope the search, but offer it as an optional feature if it's a requirement, ideally a drop down in the search field (like iTunes) instead of a listbox next to the field.

Simple search with advanced criteria in collapsible panel- Roost

Advanced search by adding criteria - Mac OSX

Scope search- iTunes

Search/Results (cont.)



Advanced

Saved search: DFW-TPE Search

Search Criteria

Flight	Origin: DFW	Flight number:	Departure Date	From: 01/01/03	To: 12/31/03
Destination:	TPE	Airline:	Processed Date	From: [redacted]	To: [redacted]
Request Info	Group type:	Request id:	Queue Criteria	Queue city: DFW	Point Of Sale:
Agency code:	User id:	Queue number:	Queue number:	Office code:	

Adhoc Requests Found

Request Id	PNR Id	Lock	Booking Name	Orig	Dest	Departure Date	Time	Seats	Type	Fare	BT Fare	Profit	Status	Processed Date
10013093			Atlantic Travels	DFW	TPE	02/25/03	00:00	12	REG	250.00	243.17	\$1.95	NR	10/07/04
10013088			GMS/A/TEST	DFW	TPE	02/25/03	00:00	6	REG	100.00	93.73	-6.27	NR	10/31/03
10013093			Atlantic Travels	DFW	TPE	02/25/03	00:00	12	REG	250.00	243.17	\$1.95	NR	10/07/04
10013088			GMS/A/TEST	DFW	TPE	02/25/03	00:00	6	REG	100.00	93.73	-6.27	NR	10/31/03
10013093			Atlantic Travels	DFW	TPE	02/25/03	00:00	12	REG	250.00	243.17	\$1.95	NR	10/07/04
10013088			GMS/A/TEST	DFW	TPE	02/25/03	00:00	6	REG	100.00	93.73	-6.27	NR	10/31/03
10013093			Atlantic Travels	DFW	TPE	02/25/03	00:00	12	REG	250.00	243.17	\$1.95	NR	10/07/04
10013088			GMS/A/TEST	DFW	TPE	02/25/03	00:00	6	REG	100.00	93.73	-6.27	NR	10/31/03
10013093			Atlantic Travels	DFW	TPE	02/25/03	00:00	12	REG	250.00	243.17	\$1.95	NR	10/07/04
10013088			GMS/A/TEST	DFW	TPE	02/25/03	00:00	6	REG	100.00	93.73	-6.27	NR	10/31/03

Found 2 items, showing 1-2

Saved search criteria- Sabre

Home | My Library | Wish List | Member Audio | AudibleKids

New Releases Best Sellers Award Winners Just Added The List of Lists

Search

By Keyword Advanced Search

Refine Search Results

PROGRAM FORMAT
Unabridged (8) Abridged (19) Original (3)

PROGRAM TYPE
AudioBook (8) Periodical (19) Radio/TV (7) Speech (3)

CATEGORIES
Arts & Entertainment (3) Business (8) Live Events (2) Newspapers & Magazines (17) Nonfiction (6) Radio & TV (4) Science & Technology (4) Self Development (2)

PUBLICATION DATE

Search Results for Keywords: Malcom Gladwell

Author : Malcolm Gladwell Narrator : Malcolm Gladwell

1 - 10 of 37 results PREVIOUS | 1 2 3 4 NEXT

Sort By: Best Sellers Show: 10 Results Per Page

AUDIOBOOK blink: The Power of Thinking Without Thinking UNABRIDGED By Malcolm Gladwell Narrator: Malcolm Gladwell Rating: ★★★★ 4.69 (2021 Ratings) Length: 7 hrs and 43 min Release Date: 04-05-05 Regular Price: \$26.99 Member Price: \$14.99 or 1 Credit
AUDIOBOOK The Tipping Point: How Little Things Can Make a Big Difference UNABRIDGED By Malcolm Gladwell Narrator: Malcolm Gladwell Rating: ★★★★ 4.07 (1295 Ratings) Length: 3 hrs and 5 min Release Date: 04-11-05

Search and save one or more of the results- Audible

Songza lets you listen to any song or band. Search for it:

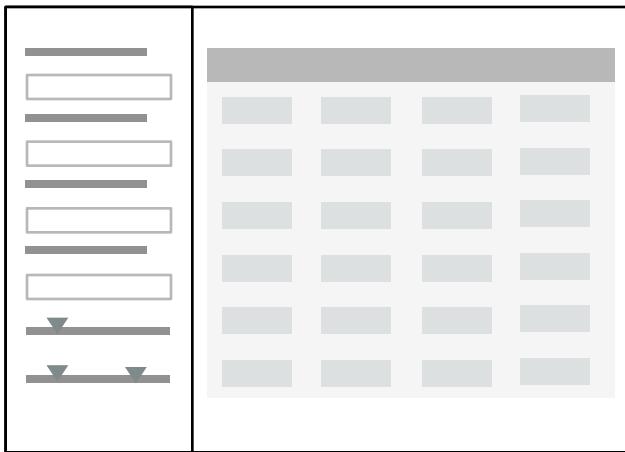
Want to save your playlist?
Join Songza today!

Roy Orbison - In Dreams

The Fray - You Found Me
The Smiths - There Is A Light That Never Goes Out
2Pac - I'm Gonna Be (Sittin' On) The Roof
The Flaming Lips - The Sun Is Shining
share alliance play rate bleed Land
Clap add to player Again
featured playlists:
60s/70s Hip Hop/R&B
Classical Indie
Country Pop
Electronic Rock

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.

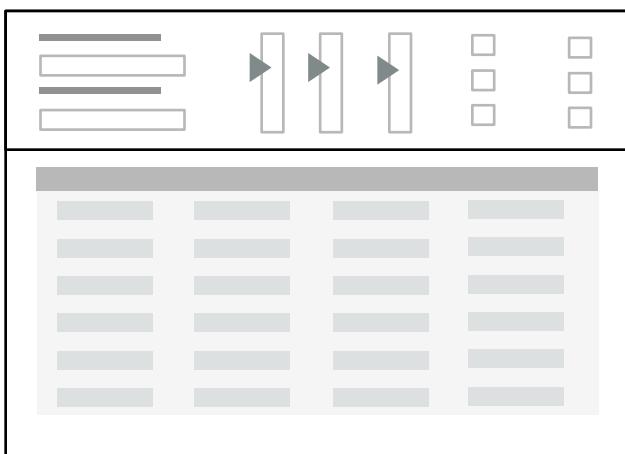
<http://looksgoodworkswell.blogspot.com/2008/02/pattern-refining-search.html>

Live filter- Kayak

Submit to refine search- Carmax

Filtering by category- eBay

Refine Dataset (cont.)



Horizontal

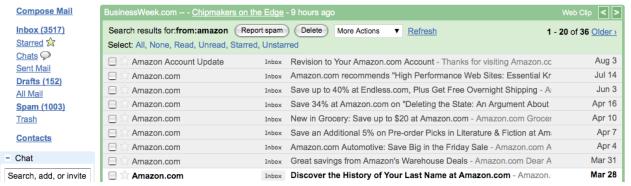
The horizontal layout provides the advantage of more horizontal space for wide result sets. This works nicely for expanding an advanced search below a simple search field, yet above the result set.

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.

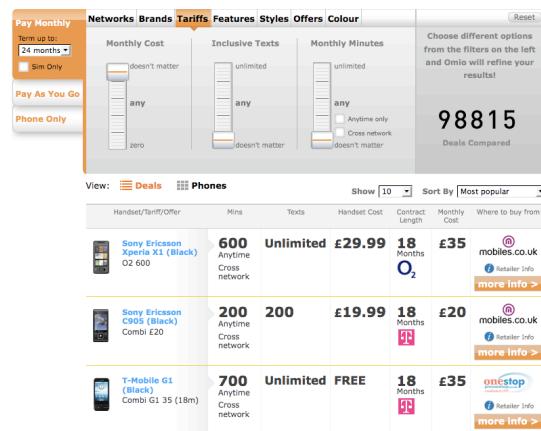
Best practices

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

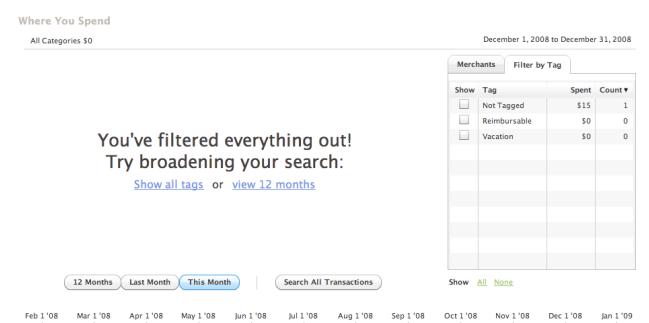
Don't provide a feature for saving a set of refinement filters. This can be taken care of with the Search (advanced search) pattern.



Refine options above, results below-Gmail

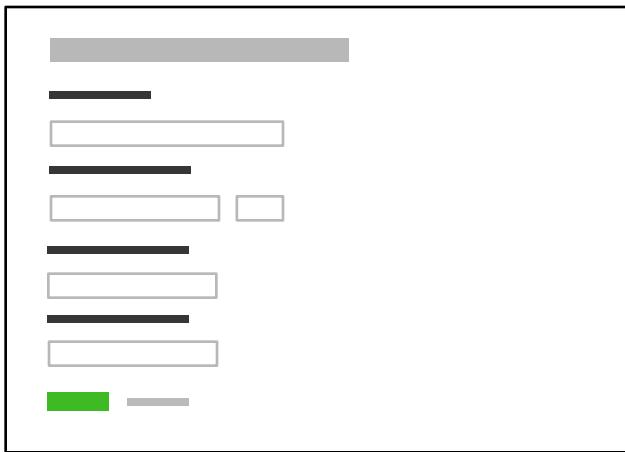


Tab top filter options- Omio



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.

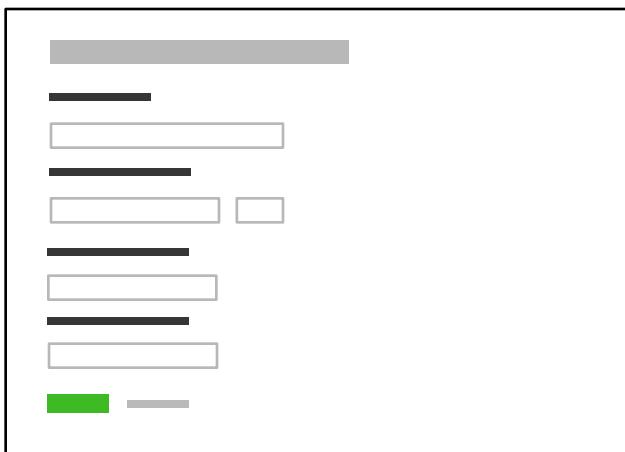
Provide clear error messages and help. Refer to "Defensive Design for the Web" by 37signals.

Single column layout- eBay

Grouped fields w/ thin rule, light background

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

Forms (cont.)

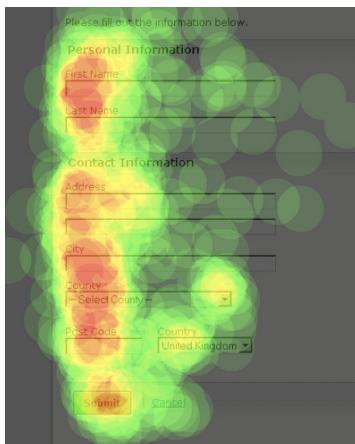


Billing Address:

First Name	Last Name
<input type="text"/>	<input type="text"/>
Address	
<input type="text"/>	
<input type="text"/>	
Town/City	State Zip Code
<input type="text"/>	<input type="text"/> <input type="text"/>
Country	
US	
Daytime Phone	<input type="text"/> Ext. <input type="text"/>
Evening Phone	<input type="text"/> <input type="text"/>

Top labels- Apple

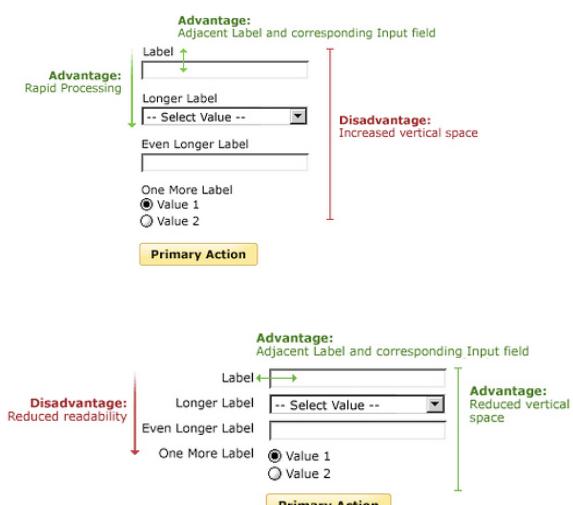
Research



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

First Name:	<input type="text"/>
Last Name:	<input type="text"/>
Email:	<input type="text"/> <small>We don't spam</small>
Password:	<input type="password"/> <small>8 or more characters</small>
Re-enter Password:	<input type="password"/>
Country:	<input type="text"/> United States <small>(Region)</small>
Postal Code:	<input type="text"/> <small>(e.g. 94041) Only your region will be public, not your postal code</small>
I am currently:	<input checked="" type="radio"/> employed <input type="radio"/> a business owner <input type="radio"/> looking for work <input type="radio"/> working independently <input type="radio"/> a student
Company:	<input type="text"/>
Title:	<input type="text"/>
Industry:	<input type="text"/> Choose industry <small>Choose the industry that best describes your primary expertise</small>
Education:	<input type="text"/> (optional)
Dates Attended:	<input type="text"/> To <input type="text"/> <small>Current students: enter your expected graduation year</small>
Join LinkedIn	

Side labels, right aligned- Linked In



Please correct the fields marked in red.			
View all payment options			
Pay with Two Credit Cards			
Card #1 Details	Card #1 Amount		
Card Type	Enter the maximum amount to charge to this card		
<input type="radio"/> AMEX	<input type="radio"/> DISCOVER	<input type="radio"/> MASTERCARD	<input type="radio"/> VISA
Card Number	Expiration Date	Security Code	
<input type="text"/>	October (10) <input type="text"/> 2010 <input type="text"/>	<input type="text"/> <small>What is this?</small>	
<input checked="" type="checkbox"/> Save this credit card information		\$ 1260.41	
Card #2 Details	Card #2 Amount		
Card Type	Estimated amount that will be charged to this card		
<input type="radio"/> AMEX	<input type="radio"/> DISCOVER	<input type="radio"/> MASTERCARD	<input type="radio"/> VISA
Card Number	Expiration Date	Security Code	
<input type="text"/>	January (01) <input type="text"/> 2008 <input type="text"/>	<input type="text"/> <small>What is this?</small>	
\$ 0.00			

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.

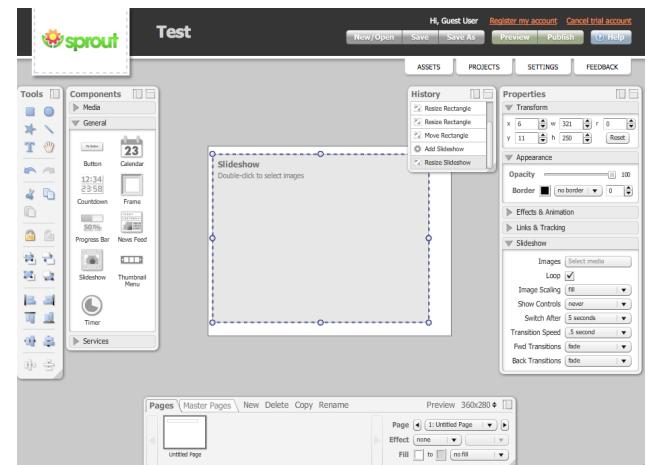
Create a dock-able object palette.

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

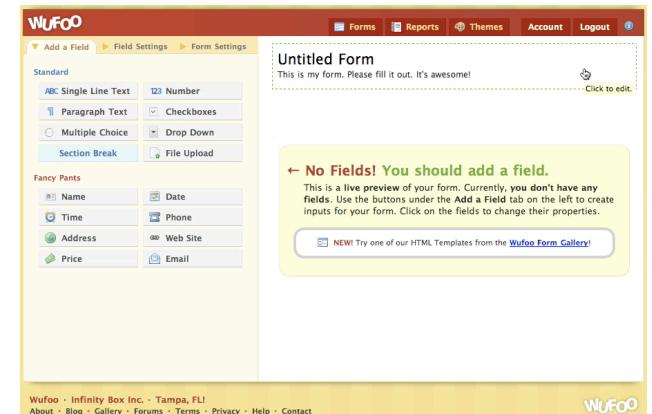
Offer a grid option visible and for "snap to".

Provide undo and redo functionality.

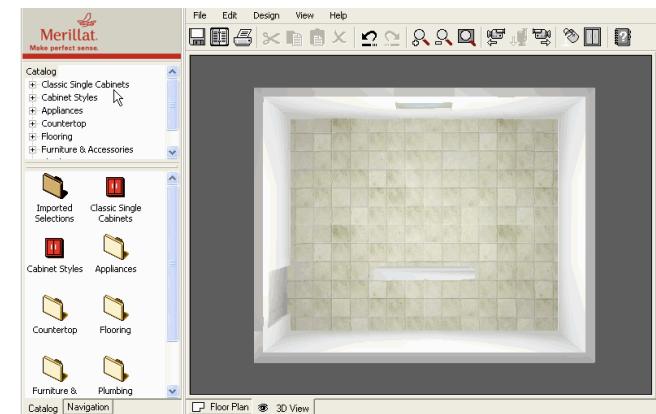
Provide a project management space for canvases (so canvases can be grouped, copied, edited, deleted..).



Floating palettes and toolbars- Sprout

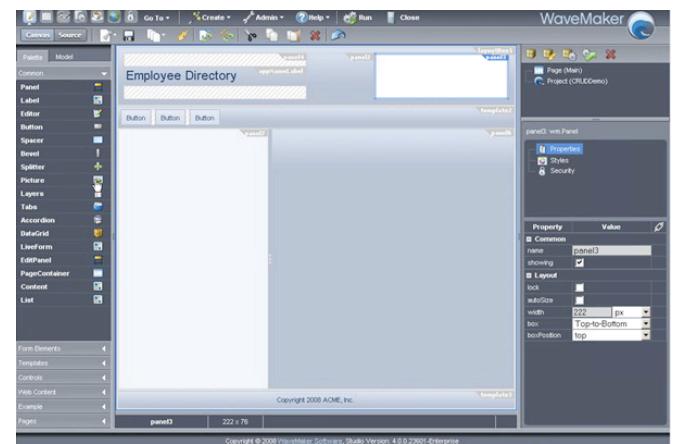
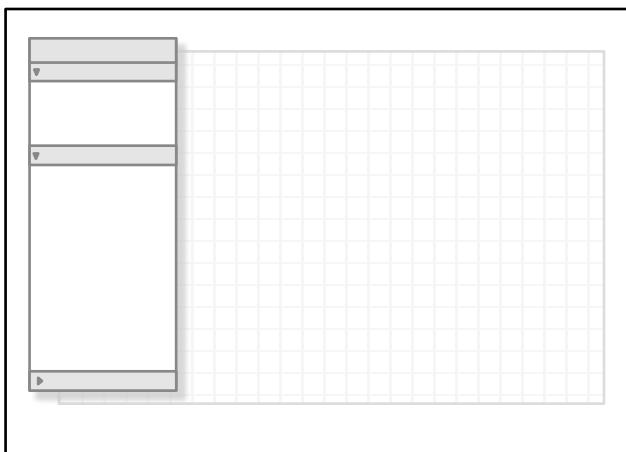


Fixed palette- Wufoo

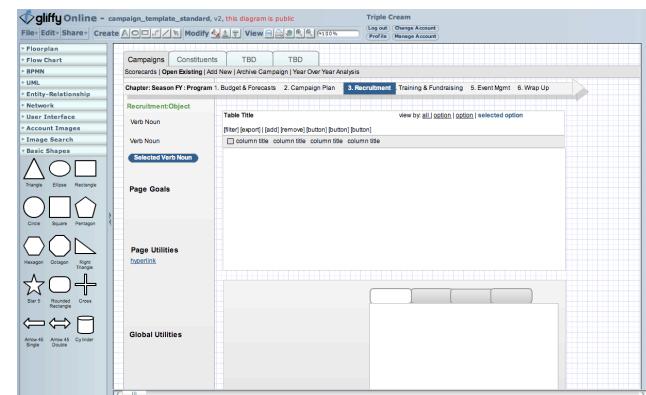


Catalog selection (top) drives palette options (below) - Merillat

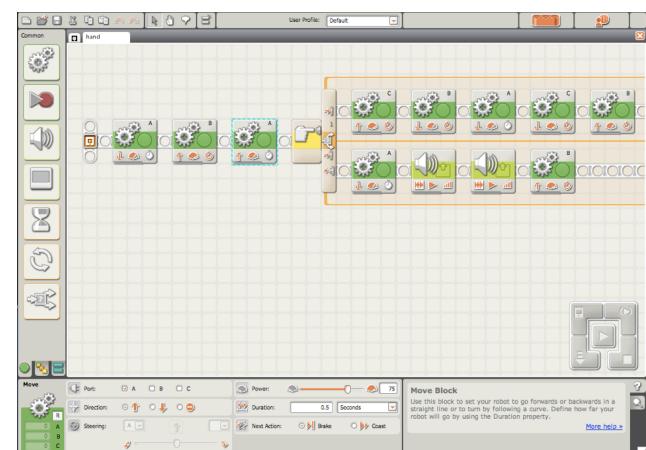
Palette/ Canvas (cont.)



*Complex palette/canvas application-
Wavemaker*

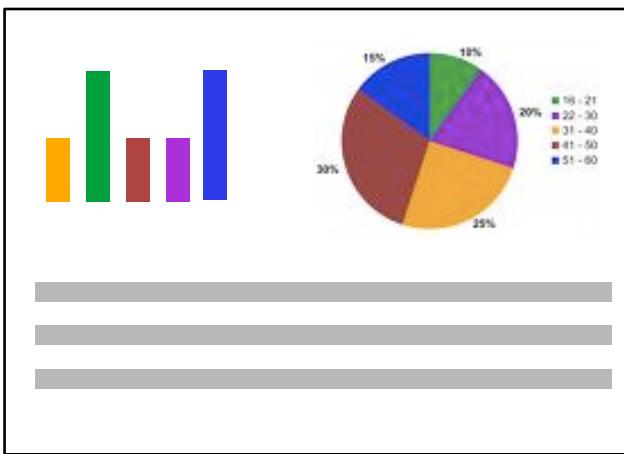


Accordion palette, resizable- Gliffy



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

Dashboard



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).

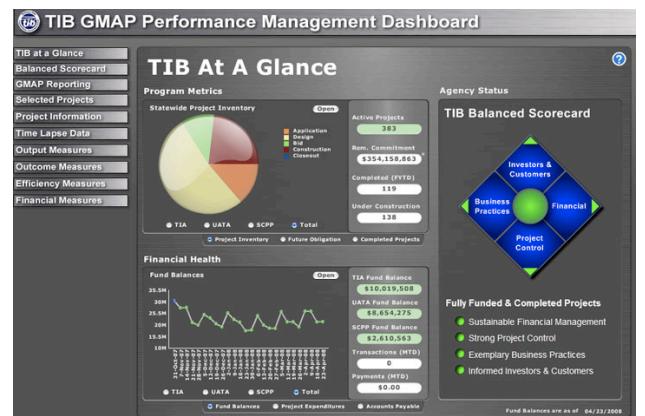
Providing a high degree of customization is no substitute for user research and testing.

Design Best Practices

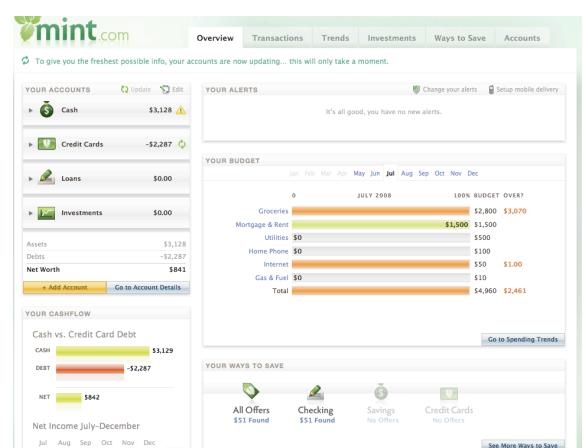
1. Choose data to be displayed
2. Confirm with actual users
3. Get rid of half of it
4. Reconfirm remaining elements with users
5. Choose components and layout, create 3-4 variations to test
6. Revise completely- nothing is sacred but the data

This screenshot of a project management dashboard includes several key components: a 'Project Status' section with a green 'On Track' indicator; a 'Checkpoints' section showing tasks due on July 14, 2008; a 'Project Calendar' for the week of July 13-19; and a sidebar with 'Actions' like Create a task, Start a discussion, etc., and 'Notifications' for email and feeds.

Succinct display of key metrics - Clearspace

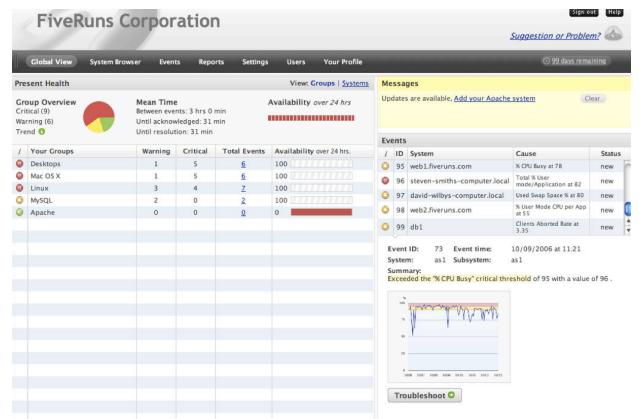
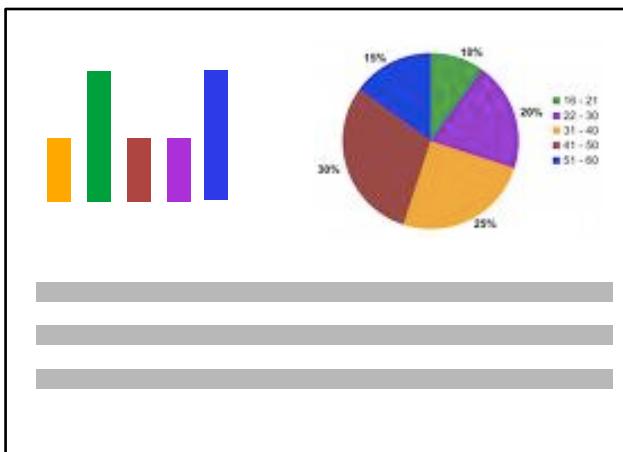


Fully evolved dashboard for showing how tax dollars are used- Washington State Transportation Improvement Board

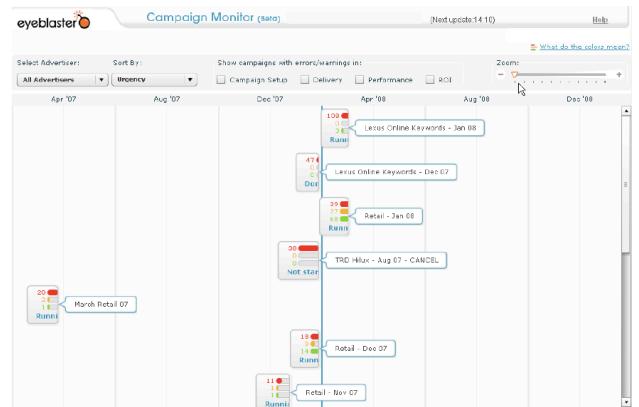


Key metrics, as well as high level goals clearly displayed- Mint

Dashboard (cont.)



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



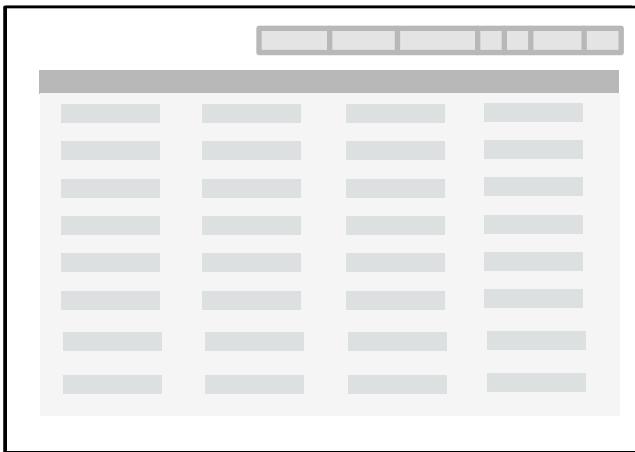
Red highlights the account managers to the underperforming campaigns- Campaign Monitor



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

Created by Theresa Neil 2009

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 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													
Date Purchased	All A-H I-J Q-Z #	Title	Author	Rate Audio	Program Length	Audio Format / File Size	Downloaded						
12/18/2008	American Gods (Unabridged), Part_1	Neil Gaiman	★★★★★ Write a Review	7 hrs and 17 mins	4 / 104 MB	4 / 104 MB 3 / 52 MB 2 / 28 MB	✓ Download It						
12/18/2008	American Gods (Unabridged), Part_2	Neil Gaiman	★★★★★ Write a Review	6 hrs and 44 mins	Format 4 / 96 MB	(Change)	✓ Download It						
12/18/2008	American Gods (Unabridged), Part_3	Neil Gaiman	★★★★★ Write a Review	6 hrs and 11 mins	Format 4 / 89 MB	(Change)	✓ Download It						

Inline editing- Audible

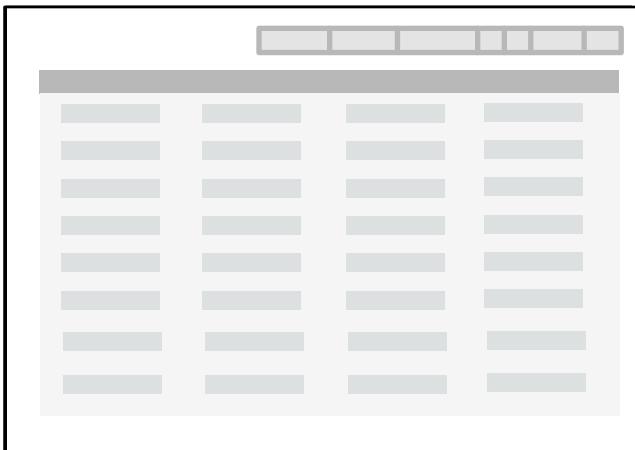
Urgency	Date	Time	Title
2	31/12/2006	09:35:47 AM	The internet is broken
2	31/12/2006	09:35:47 AM	The internet is broken
4	26/07/2006	03:09:00 PM	My cup holder is not working
3	17/07/2006	04:21:24 PM	Blank Screen
3	17/07/2006	04:21:24 PM	Blank Screen
1	06/07/2006	04:12:16 PM	I can't print
1	06/07/2006	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

Current View: Full Grade Center Set as Default Sort Columns By: Layout Position						
Last Name	First Name	Blackboard Sub	Blackboard Rev	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	
Franklin	Benjamin	-	-	81.00	81.00	
Frost	Robert	-	-	-	0.00	
Gandhi	Indira	-	-	✓	0.00	

Row editing, custom editors- Blackboard Sciences

Spreadsheet (cont.)



Name	Chapter Office	Campaign Role	Team	Event	Event Role	Prizepoint	Event Status
Mork 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 Doone	Red Wood Wine City	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 Gwilliam	Greater San Francisco	Coach	Tri Team	Lavaman Triathlon	Support Staff	Standard	Registered
Private Hudson	Red Wood Wine City	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		
Amber Melvin	Red Wood Wine City	Event Participant	Red Wood Run	Country Music Marathon	Participant	Standard	Registered
Jennifer Mull	Red Wood Wine City	Event Participant	Red Wood Run	Wildflower Marathon	Participant	Standard	Registered
Andrew Needham	Red Wood Wine City	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
Ashlie 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		
Sarah Usher	Greater San Francisco	Event Participant	East Bay Run Team	Country Music Marathon	Participant	Standard	Dropped
Lawrence Utts	Greater San Francisco	Event Participant	Tri Team	Lavaman Triathlon	Participant	Discount	Registered
Frank Xavier	Greater San Francisco	Coach	Tri Team	Lavaman Triathlon	Support Staff		
Jim Zappa	Red Wood Wine City	Mentor	Red Wood Run	Country Music Marathon	Support Staff		

300 constituents

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

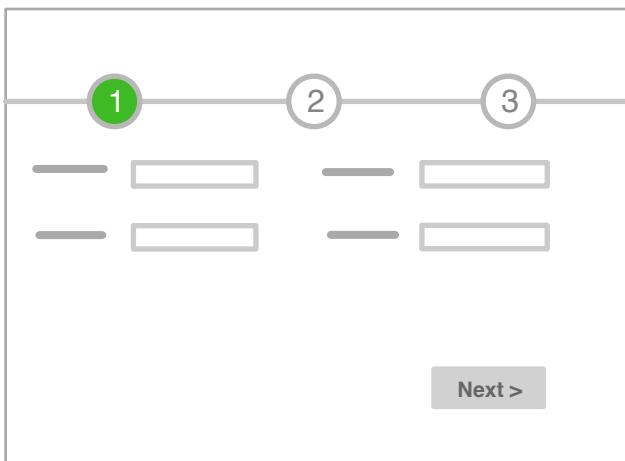
Category	To Do	Importance	Notes
FOOD	Grocery Shopping	★★★★★	06/20/2008
FOOD	Cookio	★★★★★	06/20/2008
OTHER	Get Gas	★★★★★	06/20/2008 Fred Meyer is
HOME	Mail return	★★★★★	06/20/2008
HOME	pick up dry	★★★★★	07/01/2008
FOOD	Dinner with Fam	★★★★★	07/01/2008
FUN	Get wedding gift	★★★★★	07/15/2008
OTHER	shirts	★★★★★	07/15/2008 Khalee is having a
TRAVEL	Travel plans	★★★★★	07/15/2008
FUN	dress for wedding	★★★★★	07/15/2008
YARD	plant garden	★★★★★	07/01/2008

Ultra rich cell editing, simple and advanced- Blist

	A	B	C	D	E	F	G
1	My Machine	5'5"	Female	37 y.o.	Start Weight: 220		
2	Date	Weight	Amount Lost	Total Lost	To Goal (150)	X=no weight taken	
3	4/9/2006	220	0	0	70		
4	4/16/2006	220	0	0	70		
5	4/23/2006	217	3	3	67		
6	4/30/2006	215	2	5	65		
7	5/7/2006	x	x	x	x		
8	5/14/2006	x	x	x	x		
9	5/21/2006	x	x	x	x		
10	5/28/2006	208	5	10	60		
11	6/4/2006	208	2	12	58		
12	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

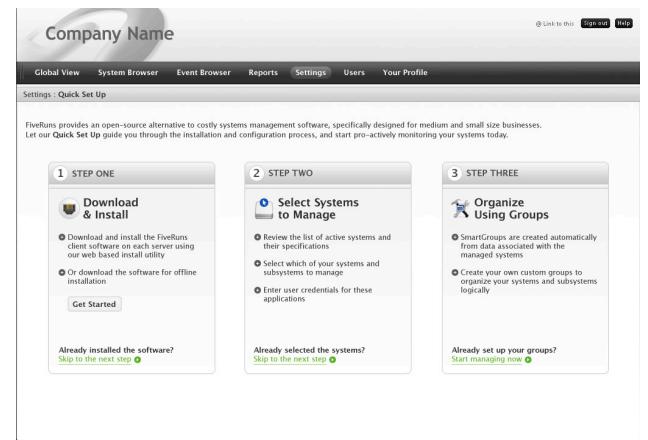
Keep the number of steps to a minimum.

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.

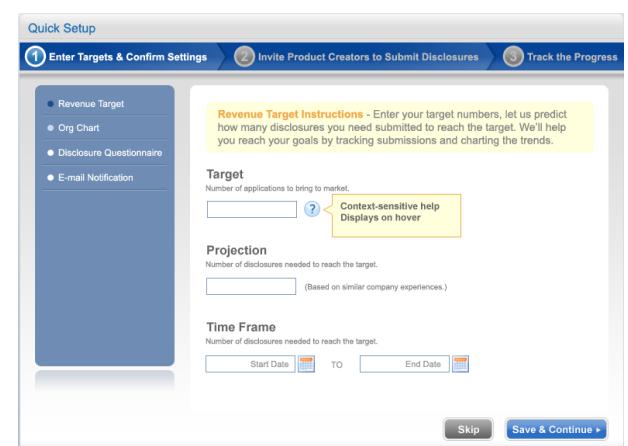
Show what step the user is currently on, allow for "back".



Quick Set Up, a one time process-FiveRuns

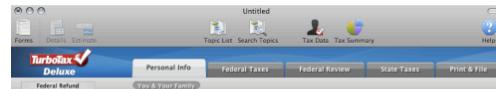
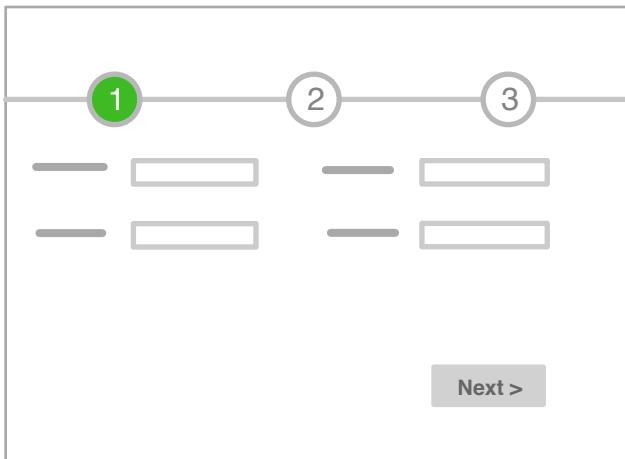


Guided wizard grouped by business functionality



Steps with sub-steps- Fluid Innovation

Wizard/ Quick Start (cont.)



What's New for You in 2007?

A lot can happen in a year. Tell us about any big changes in your life in 2007. We'll let you know how they'll affect your taxes and start preparing your return.

Choose any that apply:

- My Home**
- My Marriage**
- My Family**
- My Job**
- My Rentals**
- My Business**
- My Investments**

Select Continue even if none of these apply to you. If you've had a different change in your tax situation this year, TurboTax will handle it later.

Back Continue

Choose How to Enter This Sale Step-by-Step Guidance

Tell us how you want to enter information on this investment sale

Company Name (Box 7): pfe
Date of Sale (Box 1a): 06/13/2007
Proceeds (Box 2): 50.00
Number of Shares Sold (Box 5): 85
Tax Withholding (Box 4): Taxes were not withheld for this sale
 Taxes were withheld for this

Continue

First, tell us when you purchased this investment.
Date Purchased (02/24/1999)
Cost Basis: I want TurboTax to help me figure it out (we'll ask a few questions)
 I will enter the information myself

Continue

Here's Your Cost Basis 85 shares pfe

You Told Us		We Calculated For You	
Investment	Date	Number of Shares	Total Price
PFE	02/24/1999	23.9529	\$3,198.43 + \$0.00 = \$3,198.43

Using the shares you acquired (listed above), we calculated the following costs for the shares you sold.

Investment	Date	Long-Term Cost	Short-Term Cost
PFE	02/24/1999	\$3,198.43	\$0.00
Reinvested dividends:		\$309.55	\$87.92
Totals:		\$3,507.98 + \$87.92 = \$3,595.90	Cost Basis

Continue

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.

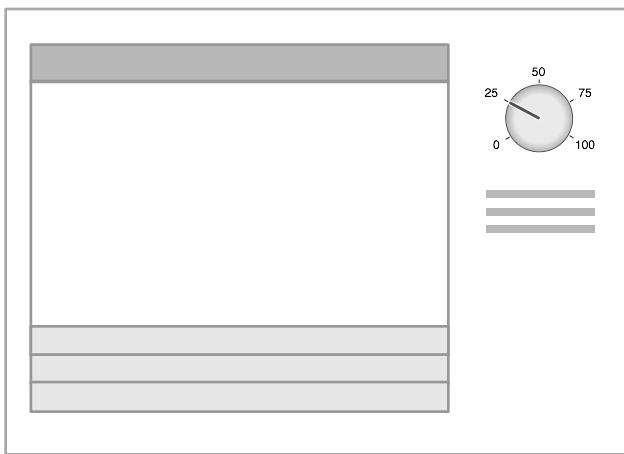
Formulate a question, see the best solutions- Fidelity Mortgage

*Q: "I want..."
A: "you need..." - Quicken*

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

Category	Value
Registration	1000.00
Offsets	200.00
Potential reimbursements	0.00
Soft credits	0.00
Total	\$850.00

Registration with multiple sections- Team in Training

iPod

Name: Theresa Neil's iPod
Capacity: 7.27 GB
Software Version: 1.1.4 (with Software Upgrade)
Serial Number: 9C801DG41N

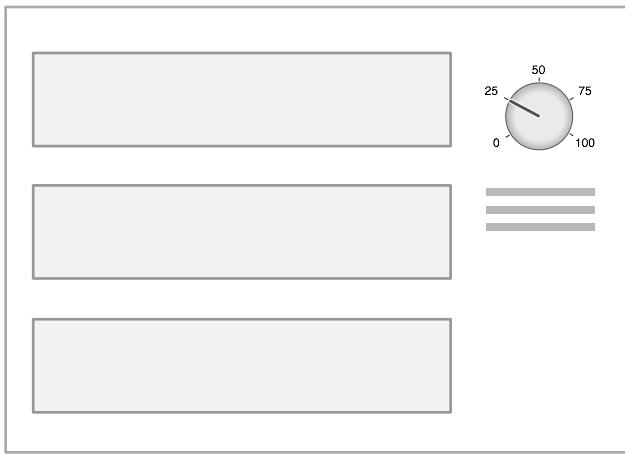
Version
A newer version of the iPod software is available (version 2.2). To update your iPod with the latest software, click Update.
If you are experiencing problems with your iPod, you can restore its original settings by clicking Restore.

Options
 Open iTunes when this iPod is connected
 Sync only checked songs and videos
 Manually manage music and videos

Capacity
7.27 GB Audio: 1.49 GB Other: 113.3 MB Free Space: 5.67 GB

Stacked panels displayed as tabs- iTunes iPod summary

Parallel Panels (cont.)



Unstacked

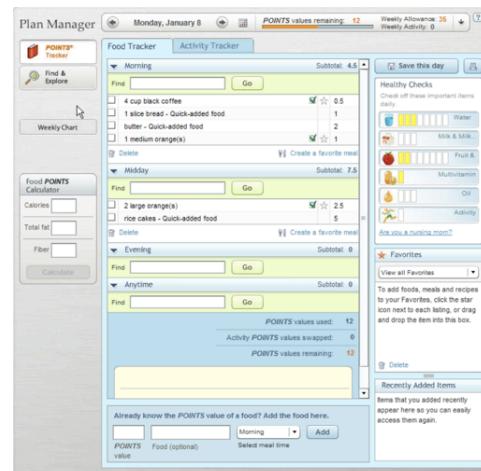
The unstacked version is appropriate in:

- 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

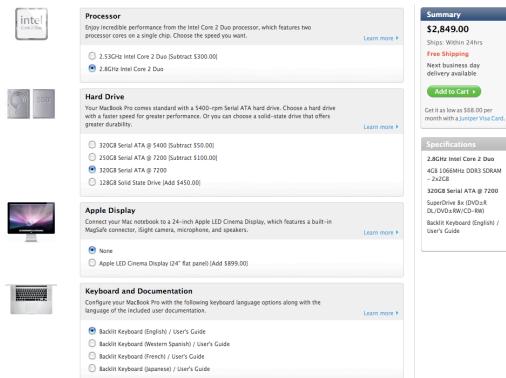
Best practices

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

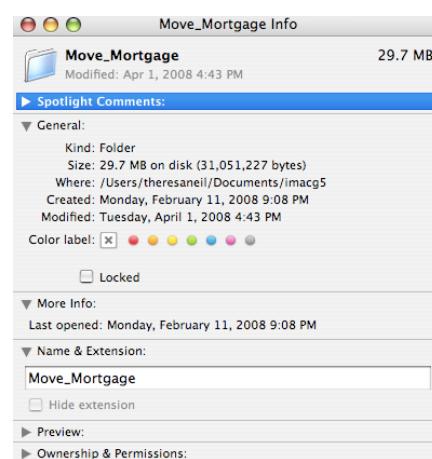
Don't nest panels.



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



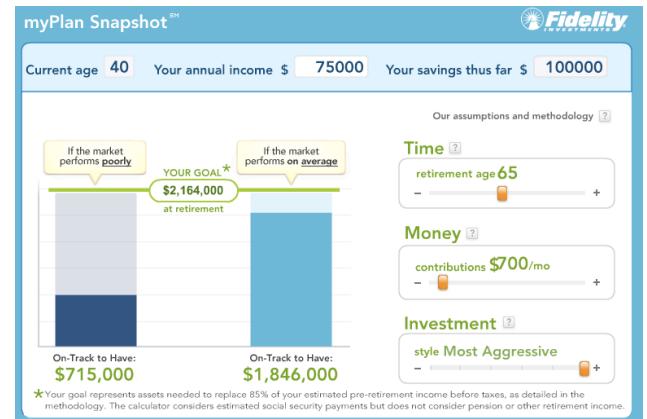
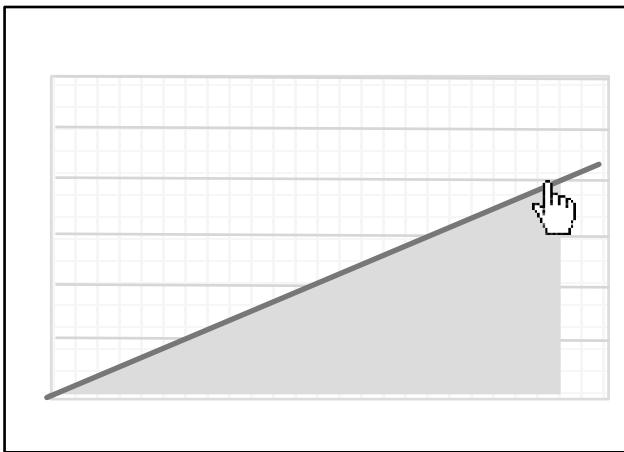
Each panel impacts the price, shown in the top right- Apple Store



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



Retirement calculator- Fidelity MyPlan

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).

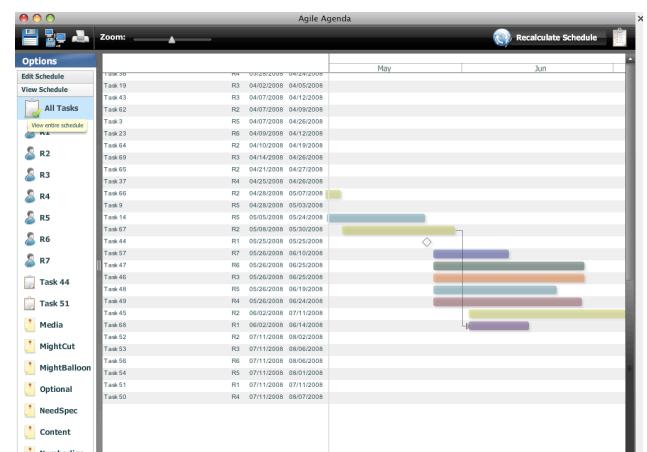
Excellent candidates for this pattern are:

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

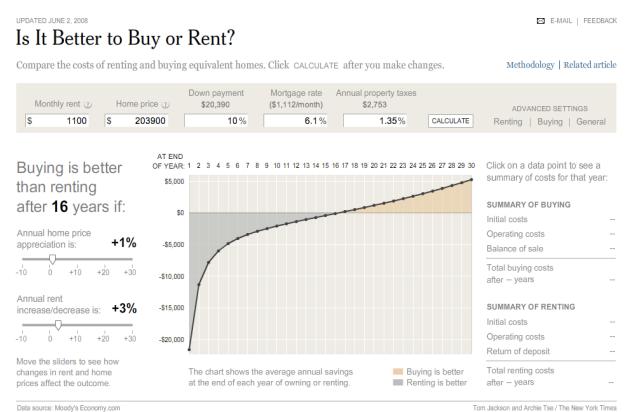
Best practices

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...

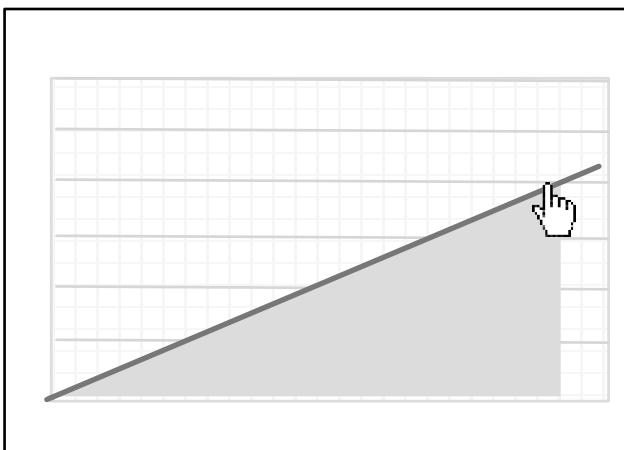


Project planning- Agile Agenda



Comparison calculator- New York Times

Interactive Model (cont.)



May 20 - 26 2007

Sun 5/20	Mon 5/21	Tue 5/22	Wed 5/23	Thu 5/24	Fri 5/25	Sat 5/26
22	23	24	25	26	27	28
29	30	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

Calendars
My Calendars
Work Calendar
Public Calendar
Other Calendars
John Mather
Portland, OR Weather
Search public calendars
Manage calendars

9am 10am 11am 12pm 1pm 2pm 3pm 4pm 5pm 6pm

9:00am 10:00am 11:00am 12:00pm 1:00pm 2:00pm 3:00pm 4:00pm 5:00pm 6:00pm

9:00am @ Weekly staff meeting
10:00am @ NHA conference @ 138 Everett St.
11:00am @ Follow up
12:00pm @ Presentation
1:00pm @ Follow up
2:00pm @ Presentation
3:00pm @ Follow up
4:00pm @ John's soccer practice
5:00pm @ Follow up
6:00pm @ Lunch meeting

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

sprout Test

ASSETS PROJECTS SETTINGS FEEDBACK

New/Open Save Save As Preview Publish Help

Components Media

History

Properties

Transform

Appearance

Opacity: 100

Border: solid 1px black

Fill: no fill

Corners: 0px 0px 0px 0px

Effects & Animation

Links & Tracking

Pages Master Pages New Delete Copy Rename Preview 360x280

Untitled Page

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

goWebTop beta

welcome Theresa Neil sign out preferences help feedback

CALENDAR

DECEMBER 2008

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
30	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3

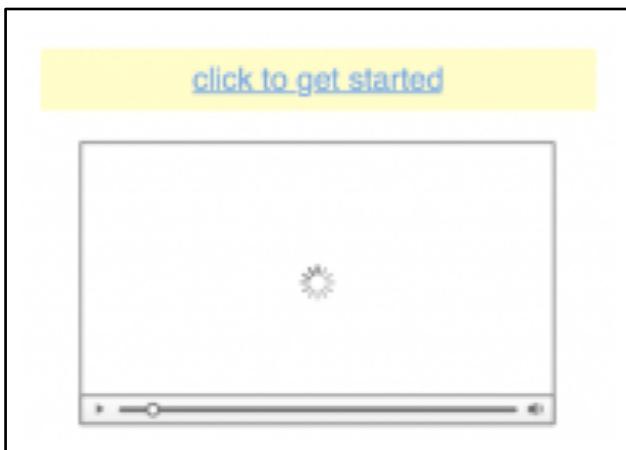
DECEMBER 2008

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

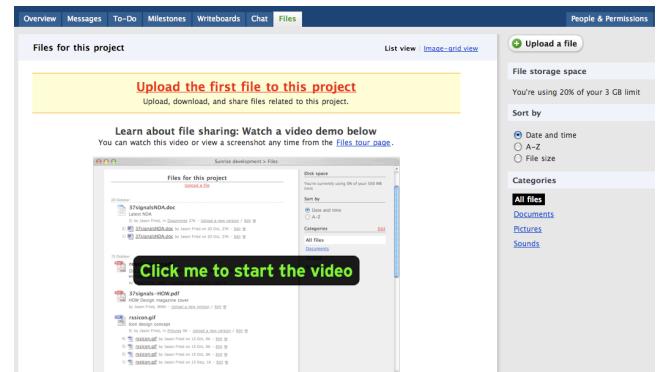
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Editable calendar with filtering- goWebTop beta by Laszlo

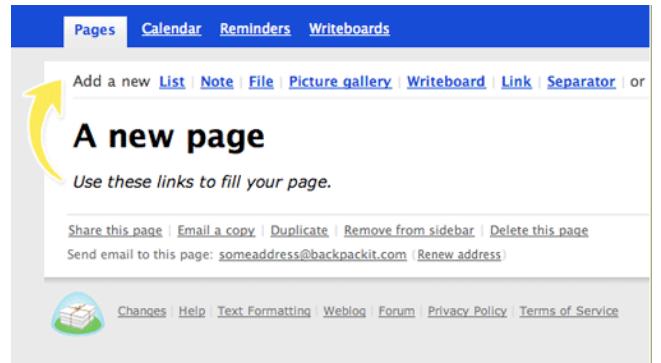
Blank State



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