PARTI & THE DESIGN SANDWICH

LUKE WROBLEWSKI
IxDA INTERACTION 2009

YAHOO! | LUKEW INTERFACE DESIGNS

Luke Wroblewski

Yahoo! Inc.
- Senior Director, Ideation & Design

LukeW Interface Designs
- Web Form Design: Filling in the Blanks (Rosenfeld Media)
- Site-Seeing: A Visual Approach to Web Usability (Wiley & Sons)
- Functioning Form: Web applications, product strategy, & interface design articles
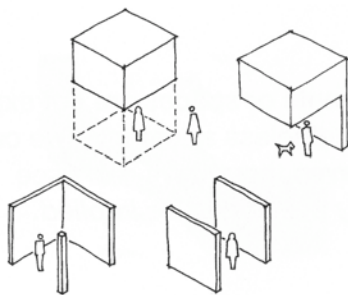
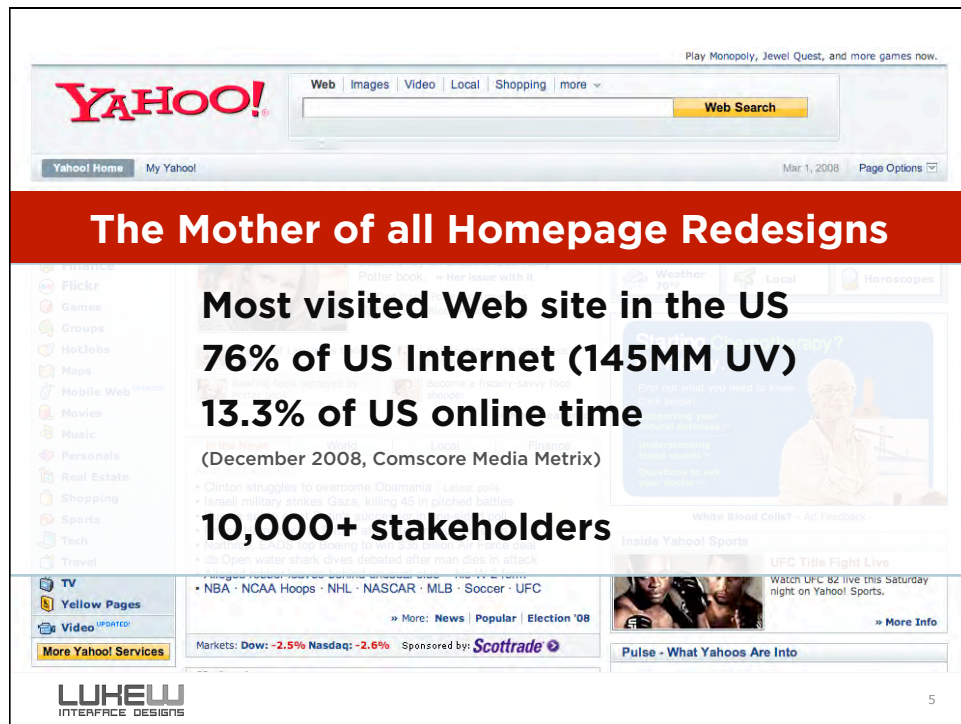**http://www.lukew.com**

LUKEW INTERFACE DESIGNS

PROCESS
METHODOLOGY
DEFINING UX

A STRUCTURE FOR GETTING TO A HOLISTIC DESIGN

DESIGN PATTERNS
BEST PRACTICES
DESIGN PRINCIPLES
PRODUCT VISION
DESIGN DECISIONS

The Mother of all Homepage Redesigns

Most visited Web site in the US
76% of US Internet (145MM UV)
13.3% of US online time
(December 2008, Comscore Media Metrix)

10,000+ stakeholders

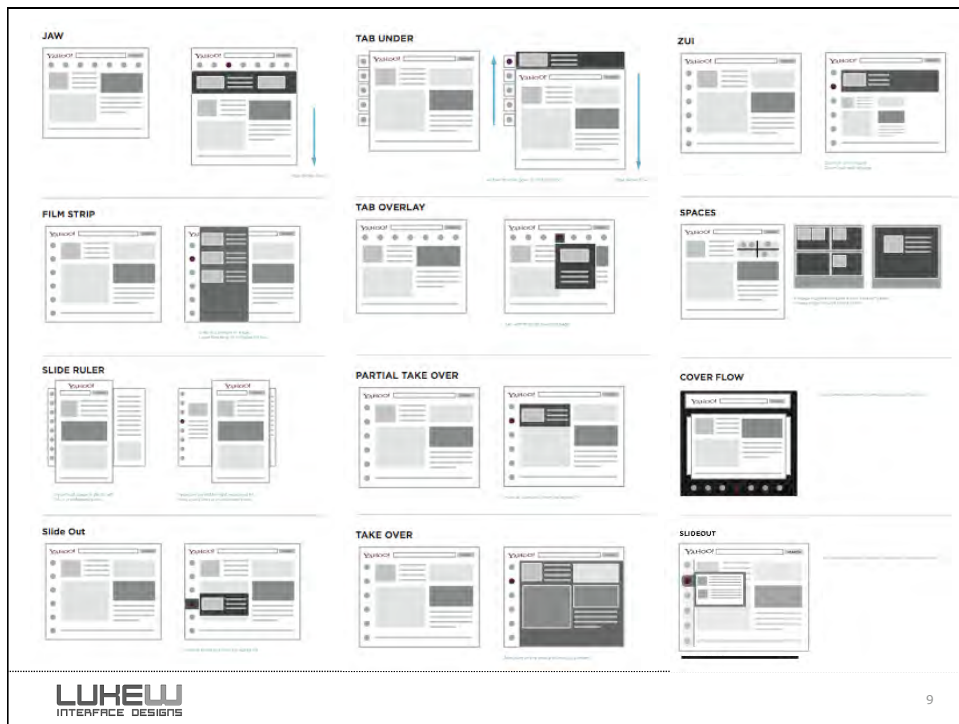101 Things I Learned in Architecture School
Matthew Frederick

"A parti is the central idea or concept of a building."

"A parti can be expressed several ways but it is most often expressed by a diagram depicting the general floor-plan organization of a building and, by implication, its experiential and aesthetic sensibility."

Odd shapes intrude on "pure" space

Finger poking into the woods

L's in conflict

Box subtracted

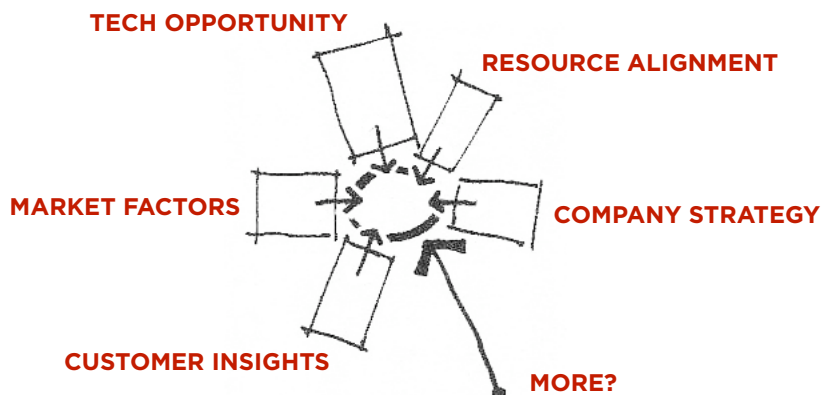Core segregates public-private

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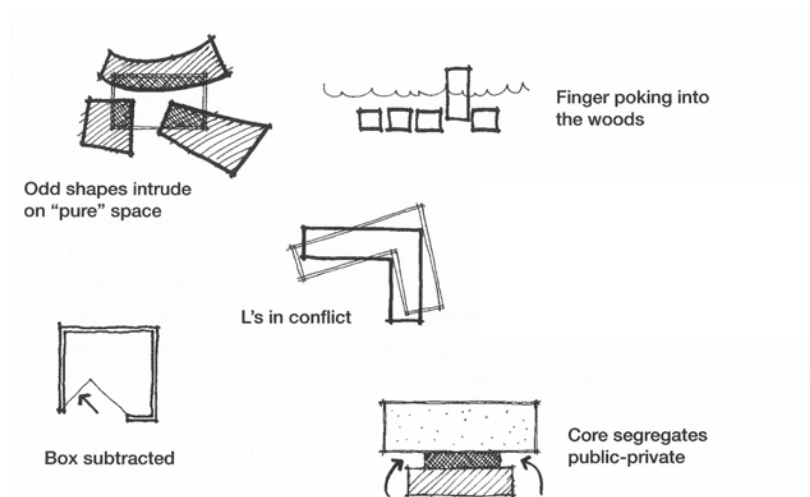
So how do you get to a parti?

"The design process is the struggle to create a uniquely appropriate parti for a project."

"Parti derives from understandings that are non-architectural and must be cultivated before architectural form can be born."

"At its most ambitious, parti derives from matters more transcendent than mere architecture."

"Parti derives from…"

TECH OPPORTUNITY

RESOURCE ALIGNMENT

MARKET FACTORS

COMPANY STRATEGY

CUSTOMER INSIGHTS

MORE?

"Parti derives from..."

USAGE METRICS
CUSTOMER FEEDBACK
MARKET TRENDS
CORPORATE STRATEGY
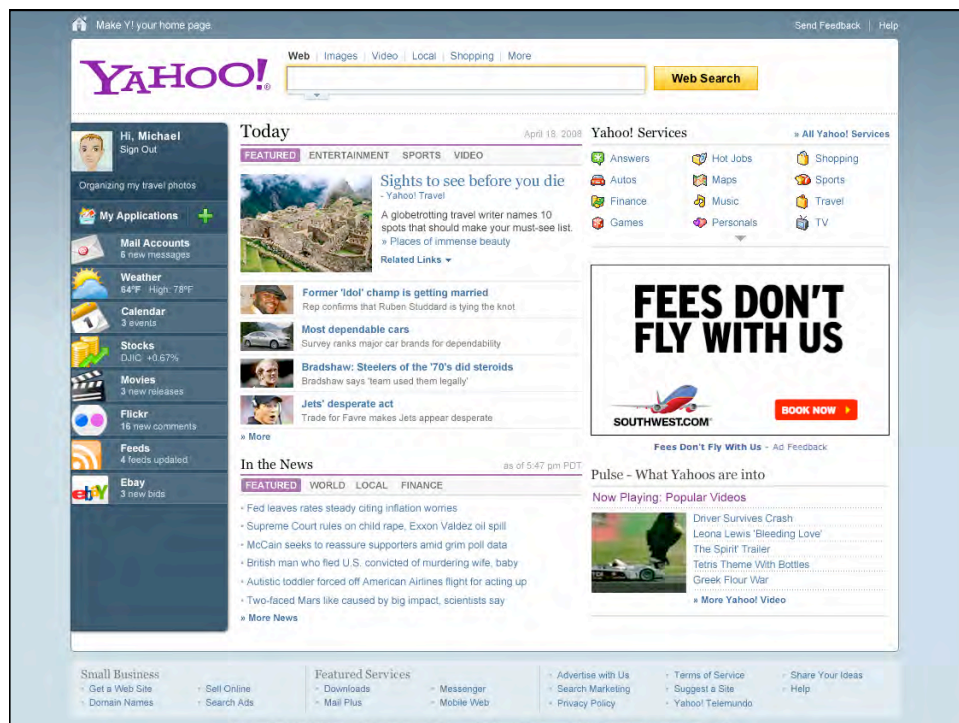REVENUE OBJECTIVES
CONCEPT TESTING

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"The dashboard for what you love on the Web."

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"A parti diagram can describe [many] concerns. The portion of attention given to each factor varies from project to project. "

Dock floats at left of screen.
Dock expands as overlay to expose modules.

LUKEW
INTERFACE DESIGNS

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PARTI
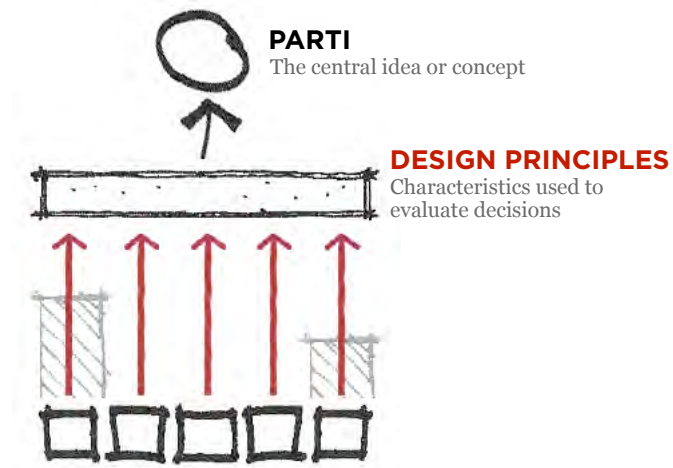The central idea or concept

The New York Times

""We are fundamentally changing the front page into a dashboard for the Web." -Tapan Bhat, SVP Yahoo! Inc.

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"Use your parti as a guidepost in designing the many aspects of a building."

"When designing a stair, window, column, roof, lobby, or any other aspect of a building, always consider how its design can express and reinforce the essential idea of the building."

101 Things I Learned
in Architecture School
Matthew Frederick

PARTI
The central idea or concept

DESIGN PRINCIPLES
Characteristics used to evaluate decisions

DESIGN PRINCIPLES
Key characteristics to evaluate decisions

ENHANCE THE CORE
• Align with primary behaviors

CHECK-IN BEHAVIOR
• Give people a reason to return
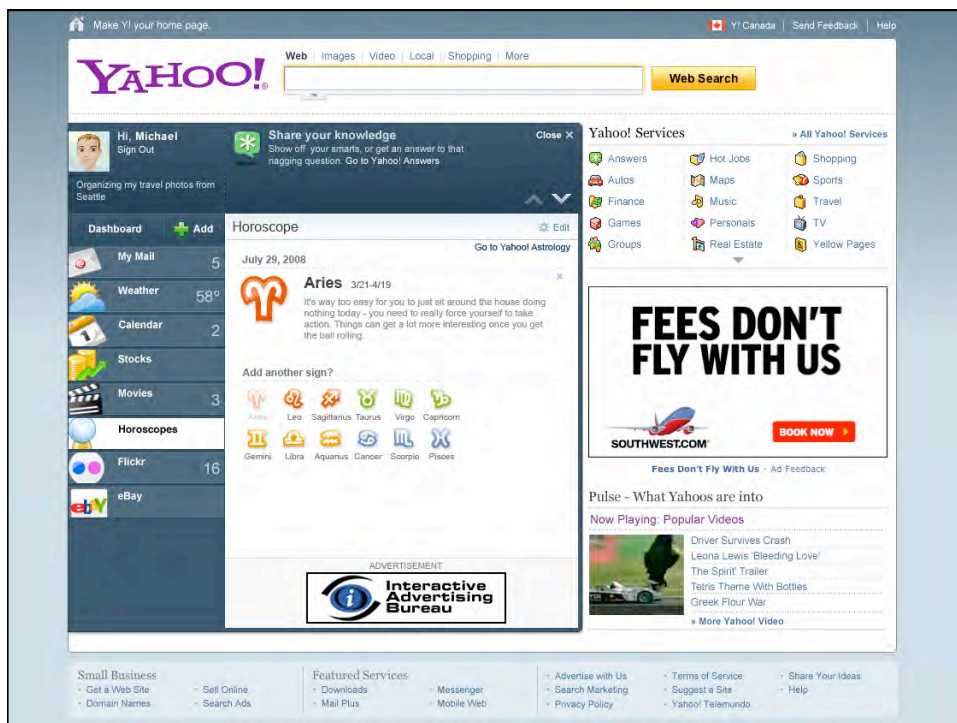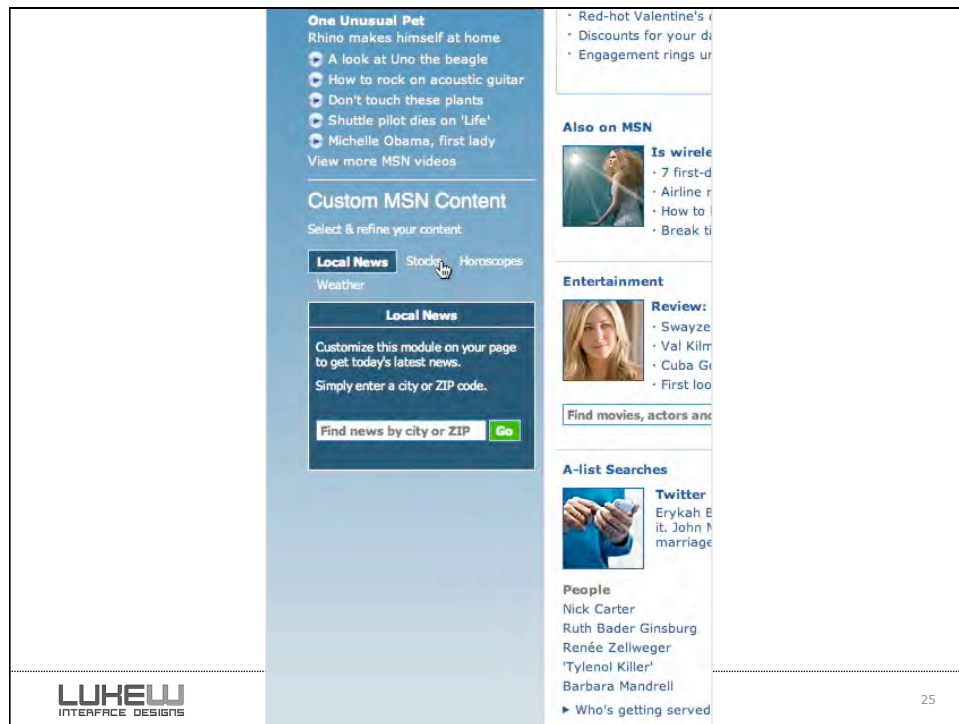• Snack-sized updates
• Communicate quickly

IMMEDIATE ENGAGEMENT
• Lightweight interactions
• Minimum set-up
• Success up front

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INTERFACE DESIGNS

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DESIGN TENENTS FOR MICROSOFT OFFICE

"Design Tenets have to be religion" –Jensen Harris, Microsoft

- A person's focus should be on their content, not on the UI.
- Reduce the number of choices presented at any given time.
- Increase efficiency.
- Embrace consistency, but not homogeneity.
- Give features a permanent home.
- Straightforward is better than clever

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DESIGN TENENTS FOR MICROSOFT OFFICE
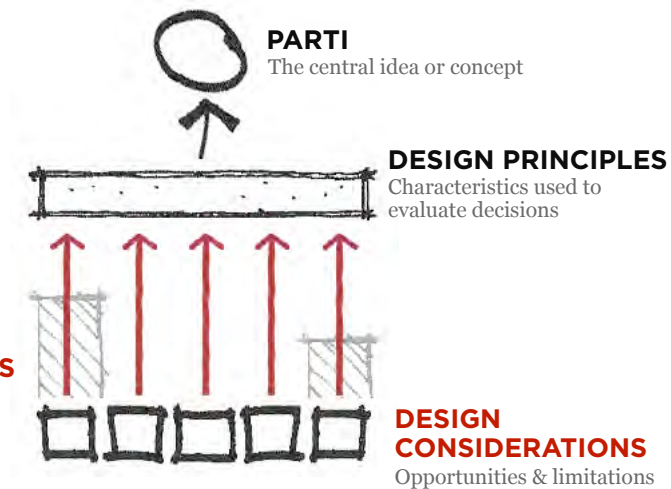"Design Tenets have to be religion" –Jensen Harris, Microsoft
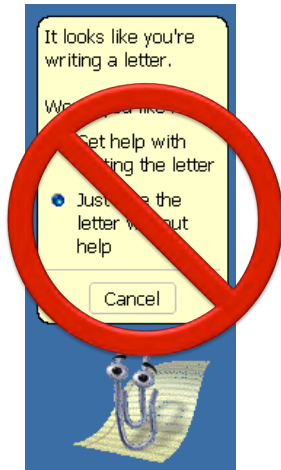
- Someone has a great idea

- Take the idea and validate it against design tenets: "straightforward is better than clever"

PARTI
The central idea or concept

DESIGN PRINCIPLES
Characteristics used to evaluate decisions

PATTERNS & BEST PRACTICES

DESIGN CONSIDERATIONS
Opportunities & limitations

DESIGN PATTERNS

Web Design patterns

Site Types
- Artist Site
- Automotive Site
- Branded Promo Site
- Campaign Site
- Commerce Site
- Community Site
- Corporate Site
- Multinational Site
- Museum Site
- My Site
- News Site
- Portal
- Web-based Application

User Experiences
- Community Building
- Fun
- Information Seeking
- Learning
- Shopping

Navigation
- Bread crumbs
- Directory
- Doormat Navigation
- Double tab
- Faceted Navigation
- Fly-out Menu
- Header-less Menu
- Icon Menu
- Image Browser
- Main Navigation
- Map Navigator
- Meta Navigation
- Minesweeping
- Overlay Menu
- Repeated Menu
- Retractable Menu
- Scrolling Menu
- Shortcut Box
- Split Navigation
- Teaser Menu
- Trail Menu

Searching
- Advanced Search
- FAQ
- Help Wizard
- Country Selector
- Search Area
- Search Tips
- Search Results
- Simple Search
- Site Index
- Site Map
- Topic Pages

Managing Collections
- Collector
- In-place Replacement
- List builder
- List Sorter
- Overview by Detail
- Parts Selector
- Table Filter
- Table Sorter
- View

Page Elements
- Customizable Window
- Constrained Input
- Country Selector
- Date Selector
- Details on Demand
- Footer Bar
- Forum
- Home Link
- Hotlist
- Language Selector
- Message Ratings
- News box
- News ticker
- Outgoing Links
- Poll
- Send-a-Friend Link
- Thumbnail
- To-the-top Link

USER NEEDS TO

▼ NAVIGATE
- Breadcrumbs
- ▶ Faceted Navigation
- Fly-out Menus
- Horizontal Bar
- Hub and Spoke
- Left Navigation
- ▼ Links
  - Alphanumeric Filter Links
- ▼ Tabs
  - Module Tabs
  - Navigation Tabs
▼ EXPLORE DATA
- Auto Complete
- Calendar Picker
- ▼ Pagination
  - Item Pagination
  - Search Pagination
▶ ORGANIZE DATA
▼ GIVE FEEDBACK
- ▼ Ratings & Reviews
  - Architecture Review
  - Rating an Object
  - Writing a Review
▶ PERFORM ACTION
▼ CUSTOMIZE
- ▼ Drag and Drop
  - Drag and Drop Modules
  - Drag and Drop Objects
- ▶ In Page Editing
- Sliders

APPLICATION NEEDS TO

▼ CALL ATTENTION
- ▶ Help
- ▼ Invitation
  - Cursor Invitation
  - Drop Invitation
  - Tool Tip Invitation
  - Hover Invitation
- Jump to Details
- Progress Indication
- ▼ Transition
  - Animate
  - Brighten
  - Collapse
  - Cross Fade
  - Dim
  - Expand
  - Fade In
  - Fade Out
  - Self-Healing
  - Slide
  - Spotlight
▼ IMPROVE READABILITY
- ▼ Ratings & Reviews
  - Review Architecture
▶ GROUP RELATED ITEMS
▼ ORGANIZE SCREEN/PAGE
- Page Grids
- ▶ Interface Panes
- Page Layout

Designing Interfaces
Patterns for Effective Interaction Design

Overview
- About the Book
- Introduction
- About Patterns

Organizing the Content
- Two-Panel Selector
- One-Window Drilldown
- Wizard
- Extras On Demand
- Intriguing Branches

Getting Around
- Clear Entry Points
- Global Navigation
- Color-Coded Sections
- Animated Transition

Organizing the Page
- Visual Framework
- Center Stage
- Titled Sections
- Card Stack
- Closable Panels
- Movable Panels
- Diagonal Balance
- Responsive Disclosure
- Responsive Enabling
- Liquid Layout

Commands and Actions
- Action Panel
- Smart Menu Items
- Progress Indicator
- Multi-Level Undo
- Command History

Showing Complex Data
- Overview Plus Detail
- Row Striping
- Sortable Table
- Jump to Item
- Cascading Lists
- Tree-Table

Getting Input From Users
- Forgiving Format
- Fill-in-the-Blanks
- Input Hints
- Input Prompt
- Dropdown Chooser
- Illustrated Choices
- Good Defaults

Builders and Editors
- Edit-in-Place
- Smart Selection
- Composite Selection
- One-Off Mode
- Constrained Resize

Making It Look Good
- Deep Background
- Few Hues Many Values

Interaction Patterns

Interaction Patterns

⊟ **User**
- ⊞ needs to navigate
- ⊞ needs to enter
- ⊞ needs to explore data that
- ⊞ needs guidance/feedback
- ⊞ needs to manipulate an ob
- ⊞ needs to issue a command
- ⊞ needs to customize
- ⊞ needs to organize information structure
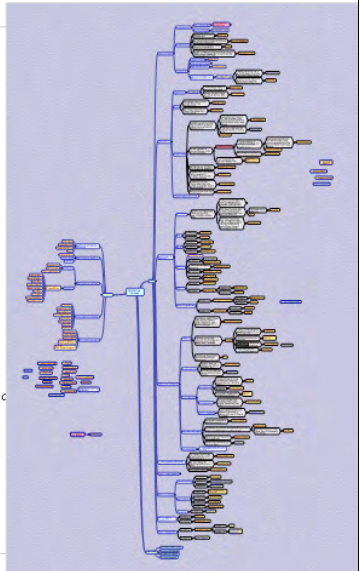- ⊞ needs to compare data

⊟ **Designer**
- ⊞ needs to call out importan
- ⊞ needs to improve readabil
- ⊞ needs to group related iter
- ⊞ needs to organize screen/
- ⊞ has limited screen space

Interaction Patterns

⊟ **User**
- ⊟ needs to navigate
  - ⊟ through a process
    - ⊟ that is step-by-step
      - ⊟ Process Workflow (Step-by-Step)
        - ⊟ use when the steps are on different pages/screens
          - ⊟ if a desktop application
            - Wizard
          - ⊟ if a web site or web application
            - Process Bar
        - ⊟ use when all of the steps are on a single page
          - ⊟ and the steps are disclosed piece by piece
            - Progressive Disclosure
          - ⊟ and all steps are shown at once on the page
            - *List of Steps
        - ⊟ use when you need to guide the user through a series c
          - *Trouble Shooter
      - ⊞ that is automated
  - ⊞ through content
  - ⊞ around a site
- ⊞ needs to enter
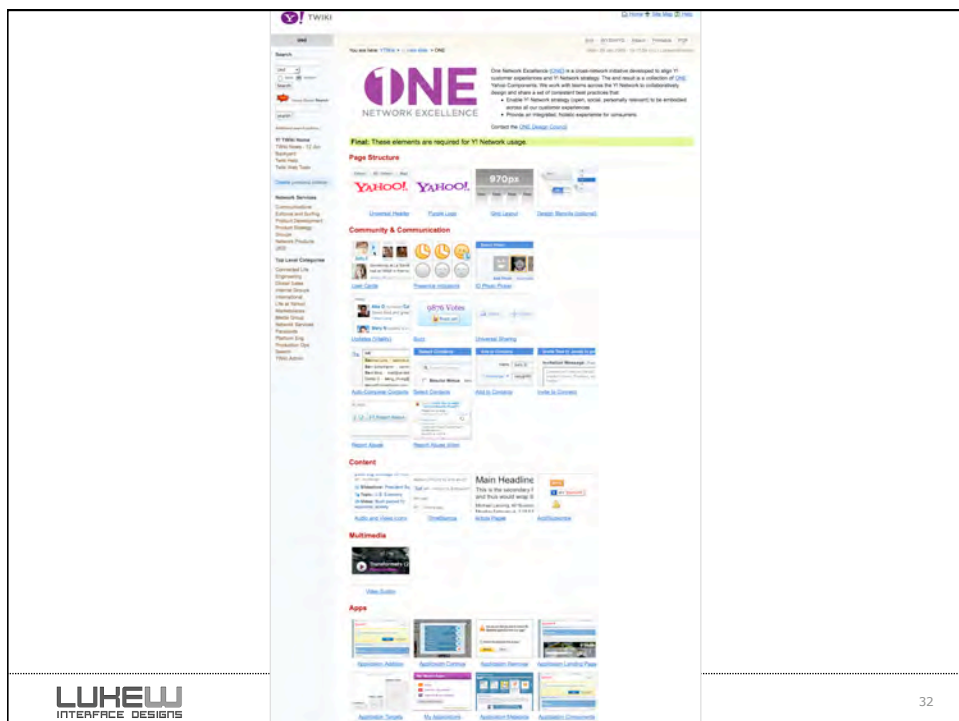- ⊞ needs to explore data that is
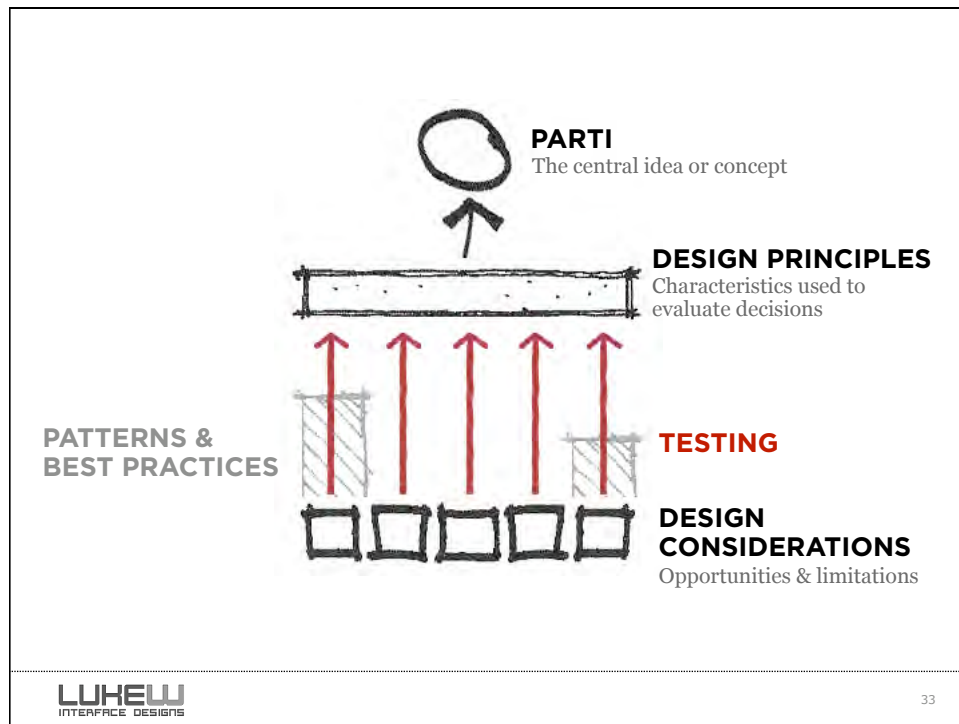- ⊞ needs guidance/feedback

BILL SCOTT, MIND MAPPING PATTERNS

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INTERFACE DESIGNS

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PARTI
The central idea or concept

DESIGN PRINCIPLES
Characteristics used to
evaluate decisions

**PATTERNS &
BEST PRACTICES**

TESTING

**DESIGN
CONSIDERATIONS**
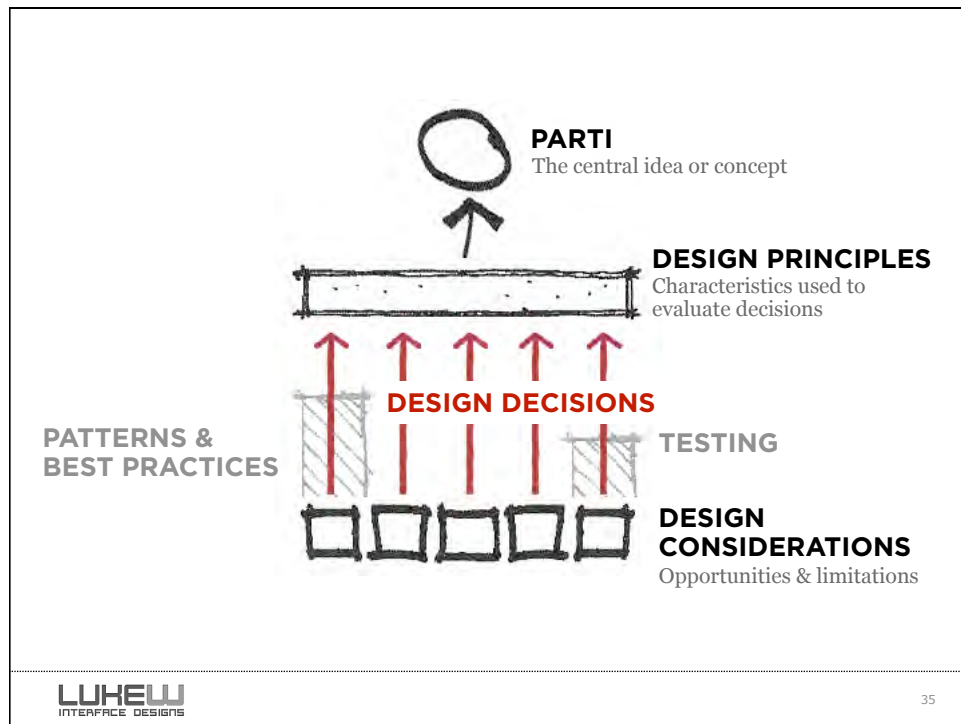Opportunities & limitations

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TESTING

- **Usability**
  - Errors, issues, assists, completion rates, time spent per task, satisfaction scores
- **Field**
  - Sources used, environment, context
- **Customer Support**
  - Top problems, number of incidents
- **Web Conventions**
  - Common solutions, unique approaches
- **Site Tracking**
  - Completion rates, entry points, exit points, elements utilized, data entered
- **Eye Tracking**
  - Number of eye fixations, length of fixations, heat maps, scan paths

PARTI
The central idea or concept

DESIGN PRINCIPLES
Characteristics used to
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DESIGN DECISIONS

**PATTERNS &
BEST PRACTICES**

TESTING

**DESIGN
CONSIDERATIONS**
Opportunities & limitations

INFORMED DECISION-MAKING

"In all situations where bad design decisions
were made, people lacked some information
that would have helped them make the right
decision." –Jared Spool, 2008

PHOTO BY KEN_LAY

So that all the decisions we make support the central idea we want to bring to life...

... as a holistic design!

PARTI
The central idea or concept

We evaluate our solutions by passing them through a filter of design principles

DESIGN PRINCIPLES
Characteristics used to evaluate decisions

We make use of patterns, best practices, and testing to help guide us toward solutions

DESIGN DECISIONS

PATTERNS & BEST PRACTICES

TESTING

We consider all relevant factors: technology, context, audience, etc.

DESIGN CONSIDERATIONS
Opportunities & limitations

WEB FORM DESIGN
Filling in the Blanks
by LUKE WROBLEWSKI foreword by Jared Spool

Rosenfeld
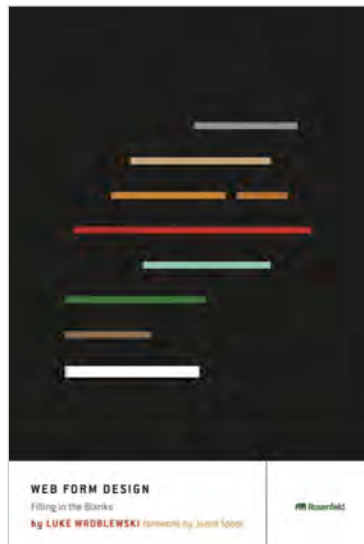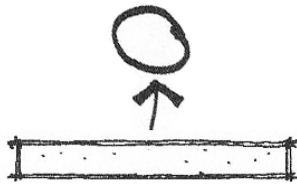
"Fast and effective Web forms"

Minimize the Pain
Illuminate a Path to Completion
Consider the Context
Ensure Consistent Communication

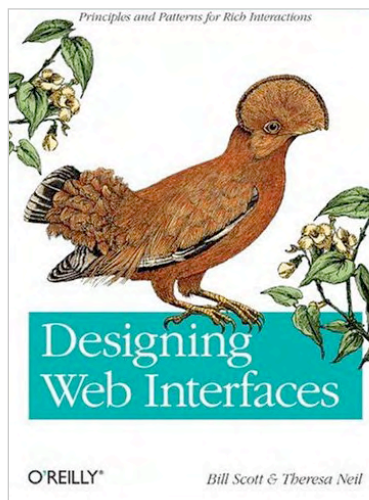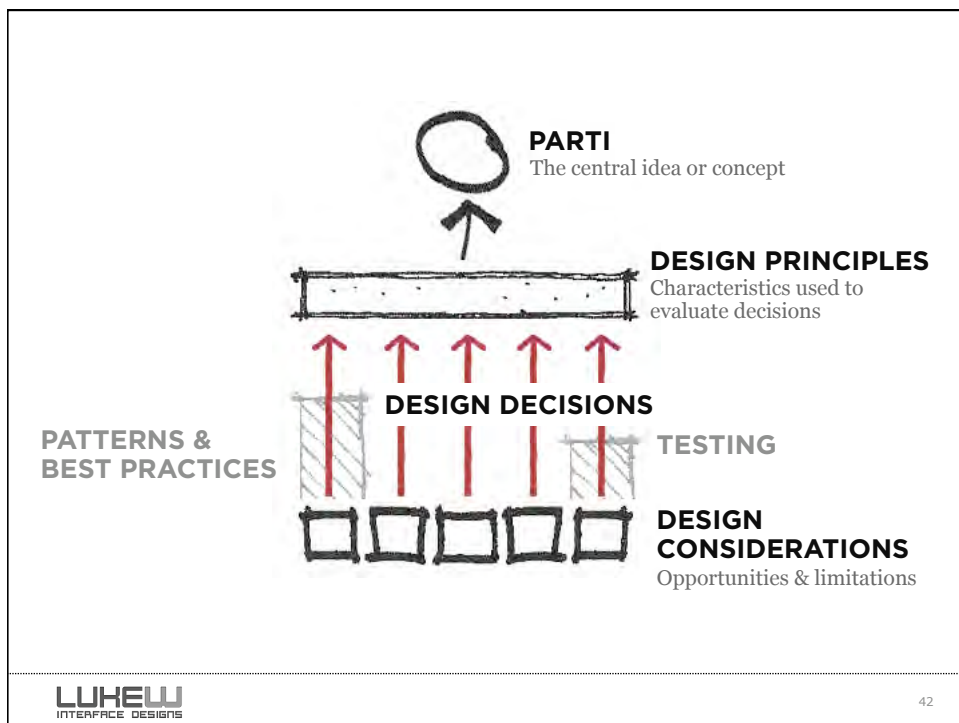|	
Label alignment	Agree and submit
Top-aligned labels	Automatic inline help
Right-aligned labels	User-activated inline help
Left-aligned labels	User-activated section help
Labels within inputs	Secure transactions
Mixed alignments	Errors
Input fields	Success
Field lengths	Inline validation
Required fields	Confirmation
Input groups	Suggestions
Flexible inputs	Unnecessary inputs
Primary and secondary actions	Smart defaults
Actions in progress	Personalized defaults

"Rich Web Interactions"

Make it Direct — Keep it Lightweight — Stay on the Page — Provide an Invitation — Use Transitions

Single Field Inline Edit — Editing a single line of text in-context.
Multi-Field Inline Edit — Editing more complex information in-context.
Overlay Edit — Editing in an overlay panel.
Table Edit — Editing items in a grid.

Drag and Drop Modules — Rearranging modules on a page.
Drag and Drop List — Rearranging lists.
Drag and Drop Object — Changing relationships between objects.
Drag and Drop Action — Invoking actions on a dropped object.

PARTI
The central idea or concept

DESIGN PRINCIPLES
Characteristics used to evaluate decisions

DESIGN DECISIONS

PATTERNS & BEST PRACTICES

TESTING

**DESIGN CONSIDERATIONS**
Opportunities & limitations

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"As the design process advances, complications inevitably arise –fluctuating clients requests, ..., new understandings of old information, and much more."

"A poor designer will attempt to hold onto a failed parti and patch local fixes onto the problem areas, thus losing the integrity of the whole. But a good designer understands the erosion of a parti as a helpful indication of where a project needs to go next."
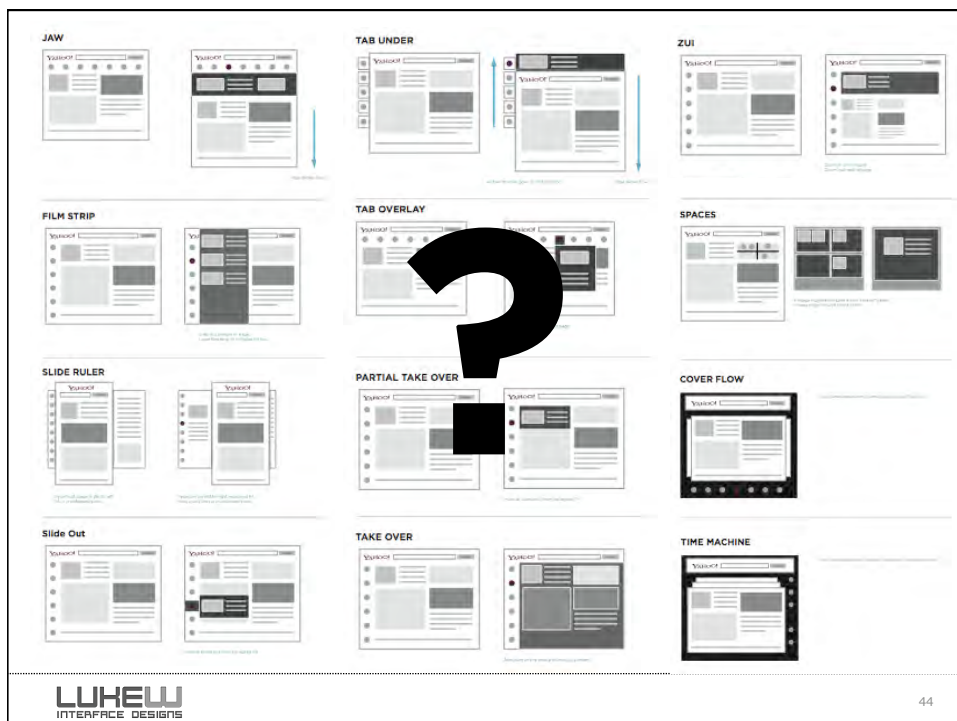
"When complications in the design process ruin your scheme, change –or if necessary abandon –your parti. But don't abandon the idea of having a parti, and don't dig in tenaciously in defense of a scheme that no longer works. Create another parti that holistically incorporates all that you know about the building."

PARTI & THE DESIGN SANDWICH

- A structure for informed (not subjective) design decisions that guides teams towards a holistic solution
- Parti is the central idea
  - Expressed as a diagram depicting general organization and experiential sensibility
  - Should focus on the elements that are specific to a project
- Design sandwich
  - Design principles: filters for decisions
  - Design considerations: factors you learn about and weigh when considering options
  - The middle is where decisions about the design happen
  - Patterns, best practices, and testing can inform decisions
- Change is ok but don't give up on having a parti

FOR MORE INFORMATION...

- **Functioning Form**
  - www.lukew.com/ff/
- **Web Form Design**
  - www.rosenfeldmedia.com/books/webforms/
- **Drop me a note**
  - luke@lukew.com