Mobius Management Systems

User Interface Style Guide

Messages

Draft – Jim Hoekema

The following are proposal User Interface Design guidelines for the layout and contents of on-screen user messages and dialogs. The guidelines are intended as a standard for all Mobius software.

This revised draft reflects responses from all internal reviews.

The goals of these standards in messages are to assure:

- Optimum clarity and ease of use for customers
- Sufficient information for Customer Satisfaction
- Reasonable efficiency for Development and Information Development.

Sources

The Mobius standards derive largely from the Microsoft User Interface standards for Windows applications – specifically, the *Official Guidelines for User Interface Developers and Designers*, which can be viewed at:
http://msdn.microsoft.com/library/default.asp?URL=/library/books/winguide/ch00a.htm
A supplementary source is the Java Look and Feel Guidelines published by Sun:
http://java.sun.com/products/jlf/ed2/book/

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A. Window Layout

A Message appears in a "secondary window." Following Microsoft guidelines, a secondary window has several characteristics:

- Includes a title bar, with an "X" to close the window
- Can be moved (by dragging the title bar)
- Does not include Minimize and Maximize controls
- Typically modal (must be dismissed before user can continue)
- Smaller than the primary window
- Smaller than the minimum display resolution

Avoid making message panels too wide, as in Fig. 1. Microsoft defines the maximum size of a message window as 263 x 263 dialog units, where a dialog unit (DLU) is based on the size of the current system font. In other words, messages appear in a secondary window occupying less than half the width of the screen (see Fig. 2).

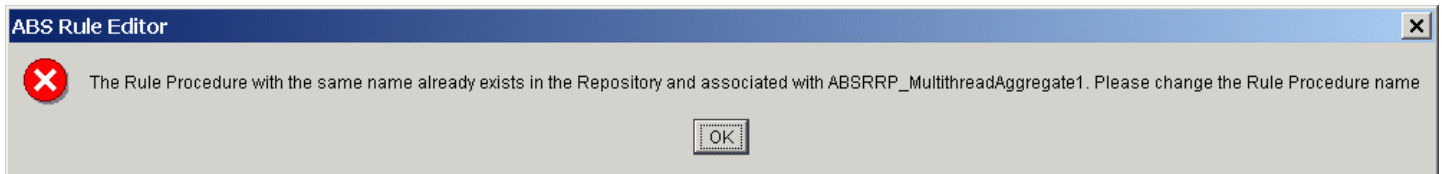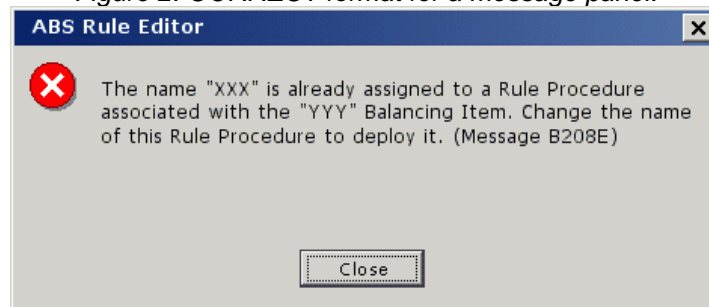*Figure 1. WRONG format for a message (too wide).*

Figure 2. CORRECT format for a message panel.

B. Text Design

Standards for the default system font are as follows:

"The default system font is a key element in the presentation of visual information. The default font used for interface elements in the U.S. releases of Windows 98 and Windows NT 4.0 is MS Sans Serif 8 point. For applications that will run on Windows 2000, it is recommended you use Tahoma 8 point. For compatibility reasons, this font is not set by default in Windows 2000; you must explicitly select it. The Tahoma 8-point font offers improved readability and globalization support; in Windows 2000, it is the default font used by most of the interface elements in the operating system." [Microsoft]

(Note that users have the ability to change the size of the system font.)

Margins and the spacing among elements – paragraphs, controls, borders, etc. – also follow Microsoft standards. For details, see: http://msdn.microsoft.com/library/default.asp?url=/library/en-us/dnwue/html/part3.asp

As a reminder, note that the guidelines govern the alignment and grouping of elements, the sizes of buttons and fields, and the spacing between elements. The following is a typical illustration from this section of the standard Microsoft guide:

Figure 3. Grouping, Alignment and Spacing in the Windows Guidelines
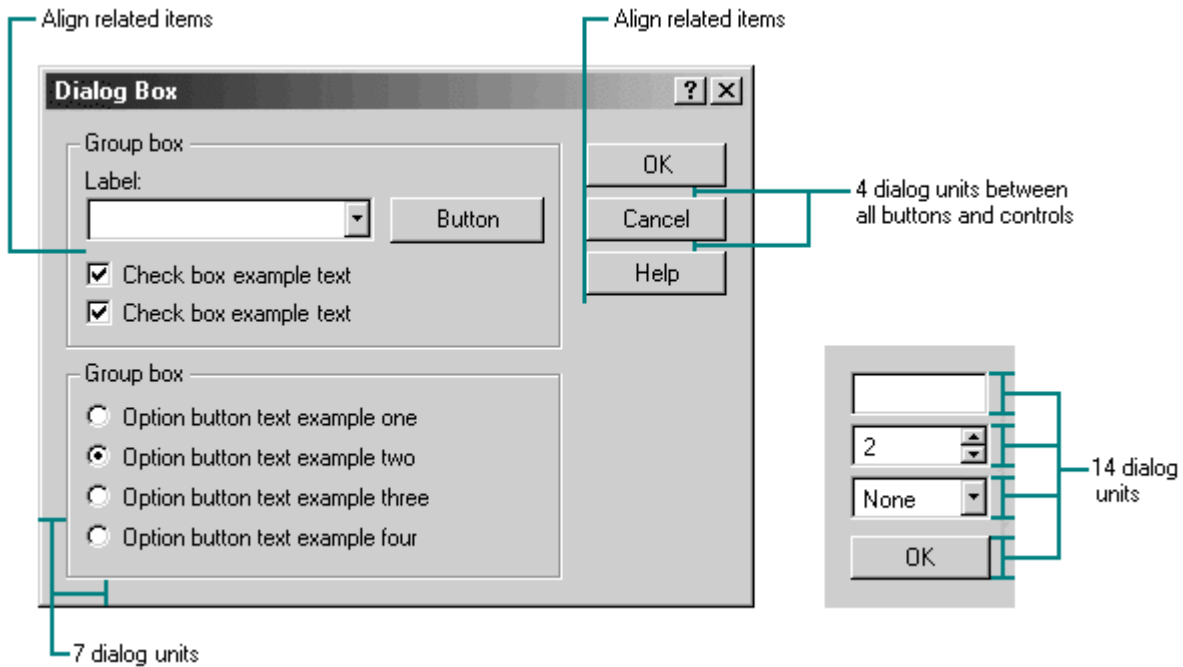
C. Message Contents

All messages interrupt a task to do one of three things: warn them of the consequences of proceeding, report an error condition, or provide some important, timely information. There are thus three types of messages:

- warning
- error
- confirmation dialog

All messages consist of the following elements:

- Title
- Symbol
- Message text
- Message ID
- Command button(s)

The sections below describe the standards for each element of the error message.

1. Title Bar Text

The text in the title bar should identify the source of the message. Following the Java guideline (rather than Microsoft), Mobius message panels should display the Product Component and the Product Name, separated by an n-dash. The following are samples of title bar text for Mobius products:

- Rule Editor – ViewDirect-ABS
- Policy Editor – ViewDirect for Networks
- Archive Creator – ViewDirect for Networks
- HTML Editor – ViewDirect Contenuity
- Content Administration – ViewDirect Contenuity [?]
- Enterprise Explorer – DocumentDirect for the Internet

Note that the product **version** number is **not** included in the title bar.

The component identified in messages should be one that is **known** to the user – that is, explained in the overall description of the product architecture.

Title Bar Text Style.

Use "book title" capitalization for title bar text: Capitalize first and last words, and all major words, but not articles or short words. Do not use a period.

RIGHT	WRONG
Policy Editor – ViewDirect for Networks	Policy editor – ViewDirect for networks

2. Message Symbol

Most Mobius products return 5 classes of error messages:

Code	Explanation
I	Informational
W	Warning
X	Exception
E	Error
D	Disaster

These classes are mapped onto three classes of error messages in the UI standard:

Symbol	Message Type	Description
	Information	Provides information about the results of a command. Offers no user choices; the user acknowledges the message by clicking the "Close" button.
	Warning	Alerts the user to a condition or situation that requires the user's decision and input before proceeding, such as an impending action with potentially destructive, irreversible consequences. The message may actually be a dialog, allowing users to select between OK or Cancel, Save or Delete, Yes or No, etc.
	Critical	Informs the user of a serious problem – Exception, Error or Disaster -- that requires intervention or correction before work can continue. User typically dismisses the message by clicking the "Close" button.

In addition, software products should add a new class for confirmation dialogs, which are messages that ask for user input before continuing (as is "Replace file of the same name?").

Code	Explanation
C	Confirmation

This code is to be used for dialogs requiring user confirmation, typically with options such as **OK** and **Cancel**, or **Yes** and **No**, and the like.

3. Message Text - Format

Standards for formatting message text can be found in the Microsoft and Java guidelines, and other sources. Below are reminders of a few

- ▪ Write error messages as complete sentences: capitalize the first word of each sentence, and end each sentence (each complete thought) with a period. Do not capitalize other words in the message unless they are proper terms capitalized throughout the interface and the documentation.

RIGHT	WRONG
The routine "Multi_Aggr34" is already associated with the file "Boffo34." Rename the routine to continue.	Routine "Multi_Aggr34" already associated with File "Boffo34." Rename Routine to continue

- ▪ Display messages in flush left, ragged-right (non-justified) style.
- ▪ Do not use hyphens to break words between lines.
- ▪ When appropriate, break lines for sense (that is, start a new sentence on a new line).

C. Message Text - Content

The following are guidelines for the content of error messages:

- ▪ For error messages, describe the problem specifically, completely, yet concisely:

RIGHT	WRONG
The disk is full.	File Error

- ▪ The ideal error message includes (a) description of the problem, (b) its probable cause (if known), and (c) what the user can do about – no matter how obvious the solution.

RIGHT	WRONG
There is not enough disk space to save this file. Free additional space on this disk, or save the file to a different disk.	Insufficient disk space.

- ▪ A message should be no longer than 3 sentences or about 100 words. (Yes, the demands of completeness and brevity conflict, but both are important!)

- ▪ The error message should include as specific as possible a reference to the cause of the error message. This may include repeating a menu selection just made, a command or function just invoked, or text string just entered by the user.

RIGHT	WRONG
The name 'ExpRpt' already exists.	Name already assigned.

- ▪ Do not blame the user.

RIGHT	WRONG
The program is unable to recognize that command.	Invalid command.

- ▪ Do not use the first person for the program or system; use the third person instead.

RIGHT	WRONG
The field requires at least six characters.	I need at least six characters.

▪ When possible, present a solution as a dialog in the message.

RIGHT	WRONG
Replace existing file ExpReports04.xls?" OK Cancel	Name already exists. OK

▪ Do not use the exclamation mark (!).

RIGHT	WRONG
The disk is full.	The disk is full!

4. Message ID

Most messages are intended give end users enough information to solve any immediate problem and carry on without additional assistance. When this is not possible, end users require additional help. Generally, as a first step, end users consult the **administrator** (which may be a Mobius customer acting as a consulting to the end user). In some cases, administrators may also consult Mobius Customer Support.

The Message ID number associated with message displayed to users is intended to help administrators solve user problems, and to help Mobius support teams solve problems raised by end users or administrators.

Message ID codes follow start with a letter for the product (e.g., "B" for VDR-ABS), following by a sequential number, and then another letter corresponding to the message class (Informational, Warning, Exception, Error, Disaster – and now Confirmation). For example, in the message ID "B148W," the "B" refers to ABS, while the "W" means the message is a Warning.

To avoid interrupting the user's ability to read a message quickly, place the Message ID **on a separate line, below the message** (not at the beginning, as we do today).

RIGHT	WRONG
A Rule Procedure "Multi_Aggr34" already exists. It is associated with the "Surplus12" Balancing Item. Rename the Rule Procedure to deploy it. Message B208E	B208E- A Rule Procedure "Multi_Aggr34" already exists. It is associated with the "Surplus12" Balancing Item. Rename the Rule Procedure to deploy it.

5. Command Buttons

User commands or options appear in buttons at the bottom of the panel, following well-established visual and typographic conventions. In addition, please observe the following:

▪ Controls or command buttons on message windows should be centered.

▪ When a message does not present a choice, and user's only interaction is to dismiss the message, use **Close** rather than OK. (Users sometimes deride being asked to say "OK" after being informed of an impending disaster.)

▪ When presenting choices, use **OK** and **Cancel** when users have the option to continue or stop an action that is in progress.

▪ Use **Yes** and **No** when or other explicit options such as **Delete** or **Deploy** when a choice must be made before any continuation can take place. In general, be as specific as possible.