

UI Standards for XactAnalysis

September 6, 2011
Updated January 29, 2013

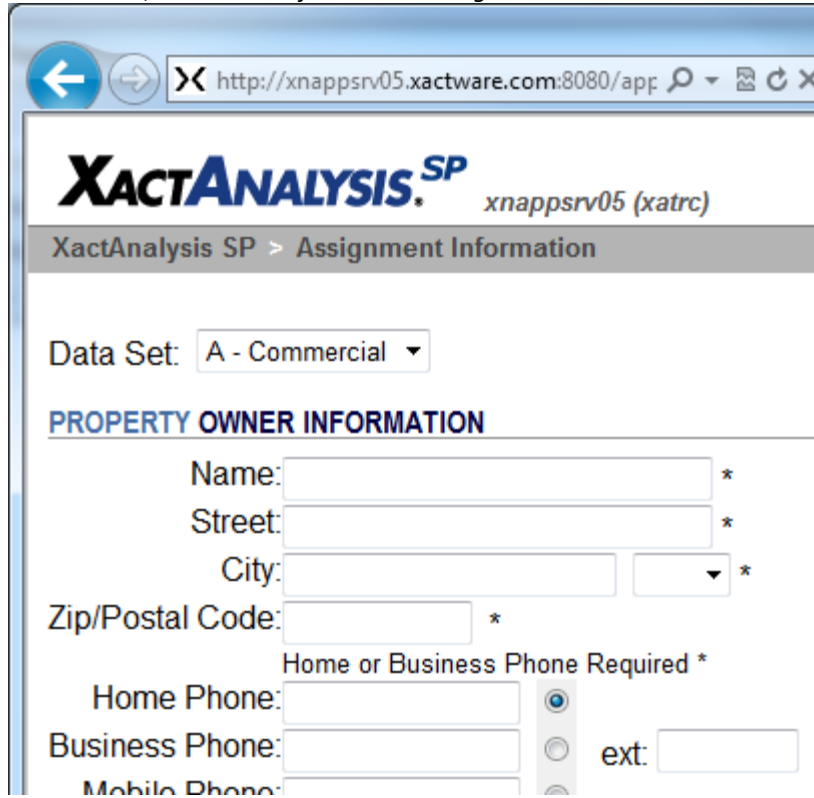
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Fonts

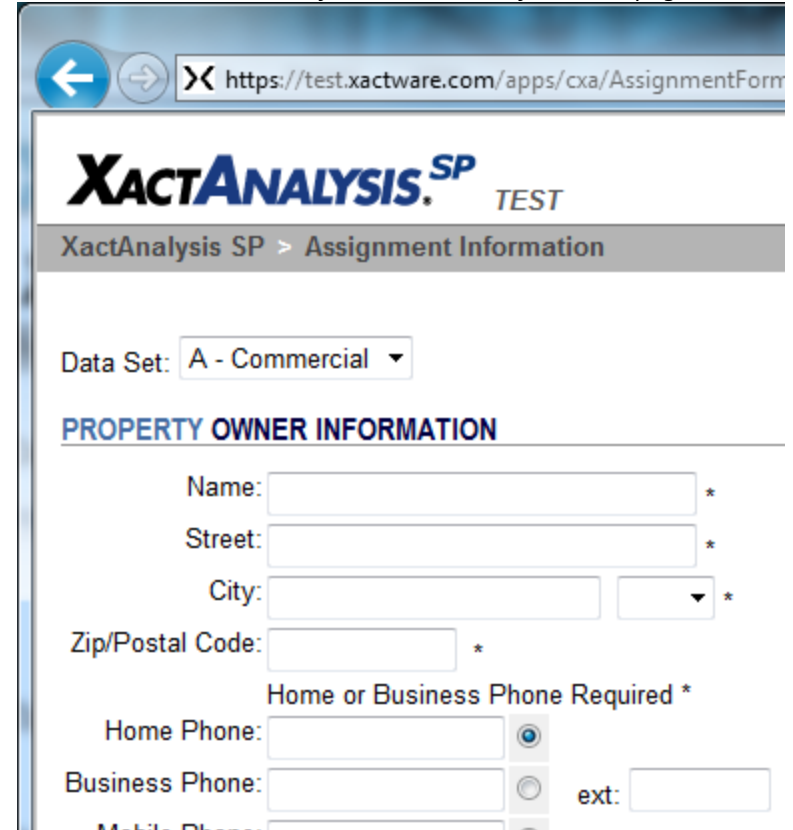
Since the font-face is well-defined in the style sheets, the primary focus/decision is on the size of the font. Make sure your fonts match the size of the fonts on the other pages in XactAnalysis.

SWA in XASP, old version—fonts are too large:



A screenshot of a web browser displaying the 'XactAnalysis SP' application. The browser's address bar shows the URL 'http://xnappsrv05.xactware.com:8080/app'. The page header includes the 'XactAnalysis SP' logo and the text 'xnappsrv05 (xatrc)'. Below the header, a navigation bar shows 'XactAnalysis SP > Assignment Information'. The main content area features a 'Data Set' dropdown menu set to 'A - Commercial'. A section titled 'PROPERTY OWNER INFORMATION' contains several input fields: 'Name', 'Street', 'City', 'Zip/Postal Code', 'Home Phone', 'Business Phone', and 'Mobile Phone'. Each field is accompanied by a radio button and an asterisk indicating it is required. The fonts used in this version are noticeably larger than those in the newer version shown on the right.

SWA in XASP, new version—fonts match other forms and pages:



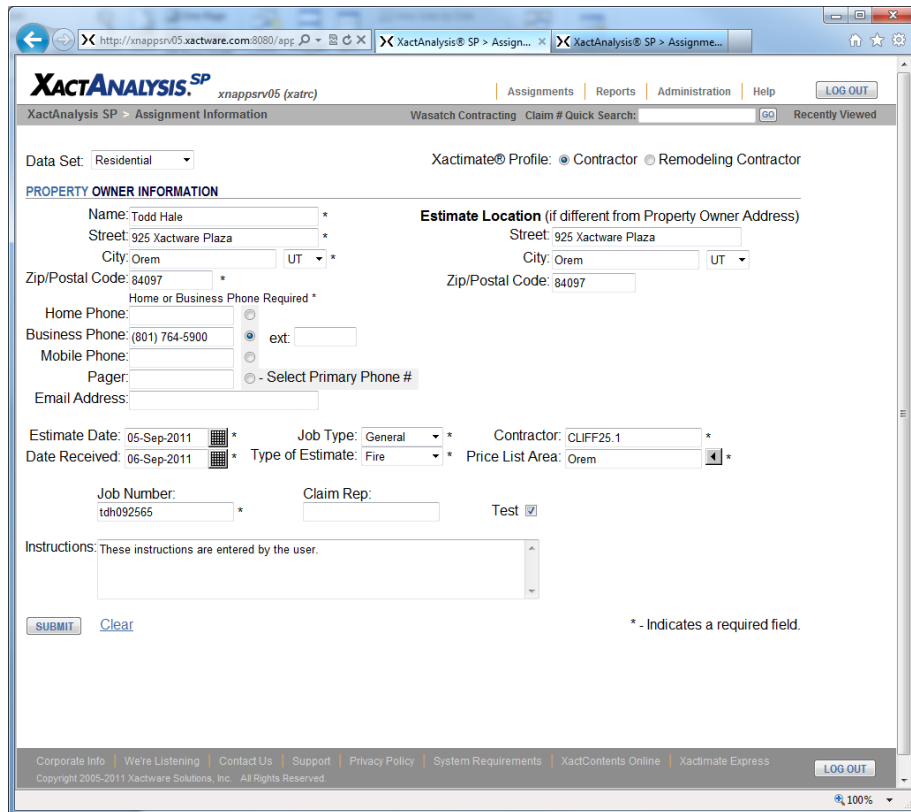
A screenshot of a web browser displaying the 'XactAnalysis SP' application. The browser's address bar shows the URL 'https://test.xactware.com/apps/cxa/AssignmentForm'. The page header includes the 'XactAnalysis SP' logo and the text 'TEST'. Below the header, a navigation bar shows 'XactAnalysis SP > Assignment Information'. The main content area features a 'Data Set' dropdown menu set to 'A - Commercial'. A section titled 'PROPERTY OWNER INFORMATION' contains several input fields: 'Name', 'Street', 'City', 'Zip/Postal Code', 'Home Phone', 'Business Phone', and 'Mobile Phone'. Each field is accompanied by a radio button and an asterisk indicating it is required. The fonts used in this version are consistent with those in the other forms and pages, as noted in the caption.

Consistent Layout & Labels

When there are multiple pages that display the same data, it needs to be laid out the same way on all pages.

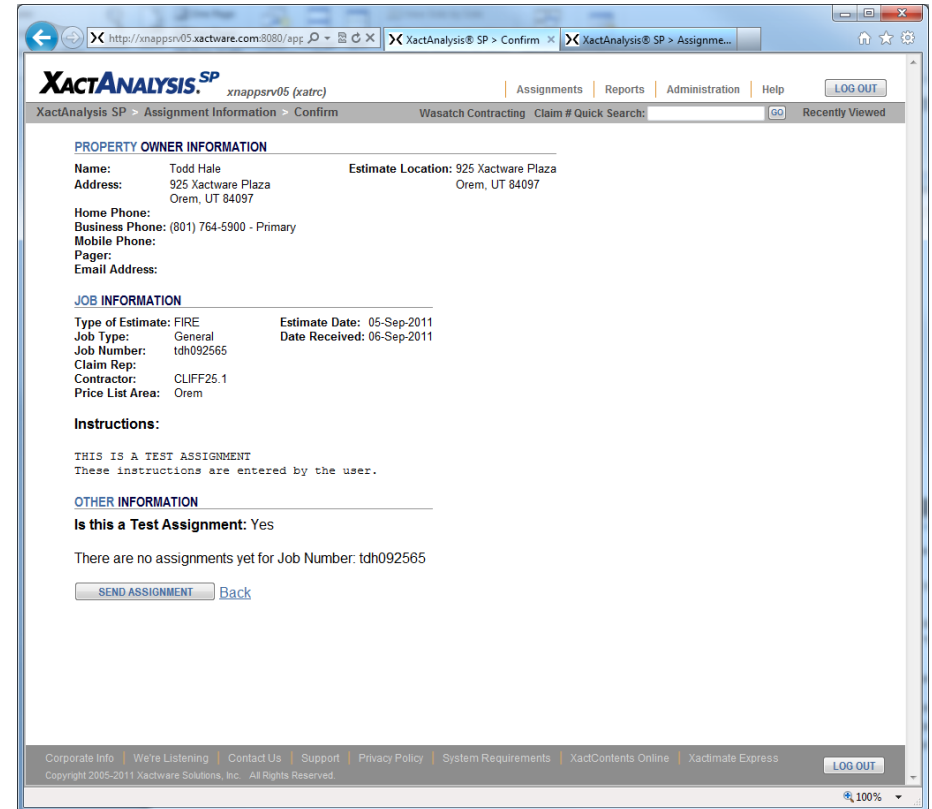
The following sample shows the SWA form in XASP and its corresponding confirmation page, which displays the data just entered so the user can review it before submitting it. Notice how different the pages are from each other. The pages need to be mirrored as much as possible.

SWA in XASP, main form, old version:



The screenshot shows the 'XactAnalysis SP' main form for 'Assignment Information'. The page title is 'XactAnalysis SP > Assignment Information'. The form is divided into several sections: 'PROPERTY OWNER INFORMATION', 'Estimate Location', 'Job Information', and 'Instructions'. The 'PROPERTY OWNER INFORMATION' section includes fields for Name, Address, City, State, Zip/Postal Code, Home Phone, Business Phone, Mobile Phone, Pager, and Email Address. The 'Estimate Location' section includes fields for Street, City, State, and Zip/Postal Code. The 'Job Information' section includes fields for Job Type, Job Number, Claim Rep, Contractor, Price List Area, Estimate Date, Date Received, and Type of Estimate. The 'Instructions' section contains a text area for user-entered instructions. The form also includes a 'SUBMIT' button and a 'Clear' link. The footer contains navigation links and copyright information.

SWA in XASP, confirmation page, old version:



The screenshot shows the 'XactAnalysis SP' confirmation page for 'Assignment Information'. The page title is 'XactAnalysis SP > Confirm'. The form displays the data entered on the main form, organized into sections: 'PROPERTY OWNER INFORMATION', 'JOB INFORMATION', and 'Instructions'. The 'PROPERTY OWNER INFORMATION' section includes fields for Name, Address, City, State, Zip/Postal Code, Home Phone, Business Phone, Mobile Phone, Pager, and Email Address. The 'JOB INFORMATION' section includes fields for Job Type, Job Number, Claim Rep, Contractor, Price List Area, Estimate Date, Date Received, and Type of Estimate. The 'Instructions' section contains a text area for user-entered instructions. The form also includes a 'SEND ASSIGNMENT' button and a 'Back' link. The footer contains navigation links and copyright information.

Here are the issues I saw that need to be corrected:

1. The menu item is "Send an Assignment", and the page title is "Assignment Information." These should match.
2. The data layout on the pages is very different (the fields are in different orders).
3. There are 3 section headings on the confirmation page, where there was only 1 on the SWA form.
4. The fonts in the last section are too big, all the way down to the Back link.
5. The "Is this a Test Assignment" label is too big and bold, draws too much attention, and it doesn't match the "Test" label on the form.
6. The input labels are right-justified on the form, but left-justified on the confirmation page. We use left justification for most labels.

- The left margin on the confirmation page is much larger than the normal margin on the form page.
- Not all selectable fields from the form are included on the confirmation page (the Data Set and Xactimate Profile). These should be added.

The two pages simply need to be laid out the same. And since I know that more time was spent laying out the form the way customers requested it, the confirmation page should be changed to match the form.

A few changes to the SWA form and confirmation page produced the following results:

XactAnalysis SP tdhale-pro (xatrc)

Assignments | Reports | Administration | Help | [LOG OUT](#)

XactAnalysis SP > Send an Assignment | Wasatch Contracting | Claim # Quick Search: [GO](#) | Recently Viewed

Data Set: Residential | Xactimate® Profile: ☒ Contractor ☐ Remodeling Contractor

PROPERTY OWNER INFORMATION

Name: | Estimate Location (if different from Property Owner Address)

Street: | Street:

City: | City:

Zip/Postal Code: | Zip/Postal Code:

Home or Business Phone Required *

Home Phone: ☒ | ext:

Business Phone: ☐ | Mobile Phone:

Pager: ☐ - Select Primary Phone #

Email Address:

JOB INFORMATION

Estimate Date: | Job Type: | Contractor:

Date Received: | Type of Estimate: | Price List Area:

Job Number: | Claim Rep:

Instructions:

Is this a Test Assignment? ☒ [SUBMIT](#) [Clear](#)

* - Indicates a required field.

Corporate Info | We're Listening | Contact Us | Support | Privacy Policy | System Requirements | XactContents Online | Xactimate Express | [LOG OUT](#)

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XactAnalysis SP tdhale-pro (xatrc)

Assignments | Reports | Administration | Help | [LOG OUT](#)

XactAnalysis SP > Send an Assignment > Confirm | Wasatch Contracting | Claim # Quick Search: [GO](#) | Recently Viewed

Data Set: Residential | Xactimate® Profile: Contractor

PROPERTY OWNER INFORMATION

Name: | Estimate Location: 925 Xactware Plaza

Address: | Address:

Home Phone: | Business Phone:

Mobile Phone: | Pager:

Email Address:

JOB INFORMATION

Estimate Date: 05-Sep-2011 | Job Type: General | Contractor: CLIFF25.1

Date Received: 06-Sep-2011 | Type of Estimate: FIRE | Price List Area: Orem

Job Number: tdh09251965 | Claim Rep:

Instructions: THIS IS A TEST ASSIGNMENT
These instructions are entered by the user.

Is this a Test Assignment: Yes

Note: There are no assignments yet for Job Number: tdh09251965

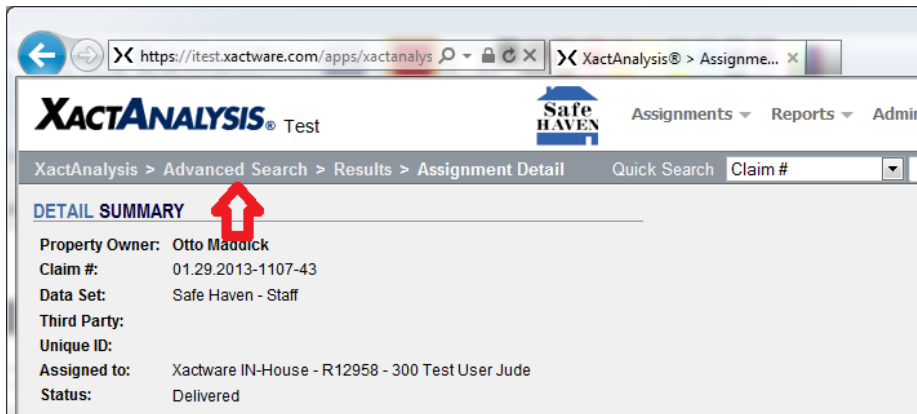
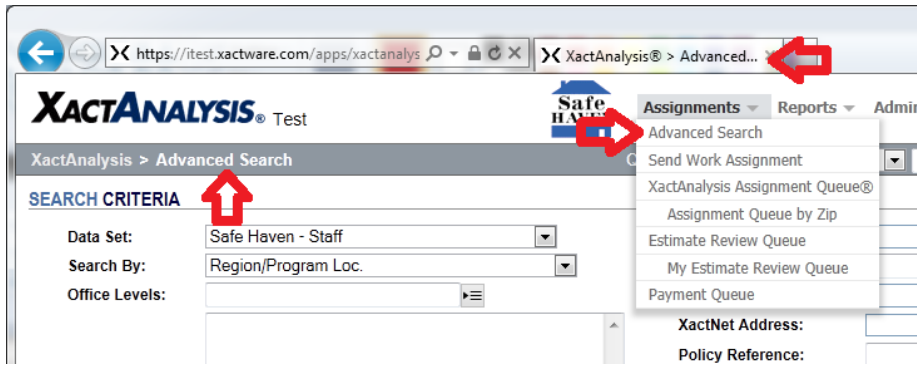
[SEND ASSIGNMENT](#) [Back](#)

Corporate Info | We're Listening | Contact Us | Support | Privacy Policy | System Requirements | XactContents Online | Xactimate Express | [LOG OUT](#)

Copyright 2005-2011 Xactware Solutions, Inc. All Rights Reserved.

Consistent Page Titles

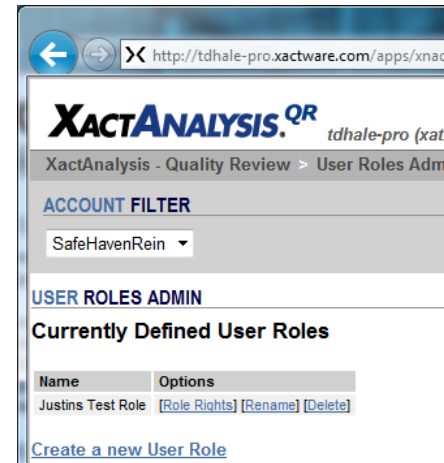
The same page name should be used 1) on the page, 2) in the page title, 3) in the menus, and 4) in breadcrumbs.



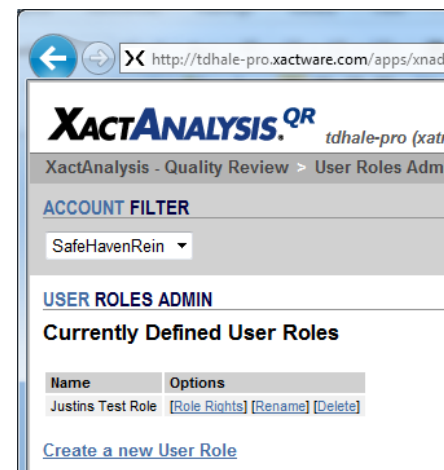
Margins

Nearly all pages should wrap the content of the page in a `<div class="bodyPad"></div>`. This gives the page a visual separation from the edge of the browser, and makes it easier for the user to consume the information.

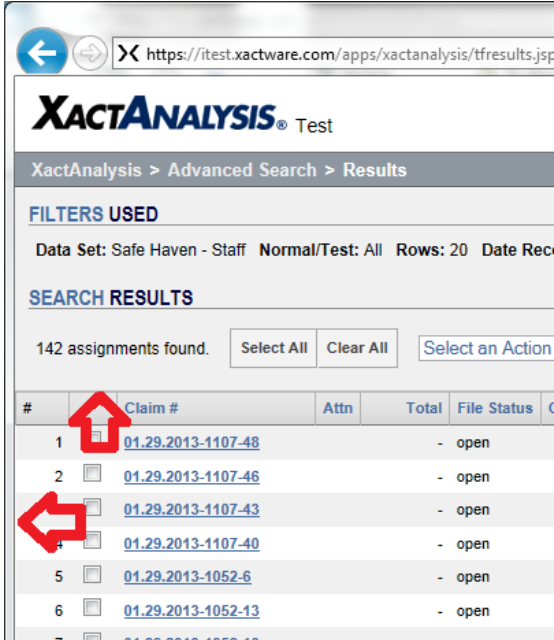
I edited this page to show how it looks when you forget the margin. Notice no space on the left side of the main content:



Here it is with the proper left margin:



The primary exception to using margins is on pages that use results/list tables—they need to extend from left margin to right margin.



XactAnalysis Test

XactAnalysis > Advanced Search > Results

FILTERS USED

Data Set: Safe Haven - Staff Normal/Test: All Rows: 20 Date Recd:

SEARCH RESULTS

142 assignments found.

#	Claim #	Attn	Total	File Status
1	01.29.2013-1107-48		-	open
2	01.29.2013-1107-46		-	open
3	01.29.2013-1107-43		-	open
4	01.29.2013-1107-40		-	open
5	01.29.2013-1052-6		-	open
6	01.29.2013-1052-13		-	open
7	01.29.2013-1052-10		-	open

Checkbox and Radio Button Labels

Make sure the labels for all checkboxes and radio buttons are clickable. Do this by adding an id attribute to the checkbox or radio button, then wrap the label with the <label> tag, as follows:

```
<checkbox name="test" value="Y" id="cbtest">  
<label for="cbtest">Is this a test assignment?</label>
```

AJAX vs. Page Reload

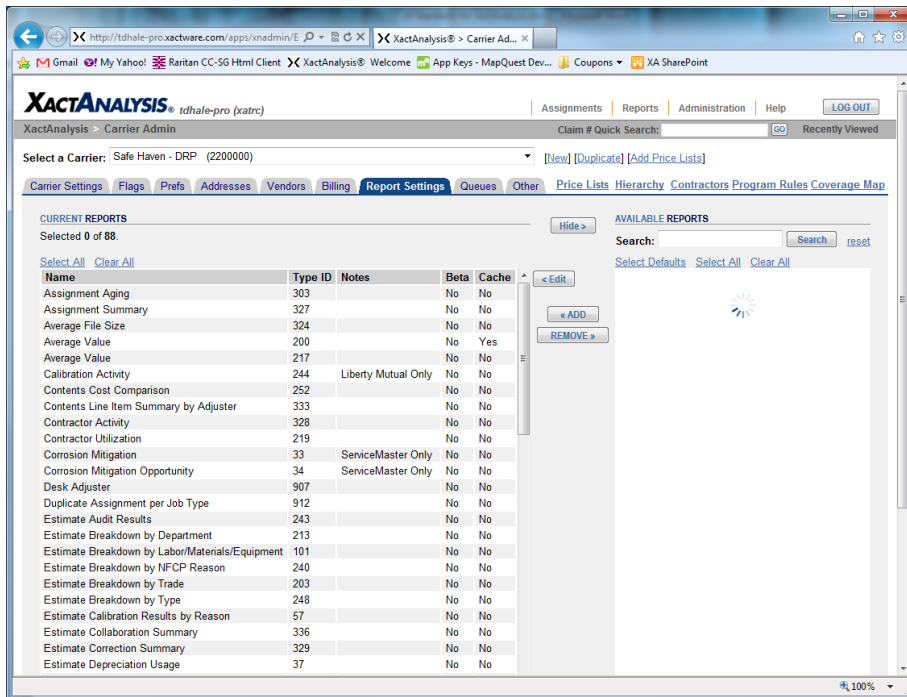
AJAX should be used for the following purposes:

1. Improve user interaction. (“auto-suggest”)
2. Reduce database traffic. (detail page)
3. Form selection dependencies (reduces JavaScript size and database traffic). (personal rules)
4. Improve page load time by separating slow-loading section from main page code. (XASP start page, user admin chat right)

If an AJAX call is going to take more than a split second, a “working” spinner should be displayed to let the user know the request is being processed. Put the following image in the target div (or td or other tag), then replace the tag html with your AJAX html data.

```
<img src='/shared/images/ajax-loader.gif' alt='loading' />
```

This screen uses a working spinner to show that the data is being loaded:



Full-page reloads are acceptable if the page load time is quick. Do not ajaxify (modularize) a page if it is loading in under a second. For example, tabs on a page does not automatically warrant ajaxifying the tab content.

Minimalize JavaScript

JavaScript should be in a static js file, and should be used for the following:

1. Improve user input & interaction (jQuery, etc.)
2. Validate user input

The following overuses of JavaScript should be avoided:

1. Do not put business logic in JavaScript
2. Do not build HTML code in JavaScript
3. Long-running, object list processing (usually because it has business logic in it)

Make sure to follow standard coding practices with JavaScript:

1. Comment all code well
2. Use good variable naming
3. Break complex Boolean operations into small, digestible parts
4. No global variables, except when state persistence is needed

Edit In-Place

We are switching much of our data editing UI to edit in-place. For example, the Edit button below used to pop up a form in a new window. Now it replaces the display html with an edit form.

XactAnalysis® Test

XactAnalysis > Adjusters

Select a Data Set

Safe Haven - Staff

ADJUSTER ADDRESS

Justins Quality Construction
Brad
1426 E 750 N
1 Xactware plaza
Orem, UT 84097

Edit

Add to Personal Address Book

Display mode

XactAnalysis® Test

XactAnalysis > Adjusters

Select a Data Set

Safe Haven - Staff

ADJUSTER ADDRESS

Justins Quality Construction

User: Brad

Street: 1426 E 750 N

1 Xactware plaza

City: Orem

Country: Utah

ZIP: 84097

Tax ID:

Update Cancel

Edit Contact Methods

Add to Personal Address Book

Edit mode

In order to minimize HTML in the JavaScript to do this, it is preferred to render both the display mode and edit mode in the parent JSP file (and use hide/show) or in a child JSP file (and use AJAX to load them).

Tables and Lists

Here are a few standards that communicate various facts to the user when you display any kind of list:

1. Display the total number of rows, and include paged max when applicable: 50 of 1,300 users displayed.
2. Number each row—this gives the user their bearing while scrolling or paginating. It also reinforces the size of the list when they scroll to the bottom of the list.
3. Alternate the light/dark background by applying the “striped” class to the <table>, and the “odd” or “even” class to each <tr>.
4. If there is a default action for clicking the row, add the “hoverable” class to the <table>. This highlights the row as you pass over it. (Then add your onclick event to the <tr> as usual.)

RECENTLY VIEWED ASSIGNMENTS

	Claim #	Insured
1	RT123R	complete me
2	CARDATES	Dates Autofilling
3	HC-031512-006	Hardy Test
4	FIRE	Completed by 27.5 Please check dates
5	KWC-032411-1336	George Hale
6	MS-09242012-08	William Peterson
7	BGR-10122012-1002	Jonathan Archer
8	JUN6-TDA3	JUN6-TDA3
9	MPT-110911-02	Matthew Tolman
10	JEH 11-12-2012 08:55:30 MST	Xm8 Tester17
11	MS-04122012-05	Patrick Roberts
12	XW-ROI7FF3	Roy SäkerHamn
13	PNS-102312-1215	Erica
14	MPT-011012-02	Matthew Tolman
15	HC-080712-001	Hardy Cherry
16	KBR06212012-01	kbr06212012-01
17	HC-080712-001	Hardy Cherry
18	WJM102286849	Darren Tietz
19	107131008301	Malinda Polinsky
20	MPT-110911-02	Matthew Tolman

Format Your Numbers

Whether the number is a total or a list item counter, put the commas in there. More specifically, use the XNLocale object to format it to the user’s region. Integers are done like this:

```
userXNLocale.numberToString(number, 0, 0)
```