



PAGE (FORM) DESIGNER

Page Designer and Publisher for the
BridgeIT Application

Project Sponsors:

X (Service Desk Director)

X (Engineering Director)

Project Team Members:

X (Senior Manager Engineering)

X (Product Owner)

X (Principle Lead Developer)

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Revision History

Date	Version	Author	Description
08/01/2015	1.0	Z Mohammed	Initial draft
14/01/2015	1.1	Z Mohammed	Added Project Brief and Project Plan from Lara's document. De-scoped project after kick-off meeting.

Introduction/Overview

With the strategic goal and directive focused on the new LANDESK BridgeIT application. It is essential that forms (including dashboard layout and gadgets) be addressed, as these elements are essential to the success of this application.

The aim of this project will be to outline the research, strategic goals, design flows and actionable processes to build the page designer and publisher for the LANDESK BridgeIT application and the interactive experience.

The main criteria being increased user productivity, increased user control, decreased user support, and increased user satisfaction with the full UX design life cycle being applied to this project.

This document presents the designs for two processes, Page Designer and Page Publisher. Page Designer is aimed at creating form elements and page layouts. Page Publisher is aimed at publishing the pages, forms (and dashboards) to the business.

Document Scope

This document scope was limited to the execution of tasks that would:

- Explore the various types of form designers and publishers currently on the market and how our competitors incorporate them into their applications.
- Evaluate usability, usefulness, aesthetics, performance, features and functionality of these form designers and publishers and how they compare against LANDESK's products.
- Investigate the users perception of these form designers and publishers and if they are easy to update, modify, use and understand.
- Assess general features and functionality capabilities, learnability, and gadget features possible for the BridgelT application.

This document uses the methodology for Human–computer interaction (HCI): a synthesis of usability and performance evaluation techniques, which together build an empirical foundation for interface evaluation.

Project Initiation Document

Information

Title	BridgeIT Forms
Primary Sponsor	Ian Aitchison
Project Manager	Lara Hellman
Project Team Members	Simon Oldfield Zulfikar Mohammed Darren Powell

Purpose

The purpose of this project is to detail how we intend for forms to work in BridgeIT going forward.

Background

At present, forms are presented in BridgeIT as single column representations of the forms designed and published via the windows console. The input fields available do not yet represent all the fields that can be designed on to forms nor does all the same form functionality yet exist in BridgeIT. Some logic exists to lay the fields out in the same logical order (while not maintaining their column positions) and in the same group boxes as the way they were originally designed. Unlike the forms used in console or Web Access, BridgeIT forms exist only in a “creation” or “read only” state, there is currently no ability to edit data that has already been saved.

However, we are experiencing significant pressure from our customer base to evolve the functionality available in the BridgeIT platform as its clean design and visual appeal make it the UI of choice for all Service Desk activities.

At present, the display of the Window Manager designed forms is unsatisfactory for several reasons.

- 1) The form rendered in BridgeIT bears little relation to the window from Window Manager. The spacing, width, position and colours are completely ignored.
- 2) The forms rendered in BridgeIT lack most of the functionality designed in to console forms, such functionality includes (but is not limited to)
 - a. Dynamic capabilities (hide, make mandatory, make read only based on other field values)
 - b. Copy rules (copying data from a source in to fields on the window based on selections already made on the window)
 - c. Filtering (ability to filter the values presented in a list based on other values selected on the window)
 - d. Templates (ability to pre-populate some data on launch of the form) n.b. this does work but must be maintained
 - e. Response level matrix (ability to set the response level based on a complex set of rules, similar to copy rules and filtering but specific to response level)
 - f. Record locking (the ability to ensure that the record is not being edited by another user at the same time).

Objectives

The objectives of this project are therefore to set out a plan for how the forms can be designed, published, used and displayed in BridgeIT. This will draw heavily on industry best practice in terms of usability while maintaining the core key differentiator of the Service Desk product- its configurability. Customer feedback will be sought to help guide the direction of the final deliverable.

Scope

The project should include describing our vision for the following functions:

- 1) How forms can be designed for use in BridgeIT. There are several options for how this could be delivered to our customers:
 - a. Continuing to use the Window Manager designed forms and interpreting them for a responsive web application
 - b. Providing a like-for like drag and drop form designer in the BridgeIT application
 - c. Creating a new form designer in BridgeIT that does not offer drag-and drop design like console but does enable a high degree of confidence in the resulting window design
- 2) How forms can be interacted with, in terms of logging, updating and viewing records.
- 3) How forms will be published, if we continue to use the console form designer then we could also continue to use the publishing capabilities there, however, if this is used then a new publishing paradigm needs to be understood.
- 4) How to design forms that will render in a suitable and predictable way across the supported breakpoints.

We should ensure that the designer, while capable of designing forms across all the breakpoints is not available to be used on those smaller breakpoints.

Excluded from Scope

Dashboard designer. While we suspect that changing dashboards will be similar to the form designer, it will not be comprehended now.

The actions available to perform when viewing a form are not a part of the form design.

Project Deliverables

The ultimate aim of this project is to deliver a highly detailed set of stories for implementation by the Service Desk scrum teams along with full specifications and designs for how it will appear and the flow, both of the designer/publisher and the users experience of the designed/published forms.

A list of existing console and Web Access form capabilities prioritised and assessed for consideration on BridgeIT forms.

Constraints

By Q2 2015 we must have a developable set of steps that are well detailed and workable for the first increment of this work.

Assumptions

Team 1 will ultimately own the delivery of this work.

Zulfikar will lead the UX effort on understanding how this work will be delivered.

Risk Analysis

Other work will encroach too heavily on the time of the project team and therefore we will not be able to maintain momentum.

Available Resources

Zulfikar – 100% of Q1

Simon – 10% of Q1

Darren – 10% of Q1

Lara – 20% of Q1

Project Plan

The key milestones are target dates for them are shown below:

- Sign off obtained – Jan 15th
- Complete User flows
- High res Designs
- Decomposed stories – Mar 20th
Customer validation collected

What is a Form Designer

A forms designer provides a design facility for designers (users of the system) to design forms easily. The designer host works with the design-time environment to manage designer states and activities such as transactions and components. In addition, there are several other key variables that allow the forms to be grouped, aligned and designed to meet the users and business needs. The form designer should be easy to use, flexible and intuitive to the designer with a GUI to create complex forms without any programming skills.

Easily create forms with deep functionality

A forms designer should be a versatile solution that enables a designer (user of the system) to design custom forms for almost any process of the business. The intuitive graphical interface of the forms designer should allow the user to easily build forms, which include the components of the forms, the layout and colours.

The forms designer should have these key components:

- GUI layout tools for the form design
- Business rules and scripting language for data verification
- Extensive data path technology for communication to the back-end

Layout

The layout should be accomplished through technologies that currently exist within the BridgeIT UI framework. Much of this layout should be performed using a toolbar (or similar unique menu/navigation), which allow for a wide variety of data types and data collection objects to be included in the form.

These may include but are not limited to: alpha fields of various lengths; numeric fields; alphanumeric fields, check box groups; free form fields; as well as a variety of specialised fields such as calendar and date and time fields.

The designer could include images to enhance the look of the form being created. It should be very easy to order, group, and align objects, giving the form a more professional look.

Business Rules

A form may require simple business rules such as required fields, cross-field validation rules or the more sophisticated business rules such as dynamic content. With the forms designer, each of these types of rules should be built into the form during the layout design sessions using the underlying scripting language within the designer and the point and click authoring of validation rules.

Key features of the forms designer

- Design forms and add business rules without any programming skills required
- Create, Amend and Delete forms
- Integration with the back-end to apply validation rules to fields and variables
- Fully admin GUI which allows fields to be added and properties to be set
- Dynamic fields/groups/sections
- Validation rules which are fully configurable
- Customisable messages and labels
- Easy to use and understand
- Flawless rendering on all devices (Responsive breakpoints)
- Friendly hints and placeholders, making forms easier and friendlier to create
- Section 508 accessibility compliant
- Autofocus fields
- W3C-valid HTML5, CSS3, with graceful degradation
- Grid background to allow accurate positioning of fields and labels
- Only using existing components within the component library (not within scope to update the existing components)
- Example templates to allow a starting point in the design
- Dynamic display rules to show and hide form elements based upon field selection actions and choices made in the form.
- Marking fields as "Mandatory" and show appropriate warning messages if necessary.
- Automatically validating user input by field type
- Defining value ranges and interval steps for number fields
- Stylish calendars and choosing date formats
- Hidden fields
- HTML elements
- UTF-8 support
- Use left, right, centered, or justified text alignment.
- Publication and Sharing of created forms
- Comprehensive overview of forms across all breakpoints
- Automated form processing.
- Custom message after submission.
- Themable option available (not within scope to create the theme functionality)
- Attribute filtering
- Copy rules

What is a Forms Publisher

The forms publisher will be an advanced system that allows non-technical users to easily update and publish forms on their BridgeIT application without learning HTML or fear of ruining the BridgeIT application design. Publishing could potentially be to business processes, groups or individuals.

It would work by adding a few simple rules, which would allow the user of the application to select or specify the criteria. Forms would be instantly updated and available to the application.

Key features of the forms publisher

- Update the BridgeIT application instantly.
- Simple point and click interface with selectable options
- User friendly advanced system

UX Deliverables

Week 1 – w/c 12th January 2015

- Finalise high level requirements (and document)
- Brainstorm ideas
- Low-fidelity sketches (pencil)

Week 2 – w/c 19th January 2015

- Finalise requirements (sign-off required)
 - Start capturing fields attributes and properties
- Start creating personas
- Modify low-fidelity sketches (omnigraffle)
- Start user flows

Week 3 – w/c 26th January 2015

- Start creating personas
- Capture full fields and attribute values
- Create wireframes of key screens and how they work (omnigraffle)

Week 4 – w/c 2nd February 2015

- Finalise Information Architecture diagram

Week 5 – w/c 9th February 2015

- Complete user flows and user journeys
- Update fully annotated wireframes (omnigraffle)

Week 6 – w/c 16th February 2015

- Complete personas
- Sign-off on annotated wireframes
- Wireframe walkthrough (stakeholders)
- Sign-off on user/process flows and user journeys

Week 7 – w/c 23rd February 2015

- Evaluate and Review
- User testing/feedback (organise)

Week 8 – w/c 2th March 2015

- Start use cases/stories

- Start detailed design

Week 9 – w/c 9th March 2015

- Use cases/stories
- Detailed design (iterations)
- User feedback
- UI walkthrough

Week 10 – w/c 16rd March 2015

- Finalise detailed design (iterations)
- User feedback (collate and review)
- UI walkthrough (stakeholders)
- Review (stakeholders)

Week 11 – w/c 23rd March 2015

- Sign-off detailed design
- UI walkthrough (developers)

Usability Goals

Usability is generally acknowledged as a factor of system quality representing the answer to many frustrating interactions with technology. It describes the quality of products and systems from the point of view of humans who use them.

Different definitions of usability have been so far proposed, which vary according to the models they are based on. Part 11 of the international standard ISO 9241 (Ergonomic Requirements for Office Work with Visual Display Terminals) provides guidance on usability, introducing requirements and recommendations to be used during application design and evaluation. The standard defines usability as “the extent to which a product can be used by specified users to achieve specified goals with effectiveness, efficiency and satisfaction in a specified context of use”. In this definition, effectiveness means “the accuracy and completeness with which users achieve specified goals”, efficiency is “the resources expended in relation to the accuracy and completeness with which users achieve goals”, and satisfaction is described as “the comfort and acceptability of use”. Usability problems therefore refer to aspects that make the application ineffective, inefficient, and difficult to learn and to use.

Although the ISO 9241-11 recommendations have become the standard for the usability specialists' community, the usability definition most widely adopted is the one introduced by Nielsen. It provides a detailed model in terms of usability constituents that are suitable to be objectively and empirically verified through different evaluation methods. According to the Nielsen's definition, usability refers to:

- **Learnability:** the ease of learning the functionality and the behaviour of the system.
- **Efficiency:** the level of attainable productivity, once the user has learned the system.
- **Memorability:** the ease of remembering the system functionality, so that the casual user can return to the system after a period of non-use, without needing to learn again how to use it.
- **Few errors:** the capability of the system to feature a low error rate, to support users making few errors during the use of the system, and in case they make errors, to help them to easy recover.
- **User's satisfaction:** the measure in which the user finds the system pleasant to use.

High-level usability goals include those related to the system are:

- Effective
- Efficient
- Safe
- Have good utility
- Easy to remember how to use

As well as those related to user experience in using the system are:

- Fun
- Satisfying
- Emotionally fulfilling
- Rewarding and aesthetically pleasing
- Motivating
- Helpful
- Enjoyable

- Entertaining

Usability principles (Nielsen 2001 - Ten Usability Heuristics.

www.useit.com/papers/heuristic)

1. **Visibility of system status.** Feedback should not be restricted to error messages. System should be constantly informing the user of what it is doing and how it is interpreting user input.
2. **Match between system and the real world.** Terminology should match users' and be consistent with their expectation.
3. **User control and freedom.** Provide clearly marked exits
4. **Consistency and standards.** Same command should have same effect. Same type of information displayed in the same location on different screens.
5. **Help users recognise, diagnose and recover from errors.** Provide good error messages; multi-layered help.
6. **Error prevention.** Use of selection rather than data entry
7. **Recognition rather than recall.** Minimise user's memory load
8. **Flexibility and efficiency of use.** Provide shortcuts for experienced users; macros, scripts, interaction histories for command reuse and defaults
9. **Aesthetic and minimalist design.** Keep it simple. Interface should match the user's tasks and task sequences, and present the user with the **information** they need when they need it.
10. **Help and documentation.** Ideally online help should be context sensitive and paper manuals should provide task-oriented access to information.

Dix et al's Principles to support usability

A structured presentation of general principles to apply during design of an interactive system.

- **Learnability:** How easy is it to attain effective use of the system?
- **Flexibility:** How much scope is there for exchanging information in multiple, different ways?
- **Robustness:** How easy is it to evaluate whether our goals have been achieved?

Detailed Usability Principles to Test

The following will be tested from a usability perspective to make sure the proposed solution meets the needs of its intended users in accordance with Nielsen's principles.

Usability

- Ease of use
 - Is it clear how to progress through pages/modals/flows
 - Is it clear how to get help?
 - Is it clear what you should do next?
 - Is the product easy to use?
- Landing page
 - Identify and value proposition clear, positive
 - Compelling content
 - Primary navigation clear and well placed
 - Strong visual affordances
 - Speedy download
 - Gadgets
 - Is it grouped into sections
- Navigation
 - Clear, comprehensible structure
 - Works as an integrated whole
 - Provides sense of place
 - Supports frequent common tasks
 - Effective search design, placement, results
- Interaction
 - Support localisation of the interface
 - Constructive error messages
 - Provides good feedback to user actions
 - Return to home option at all steps
 - Breadcrumb
- Forms
 - Is it grouped into sections
- Presentation
 - Layout – balance of consistency and variety
 - Layout – visual complexity
 - Layout – page hierarchy
 - Layout – alignment
 - Layout – grouping
 - Colour – for attention
 - Colour – for grouping
 - Colour – for highlighting
 - Graphics – support brand
 - Graphics – provide content
 - Graphics – support layout
 - Graphics – augment navigation
 - Typology – clear type hierarchy
 - Typography - legibility

- Little need for guidance
- Errors are dealt with
- Content
 - Categorisation scheme works
 - Categories are distinctive
 - Categories are descriptive
 - Categories are balanced
 - Categories promote important content
 - Editorial style – copy is scan able
 - Editorial style – copy is summary/detail format
- Engagement
- Accessibility
- Search

Aesthetics

- Visual appearance of product
- Design appeal to users
- Is everything where you expect it to be
- Clarity of calls to action
- Clarity of proposition
- Content
 - Spelling
 - Grammar
 - Mechanics
 - Font size
 - Font colours
 - Font type
 - hyperlinking
- Navigation
- Trust
- Persuasion
- Icons
- Graphics/images
 - Image quality
 - Text layout
 - Alignment of elements
 - Colour accuracy
- Documentation

Usefulness

- Is the product useful?
- Does it have a clear purpose?

Learnability

- Is product simple to master with minimal instructions required

Emotions

- Are emotional feelings evoked in response to the product and brand positive
- Does it have a lasting impact on the user
- Does the user have a willingness to use the product

Performance

- Is the application fast at retrieving data

Processes

- Strengths of process
- Weakness of process

Functionality

- Useful to its purpose
- Aesthetically pleasing

Service

- Response times
- Reliability
- Durability
- Ease of Use
- Taste
- Shelf life
- Updates/Upgrades
- Speed
- Breakdowns
- Customer perceptions

Image and Reputation

- Image of the company
- Image of the product
- Reputation for rapid response time
- Reputation for best on the market
- Content for advertising
- Actions and words of customers
- Third party reports

Page layout

- Is product simple to master with minimal instructions required

Page flows

- Does the pages flow well

Support

- Is their help were needed and does it make sense

Mobile devices

- Responsive

Summary of experience

- Likes and dislikes

Good Form Design

The forms designer will allow the designer (user of the system) to create forms but this may not necessarily be of good form design. Therefore as part of allowing the designer (user of the system) to create the forms there must be rules to enforce good form design as primarily the end users of the system will be using these forms on a daily basis.

The challenge in designing business forms is to make a form easy to read, easy to fill out, and more attractive and unique than the forms out there.

In designing forms, some of the considerations are to make it clear the purpose of the form, provide adequate space for fill-in-the-blank areas, and make it obvious or give clear instructions as to what goes in the form and where. The forms need to be scannable, so a user does not feel overwhelmed with the form size and layout. The forms need to be grouped into sections. The use of color can enhance the form design or make it harder to read or fill in the fields.

Keep the Principles of Design in mind, especially contrast and proximity. Colored fields where data is to be entered (generally in blue or black ink) may not provide enough contrast. Putting color in the background (non-data entry area) to provide contrast, make the entry fields stand out but could also distract the user. Group related items (such as name, address, phone number) in close proximity. Use proximity and spacing to make it clear which field labels go with which fields or which checkboxes go with which item to be checked off.

Principles of Design

The principles of design primarily for page design layout can also be applied to the form design layout. It can suggest how a designer (user of the system) can best arrange the various elements of a form layout in connection to the overall design and to each other.

Commonly applied **principles of design** include:

- **Alignment:** How elements on the page line up with each other and with margins (vertical and horizontal).
- **Balance:** The distribution of elements on the page (evenly distributed with an even balance).
- **Consistency:** Adherence to the uniform use of design elements (colours, fonts size, headings, etc).
- **Contrast:** A way of emphasising parts of a layout or guiding the user eye to specific areas of the form (without creating tension with differing styles).
- **Emphasis:** Creating a focal point by making one or more elements of the design more prominent or eye-catching than the other. It could also be as the arrangement of the page components to create a focal point or visual hierarchy of dominant and subordinate elements.
- **Proximity:** When faced with random objects on a page, the user will often try to find connections. Good form design can aid users by arranging objects (form elements) into groups in order to convey meaning and help disseminate their message. This closeness of these groups is referred to as proximity. Proximity creates a bond between page elements. How close together objects are placed can suggest a relationship. Objects placed further apart can suggest differences. Avoid

overwhelming the viewer when there are a lot of individual elements on the page by using proximity to group items into discrete units.

- **Repetition:** The duplication of the same elements or styles throughout a page layout (Repeating colours, patterns, form elements and words).
- **Unity:** How well parts of the document work together.
- **White space:** The use of white space provides visual breathing space for the eye. White space is more than just large empty places on the page, it's also the overall airiness or density of the page including space between lines, text offset around graphics, size of margins, and heaviness or lightness of the fonts.
- **Grouping:** Visually arranging distinct components so that they appear as a single element.
- **Harmony:** Establishing visual agreement among elements.
- **Flow (rhythm or directional movement):** Arrangement of individual components so that they lead the eye of the reader.
- **Scale:** The use of size to establish relationships or create a focal point.
- **Focal point:** The arranging and/or sizing components to lead the eye to a specific area.
- **Hierarchy:** This creates a pecking order or visual order-of-importance of all the components of a layout.

Examples of good form design

1 Personal details and Payment

2 Completion Summary

Your Contact Information

Title *	Select title ▾
First name *	First name
Last name *	Last name
Date of birth *	DD / MM / YYYY
Home number *	inc. STD
Mobile number *	Contact number



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Address Details

Property name or number *	Enter property name or number
Postcode *	For example: RG21 Find address
Enter address manually? <input type="checkbox"/>	

Information for your Security

Email address *	Email address
Verify email *	Confirm email address
Create password *	
Confirm password *	
Memorable word *	8-15 characters

Payment Information

Card type *	Select ▾
Name (as written on card) *	
Card number *	
Expiry date *	Month ▾ Year ▾
Security code	CVV no

I confirm that I have read and agreed to the above Billing Terms and Terms & Conditions

Affinion International Limited would like to use your email address to keep you up to date with any news or updates from Safe2Go™ about your Membership. A Welcome email will be sent to you shortly detailing your policy number. We will also send you a text message with the helpline number for SentinelGold.

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Create Account »

Discovery – Research & Analysis

Current Product Evaluation

Console – Windows Publisher {add details + screenshots + process + flow}

Research

<http://www.jotform.com>

<http://www.phpform.org/formbuilder/index.php>

<https://www.cognitoforms.com/forms/build>

<https://docs.google.com/forms/>

<https://admin.typeform.com/form/274684/fields/>

<https://builder.devicemagic.com/load>

{RESEARCH MORE + INVESTIGATE EACH LINK}

Research

Brainstorming – Various page/form designers and publishers (native + web)

Identifying Form Elements

After investigating form elements, the following list represents a comprehensive list of all elements that will be considered as part of the Form Designers components:

- **Input field** (fixed, variable, read-only, disabled)
- **Text area** (text-box)
- **Checkbox**
- **Dropdown** (basic dropdown, selection dropdown, search selection dropdown)
- **Radio box** (basic, slider, toggle)
- **Error messages** (inline (field level), global)
- **Date** (input, dropdown (single, multiple), calendar (single, multiple, fixed, to-from, jquery, input -> icon -> launch))
- **Time** (input, dropdown (single, multiple), slider (time, hours, minutes, to-from, jquery))
- **Call-to-action** (buttons, submit, cancel, close, etc)
- **Phone number** (integer, area code, global code, mobile/landline) (not required)
- **Currency** (integer, decimal, currency type) (not required)
- **Image** (embedded image)
- **Label** (form element)
- **Postcode** (not required)
- **Search**
- **Attachment** (browse -> selection option)
- **Tooltip**
- **Category** (select, read-only, drill-down tree)
- **Dynamics** (forms, elements, page)
- **Tabs**
- **Data grid and Tables**
- **Pagination**
- **Progress bar** (Step 1 of 3, etc)
- **Heading** (form, section, group)
- **Hover states** (not required)
- **Designs** (font, colours, border, background, alignment, icons, mobile, tablet, desktop)
- **Warning/Info window**
- **Tags**
- **Modal Windows** (not required)
- **Boolean**
- **Accordion**

Identifying form element properties

Need to discuss this section at next meeting

Each form element will have a feature/property that is related to its control, which will be the supported functionality on how it works.

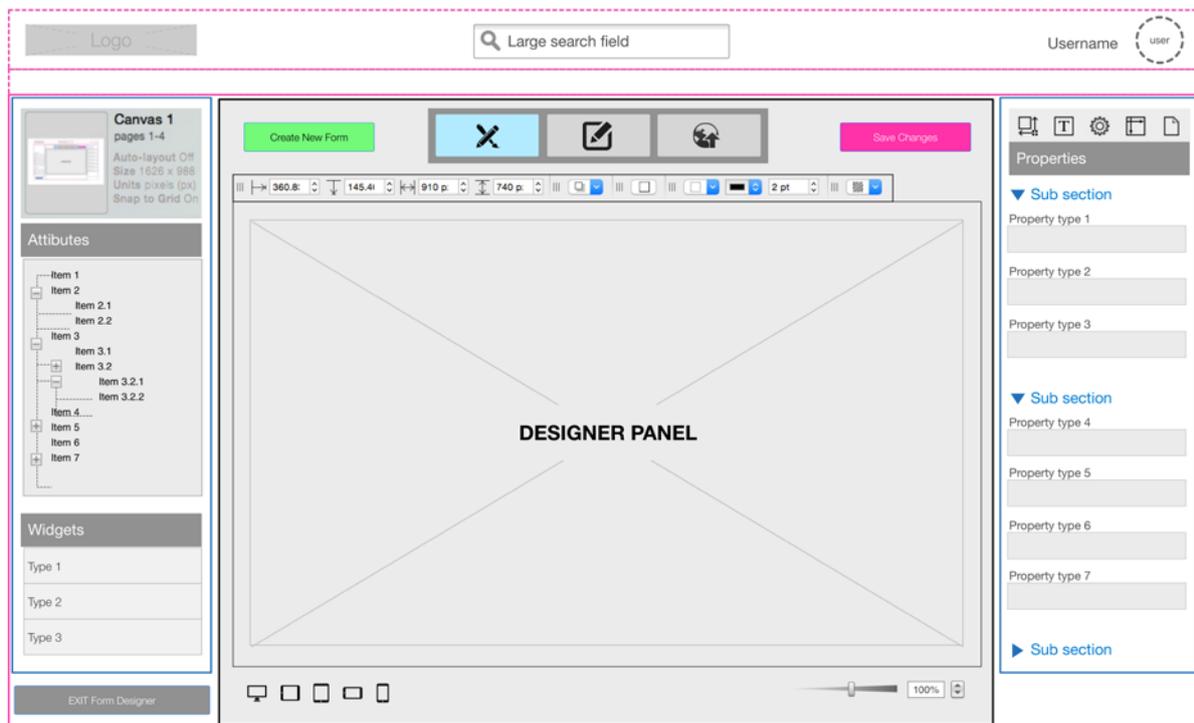
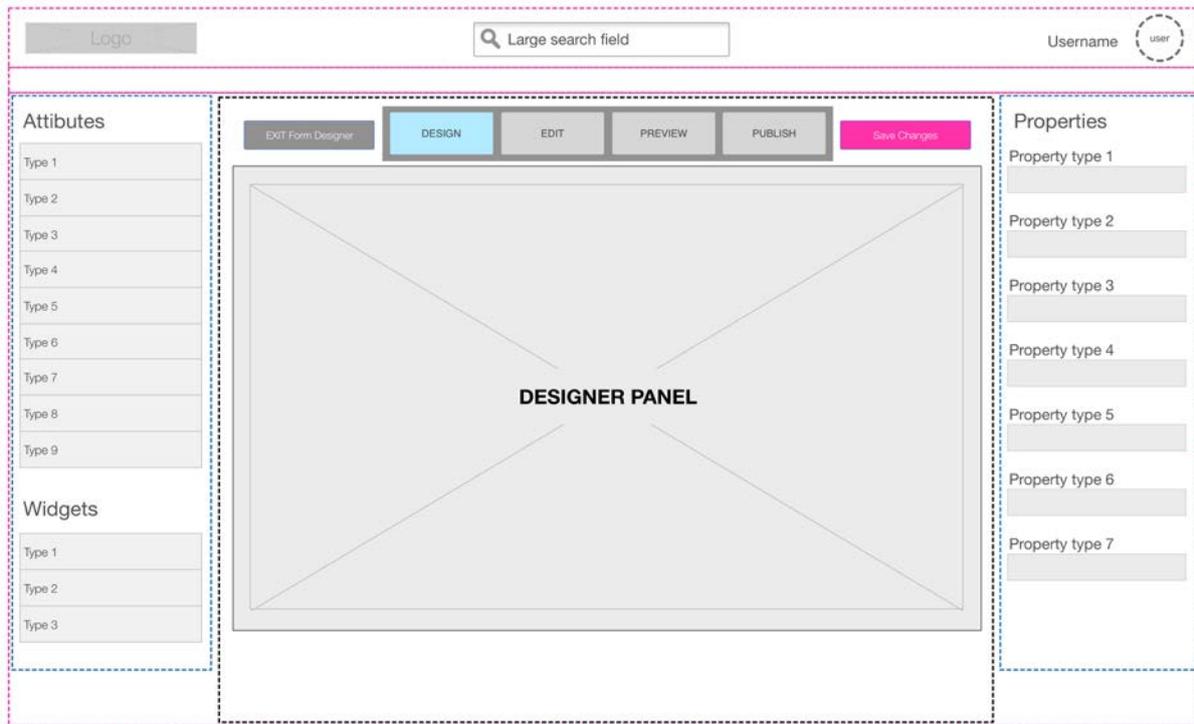
- Input -> AddressLookup
 - Control access
 - Copy to
 - Mandatory
 - Description
 - Label text
 - Label auto-size
 - Label text align
 - Label position
 - Auto search
 - Remove postcode spaces
 - Tab order
- Button
 - Control Access
 - Mandatory
 - Label text
 - Label auto-size
 - Label text align
 - Label position
 - Tab order
 - Font size
 - Font weight
 - Border type
 - Border colour
 - Border size
 - Background colour
 - Background opacity
 - Alignment
- Input -> CheckBox
 - Control Access
 - Mandatory
 - True (value)
 - False (value)
 - Description
 - Label text
 - Label auto-size
 - Label text align
 - Label position
 - Tab order
- Currency
- Decimal
- Image

- Phone
- Postcode
- Text box
- Heading
 - Sub heading
 - Font size
 - Font weight
 - Font colour
 - Header image
 - Width
 - Text alignment
 - Vertical text alignment
- Text
- Drop down
 - Label align
 - Mandatory/required
 - Options
 - SPECIAL DELIVERY visible options
 - Allow multiple
 - Width
 - Selected
 - Sub label
 - Hover text
- Radio button
-
- **{FINISH OFF}**

- **Use Cases**
- **Information Architecture**
- **User/Process Flows (Journeys)**
- **Task Flow and Need Analysis**

Conceptual Design

Wireframes



Detailed Design

Evaluate, Test, Measure and Refine

- **User Feedback**
- **Brand Relevance Testing**
- **Measuring Usability**
- **Measuring Success**

Improvements

Add results conclusion

Add recommended action to be taken

Add suggested improvements to design/layout/functionality/process

Add further investigation