

Citi Global Wealth Management User Interface Guidelines

Version 1.1

Published: February 29, 2008

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1. Overview

Introduction

Purpose of this guide

This guide is intended for designers, developers, information architects and content developers building or enhancing any of the Global Wealth Management browser-based applications or Web sites.

The rules and examples in this guide provide direction for establishing standardized behavior and a unified look to all Global Wealth Management online properties. This guide is a living document and will be updated as new needs are discovered.

Organization

The guidelines incorporate sections on general usage and common functions, followed by appendices. Within sections, structural blueprints precede look and feel specifications. Widely-used features, not covered in the general usage section, appear under Common Functions. Appendices provide guidelines for particular applications and document cases that deviate from the standards.

Contact Information

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Release notes

This is release version 1.1 of the Citi Global Wealth Management User Interface Guidelines. This version represents a significant reworking of the document structure in an effort to simplify the core guidelines that apply to all site and application types.

This set of globally-applied definitions, while still organized by component type, is presented in two ways: first, as a set of structural blueprints and secondly as “skin.” Skin refers to the look-and-feel, rather than the functionality, of an application.

This document also contains several appendices containing application-specific guidelines, as well as any structural exceptions or entirely new components that have been designed as the result of an application’s unique business requirements. Charts and Graphs, now an independent section but still a work in progress, is also included in the appendix section.

The Online Client Experience team will be making incremental additions and publishing updates in future versions.

Updates in Version 1.1

1. Additional guidelines regarding ADA compliance
2. Reformatted Color Palette section provides more detail around functional application of colors
3. Copywriting section incorporates the Associated Press Stylebook
4. Updated Text guidelines include specifics on bulleted lists, hyperlinks and footers
5. The Image Usage section now includes Photography guidelines
6. The Grids section is now Page Grids and Templates. Homepage, dashboard and content templates are illustrated in the context of a standard layout grid
7. Expanded Navigation specifications discuss all levels of Web-based navigation, from global and utility navigation to breadcrumbs and contextual menus
8. A new section, Containers: Windows, Modules, Panels, compiles and reorganizes information which was previously spread across various sections
9. The Forms section now includes display of field-level error messages and additional forms layout examples
10. The Data Tables section contains more comprehensive explanations of table interactions, including detailed step-by-step diagrams illustrating precise interaction points and behaviors
11. Guidelines for Search, Help, Login, Site Previews and Online Polling have been added and grouped within the new Common Functions section

2. Browser and System Requirements

Browser and System Requirements

Internet Requirements

Browser and Compatibility

For PC browsers, design client-facing pages and applications for Internet Explorer 5.0 and above, Firefox and Mozilla. For Mac browsers, design pages for Firefox and Safari.

Screen Resolution

Optimize Web pages for 1024x768 screen resolution, and allow pages to be scalable from 800x600 to 1280x1024.

Bandwidth and Performance

Design applications for reasonable performance for users at lower bandwidths. Optimize client-end scripts and downloadable plug-ins to accommodate low-bandwidth users. Refrain from using unnecessary images.

Flash Player, Operating Systems and Browsers

Flex Applications require that Flash Player 9.0.28.0 or above be installed.

Intranet Requirements

Browser and Compatibility

Design internal pages and applications for Internet Explorer 5.0 and above.

Screen Resolution

Optimize Web pages for 1024x768 screen resolution.

Bandwidth and Performance

Design applications for reasonable performance for users at lower bandwidths. Optimize client-end scripts and downloadable plug-ins to accommodate low-bandwidth users. Refrain from using unnecessary images.

Flash Player, Operating Systems and Browsers

Flex Applications require that Flash Player 9.0.28.0 or above be installed.

ADA Compliance

Although there is no specific GWM mandate for ADA site design and functionality, below are basic guidelines to accommodate users with physical and other disabilities.

Examples of measures previously taken include www.smithbarney.com/ada, which addresses users with visual impairments, who can access the site via screen readers or other assistive technologies.

Additional recommendations are described below.

Images, Audio and Video

- Create equivalent alternatives for non-text elements, such as applets and programmatic objects, audio, frames, graphical buttons and check boxes, icons, images, sounds, symbols and video
- Make images accessible to the color blind, so that all information conveyed with color is understandable without color. Use text-based descriptions to supplement instructions. For example, if referring to a "green button," include a tooltip that says "green button" upon mousing over the button

Navigation Links

- Use introductory text to inform users of assistive technologies about the available controls or tasks
- Ensure that the link's text clarifies the target and/or purpose of the link

Additional Recommendations

- Identify row and column headers for data tables so that particular cells are associated with their row and column headings
- Ensure that electronic forms allow assistive technology access, and provide directions, cues and field elements required for completion and submission of the form
- Provide a text-only page, with equivalent information or functionality when ADA compliance cannot be accomplished in any other way

For more information on legal mandates and industry practices, see government and accessibility Web sites, such as <http://www.w3.org/TR/WAI-WEBCONTENT/>.

For legal requirements specific to a particular GWM site, please consult the Legal department.

3. Color Palette

General Usage

The main colors associated with Citi Global Wealth Management brands are shown in Figures 3.1 and 3.2.

The original brand signature colors - Citi Red, Citi Silver, Citi Blue, Citi Dark Blue and Citi Gray - are Pantone spot colors; use RGB and hexadecimal equivalents for the Web.

Core colors

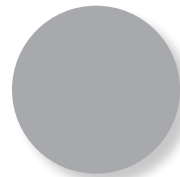
Use Citi Silver and Citi Red as the core colors of the color palette.

Use white space as a background, to provide a simple and clean canvas.

Secondary colors

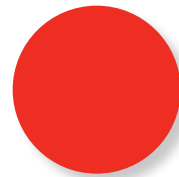
Use secondary colors to support the brand personality and to add dimension to communication.

Figure 3.1: Core colors



Citi Silver

RGB: R142 G146 B149
HEX: #8E9295



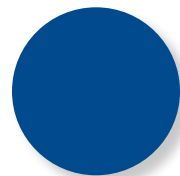
Citi Red

RGB: R220 G36 B31
HEX: #DC241F



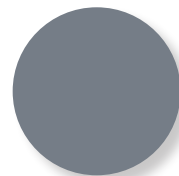
White

Figure 3.2: Secondary colors



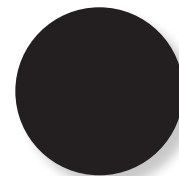
Citi Blue

RGB: R0 G48 B130
HEX: #003082



Citi Dark Gray

RGB: R98 G100 B105
HEX: #626469



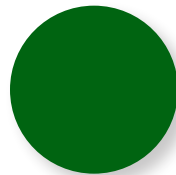
Black

Chart Colors

Use the color palettes shown in Figures 3.3 and 3.4 for charting.

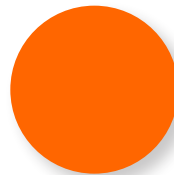
Ensure consistency of the palette across all charts and graphs.

Figure 3.3: Main charting colors



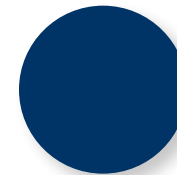
Cash & Equivalents (C&E)

RGB: R0 G100 B17
HEX: #479DC7



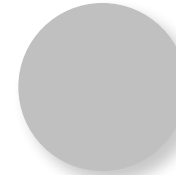
Fixed Income (FI)

RGB: R255 G102 B0
HEX: #FF6600



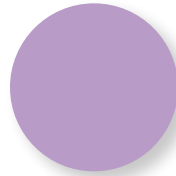
Equities (EQ)

RGB: R0 G51 B102
HEX: #003366



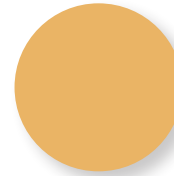
Alternative Income (AI)

RGB: R192 G192 B192
HEX: #COCOCO



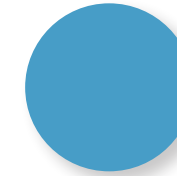
Other (O)

RGB: R184 G156 B199
HEX: #B89CC7



Comparison B

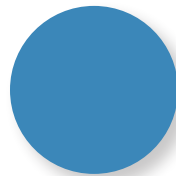
RGB: R234 G180 B101
HEX: #EAB465



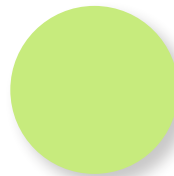
Index

RGB: R71 G157 B199
HEX: #EAB465

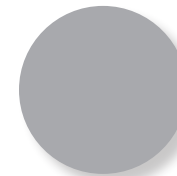
Figure 3.4: Alternate charting colors



RGB: R59 G135 B185
HEX: #3A85BC



RGB: R199 G235 B176
HEX: #C7EB7D



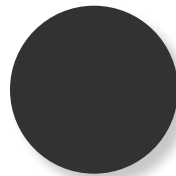
Citi Silver

RGB: R142 G146 B149
HEX: #8E9295

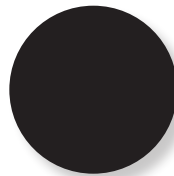
Text

Use the color palette in Figure 3.5 for body text, hyperlinks and messages.

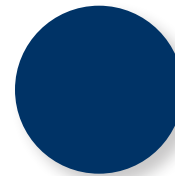
Figure 3.5



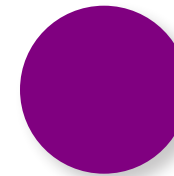
Body Text 1
RGB: R51 G51 B51
HEX: #333333



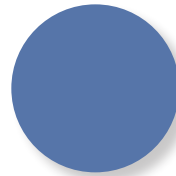
Body Text 2
RGB: R0 G0 B0
HEX: #000000



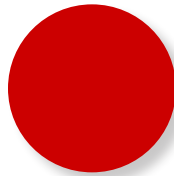
Hyperlink
RGB: R0 G48 B130
HEX: #003082



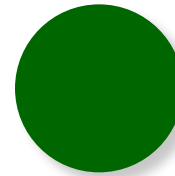
Hyperlink Visited
RGB: R128 G0 B128
HEX: #800080



Hyperlink Mousedown
RGB: R86 G117 B169
HEX: #5675A9



Alerts / Error Messages
RGB: R204 G0 B0
HEX: #CC0000

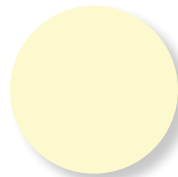


Confirmation Messages
RGB: R0 G102 B0
HEX: #006600

Backgrounds

Contrast background colors with dark text to enhance readability.

Figure 3.6



Alert BG; Info Panel BG

RGB: R255 G255 B204

HEX: #FFFFCC



Alternating Row BG

RGB: R248 G247 B242

HEX: #F5F3EC



**Search Boosted Results;
Header BG**

RGB: R237 G241 B244

HEX: #EDF1F4



Confirmation BG

RGB: R233 G243 B208

HEX: #E9F3D1



Text BG 1

RGB: R246 G240 B231

HEX: #F6F0E7



Text BG 2

RGB: R239 G231 B214

HEX: #EFE7D6

4. Image Usage

Icons

The icons displayed in Figures 4.1 and 4.2, for documents, applications, alerts and indicators, do not have enabled/disabled states.

Figure 4.1: Document and Application Icons

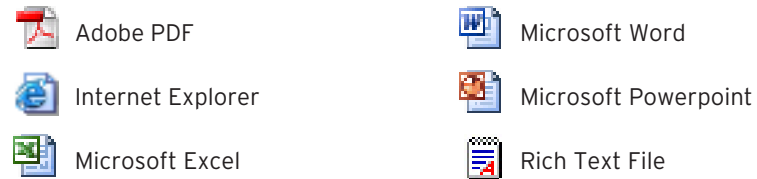
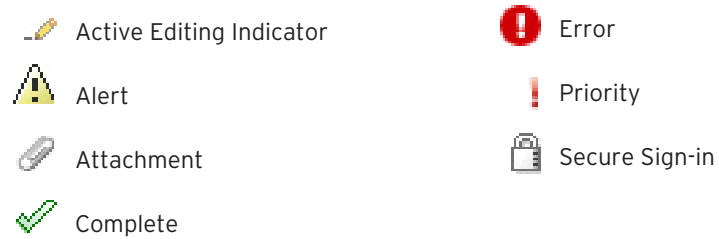


Figure 4.2: Alerts and Indicator Icons



Icons (Continued)

Task Icons

Task icons convey a function or task, such as print, delete or send email.

The icons in Figure 4.3 are generally interactive and may have different states.

Figure 4.3: Task Icons

Task Controls

-  Delete / Remove Enabled
-  Delete / Remove Disabled
-  Edit Mode Enabled
-  Edit Mode Disabled
-  Print
-  Download

Button Icons

-  Delete / Remove
-  Add
-  Look Up

Secondary Panel Controls

-  Open Notes Panel (no notes)
-  Open Notes Panel (with notes)
-  Open Date Picker
-  Open Info Panel
-  Open DataGrid Title Window

Open / Close / Expand / Hide

-  Arrow Closed
-  Arrow Open
-  Close Row
-  Close Row onHover
-  Open Row
-  Open Row onHover
-  Collapse Primary Module
-  Expand Primary Module
-  Full Primary Module
-  Close Title Window
-  Close Expandable Drawer
-  Close Info Panel
-  Close Notes Panel

Confirmation Panel Icons

-  Confirm Delete / Remove

View Toggles

-  Contacts View Off
-  Contacts View On
-  Members View Off
-  Members View On
-  Chart View Off
-  Chart View On
-  Table View Off
-  Table View On
-  Filter
-  Filter onHover
-  Filter onSelect
-  Filter Applied

Photography: Basic Approach

People

Display images of people in environments that suggest the product, service or concept covered on the page.

Crop photos, use high-quality images and treat subjects creatively.

Do not use conventional or representational stock photography.

Images of people should appear natural and not “photo styled”.

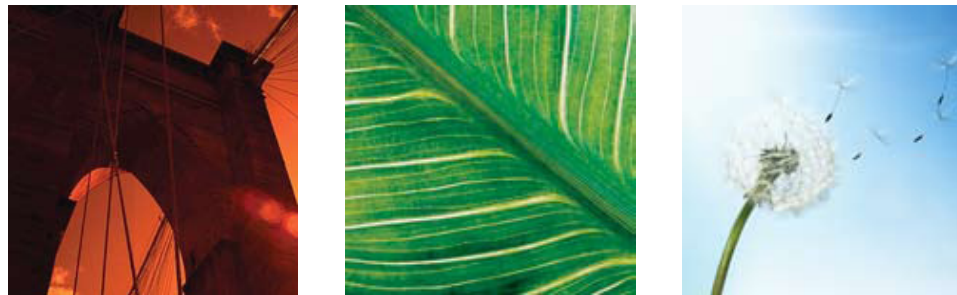
Figure 4.4



Metaphoric/Abstract images

Employ metaphoric or abstract images when images of people are not appropriate. For example, the Brooklyn Bridge image in Figure 4.5 has a strong graphical effect due to the angle, cropping, and special color theme of the photo. A more conventional photograph of a bridge would have less impact.

Figure 4.5



Photography: Backgrounds and Silhouettes

When an image of a person appears against a busy or irrelevant background, maintain the relationship of subject to environment, but de-emphasize the environment.

Figure 4.6 employs a silhouette and a muted background to reduce distraction.

Figure 4.6



5. Logo Usage

The Citi Smith Barney Logo

Smith Barney has a one-piece brand signature, that includes both the Citi symbol and the Citi Smith Barney wordmark. Together, they appear as a single, connected unit.

The Citi Smith Barney logo colors are Citi Red and Citi Silver.

Use the default colors, shown in Figure 5.1, on white or light backgrounds.

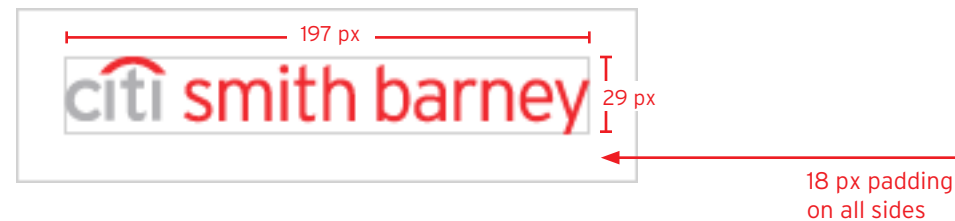
Use the “red reverse” treatment, as shown in Figure 5.2, on black or dark backgrounds. In this case, make “Citi” white rather than silver.

Figure 5.1: Logo with default colors



- 1 **Citi Red**
(Pantone® 485)
#DC241F
- 2 **Citi Silver**
(Pantone® 877)
#8E9295

Figure 5.2: Logo with default size and padding



The Citi Private Bank Logo

The Citi Private Bank logo colors are Citi Red and Citi Silver.

Figure 5.3: Logo with default colors

Citi Private Bank

Figure 5.4: Citi Private Bank logo as used on web page

Citi Private Bank



6. Copywriting Best Practices

Writing for the Web

The following pages provide recommendations for copywriters, developers and content creators to ensure that online content is readable, engaging, effective and consistent.

Headers

- Label headers to accurately reflect the content being summarized
- Maintain consistency in link, navigation and header language. For example, if a link reads “Edit Preferences,” the header should not read “Editing Your Preferences”
- Use headers and subheaders to call out sections and subsections

Links

- Place links at the end of the sentence or section. Otherwise, the link implies that it is not necessary to read beyond that point
- Use descriptive links and avoid “Click here.” Instead of “Click here to view article archive,” write “View article archive”
- Phrase links leading to the same place with identical text
- Keep text brief. Avoid wrapping links

Be Direct

- Put the most essential information at the top of the page
- Ensure that the content is scannable and can be grasped at a glance
- Use calls-to-action whenever possible, such as “Read more” or “Contact a Financial Advisor”

Be Concise

- Limit overviews to two to three sentences
- Use bullets for lists
 - Keep bullets uniform in subject-verb agreement
 - Limit bullets to two lines each
- Limit lists to 10 items. For longer lists, break items into smaller groups
- Detail complex and static information in hardcopy downloads

Copy and Language Conventions

Case	Rule
Spacing	• Insert one space after periods • For line height, insert 16 px between lines of HTML text • Use a <P> after paragraphs
Capitalization	• Capitalize all interface element labels in either Title Style or Sentence Style • Title Style – Capitalize every word except: - Articles (a, an, the) - Coordinating conjunctions (and, or) - Prepositions of three or fewer letters, except when the preposition is part of a verb phrase, as in “Starting Up the Computer” – Always capitalize the first and last word, even if it is an article, a conjunction or a preposition of three or fewer letters • Sentence Style – Capitalize the first word and leave the rest lowercase, except in the case of proper nouns or proper adjectives
International Users	International Addresses and Names • Allow for house numbers to follow street names. For example: Avenida Robles 17 • Account for postal codes of various lengths, which often precede city names. For example: 28043 Madrid SPAIN • Use “Postal code/ZIP code” instead of just “ZIP code,” which is a U.S.-only term • Avoid separate fields for first name and last name whenever possible. (For example, in many Asian countries, the first name is the family name.) Offer a single field to accommodate a person’s entire name Phone Numbers • Allow enough space for a varying number of digits and a country code • Avoid stating phone numbers in letters (such as 1-800-TOO-EASY) because many countries do not include letters on their telephone keypads Measurements • Give measurements in both metric and traditional English units. State explicitly which system is used

Style and Usage

Editorial style for Global Wealth Management sites should be based on the **Associated Press Stylebook**.

Case	Rule
Asterisks (*) and Footnotes	- Do not insert a space before an asterisk or footnote that follows a word or punctuation mark - Insert one space after an asterisk or footnote
Chart Signs	- Use the “USD” and “%” signs next to every top entry in a list and next to the first entry after a tally line - Do not use the currency or percent signs next to each number in a column
Dashes	Follow the same standards for dashes and hyphens as in print text
Dates	- Write the date as 01 JAN 2008 when it appears as data, such as in a data grid or a date stamp - Display the date as January 1, 2008 when it appears in a block of text
Metrics	- Display full numbers in data tables - In written copy, if space is tight, abbreviate large numbers as: 30K (30,000) signifying thousands 3.0MM (3,000,000) signifying millions 3.0B (3,000,000,000) signifying billions 3.0T (3,000,000,000,000) signifying trillions

Case	Rule
Numbers	- Spell out the numbers one through nine - Use numerals for 10 and above - Spell a number if it is the first word in a sentence - Display actual numbers in data tables
Prepositions	Do not end a sentence with a preposition
Quarters	Abbreviate quarters with an uppercase “Q,” preceded by the quarter number and followed by the two-digit year. For example: 2Q08
Quotation marks	Put periods and commas inside quotation marks
Telephone numbers	Put area codes in parentheses, followed by a space and then the phone number. For example: (212) 555-6767
Time	- Write “am” and “pm” with lowercase letters and no periods. For example: 2:15pm ET - Use “ET” for eastern Time, rather than “EST” or “EDT” - Do not add an apostrophe for years. For example: write 1990s instead of 1990's

Common Terms

Case	Rule
Branch and branch manager	• Use uppercase “B” when referring to a specific Smith Barney branch • Use lowercase b when speaking of branches generically • Spell branch manager as two words, with lowercase “b” and “m”
Bytes (abbreviations)	• MB - Megabytes • GB - Gigabytes • k - Bytes
File types	• Spell file types, such as PDF, GIF or MP3, in all capital letters
Financial Advisor	• Uppercase “F” and “A” when referring to Smith Barney Financial Advisor
Fixed Income	• Use fixed income - lower case, no hyphen
Internet, intranet and Net	• Use uppercase “I” on Internet, lowercase “i” on intranet and uppercase “N” for Net
Login, log in, logon, log on, log-out, log out	• Use log in/log on and log out (two words) as verbs; For example the action of logging in to or out of a Web site • Use login/logon and logout (one word) as a noun. For example: “Your login is incorrect”
Online and offline	• Write online and offline in lowercase, as compound words, without hyphens
Smith Barney	• Always use the full Smith Barney name when referring to the company
Web and Web site	• Use uppercase “W” when referring to the World Wide Web • Spell Web site as two separate words, with uppercase “W” and lowercase “s”

Nomenclature: Buttons and Actions

Form Buttons	
Cancel	- Use Cancel to end an action without committing changes - In a popup, Cancel closes the window
Clear	Use Clear to remove editable data from the form, rather than re-populating it with previous data
Confirm	Use Confirm in a multi-step process, following approval, submission or any action that requires a confirmation step
Continue	Use Continue for interim messages and notice pages. For example, a user must read a legal notice and click Continue before proceeding to the desired page
Finished	Use Finish after a user completes a task or set of tasks
Reset	Use Reset to re-populate a form with the page's initial data before edits made
Save	- Use Save to commit changes or new data that the user has input, if this data can later be retrieved and further edited - In some cases, such as entering a transaction, Save and Submit may appear side-by-side
Search	Place Search only next to a search text field
Submit	- Use Submit when submitting a form with the expectation of displayed results, such as finding a report or entering a transaction - Submit indicates that the action is final - In some cases, such as when entering a transaction, Save and Submit may appear side-by-side

Actions	
Add	- Use Add to include multiple items in an action or group, such as adding selected reports - Use Add instead of Create for minor activities. For example: Add Comment
Archive	Use Archive when referring to a set of old documents or pages, when the archive contains old versions of content
Create	Use Create when adding a new item. For example: Create New Template
Delete and Remove	- Use Delete to eliminate items. Delete is often shown with Add and Edit - Use Remove to take elements out of the display, without deleting them from the system
Edit and Manage	- Use Edit for taking action on a single item. Edit is preferred over the term Modify - Use Manage to work with a list of items
History	Use History to display a chronology of edits to a single item or transaction. For example: "View History" to see modified trades
More	Use More to start a text link to additional information. For example: "More reports," "More disclosures"
Previous and Next	Use these labels for a stepped process such as a wizard

7. Text Guidelines

Graphical and HTML Text

HTML Text

Use Arial (regular, bold or italic) for all HTML text, as illustrated in Figure 7.1.

Graphical Text

Minimize graphics to reduce the amount of production work required.

Consider how the use of graphics affects download time for users.

If graphics are required, use Interstate, the approved Citi typeface, shown in Figure 7.2.

Use one of three weights: light, regular or bold.

Figure 7.1: Arial regular and bold

ABCDEFGHIJKL	ABCDEFGHIJKL
abcdefghijklm	abcdefghijklm
1234567890	1234567890

Figure 7.2: Interstate light, regular and bold

ABCDEFGHIJKL	ABCDEFGHIJKL	ABCDEFGHIJKL
abcdefghijklm	abcdefghijklm	abcdefghijklm
1234567890	1234567890	1234567890

Bulleted Lists

Use the custom image bullet (•) for top-level bulleted items, a long dash (–) for second-level items and a short dash (-) for third-level items.

Insert 9 px between the bullet and the text which follows. The distance from one line of text to another should equal 19 px.

Figure 7.4 shows a bulleted list with three levels of items. Indents and alignment for these three levels are illustrated in Figure 7.5.

Figure 7.4

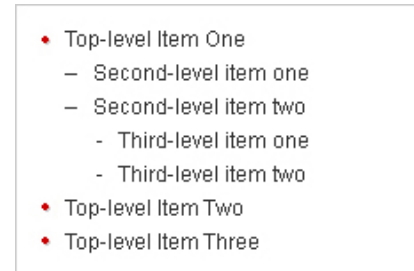
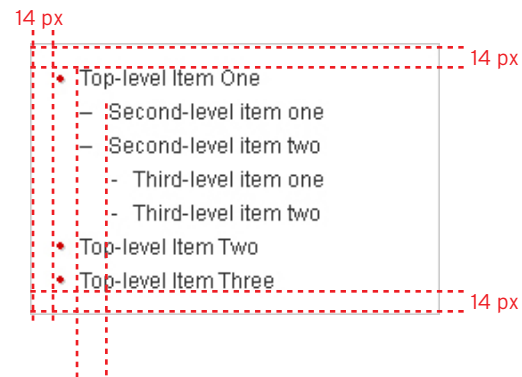
- 
- Top-level Item One
 - Second-level item one
 - Second-level item two
 - Third-level item one
 - Third-level item two
 - Top-level Item Two
 - Top-level Item Three

Figure 7.5



Hyperlinked Text

When to Underline

Underline hyperlinked text when it appears within a block of copy, to visually distinguish it from the rest of the text.

Do not underline hyperlinked text when it appears within a breadcrumb, as a linked subtitle or within a list of bulleted links.

Upon Rollover

Do not alter hyperlinked text which is already underlined.

Add an underline to hyperlinked text which is not yet underlined.

Visited Hyperlinks

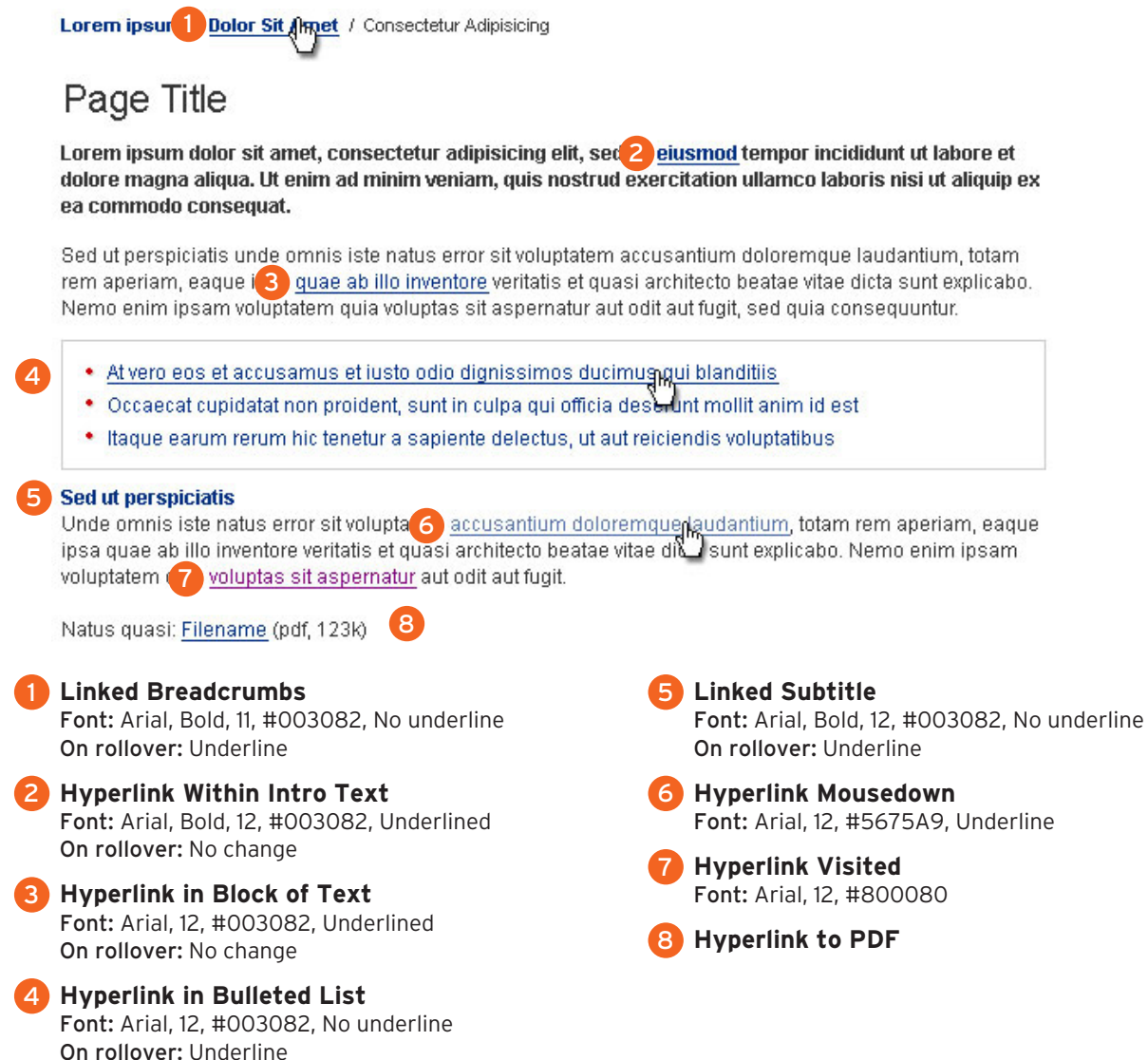
Change the color of visited hyperlinks to purple (#800080).

Whether or not a link was underlined prior to being clicked, its status does not change after it has been clicked.

Hyperlinks to Documents

To indicate that a hyperlink opens a document, include the file type and file size **after** the link.

Figure 7.6



Text Spacing

Clear and consistent spacing, between separate text elements and between blocks of text, establishes an orderly hierarchy of information.

Line-height, the space between lines of text, is always 16 px.

Figure 7.7 illustrates basic rules and guidelines that govern the spacing of text.

Figure 7.7

Lorem ipsum / Dolor Sit Amet / Consectetur Adipiscing

32 px

Page Title

20 px

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.

20 px

Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae dicta sunt explicabo. Nemo enim ipsam voluptatem quia voluptas sit aspernatur aut odit aut fugit, sed quia consequuntur.

15 px

- At vero eos et accusamus et iusto odio dignissimos ducimus qui blanditiis praesentium voluptatum deleniti atque corrupti quos dolores et quas molestias excepturi sint occaecati cupiditate provident.
- Occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.
- Itaque earum rerum hic tenetur a sapiente delectus, ut aut reiciendis voluptatibus.

12 px padding in table

15 px

Sed ut perspiciatis

Unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae dicta sunt explicabo. Nemo enim ipsam voluptatem quia voluptas sit aspernatur aut odit aut fugit.

20 px

Nemo enim ipsam voluptatem quia voluptas sit aspernatur aut odit aut fugit, sed quia consequuntur magni dolores eos qui ratione voluptatem sequi nesciunt. Neque porro quisquam voluptas est, qui dolorem ipsum quia dolor sit amet.

15 px

Footer

The footer comprises the text and images at the bottom of a Web page that provide information on the institutional sponsor, revision date, copyright and other issues pertaining to legality and registration.

Divide the footer from the rest of the text on the page with a horizontal rule.

Align the footer text and images to the right of the page.

Figure 7.8 displays the footer as it appears in the bottom right corner of smithbarney.com.

Footer details are provided in Figure 7.9.

Figure 7.8

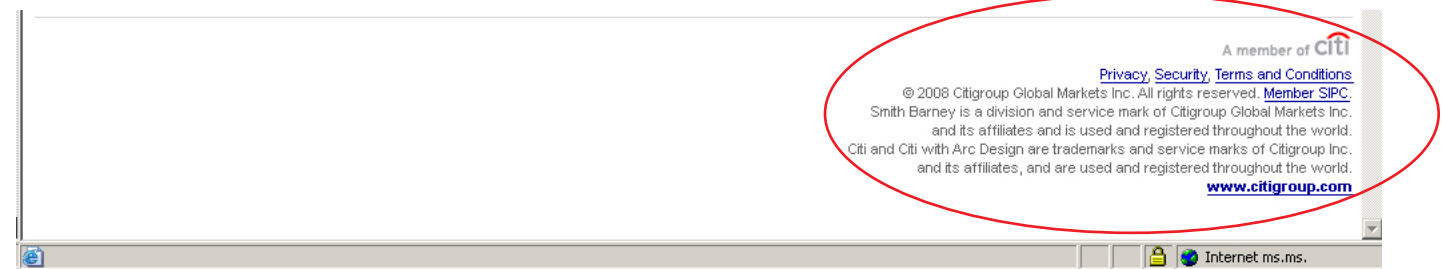


Figure 7.9



- 1 Links**
Font: Arial, 11, #003082, Underlined
- 2 Footer Text**
Font: Arial, 11, #666666, 14 px line-spacing
- 3 Link to citigroup.com**
Font: Arial, Bold, 11, #003082, Underlined

8. Page Grids and Templates

Fixed-width vs. Liquid Layouts

Fixed-width Layouts

In a fixed layout, the size of each containing element on the Web page is specified exactly. The page layout does not change when the browser window is resized and looks essentially the same across browsers and computers.

Benefits

- Guarantee an easy-to-read line length
- Provide the designer full control over how the page is displayed
- Allow for predictable default printing behavior

Drawbacks

- Can cause horizontal scrolling in smaller browser windows
- May result in large white spaces on larger monitors
- Do not handle user changes to font sizes well. Large font size increases can compromise the layout

Liquid Layouts

In a liquid layout, the size of each containing element on the Web page is dependent on the browser window size and a user's preferences. The container size increases for larger screen resolutions and decreases for smaller resolutions.

Benefits

- Allow for full use of the browser window area
- Respond well to user-imposed restrictions like larger font sizes

Drawbacks

- Allow for limited precise control over the width of the various page elements
- Can result in unreadable text or hard-to-read line lengths if the screen size is too large or too small
- Can cause problems with default page printing, unless printing is controlled with a style sheet
- Can lead to awkward image-to-text proportions as the window size changes

When to Use Fixed-width Layouts, Liquid Layouts or Both

Use fixed-width layouts for Web sites that require precise control over how the page displays in every situation. This offers more assurance that branding is consistent and clear regardless of monitor and browser size.

For text-heavy, content-centric Web sites such as SBLinx, a fixed-width layout guarantees readability and accurate presentation of content. A fixed layout is easier to maintain, assures readability by all users and is easier for a Web designer to assure quality control.

Use liquid layouts for Web sites that have a lot of information to convey in as little space as possible (e.g., data grids with many columns). Liquid layouts maximize the utilization of the window space that larger monitors provide, while limiting the impact to smaller displays.

Combine fixed-width and liquid layouts for data-intensive applications such as Next-Gen. Apply a liquid layout for modules that contain a large amount of horizontally displayed data (e.g., data grids with many columns). Apply a fixed-width layout for secondary modules, in which control over presentation and content is more important.

Target Resolution and Basic Layout Rules

Figure 8.1 illustrates the basic layout for all pages.

Center pages horizontally in the browser window.

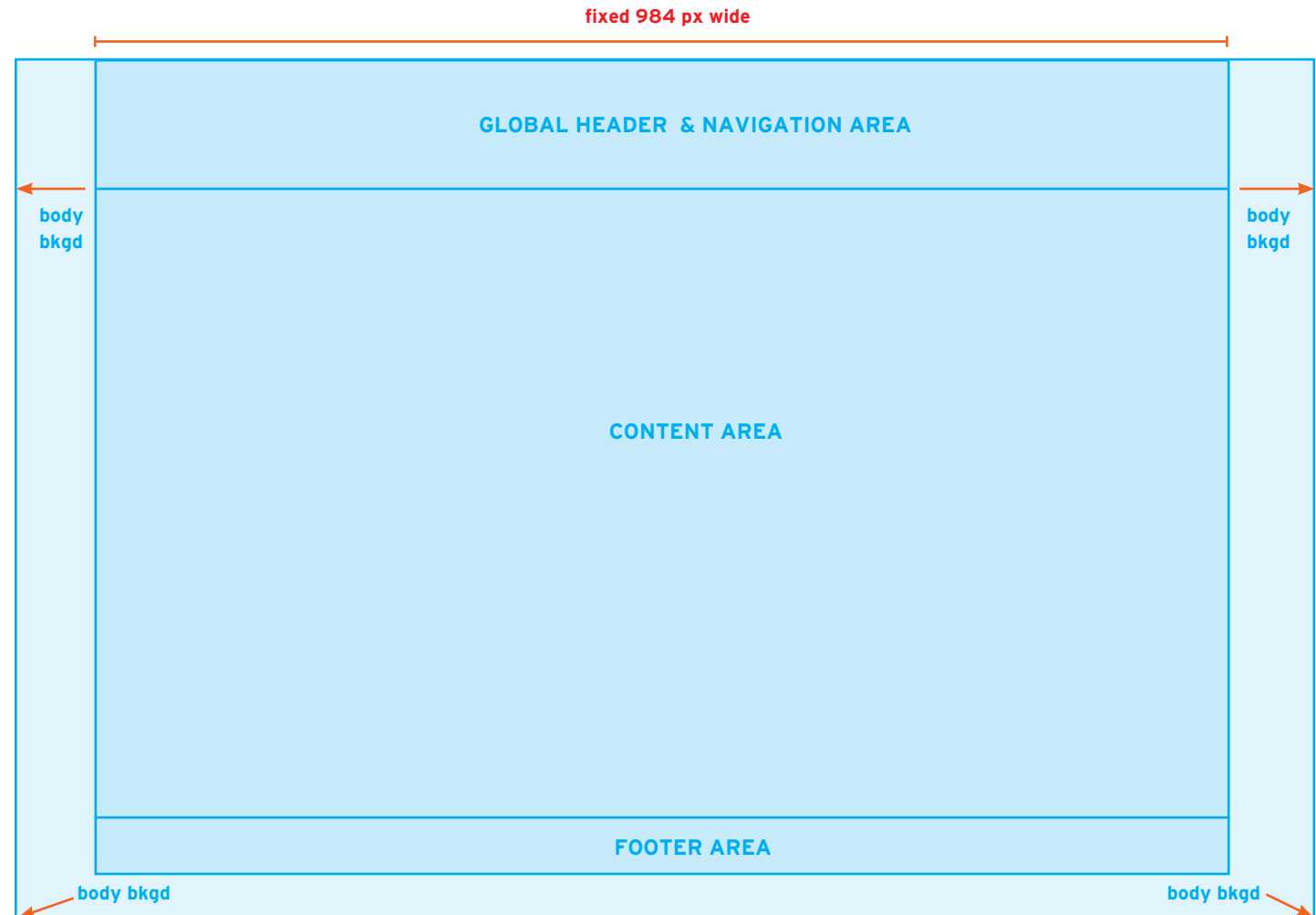
Design pages for a target screen resolution of 1024x768. Maintain a “safe” width of 984 px for this resolution to account for browser chrome and to allow space for the creation of a vertical scrollbar.

Apply a fixed-width layout to page content.

Apply a liquid layout to header and footer areas.

Expand the body background beyond the borders of the content area when a user’s resolution or browser window exceeds 1024x768.

Figure 8.1



The site is horizontally aligned center and vertically aligned top within the browser

Basic Page Grid

A consistent grid system provides the structural framework for all GWM Web sites.

The grid system dictates alignment, image and text placement and gutters. It also provides flexibility to accommodate a number of layout options.

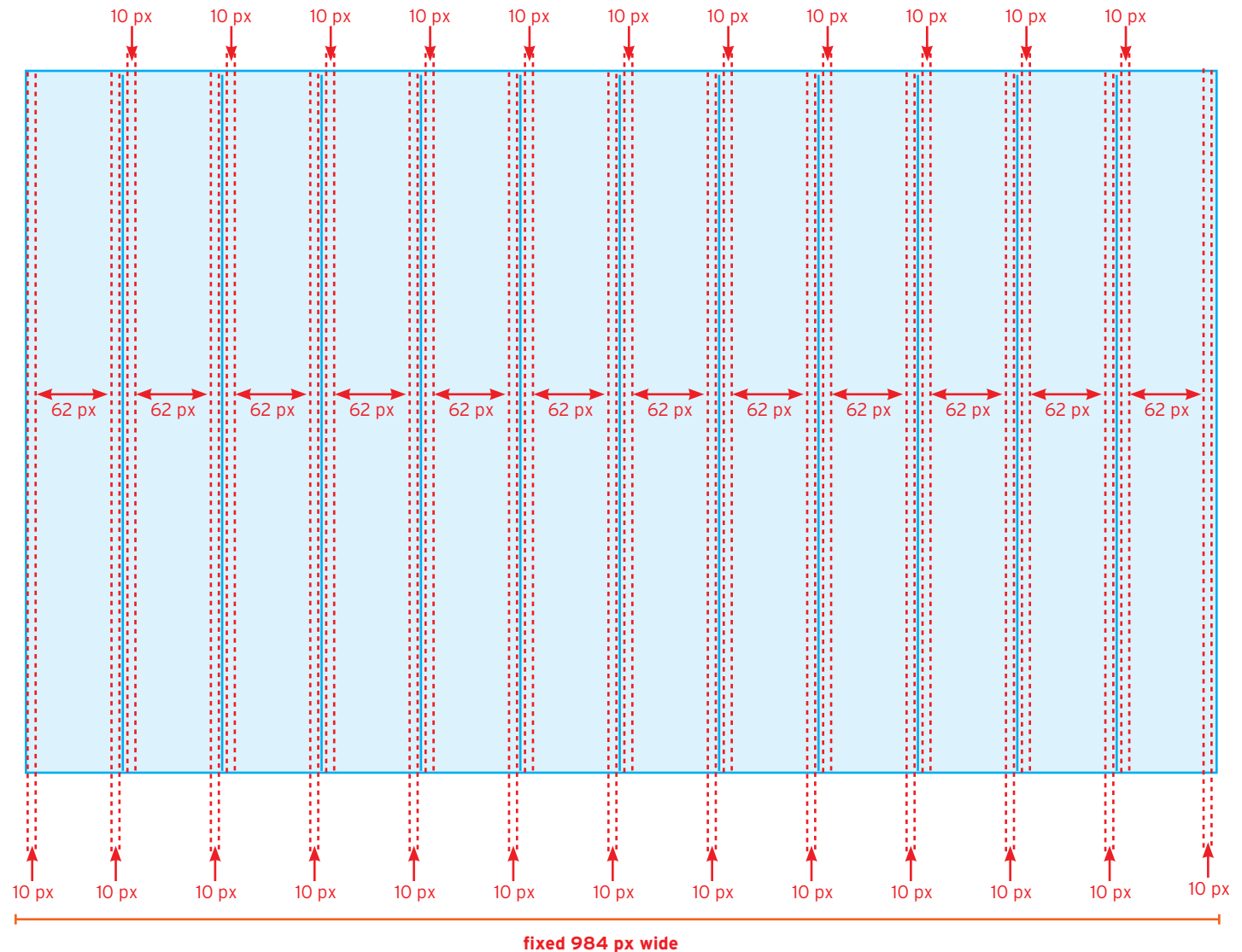
Use a consistent grid throughout a site or application to provide visual structure and predictability.

Figure 8.2 illustrates grid and gutter spacing.

Place primary content in the top portion of the page. If there is more than one primary content module, place the most important module on the left.

Place secondary and tertiary content below primary content. If possible, ensure that at least the titles of these modules are visible above the fold.

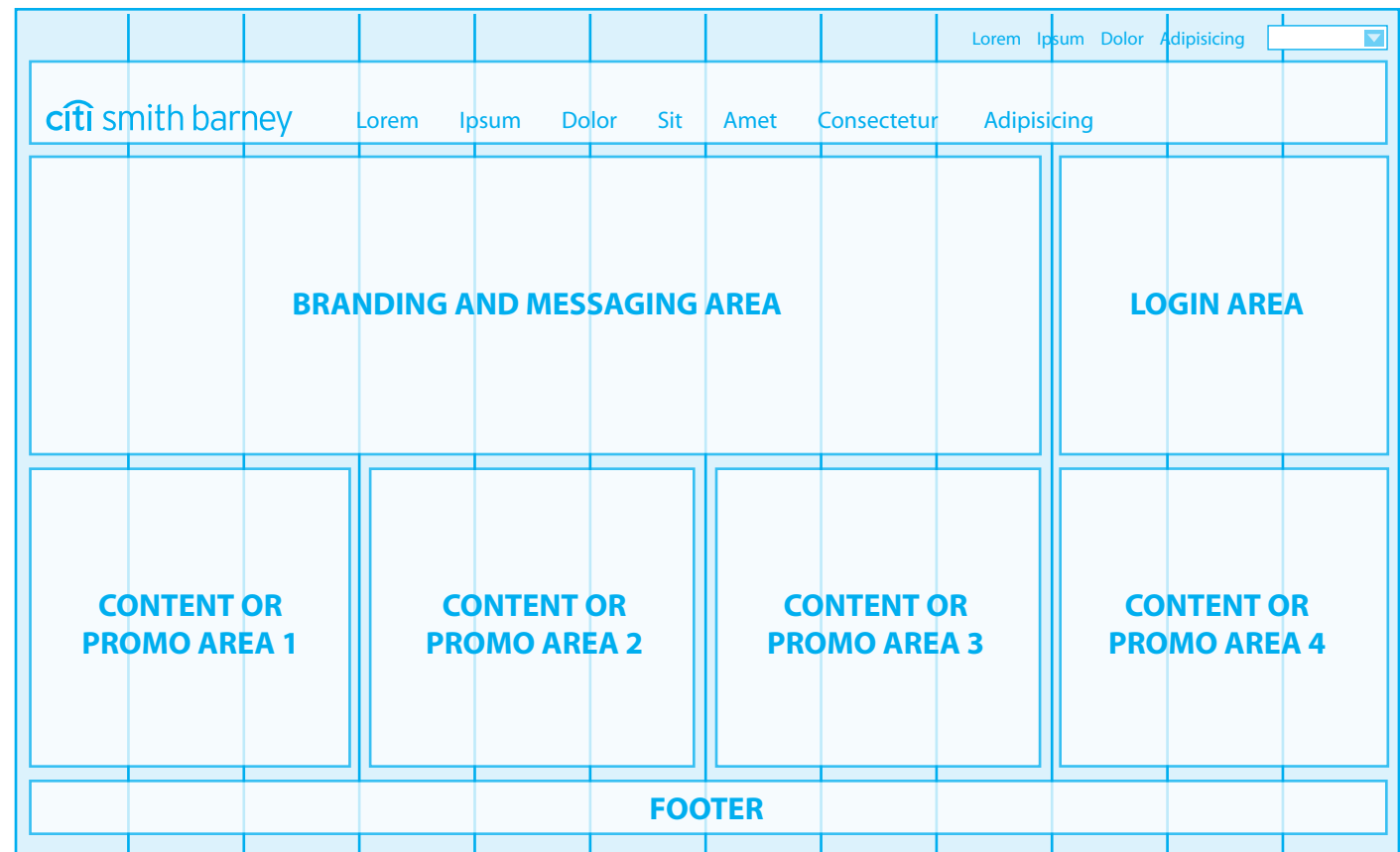
Figure 8.2



Homepage Template

Use the layout illustrated in Figure 8.3 when creating a homepage for users who are not logged in.

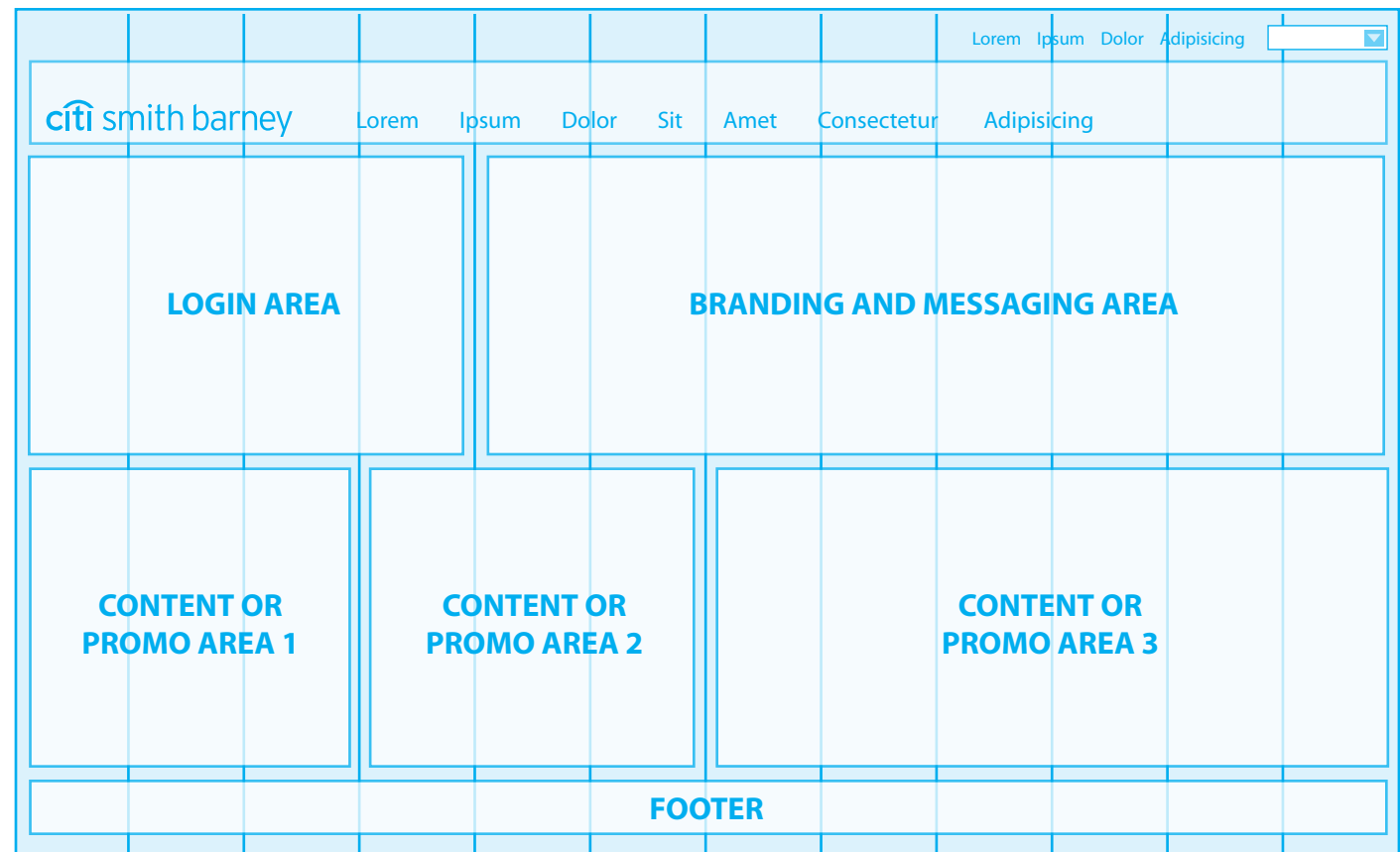
Figure 8.3



Alternate Homepage Template

Use the layout illustrated in Figure 8.4 as an alternate homepage layout for users who are not logged in.

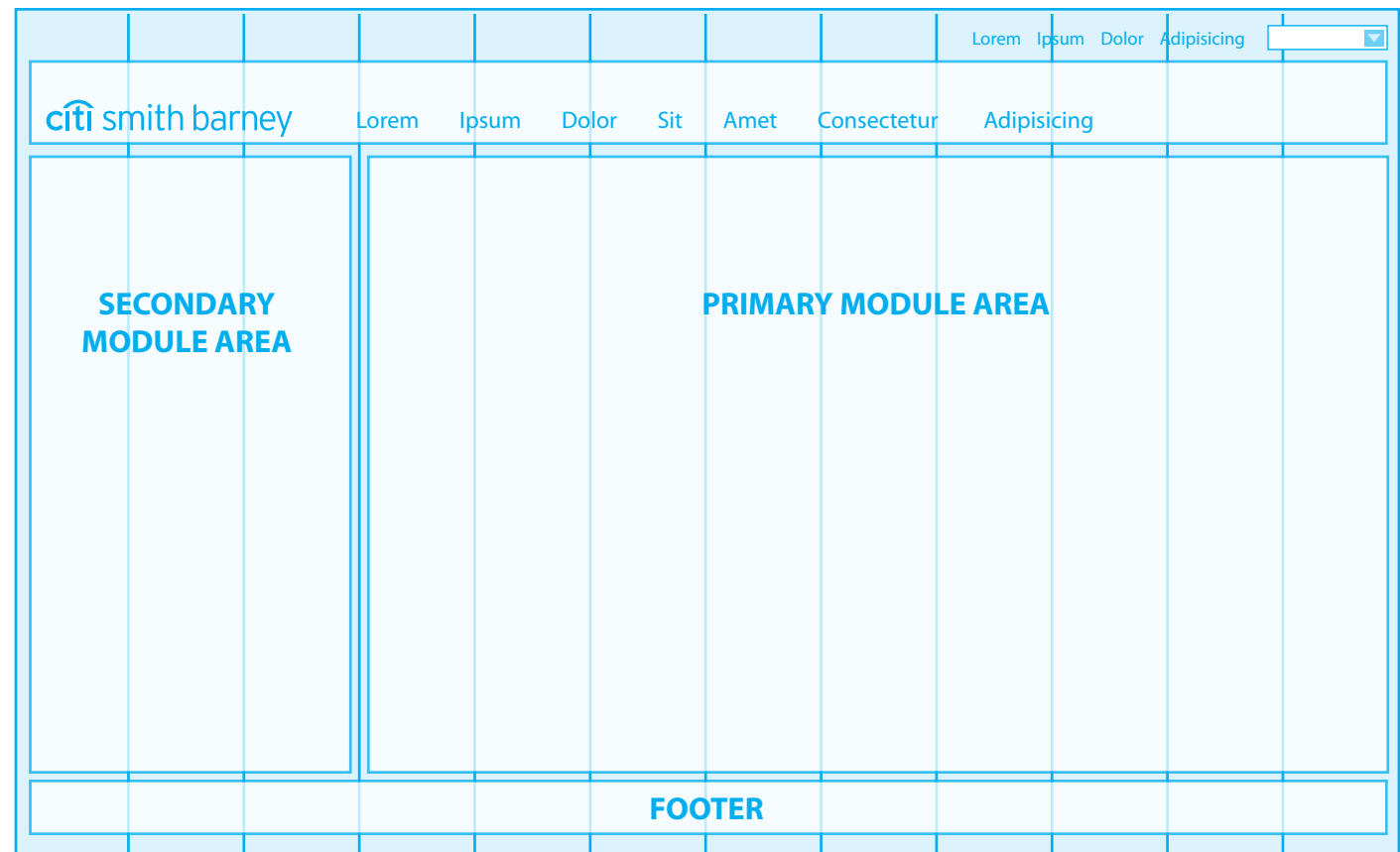
Figure 8.4



Dashboard Template

Use the layout illustrated in Figure 8.5 when creating a dashboard page for an application.

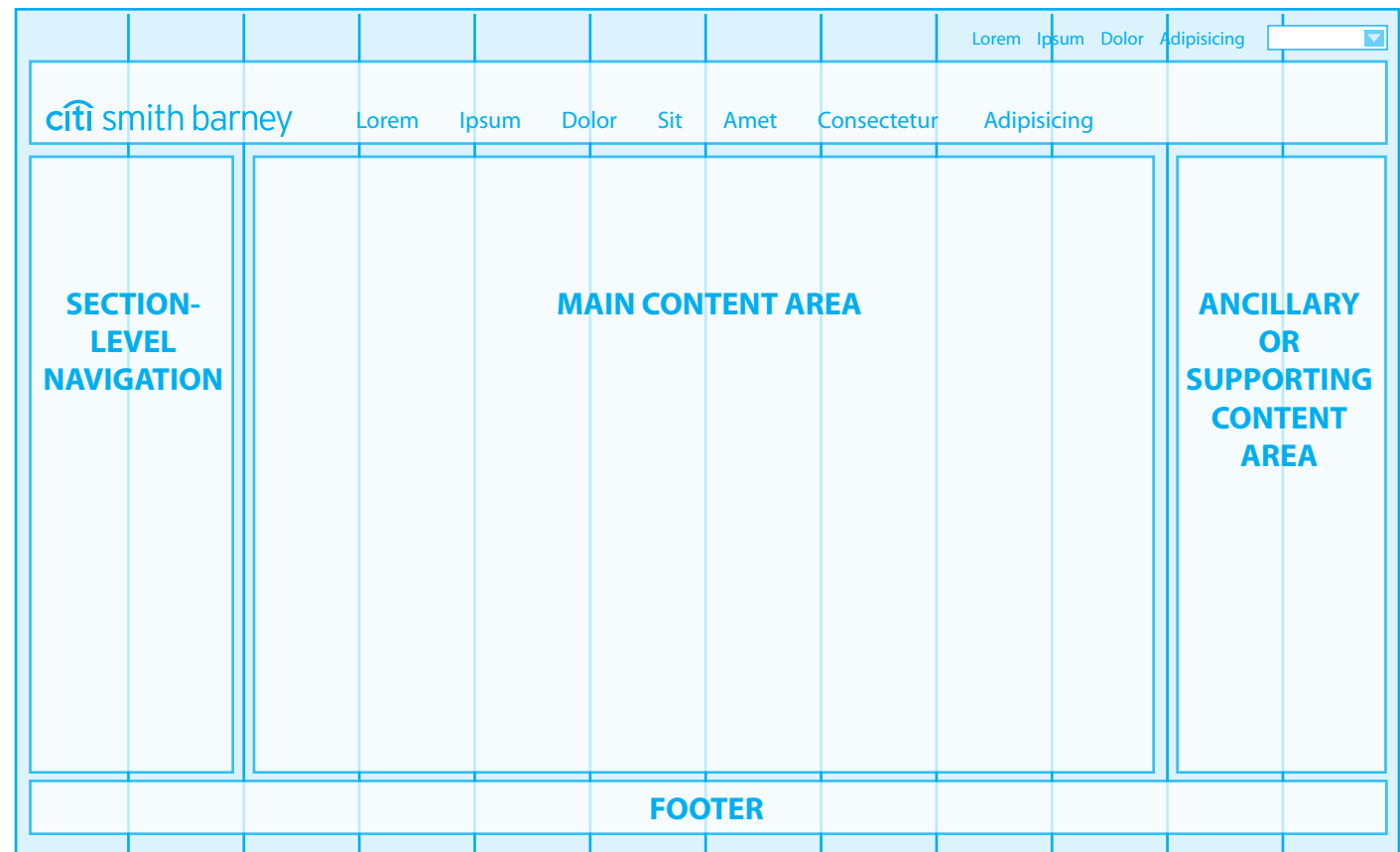
Figure 8.5



Landing Page or Content Page Template

Use the layout illustrated in Figure 8.6 when creating a landing page for a site section, as well for content pages which require a supporting content area.

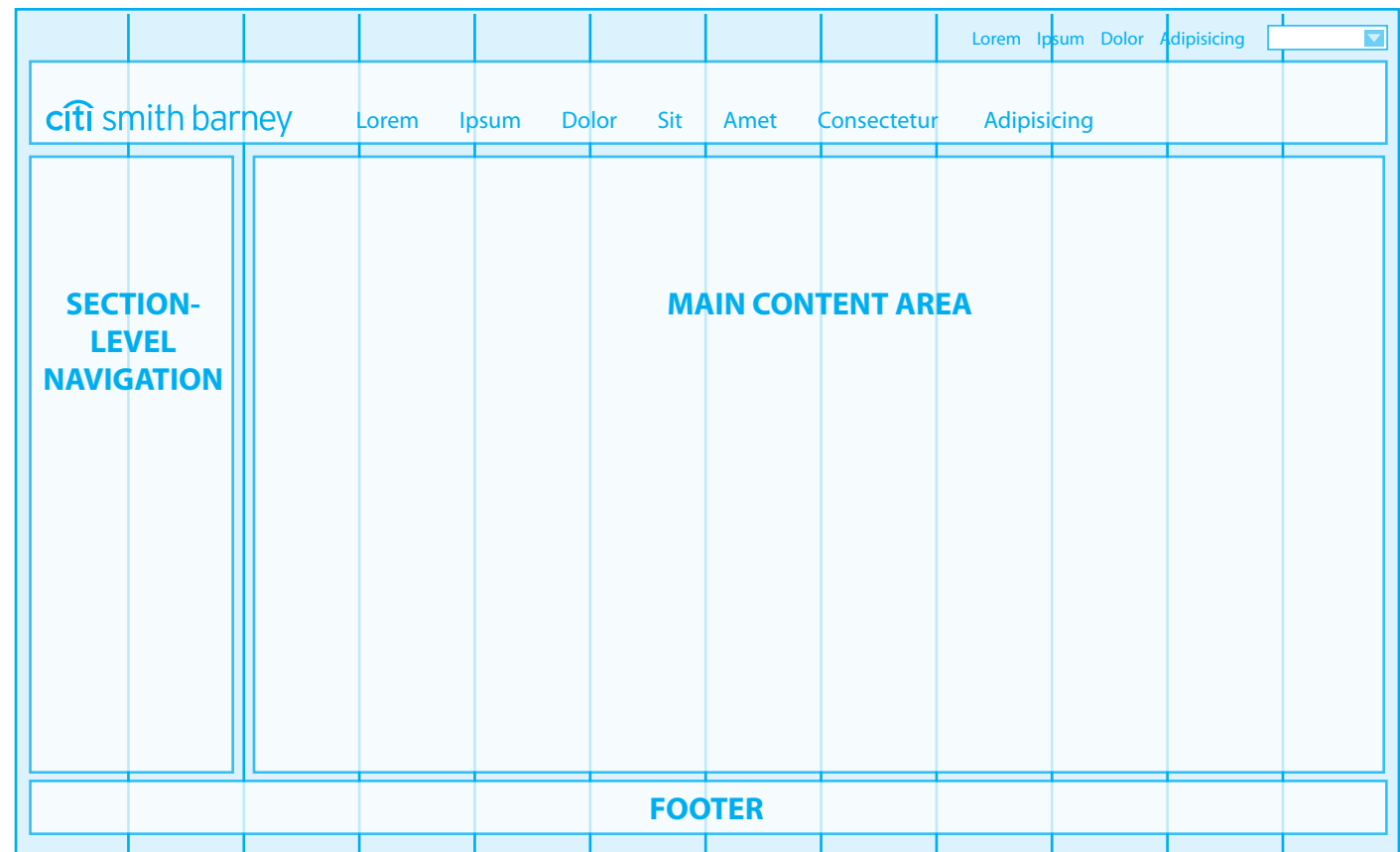
Figure 8.6



Content Page Template

Use the layout illustrated in Figure 8.7 for content pages that do not require a supporting content area.

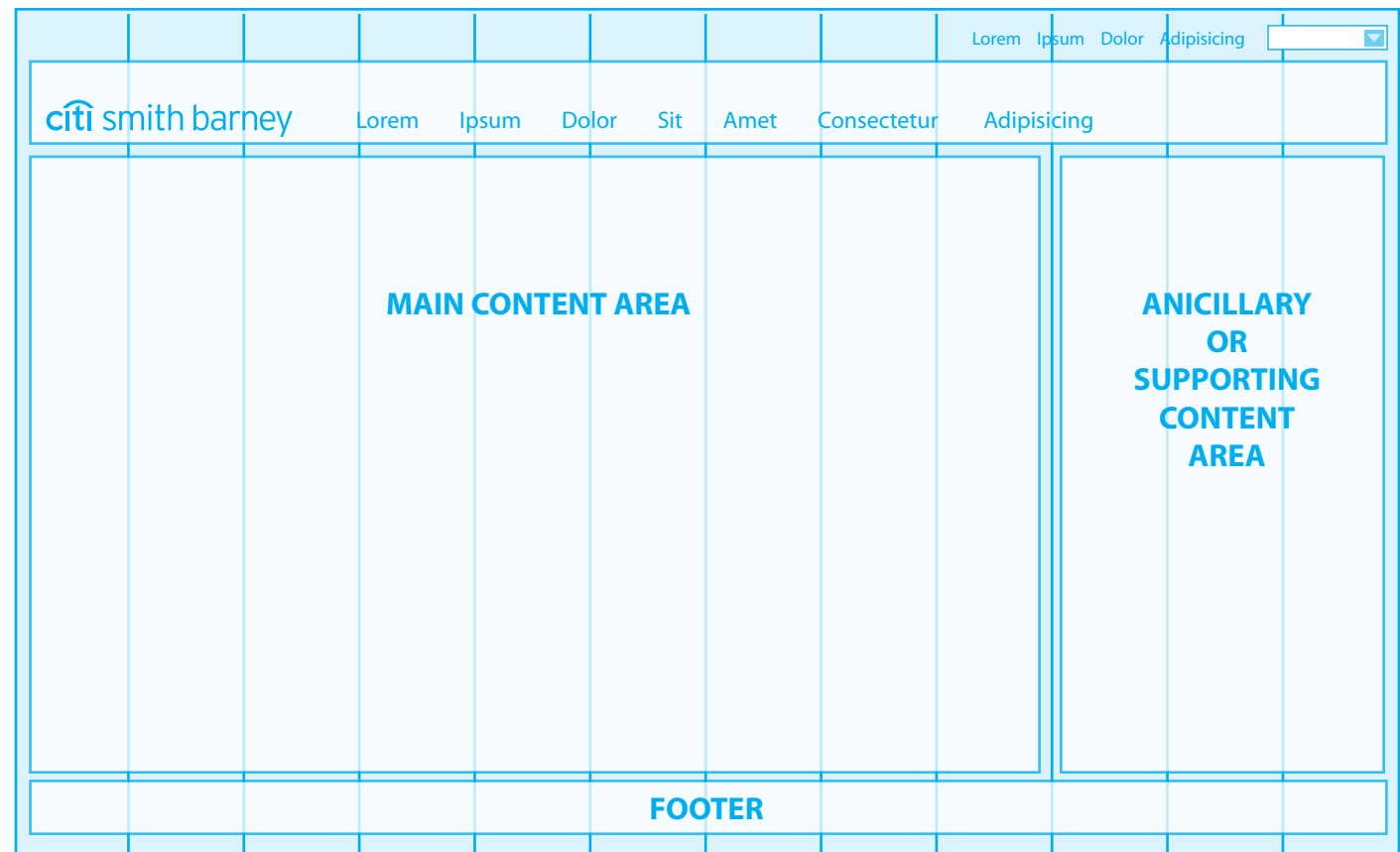
Figure 8.7



Alternate Content Page Template

Use the layout illustrated in Figure 8.8 for content pages, such as search results pages, that do not require an area for left-hand navigation but do require a wider ancillary or supporting content area.

Figure 8.8

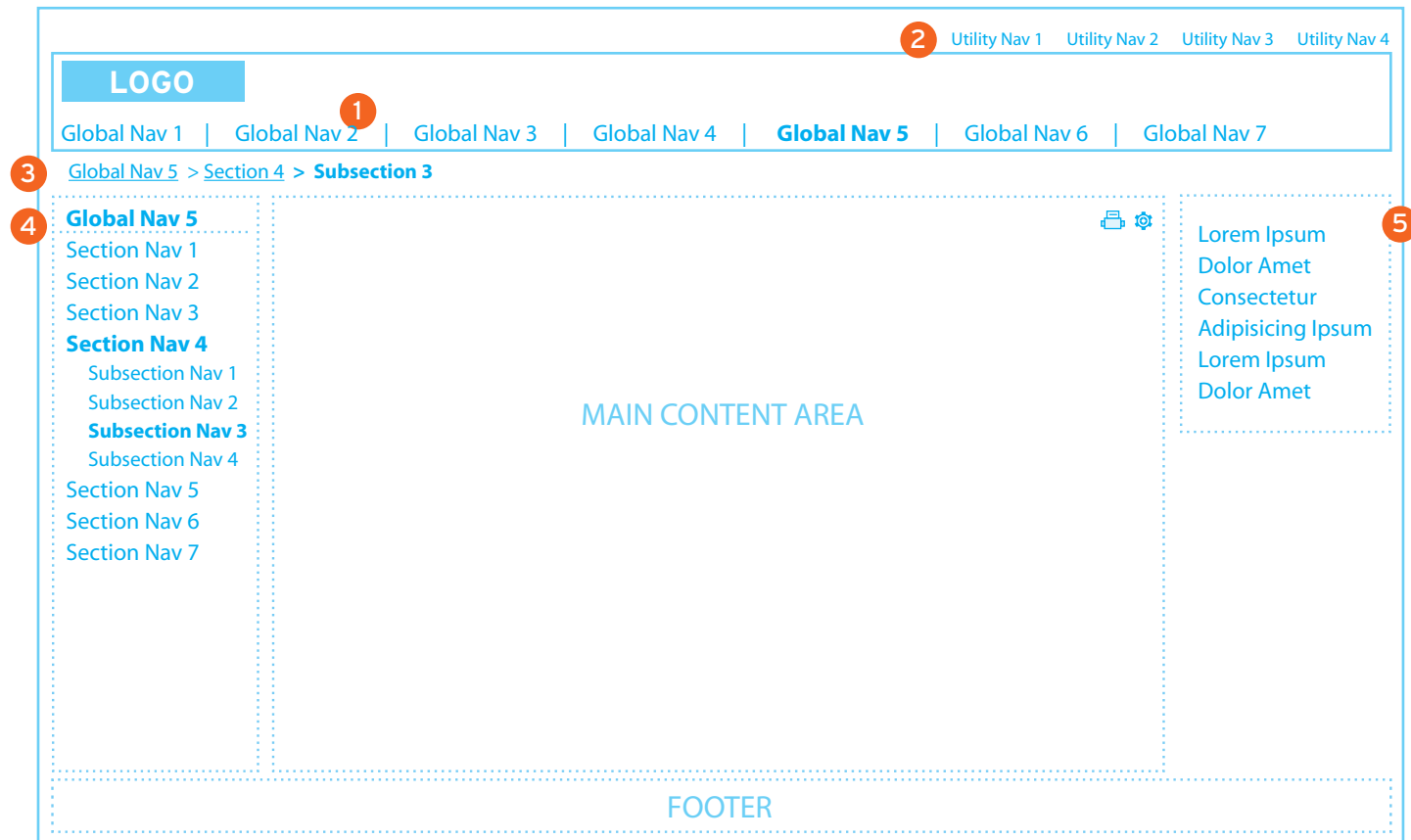


9. Navigation

Navigation

Figure 9.1 illustrates the types of navigation discussed in this chapter, as well as navigation placement on the screen.

Figure 9.1



- 1 Global navigation**
- 2 Utility navigation**
- 3 Breadcrumbs**
- 4 Section (local) navigation**
- 5 Contextual navigation**

Global Navigation

Global navigation, illustrated in Figure 9.2, provides access to the main content sections or services of a site or application.

Global navigation categories and link positions remain constant throughout the site.

Ensure that the global navigation bar does not wrap when viewed at the optimized screen resolution of 1024x768 and with default text-size settings.

Limit the number of global navigation categories to seven.

Figure 9.2



Utility Navigation

Utility navigation provides access to site- or system-wide utilities such as help, sitemap, contacts and user preferences.

If the site or application exists within a secure environment, place the link to log in or log out in the utility navigation as well.

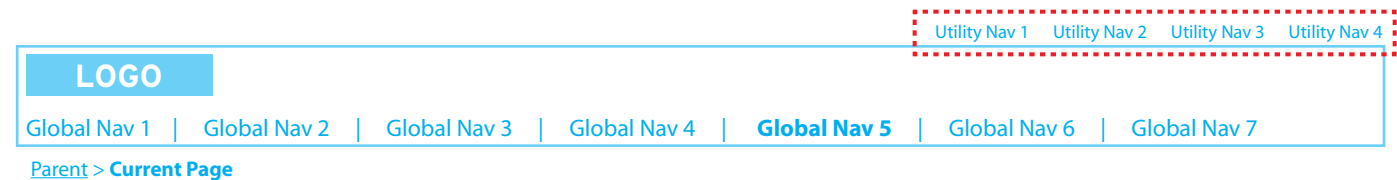
Labels for Log In and Log Off will toggle, depending on whether a user is logged in.

Utility navigation categories and link placement remain constant throughout the site or application.

Display the utility navigation in the upper right corner of the page, above the global navigation bar, as illustrated in Figure 9.3.

Ensure that the utility navigation does not wrap when viewed at the optimized screen resolution of 1024x768 and with default text-size settings.

Figure 9.3



Breadcrumbs

Breadcrumbs provide context for users, as well as a method for navigating a site's hierarchy.

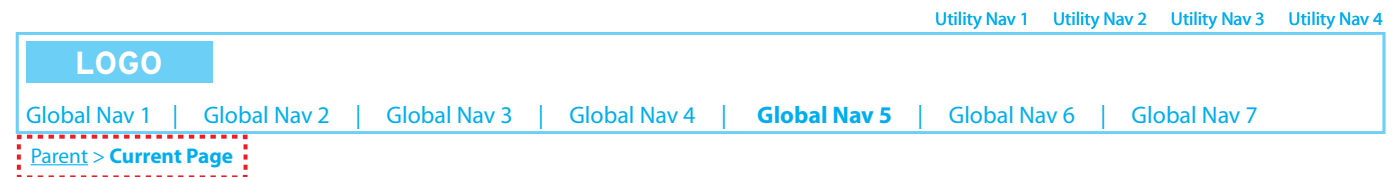
Breadcrumb Labels

- Match labels to page titles
- Use title capitalization
- Separate each label with a greater-than sign (>)
- Include the title of the current page as the last label in the breadcrumb
- Do not display breadcrumbs on the first page of a section
- Do not use the label "Home" for the first page; instead use the page's title

Hyperlinks

- Hyperlink all labels in the breadcrumb trail except the final one (which corresponds the current page)
- Never hyperlink the greater-than sign (>) or the spaces that separate the labels

Figure 9.4



Section (Local) Navigation

For navigation within a section, there are three systems: vertical hierarchical (tree) navigation, horizontal navigation and cascading menus.

Use a consistent section navigation system throughout the site or application.

Keep the navigation categories constant. If a link is available at the top level from one page, make it available from all the pages at the same level in that section.

Vertical Hierarchical (tree) Navigation

Use a vertical hierarchical navigation system when the site must support several levels of section navigation categories and horizontal screen real estate is available.

Horizontal Navigation

Use a horizontal navigation system when only one level of section navigation needs to be supported and horizontal real estate is at a premium.

Figure 9.5: Vertical hierarchical (tree) navigation

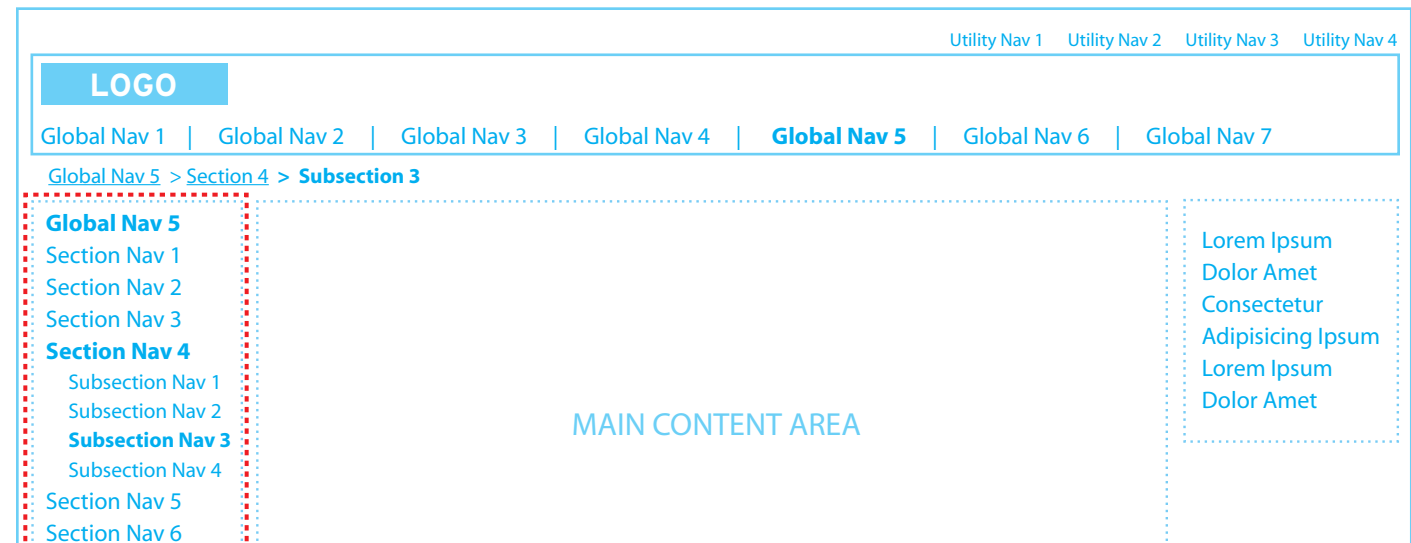
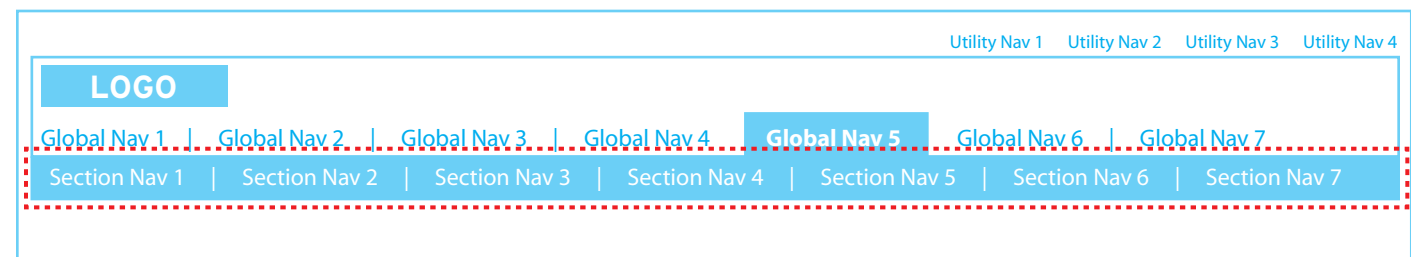


Figure 9.6: Horizontal navigation



Section (Local) Navigation (continued)

Cascading Menus

Cascading menus allow users to quickly navigate to a site or application's subsections without having to click through multiple pages. This type of menu also provides a preview of the content or functionality available within a section.

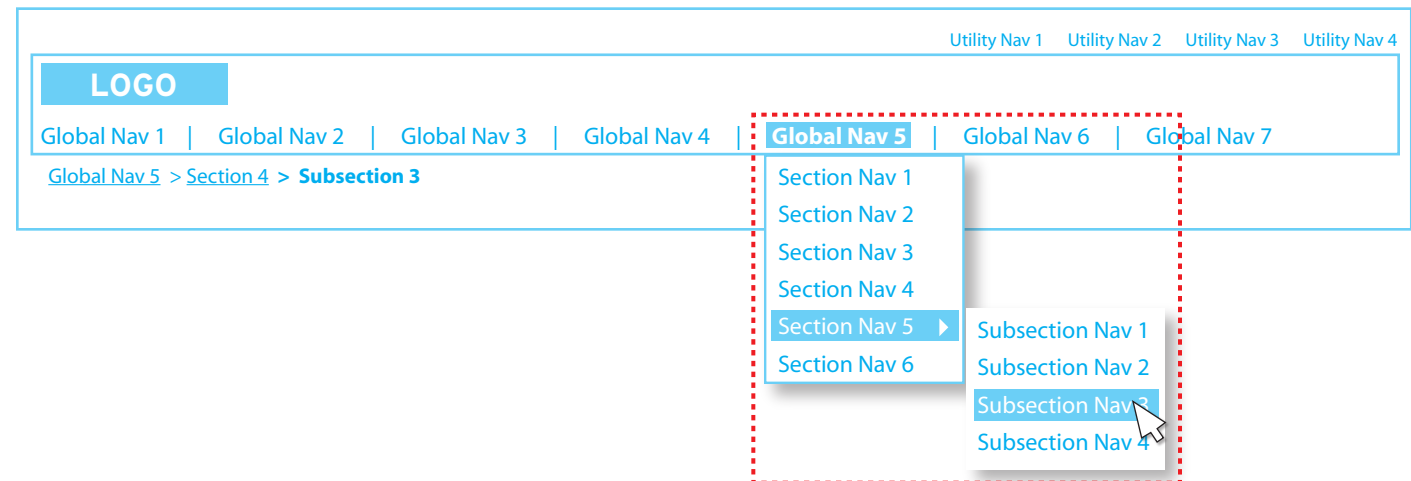
When applicable, use cascading menus in addition to the two systems mentioned on the previous page, rather than as a substitute.

Display cascading menus when users hover over a navigation category on the global navigation bar.

Expose the menu when users click on the navigation category. Hide the menu when users roll outside the menu area.

When using cascading menus, display a dropdown arrow to the right of the label to provide a visual cue that a menu is available, as illustrated in Figure 9.7.

Figure 9.7



Contextual Navigation

Contextual navigation is used to provide links to information related to the content or functionality on a page.

Contextual links can be embedded within the text, contained above or within a table or grouped together in a module. Contextual links can also be provided via contextual menus.

When contextual links are embedded in text, underline the link.

Avoid “click here” or variants. To name a link, use the title or information about the target page.

Figure 9.8



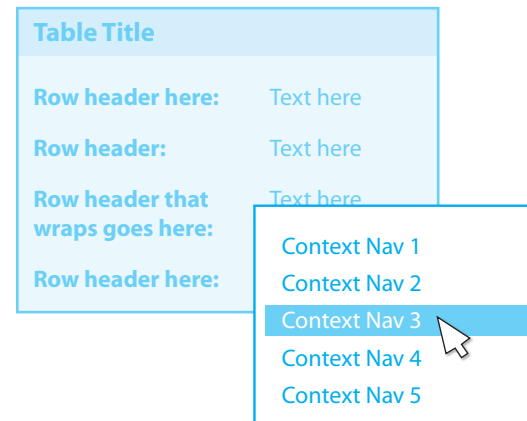
Contextual Menus

Contextual menus open when users right click on an area of the page. The menu categories displayed are determined by the target area from which it is accessed.

Contextual menus release after users left click on a menu category, thereby navigating to the corresponding content or functionality, or when they click anywhere outside of the menu target area.

Do not use contextual menus as a substitute for other the other types of navigation unless screen real estate is at an absolute premium and your user base consists of knowledgeable users.

Figure 9.9



History Management: The Back Button

Support Web browser conventions such as history management using the Back and Forward buttons.

Rich Internet applications often eliminate the need for total page refreshes by loading data in the background and updating only portions of the page. Users, however, will expect that changes made in previous steps of a multi-step process will be retained when pressing the Back button.

10. Containers: Windows, Modules, Panels

Pop-up Windows

A pop-up window is smaller than a standard Web browser window, and pop-ups lack some standard window features, such as toolbars or location bars.

Use pop-up windows sparingly for task-driven activities, such as wizards or forms, or for displaying tangential, read-only information like Help or Glossary items.

Behavior

Program all pop-ups to load in front of primary windows.

Keep scrolling to a minimum.

Restrict the number of open windows to two. If two child windows are open, launch additional content in one of the open windows.

Ensure that the pop-up window closes when the parent window closes.

Buttons

Always provide a “Close” button as a reinforcement to the “x” that appears at the right of the title bar area.

On forms, provide both “Submit” and “Cancel” buttons. The text for “Submit” can be changed to more accurately suit the content.

Display

Display title and status bars, even if a custom “loading” component is being provided.

Do not display the toolbar or the location bar.

Positioning

Whenever possible, open new windows in the horizontal center, as shown in Figure 10.1.

Position these windows at the visual vertical center, discounting the browser chrome.

Move subsequent windows to the right 20 px and down 20 px.

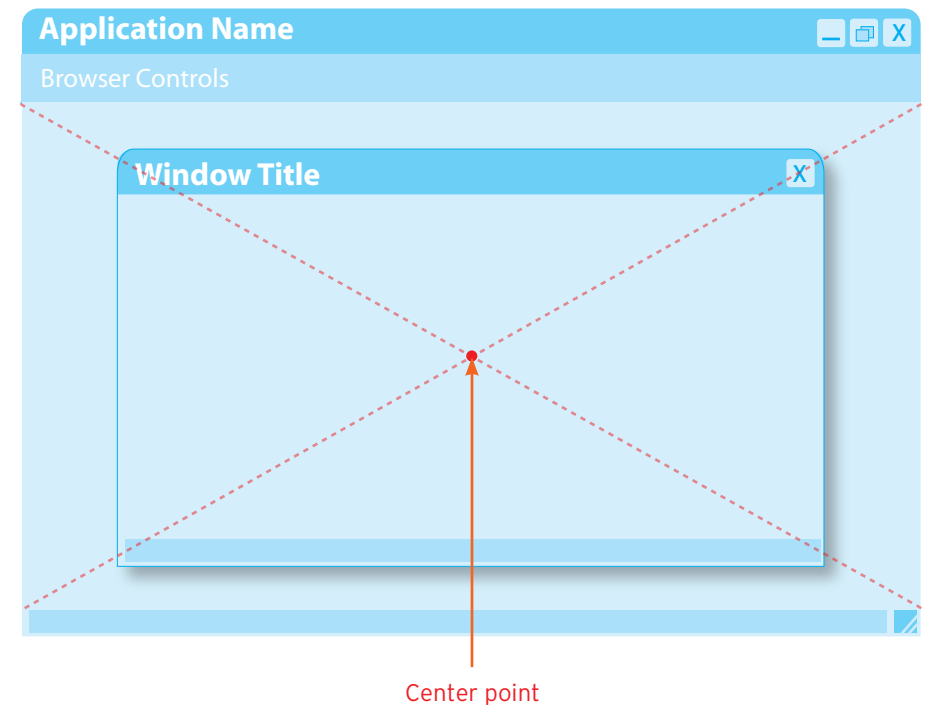
Size

Do not allow user resizing of pop-up windows.

Size pop-ups appropriate to the content, in a manner that avoids scrolling as much as possible.

Never make pop-ups larger than 90% of the target screen resolution.

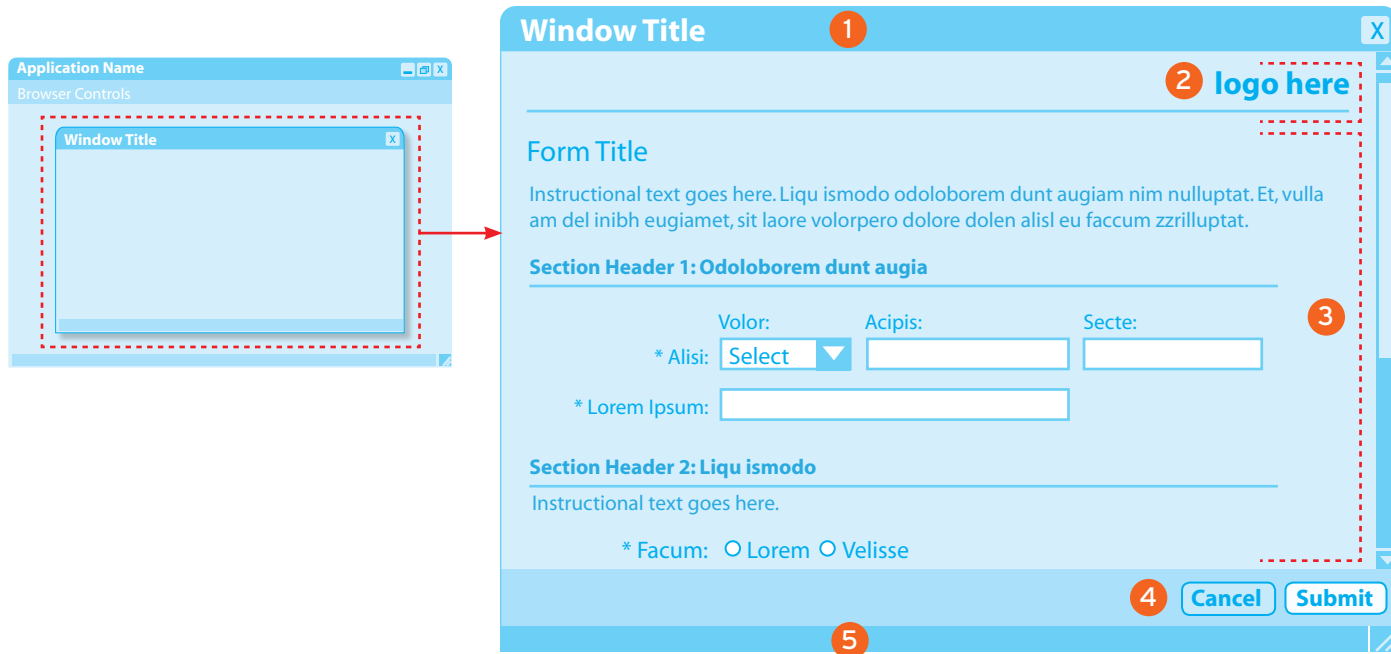
Figure 10.1: Placement of child window within parent



Pop-up Windows: Properties

Pop-up window layout is illustrated in Figure 10.2.

Figure 10.2



- 1 Browser chrome: window title bar with close button
- 2 Header: logo and horizontal rule
- 3 Content area
- 4 Command area and form buttons
- 5 Browser chrome: status bar; resize disabled

Launching External Sites and Documents

To inform users when a link will open a third-party Web site, not maintained by Citigroup, follow the guidelines below.

Disclosing an external link

Provide clear indication that the link leads to a non-Citigroup site:

- near the link or
- in a clearly marked footnote

When possible, word the link text to indicate that it opens another Web site. For example: "Visit the SEC for investment information for seniors."

For the disclaimer, use approved text, such as "By clicking on this link, you will open a Web site created, operated and maintained by a different company and subject to different privacy, security and user conditions."

Opening a new window

Open the external site in a new browser window sized 10% smaller than the originating window or than the full-screen size of the lowest screen resolution of prospective users.

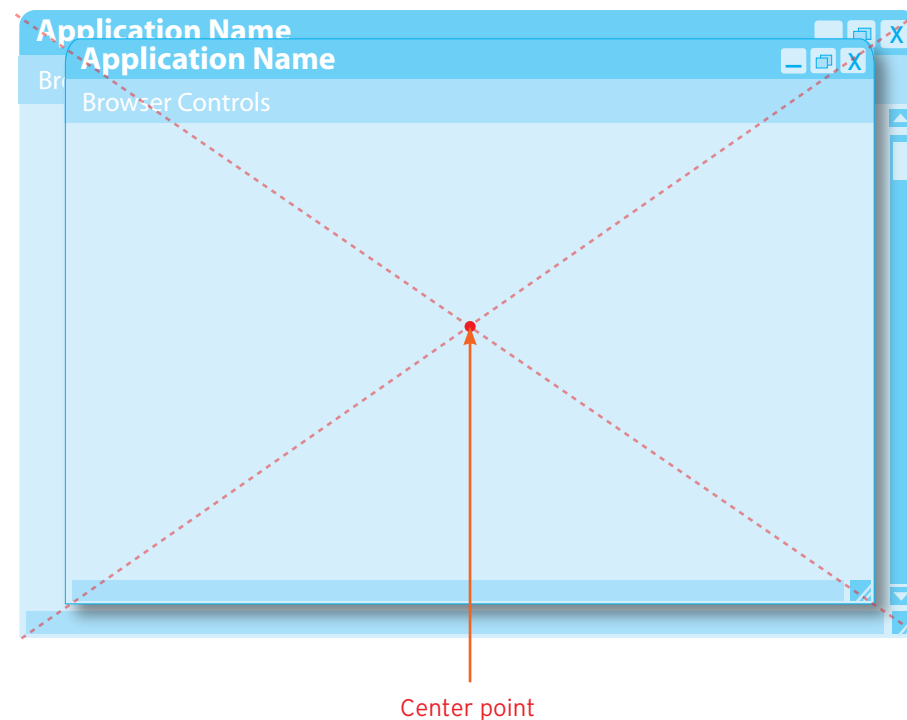
Center the new window in the browser.

Forego speed bumps/pop-up windows.

Do not link to a third-party site from the side navigation or top navigation, only from the body of a Web page.

When opening a document that requires launching an external application, such as Acrobat or Excel, the file should automatically open within the default application as indicated in the document's extension.

Figure 10.3: Launching a new window



Frames: General Rules

A frame behaves like a window in that its content comes from a discrete server source. Rather than floating freely like a window, a frame is either built into an HTML document as part of the frameset or is embedded in the document as an i-frame.

Frames display independently delivered content and most browser functions by default handle only primary documents. Therefore, issues may arise related to:

- Navigating via the browser's native "Back," "Forward" and "History" controls
- Printing pages containing frames. Frames are often borderless, and users may not realize that the content they are trying to print is delivered in a frame. Most browsers print the main document loaded into the browser
- Bookmarking pages inside a frameset. A bookmark to the frameset will lead to the front page instead of the deeper page desired

GWM does not impose an outright ban on frames but demands careful consideration of frames-based designs and features to mitigate or resolve the issues mentioned above.

Modules: Properties

Figure 10.4 illustrates the anatomy of a primary module.

In addition to the basic features, optional components of a module are shown in Figure 10.5.

Figure 10.4

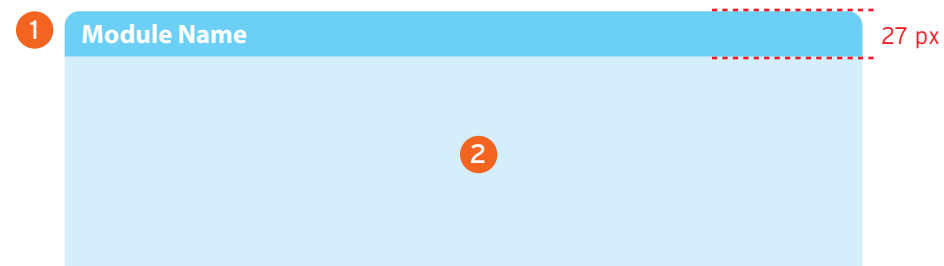
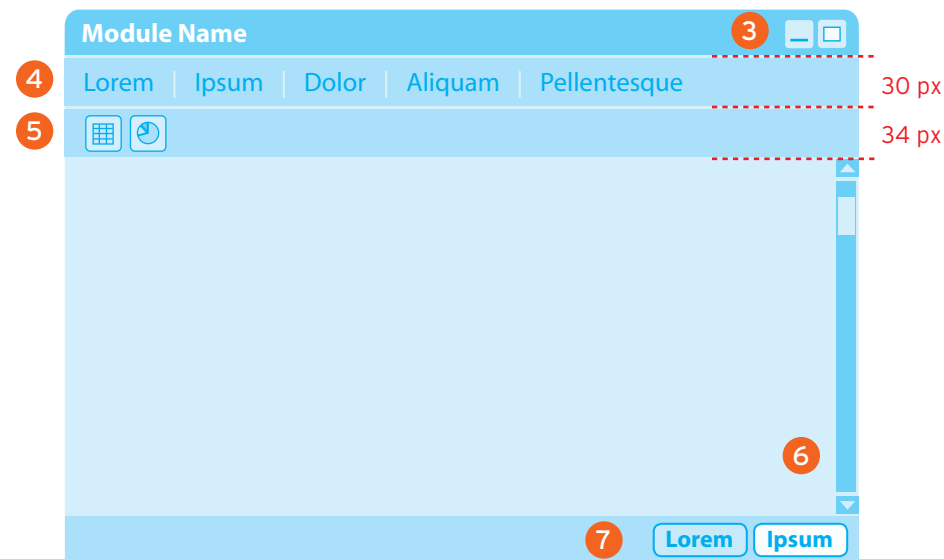


Figure 10.5



- 1 Title Bar
- 2 Content Area
- 3 Module View Controls
- 4 Module Navigation (Link Bar)
- 5 Dataview Controls
- 6 Scrollbars
- 7 Command Area

Modules: States

Modules can be viewed in three states: collapsed, expanded (to a default size) and full (when the content exceeds the default size).

The view control pairs, displayed in the far right of the title bar, vary by module state, and are described below.

In the collapsed state, the Expand and Full controls are displayed, as in Figure 10.6.

In the expanded state, the Collapse and Full controls are displayed, as in Figure 10.7.

In the full state, the collapse and expand controls are displayed, as in Figure 10.8.

Figure 10.6: Collapsed state



Figure 10.7: Expanded (default) state

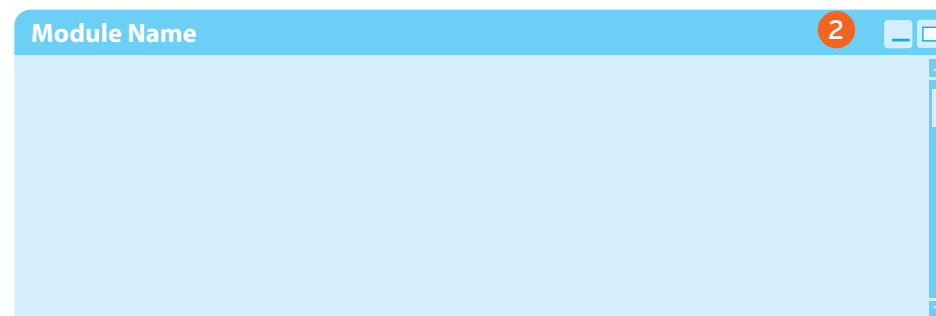
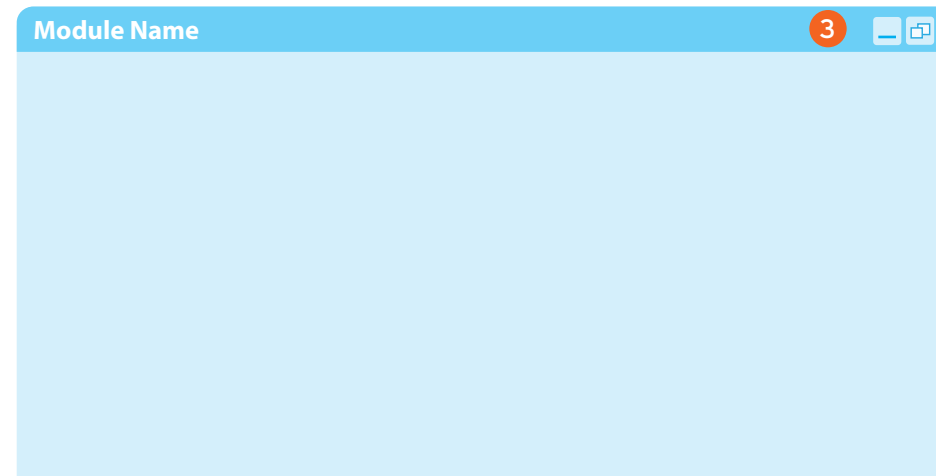


Figure 10.8: Full state



1 Collapsed State

2 Expanded State

3 Full State

Modules: Behavior and Interaction

Initial View

Figure 10.9 demonstrates the initial view of modules. Note that, even as Primary Modules 1 and 2 (PM1 and PM2) are expanded and collapsed, the vertical space between these modules remains constant.

Full view

Figure 10.10 illustrates PM 1 in a full state, while PM2 remains in the default state.

The expanded module will be centered within the viewable area.

Expanding one primary module does not affect the state of other primary modules.

If the total height of the primary modules exceeds the available vertical space, a vertical scrollbar appears.

Secondary Modules

Figure 10.11 illustrates Secondary Module states.

Expanding or collapsing a secondary module does not affect the state of other secondary modules.

If the total height of secondary modules exceeds the available vertical space, a vertical scrollbar appears.

Figure 10.9: Initial view

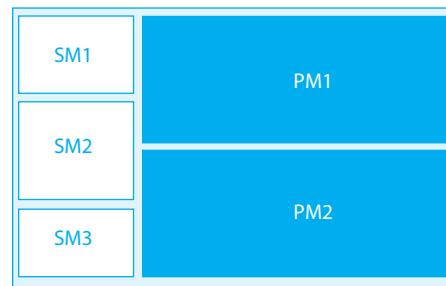


Figure 10.10: PM1 in full view, PM2 in default view

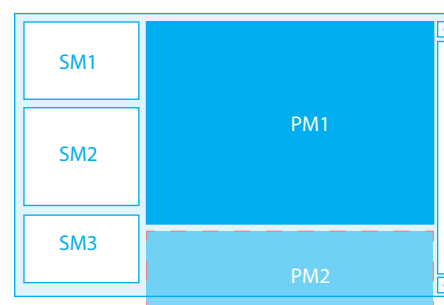
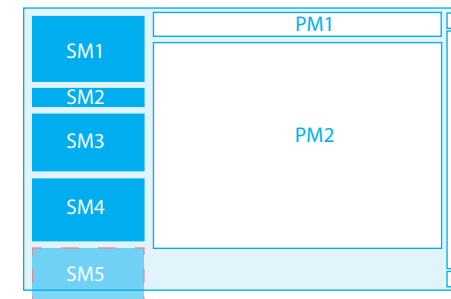


Figure 10.11: SM1, 3, and 4 in full view, SM2 collapsed



Panels: Collapsible Panels

The three states of collapsible panels are: collapsed, expanded and edit mode.

While similar in appearance to accordion headers, collapsible panels expand and collapse independently of each other, and more than one panel can be open at any time.

Horizontal and vertical scrollbars appear when full content exceeds the full panel. See [User Controls > Scrollbars](#) for additional details.

Collapsed/Expanded State

Collapsible panels have a single view control located at the far left of the panel header, as illustrated in Figures 10.12 - 10.14.

The panel expands or collapses when a user clicks the arrow or the panel title.

Edit Mode

Additional components, such as edit controls, may be added to collapsible panels to facilitate data manipulation and display.

Users click on the edit icon to switch the panel into edit mode.

In edit mode, the edit icon in the panel header becomes disabled and command buttons appear at the bottom of the panel. After a user clicks a command button, the panel returns to display mode.

Figure 10.12: Collapsed state



Figure 10.13: Expanded state

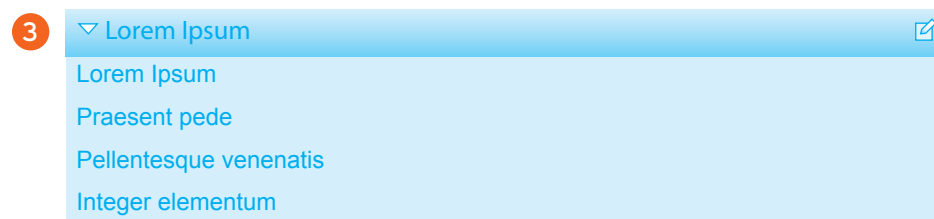
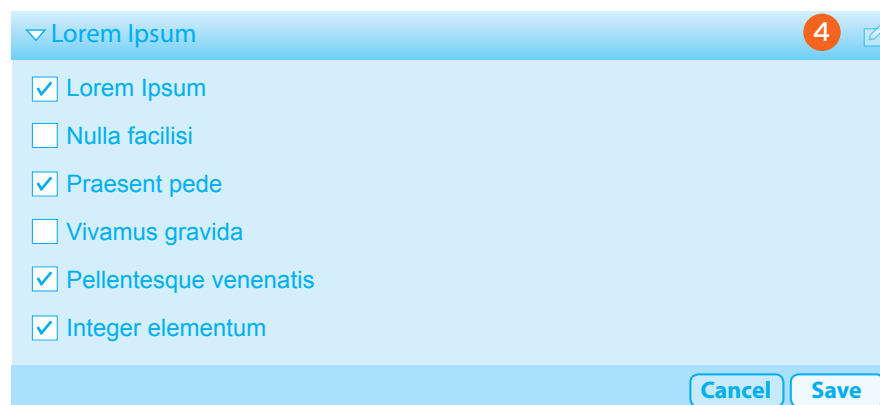


Figure 10.14: Edit mode



1 View Control Collapsed State

2 Edit Icon: Enabled State

3 View Control Expanded State

4 Edit Icon: Disabled State

Panels: Date Picker

Users click the calendar icon to launch the date picker. The panel closes when users select a date or click "Today."

Positions

The date picker automatically positions itself based on screen real estate. The default position is below and left-aligned with the calendar icon, as shown in Figure 10.15.

Alternate positions, illustrated in Figure 10.16, depend on the position of the date entry field in the browser.

If the page is scrolled to a point where the entire date picker cannot be viewed below the calendar icon, the date picker will position itself above the icon.

If the text field is so far to the right in the browser that the entire date picker cannot be displayed, the date picker will reposition itself so that it is right-aligned with the icon.

Display

- The default display is the current month and year.
- Weekdays appear in black
- Weekends and leading/trailing days appear in gray
- Days with scheduled events are in bold
- The current day is in a red bounding box
- The selected day is in a black bounding box

Figure 10.15

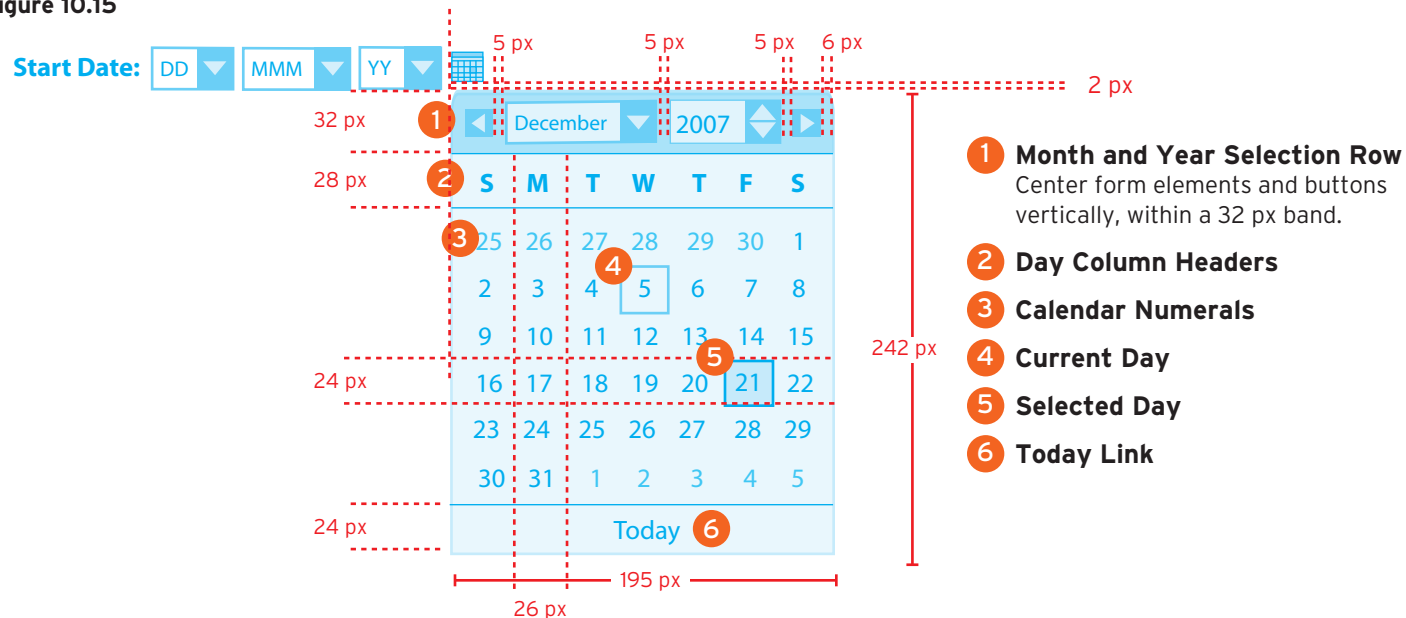
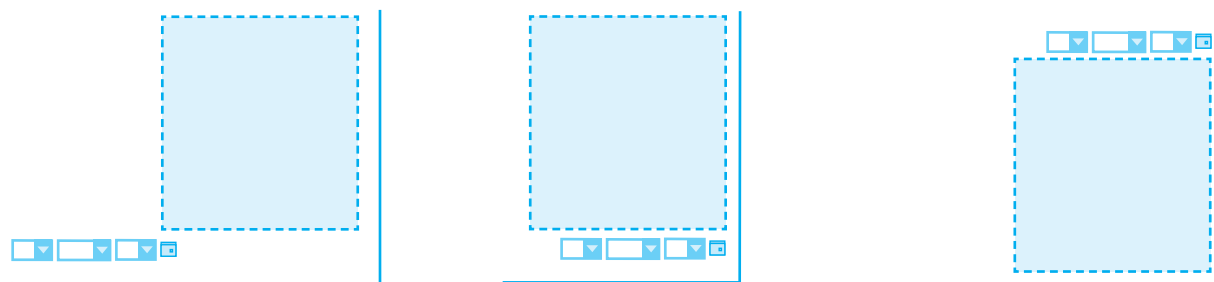


Figure 10.16: Alternate positions



Panels: Info Panel

An info panel contains brief additional information about content.

Info Panels load with the page but are hidden until a user rolls over or clicks the info icon.

Unlike a window, info panels do not display the browser chrome.

Once the info panel is open, the icon changes to an "X" and functions as a close control. The info panel may also be closed with a click anywhere outside the panel.

When visible, the panel appears to be attached to the icon that launched it.

Design the panel to appear below and to the right of the icon. However, if this placement is impossible, see [Panels: Date Picker](#) for alternate positioning rules.

Figure 10.17: Info panel in the open state

	Account	Label (USD)	Label (USD)	Label (USD)	Label (USD)
1 i	Curabitur risus	12-345-678	123,456	123,456	123,456
i	Donec velit	21-334-654	432,654	432,654	432,654
i	Sed nec leo	32-444-334	123,456	123,456	123,456
X	Vivamus accumsa	76-473-098	432,654	432,654	432,654
2	In hac habitasse platea dictumst. Sed arcu magna, nonummy eu, accumsan eget, sollicitudin vitae, nibh. Etiam pellentesque. Etiam tempor augue at enim.				
			123,456	123,456	123,456
			432,654	432,654	432,654

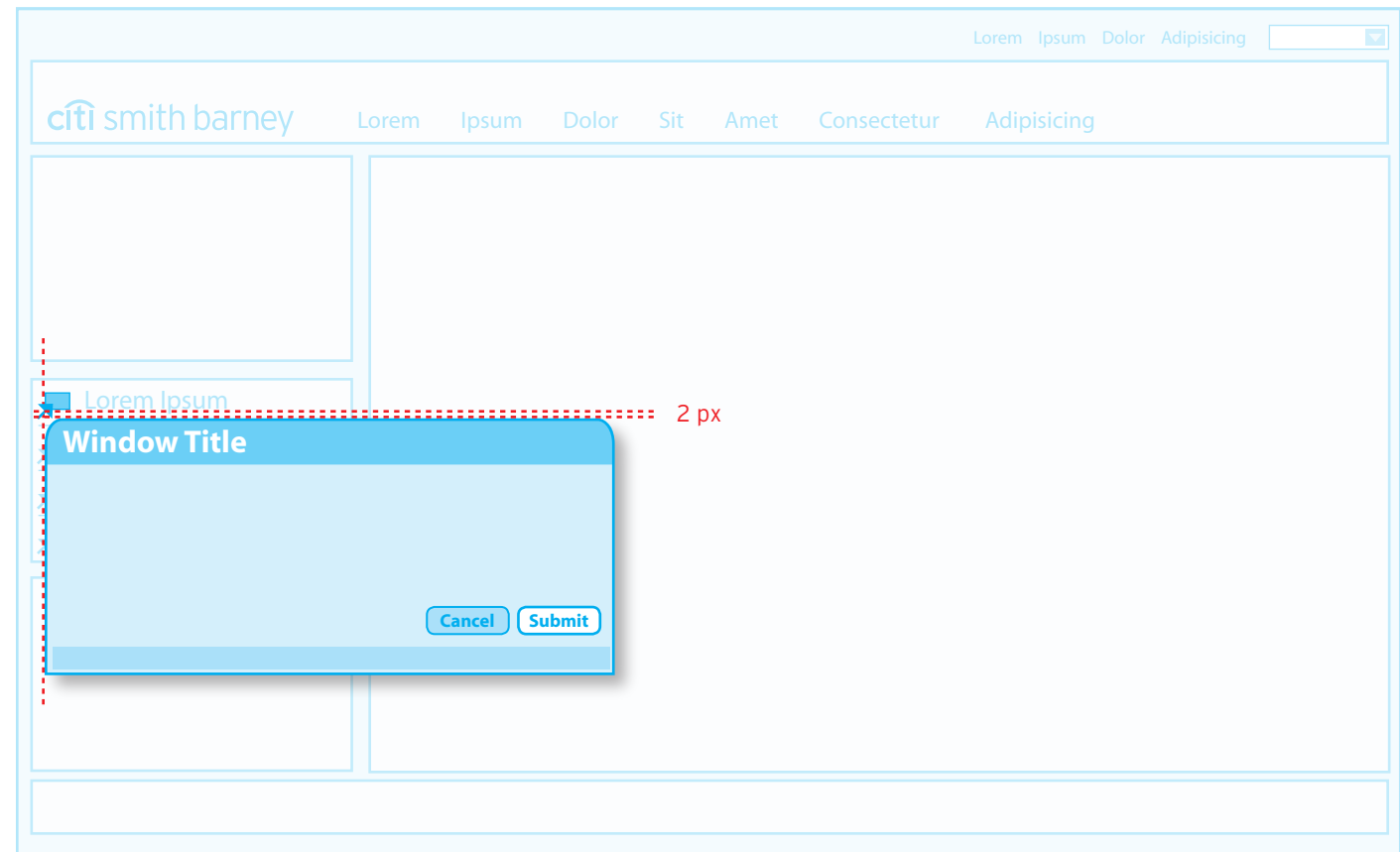
- 1 Info/Close Icon
- 2 Info Panel

Panels: Contextual Panel

A contextual panel displays additional relevant content. Although it is not a pop-up window, it functions in a similar way. Contextual panels contain a custom title bar, but no browser chrome.

Position the panel below and to the right of the icon. However, if this placement is impossible, see [Panels: Date Picker](#) for alternate-positioning rules.

Figure 10.18



Panels: Tertiary

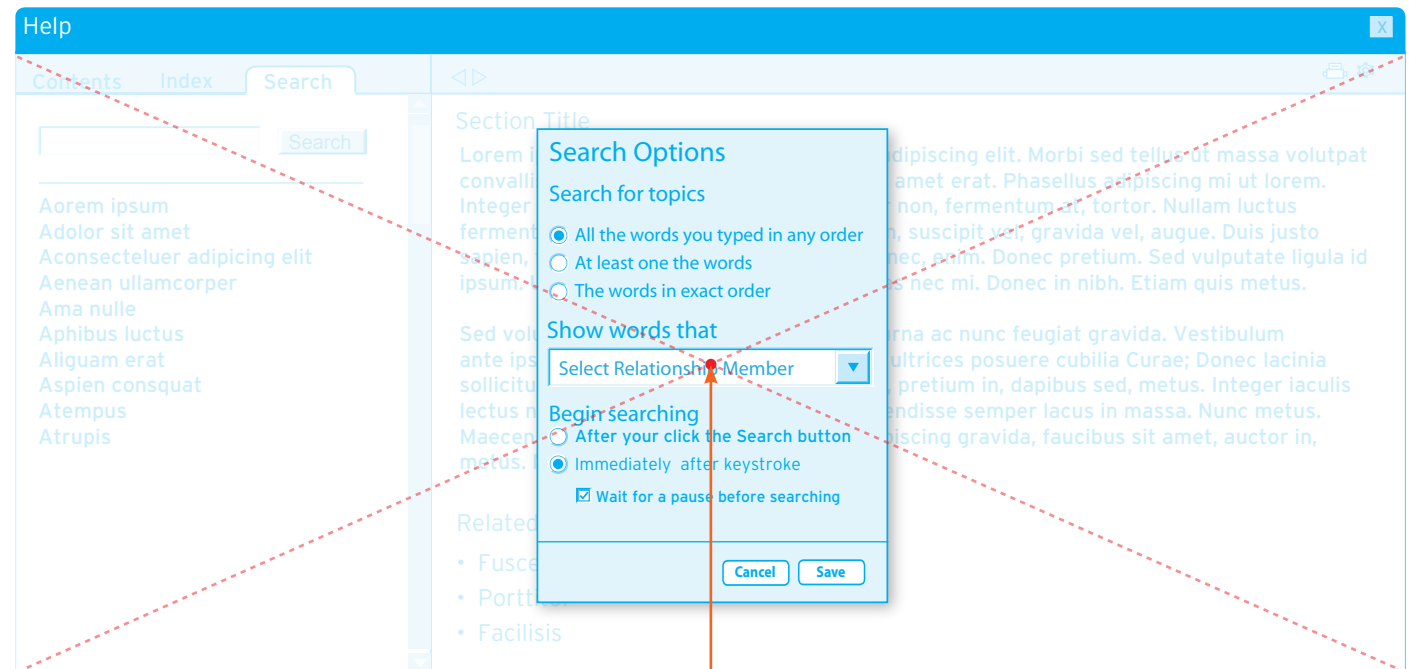
In addition to a secondary panel, it may be necessary to display ancillary content or functionality in a third panel, called a tertiary panel.

Tertiary panels are always modal; the user must interact with the window before returning to the parent application.

Center the opened tertiary panel in its parent panel, as shown in Figure 10.19.

Do not size a tertiary window larger than its parent. It should be at least 10 px smaller on all sides.

Figure 10.19



Center point

Application Windows

The application window appears overlayed on top of the parent window and is inset 10 px from each edge of the parent window.

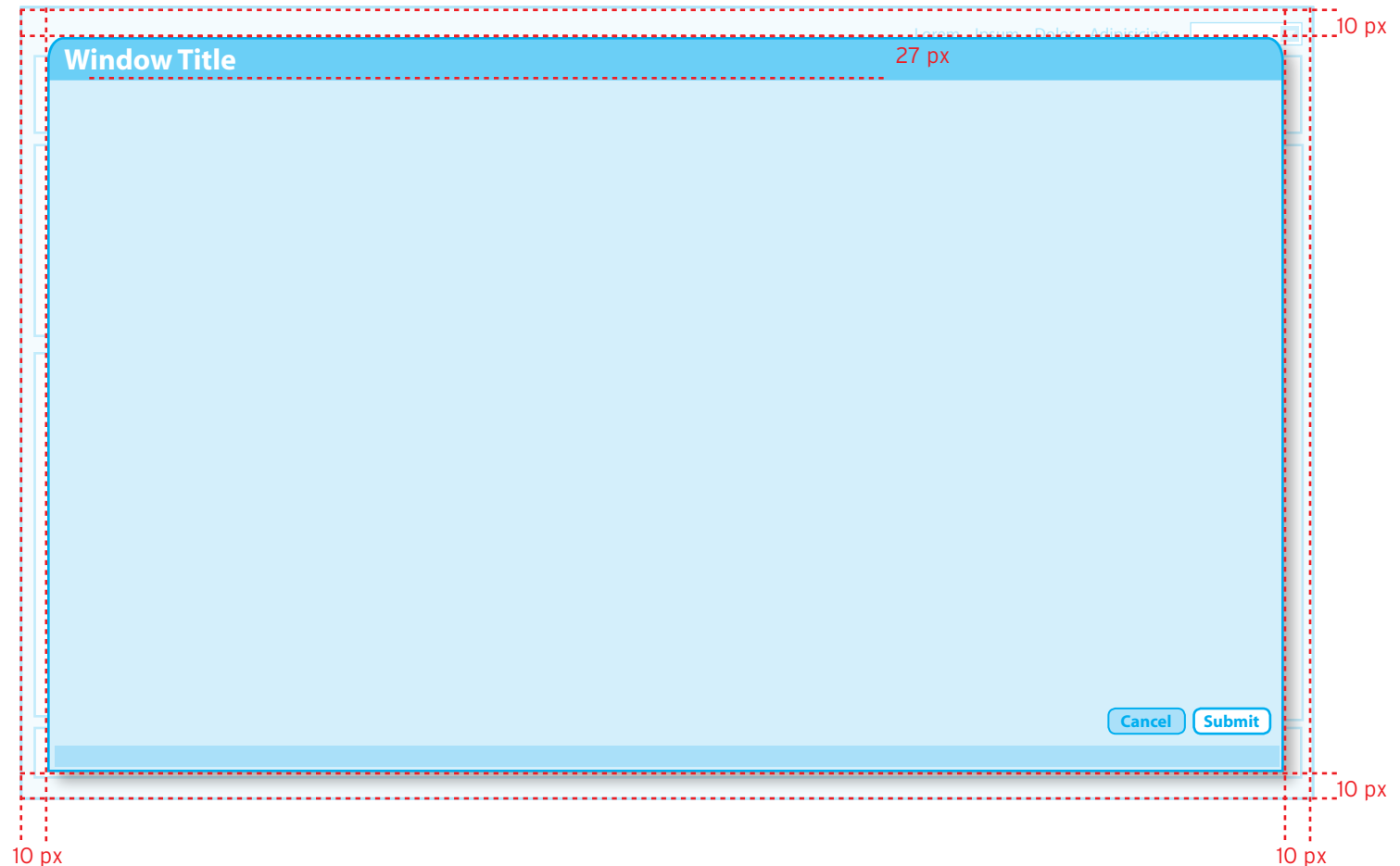
If the content of the overlay is larger than the parent window, the overlay generates scrollbars.

The command area with buttons is pinned to the bottom of the overlay, so scrolling will occur only between the top and the command area of the overlay.

If the parent window is moved by grabbing the title bar, the overlay moves with the parent window.

The window overlay is modal and disables the controls of the parent window. Therefore it must be submitted or dismissed in order to enable the controls on the parent window.

Figure 10.20: Application window overlayed with parent window in background



Skin: Pop-up Windows

Figure 10.21

Application Title Here

citi smith barney

Page Title

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco.

Section Header 1: Sed do eiusmod

Volor: Acipis: Tempor:

Consectetur: Select

Lorem Ipsum:

Section Header 1: Sed do eiusmod

Factum: ☒ Veniam ☐ Nostrud

Consectetur: Select

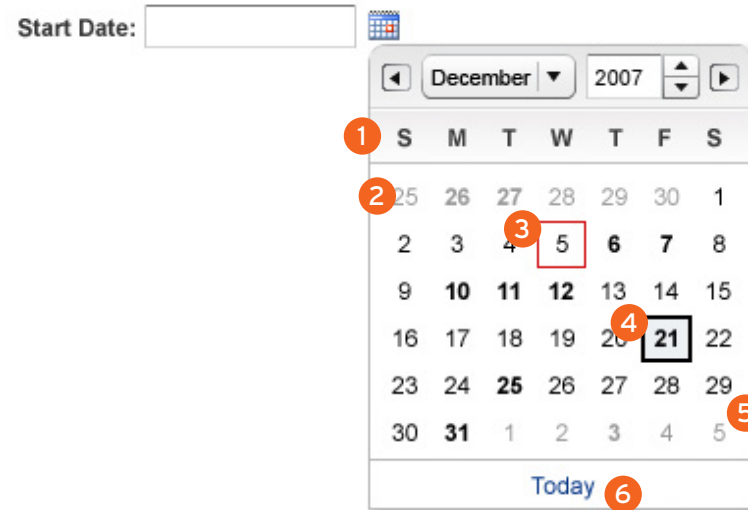
Lorem Ipsum: Instructional text goes here.

Cancel Save

Internet ms.ms.

Skin: Date Picker

Figure 10.22



- 1 **Day Column Headers**
Font: Arial, 12, bold, #000000, centered vertically in row, tabbed at 26 px
- 2 **Calendar Numerals**
Font: Arial, 12. Current month: #000000. Leading/trailing days: #999999. Dates with events scheduled are bold
- 3 **Current Day**
Border: Solid, 1, #CC0000
BG Color: #EDF1F4
- 4 **Selected Day**
Border: Solid, 2, #000000
- 5 **Drop Shadow**
Right, 2
- 6 **Today Link**
Font: Arial, 12, #003082
Alignment: centered vertically and horizontally in band

Skin: Info Panel

Figure 10.23

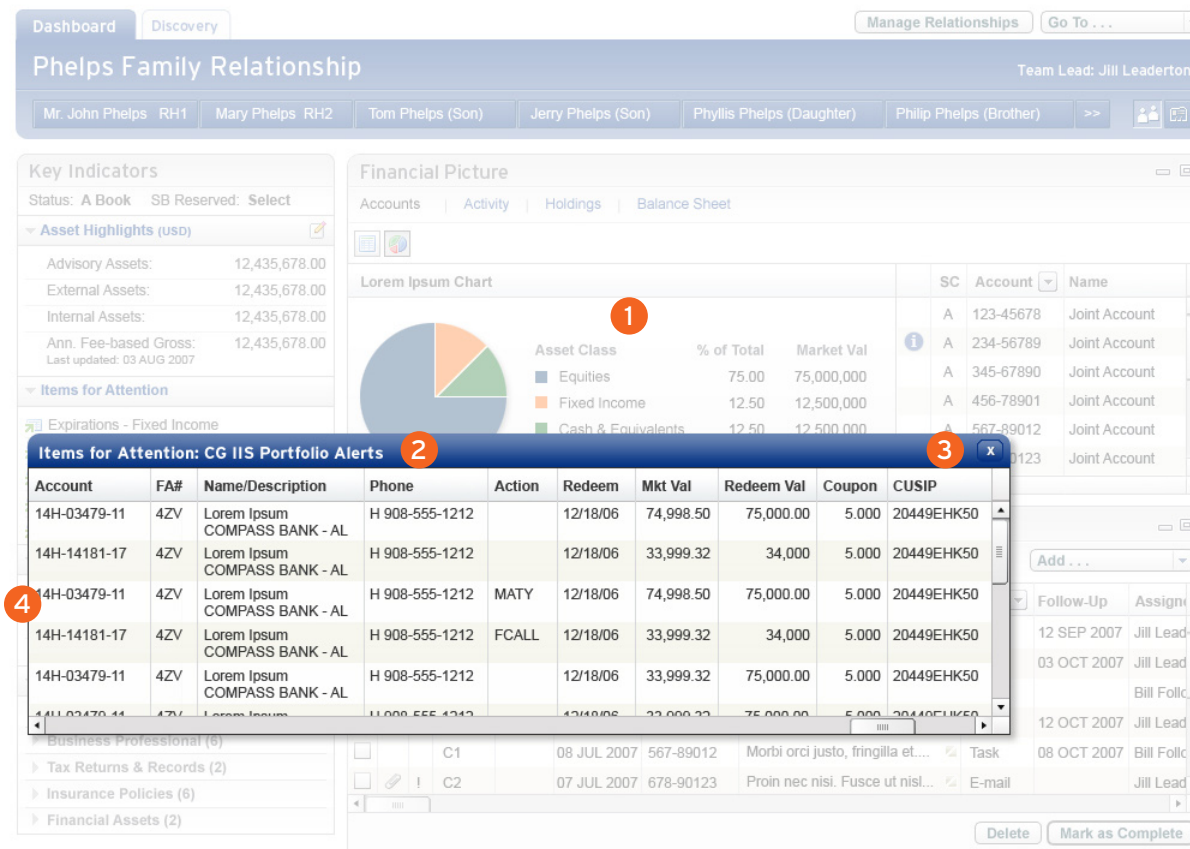
	SC	Account ▾	Name	Type ▾	Manager	Equities (USD)
	A	123-45678	Joint Account	NPI	Lorem Ipsum	5,200,000.00
i	A	234-56789	Joint Account	IRA	Lorem Ipsum	5,200,000.00
	A	345-67890	Joint Account	SMA	Lorem Ipsum	5,200,000.00
1 X	A	456-78901	Joint Account	SA	Lorem Ipsum	5,200,000.00
			SMA	Lorem Ipsum	5,200,000.00	
			SMA	Lorem Ipsum	5,200,000.00	

Lorem ipsum dolor sit amet,
 consectetur adipiscing elit. In nunc
 felis, ultricies sit amet, volutpat at,
 lacinia vitae, magna. Donec bibendum
 metus vitae sapien. In id turpis.

- 1 Info Panel**
 BG Color: #FFFFFFE0
 Border: Solid, 1, #999999
 Corner Radius: 3
 Drop Shadow: Right, 2, #A6A6A6

Skin: Contextual Panels

Figure 10.24



1 Parent Window

2 Title Bar

Font: Arial, Bold, 14, #FFFFFF
BG Gradient: #6B8CCA, #5979B6
Height: 27

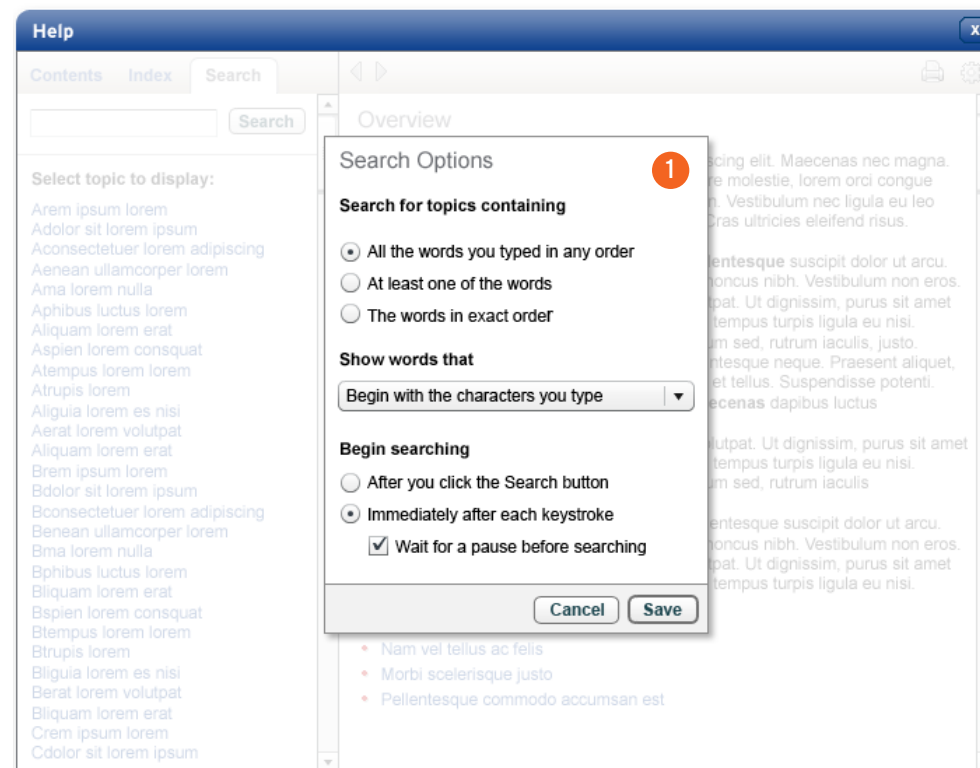
3 Close Button

4 Pop-up Container

Border: Solid, , #FFFFFF
Drop Shadow: 3, Right, #808080
Corner Radius: 0
Rounded Bottom Corners: False

Skin: Tertiary Panels

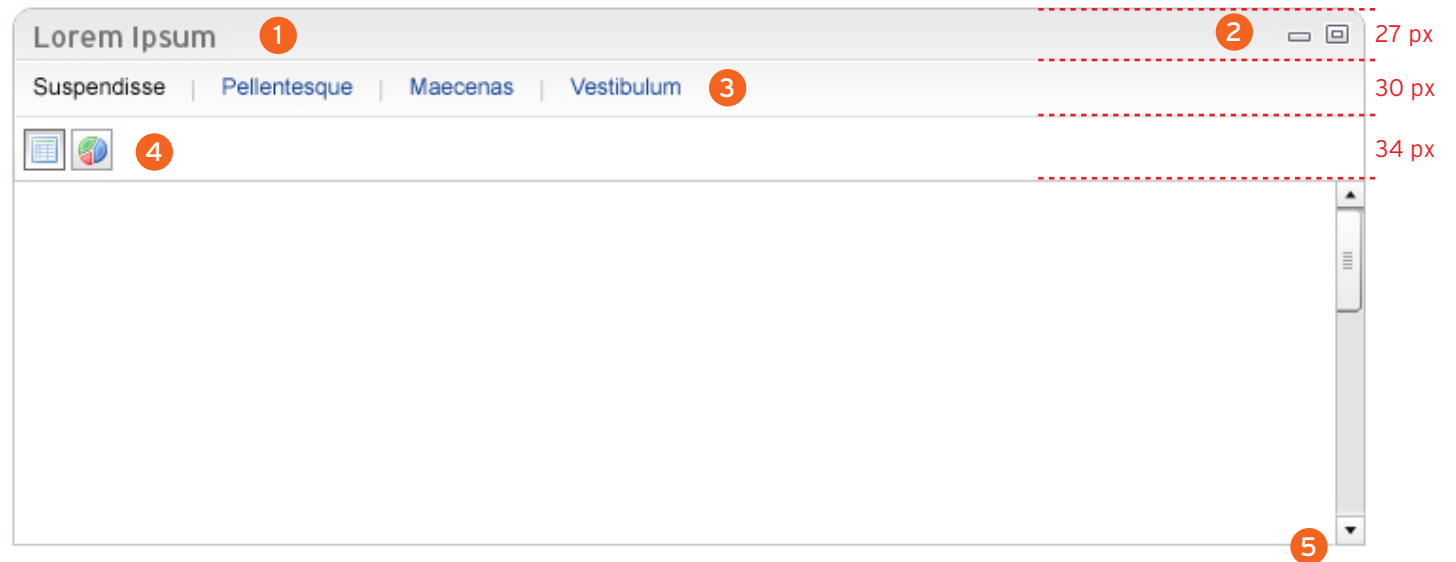
Figure 10.25



- 1 Pop-up Container**
 BG Color: #FFFFFF
 Border: Solid, 1, #626469
 Drop Shadow: 3, Right, #808080

Skin: Basic Module

Figure 10.26



- 1 Title Bar**
 Border: Solid, 1, #FFFFFF
 Corner Radius: 10
 BG: #E7E7E7, #F3F3F3
 Font: Interstate Regular, 16pt, #626469
 H Rule: 2px, #D9D8D8, #FFFFFF

- 2 Module View Controls**

- 3 Module Navigation (Link bar)**
 BG: #F2F2F2, #FEFEFE
 Links: Arial, Regular, 12, #003082
 Active: Arial, Bold, 12, #474747
 Pipes: Arial, Regular, 12, #BEBEBE

- 4 Dataview Controls**
 Toggle between table and graph views of a dataset. The left control switches to table view and the right control to chart view

- 5 Scrollbars**

11. Forms

Form Elements and Layout

Forms are intrinsic and critical features of Web-based applications, often used to manage significant and valuable user data. Use the following guidelines when considering form design, layout and error handling.

Design forms in logically organized and easily comprehensible structures.

Ensure that errors are identified and corrected as seamlessly as possible.

Figure 11.1 provides a high-level view of a basic form layout.

- Create noticeable divisions between form sections
- Clearly identify required fields to reduce errors
- Include concise instructional text at the general, section and field levels to inform users and to prevent errors

While a user's browser or operating system determines the default look and feel of some form element features - such as borders, backgrounds and scrollbars - apply CSS to customizable features to achieve a consistent look and feel.

See the following pages in this section for details on field and field label formatting.

Figure 11.1

1 Form Title

2 Instructional text goes here. Liqu ismodo odoloborem dunt augiam nim nulluptat. Et, vulla am del inibh eugiamet, sit laore volorporo dolore dolen alisl eu faccum zrrilluptat.

3 Section Header 1: Odoloborem dunt augia

4 Field sublabels

5 * Alisi: Select

* Lorem Ipsum:

Section Header 2: Liqu ismodo

6 Instructional text goes here.

* Facum: ☐ Lorem ☐ Velisse

7 Instructional text.

150 px

8 Reset Cancel Submit

- 1 Form title
- 2 Instructional text (general)
- 3 Section header
- 4 Field sublabels
- 5 Required field indicator
- 6 Instructional text (section)
- 7 Instructional text (field)
- 8 Command area and form buttons

Form Layout Options

Form layout refers to field label and form field alignment.

Horizontal Layout

Horizontal layout is the preferred method.

Position labels to the left of their form fields, and right-align field labels.

Vertical Layout

Apply a vertical layout only when horizontal space is limited.

Position labels above their form fields, and left-align field labels and form fields.

Figure 11.2: Horizontal Layout

The diagram illustrates a horizontal form layout. Labels are positioned to the left of the form fields. The labels are right-aligned, and the fields are left-aligned. The dimensions are as follows:

- Label width: 150 px
- Label height: 8 px
- Field height: 12 px

The form fields include:

- * Preferred Name: (text input)
- Date of Birth: (DD, MMM, YYYY dropdowns)
- Gender: (Male, Female radio buttons)
- Association Type: (Select dropdown)
- Referred by: (Look Up button)

Figure 11.3: Vertical Layout

The diagram illustrates a vertical form layout. Labels are positioned above the form fields. The labels are left-aligned, and the fields are left-aligned. The dimensions are as follows:

- Label height: 5 px
- Field height: 16 px

The form fields include:

- * Preferred Name: (text input)
- Date of Birth: (DD, MMM, YYYY dropdowns)
- Gender: (Male, Female radio buttons)
- Association Type: (Select dropdown)
- Referred by: (Look Up button)

Checkboxes and Radio Buttons

Checkboxes and radio buttons are unique input types that appear as sets of options rather than single inputs.

Layout and formatting

Place the sub-label to the right of the input, vertically aligned to the middle.

Left-align group elements (input and sub-label), when organized vertically as shown in Figures 11.4 and 11.7.

Checkboxes

Checkboxes can be selected by clicking an input, and deselected by relicking the input.

If required, default checkboxes and checkbox groups to an unselected state.

Use checkbox groups when a question permits or requires multiple answers.

Use a single checkbox when a question requires a binary answer, such as yes or no responses.

Use a checked box to indicate the positive response and an unchecked box to indicate the negative response.

Radio Buttons

Radio buttons are selected by clicking the input but cannot be deselected by relicking the input. Instead, another radio button from the same group must be selected.

If required, default radio buttons to their unselected state.

Use radio buttons when a question requires selecting a single option from a group of options.

Radio buttons are often used when an explicit answer, such as a legal attestation or agreement, is required.

Checkbox Groups or Exposed List Boxes

Although checkbox groups and exposed list boxes provide similar functionality, use checkbox groups if any of the following are true:

- the list of options is fewer than four
- all list options must display in a single view
- screen real estate is readily available

Radio Button Groups or Drop-down Lists

When deciding between radio button groups and drop-down lists, the same rules apply. Use checkbox groups if any of the following are true:

- the list of options is fewer than four
- all list options must display in a single view
- screen real estate is readily available

Figure 11.4: Checkboxes in vertical arrangement

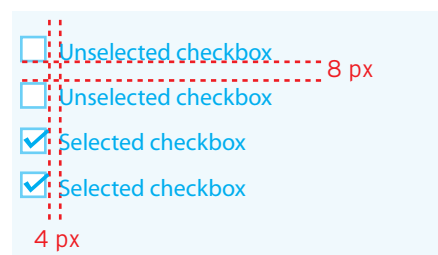


Figure 11.5: Checkboxes in horizontal arrangement

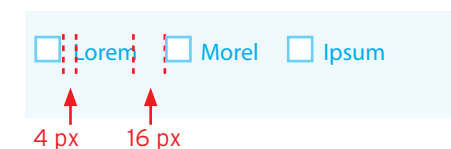


Figure 11.6: Checkbox used for binary response

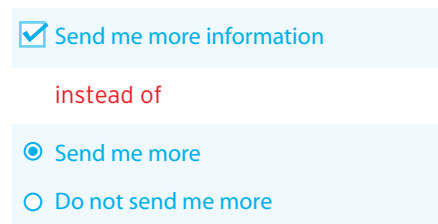


Figure 11.7: Radio buttons in vertical arrangement

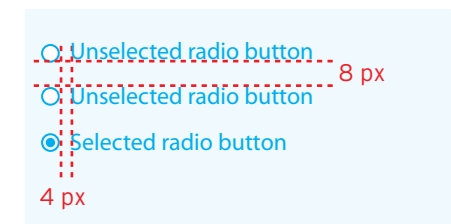
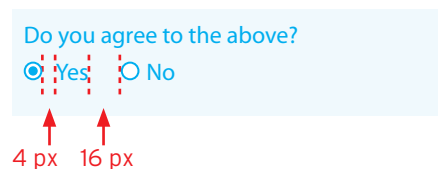


Figure 11.8: Radio buttons used for binary response in horizontal arrangement



Select Boxes

Select boxes are form controls that allow large groups of options to display within limited space.

Use a select box to limit a response to predefined options in order to simplify a task and mitigate input errors.

Drop-down List Boxes (Single-select)

The drop-down list box, illustrated in Figure 11.9, allows a user to select a single option from a list of options.

Apply scrolling for lists containing more than 11 options.

Do not use drop-down list boxes as navigational devices.

Exposed List Boxes (Multi-select)

The exposed list box, illustrated in Figure 11.10, offers a similar interaction to the drop-down list box, but the exposed list box has an adjustable height and allows multiple selections.

Use exposed list boxes to display large lists of options when screen real estate is limited.

Exposed list boxes are also applicable when a fixed number of options must be viewable at one time, such as in the case of list builder controls. For more details, see User Controls > List Builder.

Combo Boxes

The combo box, illustrated in Figure 11.11, combines a drop-down list box with a single-line text input fields. For more details, see Forms > Text Inputs.

Use combo boxes when requirements specify that users have the ability to add to the selection list by entering text into the selection display area.

Combo boxes are standard components in Adobe Flex but are not a native HTML controls. Pure HTML application requires an emulated control.

Spinners

The spinner, illustrated in Figure 11.12, is a single-select list similar to the drop-down list box, however the options list is never exposed.

A spinner displays only a single option in the selection display area. The options in the list move forward or back when a user clicks the up or down arrows next to the box, or on their keyboard.

Use spinners when the options list consists of incremental values, such as numbers or dates.

Spinners are standard components in Adobe Flex but are not a native HTML controls. Pure HTML application requires an emulated control.

Figure 11.9: Drop-down list box (single-select)

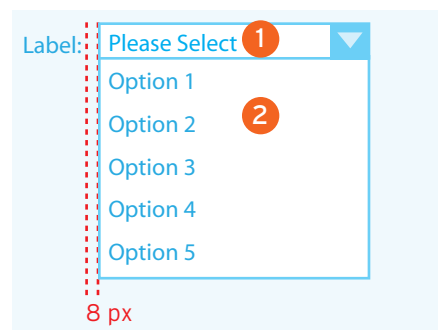


Figure 11.10: Exposed list box (multi-select)

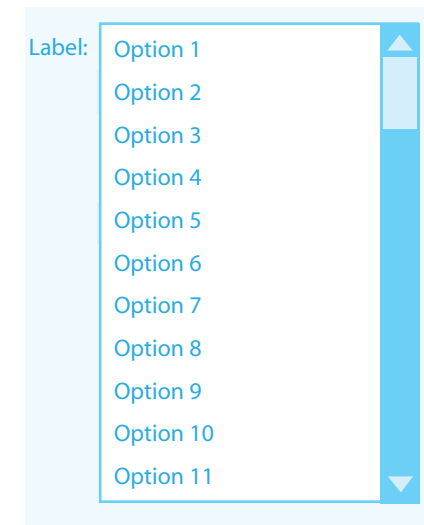


Figure 11.11: Combo box

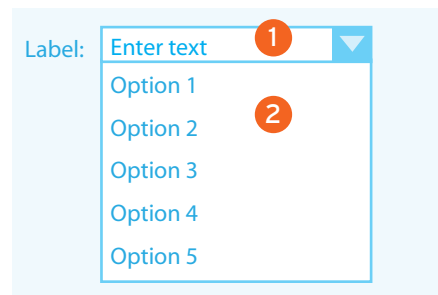
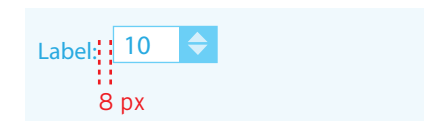


Figure 11.12: Spinner



- 1 Selected Option Display
- 2 Options list

Text Inputs

Text inputs are form fields that collect variable, rather than predefined, information types, such as names, addresses or account information.

Single-line Text Inputs

Use single-line inputs, as illustrated in Figure 11.13, for collecting relatively short responses.

For fixed-length responses, such as phone numbers and postal codes, specify field width to display exactly the entire entry.

For variable-width responses, such as names and addresses, specify field width to display a reasonable number of characters for the given data type.

Include field-level instructional text to indicate the character limit when the input field display is shorter than the field's character limit. For further details, see Forms > Instructional Text.

Multi-line Text Inputs

A multi-line text input, also referred to as a text area, displays wrapped text with multiple viewable lines. The specified width and height determine the number of viewable lines.

Ensure that the text input displays at least four or five lines before incurring scrolling.

Use a character counter to indicate remaining characters, displaying the initial limit and counting down with each character entered.

Regardless of overall layout, apply the vertical labeling format for multi-line inputs, as shown in Figure 11.14.

Figure 11.13: Single-line text input

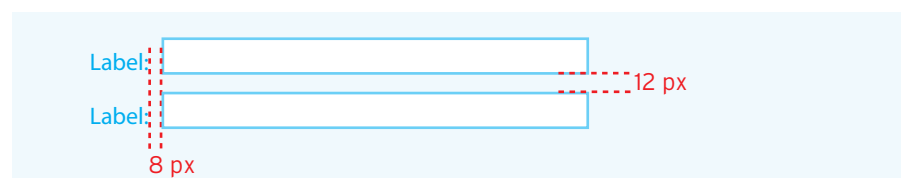
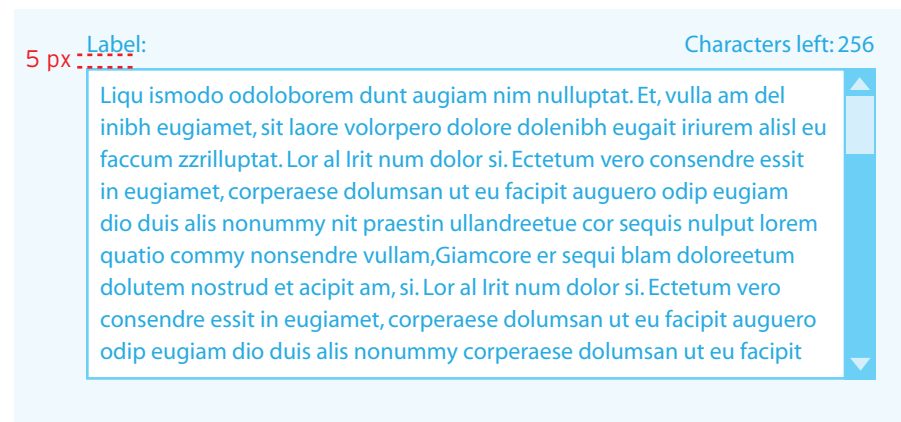


Figure 11.14: Multi-line text input



Command Buttons

Command buttons execute actions associated with forms. There are three main types: commit buttons, dismiss buttons and secondary action buttons.

Button Types

Commit Buttons

Use commit buttons to execute the default intended action of the form, such as transferring information from the form to the server. Commit buttons include “Submit”, “Done”, “Save” or “OK”.

Dismiss Buttons

Use dismiss buttons, including “Cancel” or “Close”, to terminate interaction with a form without transmitting data to the server.

Secondary Action Buttons

Use secondary action buttons for ancillary form actions, such as “Reset” and “Clear”.

Button Layout

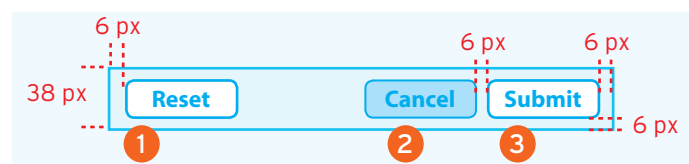
Place command buttons dedicated to a specific field to the right of the field, as illustrated in Figure 11.15. This arrangement is often found in conjunction with keyword search components.

For form-level command buttons that apply to many fields, group command buttons in a dedicated section of the form, known as the command area. Place the command area at the bottom of the form. See the button placement in Figure 11.16.

Figure 11.15: Command button associated with a single field



Figure 11.16: Command area



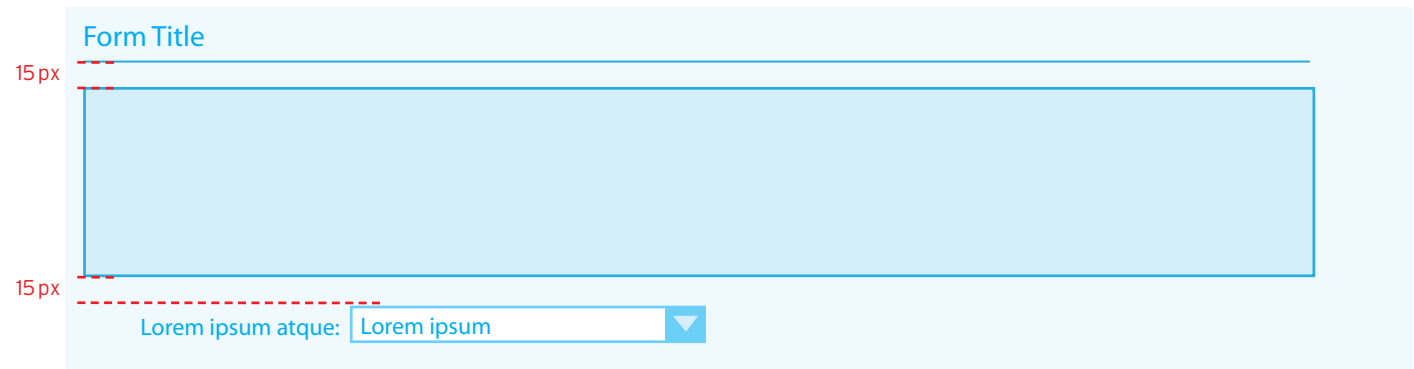
- 1 Secondary action button
- 2 Dismiss button
- 3 Commit button

Confirmation Messages

Confirmation messages inform users of the successful completion of a form submission.

Place the confirmation message block at the top of a form, directly below the form title. Keep message copy brief and, when applicable, include related links that anticipate a user's subsequent destination, as shown in Figure 11.17.

Figure 11.17



Error Messages

Error messages indicate form submission errors, typically due to empty required fields or invalid responses. Provide error messaging at the general and field levels.

General Error Messages

The general error message alerts users of form submission failure. Display an error message block at the top of the form, directly below the form title. Do not include field-level errors in the error message block.

Use an error icon to emphasize the condition, as shown in Figure 11.18.

Field-level Error Messages

When users neglect to provide required information, outline the field in red, as shown in Figure 11.18.

For complex errors, such as invalid entries, also display a message below the field where the error occurred.

When the message text exceeds the width of its respective field, wrap the text, with the break point equal to the field width.

When multiple errors occur in a single field, display errors as a bulleted list. Apply the same text wrapping guidelines for single error conditions to the bulleted list.

Figure 11.18

Form Title

15 px

15 px

1 ! Lorem atum vullupt atuerat. Sed atque. Lorem ipsum sed alter. Put ad ent am, quat irit augia. Lorem atum vullupt atuerat. Sed atque. Lorem ipsum sed alter vullupt atuerat. Put ad ent am, quat irit augia.

Sed atque alter vullut et facuum ismodo odoloborem dunt augiam nim nulluptat. Et, vulla am del inibh eugiamet, sit laore volorpero dolore dolen alisl eu faccum zrrilluptat. Put ad ent am, quat irit augiam doleniam, cons delendio conum acipit.

Section Header: Odoloborem sunt augiam

15 px

9 px

2 *Quat augia: Lorem atum vullupt dolobortio consequip esse.

Sed atque: Lorem ipsum quat augia, doleniam.

Section Header: Lorem ipsum

Ipso lorem sum Lorem sum

*Quat augia arirt: Lorem sum

Sed alter quam lorem ipso: Lorem sum

3 Lorem atum vullupt dolo ortio consequip esse.

• Lorem atum vullupt dolo ortio consequip sumus alia.

• Ortio consequip laureat.

Alter quam augia rem: Lorem sum

1 General error message

2 Field-level error message

3 Bulleted list for multiple error messages

Error Messages in Flex-based Applications

Error message treatments in Flex-based applications apply similar rules as the basic error message guidelines.

General Error Messages

Place general error messages at the top of the page or in an area apparent to the user.

Display error messages in the main content in a tinted box, with 15 px vertical spacing above and below.

Field-level Error Messages

Outline any field in the form to which the general error message applies.

Utilize Flex functionality for dynamic field-level error message treatment. When the user passes the cursor over a highlighted field, the error message will appear to the right, top or bottom of the field depending on form layout.

Figure 11.19

Form Title

Sed atque alter vullut et facuum ismodo odoloborem dunt augiam nim nulluptat. Et, vulla am del inibh eugiamet, sit laore volorpero dolore dolen alisl eu faccum zrrilluptat. Put ad ent am, quat irit augiam doleniam, cons delendio conum acipit.

15 px

1

! Lorem atum vullupt atuerat. Sed atque. Lorem ipsum sed alter. Put ad ent am, quat irit augia. Lorem atum vullupt atuerat. Sed atque. Lorem ipsum sed alter vullupt atuerat. Put ad ent am, quat irit augia.

- Sed atque. Lorem ipsum sed alter. Put ad ent am, quat irit augia.
- Vullupt atuerat. Lorem ipsum sed alter vullupt atuerat.

15 px

Section Header: Odoloborem sunt augiam

2

3

Section Header: Lorem ipsum

Ipso lorem sum Lorem sum Lorem sum

Quat augia airt: [input] [input] [input]

2: Lorem atum vullupt dolobortio consequip

3: Lorem atum vullupt dolobortio consequip

- 1 General error message
- 2 Field-level errors are highlighted.
- 3 Error message above the field

Instructional Text

Instructional text provides high-level guidance to prepare a user for the upcoming task. The three levels of instructional text are page-level, section-level and field-level.

Always include page-level instructional text to orient users and to explain the form's purpose.

Provide section-level instructional text for specific guidance for the upcoming section.

Include field-level instructional text to preclude submission errors by providing character length, allowable characters and expected entry formats.

Place field-level instructions to the right of the fields to which they refer, as shown in Figure 11.20.

Figure 11.20

Form Title

1 Instructional text goes here. Liqu ismodo odoloborem dunt augiam nim nulluptat. Et, vulla am del inibh eugiamet, sit laore volorpero dolore dolen alisl eu faccum zrrilluptat.

Section Header 1: Odoloborem dunt augia

Volor: Acipis: Secte:

* Alisi: Select

* Lorem Ipsum:

Section Header 2: Liqu ismodo

2 Instructional text goes here.

* Facum: ☐ Lorem ☐ Velisse

Lorem Ipsum: Select

3 Instructional text goes here.

Lorem: Select

- 1 **Instructional text (general)**
- 2 **Instructional text (section)**
- 3 **Instructional text (field)**

Skin: Error Messages and Instructional Text

Figure 11.21: Error messages

1 There is a problem with your funds transfer submission. Please fill in all required address fields.

1 *Outside Account: Example: xxxxx

2 You must fill in your outside account number.

1 **Section-level error message**
 Border: Solid, 1, #DD9888
 BG: #FEFFD5
 Align: Left
 V Align: Middle
 Padding: 8 px

2 **Field-level error message**
 Font: Arial, Bold, 12, #CC0000

Figure 11.22: Instructional text

3 Page Title

4 Lorem ipsum dolor sit amet, consectetur adipisicing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco.

5 Section Header 1: Sed do eiusmod

6 Volor: Acipis: Tempor:

Consectetur: Select

7 Lorem Ipsum:

Section Header 1: Sed do eiusmod

Factum: ☒ Veniam ☐ Nostrud

Consectetur: Select

8 Lorem Ipsum: Instructional text goes here.

3 **Page Title**
 Font: Arial, 23, #333333

4 **Section-level Instructions**
 Font: Arial, 12, #000000

5 **Section Header**
 Font: Arial, Bold, 12, #000000

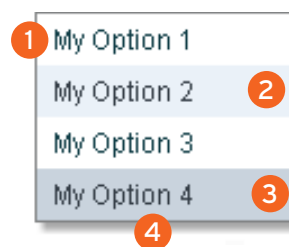
6 **Form Field Labels**
 Font: Arial, Bold, 12, #000000

7 **Form Field Options**
 Font: Arial, 12, #000000

8 **Section-level Instructions**
 Font: Arial, 12, #000000

Skin: Drop-down List

Figure 11.23



- 1 Text**
Font: Arial, 12, #000000
- 2 Rollover State**
BG Color: #E7EFF7
- 3 Selected State**
BG Color: #C3CED9
- 4 Drop Shadow**
Right, 3

Skin: Command Buttons

Figure 11.24: Default command button specifications



Gradient Fill: #FFFFFF to #E9E9E9
 Border: 2, #666666
 Font: Arial, Bold, 12, #183E47, Align Center
 Minimum 6 px of padding to the left and right of the label
 Minimum button width of 54 px

Figure 11.25: Standard command button specifications



Gradient Fill: #FFFFFF to #E9E9E9
 Border: 1, #666666
 Font: Arial, Bold, 12, #183E47

Figure 11.26: Button states



Standard
 Background Gradient:
 #FFFFFF to #E9E9E9
 Font Color: #183E47
 Border: #666666



Mouseover
 Background Gradient:
 #FFFFFF to #dce7f8
 Font Color: #003082
 Border: #666666



Mousedown
 Background: #FFFFFF
 Font Color: #183E47
 Border: #666666



Disabled
 Background: #EDEDED
 Font Color: #B8B8B8
 Border: #B8B8B8

Other Considerations

Tabbing Order

Tabbing order is an accessibility feature that enables logical navigation through a form without using a mouse.

Maintain a logical tabbing sequence for users who rely on the tab key to move from one input field to the next.

The “Enter” Key

Always enable form submission via the “Enter” key.

Setting Focus and Selection

Upon form load, default focus to the initial form field.

Progressive Disclosure

Progressive disclosure, a technique afforded by advanced Web technologies, allows pieces of content to be hidden until users need to view them.

Apply progressive disclosure when users do not need to see all of the form fields. Reveal available responses as needed during form completion.

12. Data Tables

Table Elements and Format

All data tables consist of a core set of properties and elements, as illustrated in Figure 12.1.

Margins and Spacing

Place the Table Title 6 px above the table, aligned left. Put a 4 px margin of padding around cell content in all column headers and data cells.

Data Cell Alignment

Vertically align all cell data to the top.

Left-align:

- Text and hyperlinks
- Combinations of text and numerical data, such as street addresses
- Numbers used as identifiers, such as account numbers or dates
- Text input form fields

Right-align:

- All numerical data. For negative numbers, when parentheses indicate negative values, align to the number, not to the closing parenthesis
- Combinations of text and numerical data, when the text describes the number (such as 10 yr or 11 mo). As shown in the third column of Figure 12.1, right-align the number, left-align the text, and right-align the entire unit within the cell

Center-align:

- Icons
- Unlabeled radio buttons and checkboxes

Column Header Alignment

Horizontally align column headers with the data in their respective columns.

If the header text is right-aligned and the cell contains a graphic such as a sort indicator or filter icon, align the text to the left of the graphic.

Right-align sort indicators in the column header cell. If a cell displays an additional graphic, display the other graphic to the left of the sort indicator.

Vertically align column headers to the bottom. Use cell padding to set the spacing above and below the text.

Units of Measure

When all units for a particular measure within a table are the same type, clearly indicate the type (abbreviated) on the page, preferably below the table title, as illustrated in Figure 12.1.

When units of measure within a column are mixed (for example, year and month), indicate units in the cell, as shown in the third column of Figure 12.1.

If a table contains mixed currencies, but has a column with only one currency, indicate units in the column header. For example: Price Change (USD).

Additional Guidelines

Set column widths to values that reflect the anticipated length of the content.

Alternate row colors, beginning with the lighter color.

Use symbols (for example, \$ or €) in the first row of a single-currency column to improve comprehension while maintaining scanability.

Figure 12.1

1 Lorem Ipsum
Reporting Currency USD

2 Dolor Sit Amet	3 ▲	4 Consecutur	Excortatio Ullamco	Laudantium
Data that wraps to show what happens	5	6 \$999,456	7 6.00 mo	8 1234-789
Boro ipsum	9	888,654	12.00 yr	1234-789
Cavet ipsum		666,456	1.50 yr	1234-789
Dolor ipsum		444,654	2.00 yr	1234-789
Et ipsum		333,456	2.50 yr	1234-789
Lorem ipsum		222,564	3.00 yr	1234-789

- Table Title**
- Column Header**
- Sort Indicator**
- Column Divider**
- Cell Data - Text Only**
- Cell Data - Numbers Only**
- Cell Data - Mixed Text/Numbers**
- Cell Data - Fixed-length Numerical Values**
- Alternating Row Colors**

Column-oriented and Row-oriented Tables

Column-oriented Tables

Use column-oriented tables to compare multiple records of the same data type.

Indicate data types in the column headers.

Display data types that support the table's function in the left columns. For example, if the table is titled "Account Numbers by Account Type," label the first column "Account Number" and the second column "Account Type."

Row-oriented Tables

Use row-oriented tables to display information for a single entity.

Make row headers bold.

Left-align row headers and cell data, and vertically align them to the top.

Maintain clear separation between the row header and the text.

If a row header wraps, set line spacing between the wrapped text to less than the spacing between row headers. See the "Row header that wraps" example in Figure 12.3.

Figure 12.2: Column-oriented table

Lorem Ipsum

Dolor Sit Amet ▲	Consecutur	Excertatio Ullamco	Laudantium
Data that wraps to show what happens	999,456	6.00 mo	1234-789
Boro ipsum	888,654	12.00 yr	1234-789
Cavet ipsum	666,456	1.50 yr	1234-789
Dolor ipsum	444,654	2.00 yr	1234-789
Et ipsum	333,456	2.50 yr	1234-789
Lorem ipsum	222,564	3.00 yr	1234-789

Figure 12.3: Row-oriented table

Lorem Ipsum

Row header:	Text here
Row header:	Text here
Row header that wraps:	Text here
Row header:	Text here
Row header:	Text here

Tables with Row and Column Headers

Use tables with row and column headers to compare multiple sets of data.

As illustrated in Figure 12.4, column headings designate the basis of comparison, while row headings designate what is being compared.

Figure 12.4

Lorem Ipsum

	2004	2005	2006	2007	2008
Lorem Ipsum	123,456	123,456	123,456	123,456	123,456
Dolor Sit	432,654	432,654	432,654	432,654	432,654
Amet Consecutor	123,456	123,456	123,456	123,456	123,456
Lorem Amet	432,654	432,654	432,654	432,654	432,654
Lorem Amet	123,456	123,456	123,456	123,456	123,456
Doloremque	432,654	432,654	432,654	432,654	432,654

Table Interaction: Highlighting

Highlighted rows and columns assist users with visually scanning Data Tables.

The color value for the highlight may vary according to the application's visual design specification.

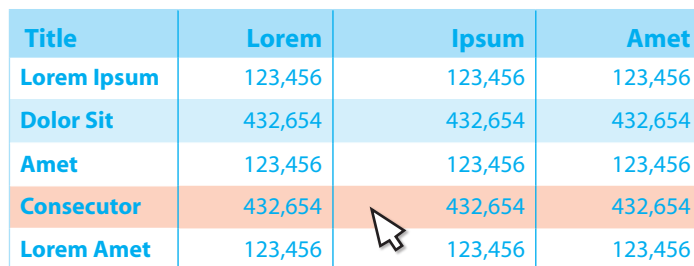
Highlighting a Row

As illustrated in Figure 12.5, the row's background color changes as the user moves the cursor over any portion of the row. As the cursor is moved out, the row's background color returns to its default value.

Highlighting a Column Header

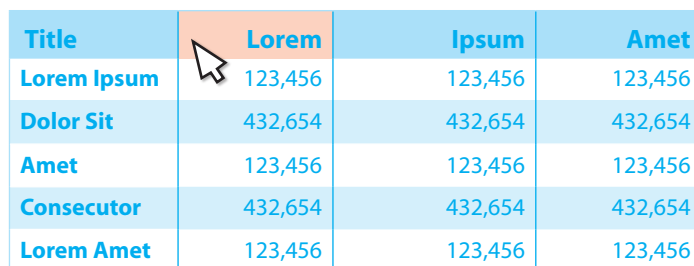
Figure 12.6 illustrates the interaction for column headers. As described for rows, the background color changes with cursor movement.

Figure 12.5



Title	Lorem	Ipsum	Amet
Lorem Ipsum	123,456	123,456	123,456
Dolor Sit	432,654	432,654	432,654
Amet	123,456	123,456	123,456
Consecutor	432,654	432,654	432,654
Lorem Amet	123,456	123,456	123,456

Figure 12.6



Title	Lorem	Ipsum	Amet
Lorem Ipsum	123,456	123,456	123,456
Dolor Sit	432,654	432,654	432,654
Amet	123,456	123,456	123,456
Consecutor	432,654	432,654	432,654
Lorem Amet	123,456	123,456	123,456

Table Interaction: Selecting Rows

Data tables can be used to manage information. For example, a user may select one or more workflow items in order to perform actions.

Selecting a Single Row

Figure 12.7 illustrates a table with single row selection.

When only one row may be selected at a time, the user clicks directly on the row to enable selection.

Once selected, the row's background switches to a color that clearly indicates its new status, such as a color outside the core palette.

If the user subsequently selects another row, the new row is highlighted, and the previously selected row returns to its default state.

Selecting Multiple Rows

Figure 12.8 illustrates a table with multiple row selection.

When a single operation, such as row selection, may be performed on multiple rows, provide a column of checkboxes in the left column.

Include a checkbox in the column header where the user can select or deselect all the checkboxes at once.

Create a standard Form Command Area, with Commit and Dismiss buttons such as Submit and Cancel. The Commit button should not be active until an option has been checked, while the Dismiss button should always appear in its active state. See [Forms](#) for more information.

Figure 12.7: Single row selection

Title	Lorem	Ipsum	Amet
Lorem Ipsum	12-345 -678	123,456	123,456
Dolor Sit	21-334-654	432,654	432,654
Amet	32-444-223	123,456	123,456
Consecutor	76-473-098	432,654	432,654
Lorem Amet	12-433-456	123,456	123,456
Doloremque	54-654-678	432,654	432,654

Figure 12.8: Multiple row selection

Lorem Ipsum

	Title	Lorem	Ipsum	Amet
☐	Lorem Ipsum	12-345 -678	123,456	123,456
☐	Dolor Sit	21-334-654	432,654	432,654
☒	Amet	32-444-223	123,456	123,456
☐	Consecutor	76-473-098	432,654	432,654
☐	Lorem Amet	12-433-456	123,456	123,456
☒	Doloremque	54-654-678	432,654	432,654
<button>Cancel</button><button>Submit</button>				

Table Interaction: Reordering Columns with Drag-and-Drop

Large, complex data tables often allow users the ability to customize their view.

Column Reordering is a customization feature where users can override the default order and rearrange columns.

The steps below outline the Drag-and-Drop process, as illustrated in Figure 12.9.

Step 1

The user selects the column by mousing-down on the column header.

The header's background color changes to indicate that it has been selected.

Step 2

The user moves the column by dragging the mouse horizontally in either direction. Motion is locked to the horizontal axis, so that any vertical mouse movement will not move the header.

As the user begins dragging the header, a semi-transparent duplicate header appears, to represent the "grabbed" object, and moves with the cursor. The original column header remains in place.

The entire selected column is highlighted.

When the cursor is dragged to the halfway point of another column header, that column's border is highlighted to indicate the column's insertion point.

Step 3

Once the insertion point has been selected, the user ends the drag motion and releases the mouse button.

The column and header move to the left of the highlighted border if the column

was dragged left, or to the right of the border if dragged to the right.

When released, column highlighting switches off, and the cells return to their original state.

Note that once a user has changed the column order, the changes are maintained across sessions.

KEY

■ Hover

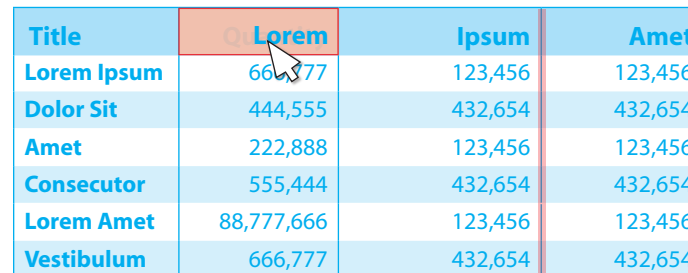
□ Release

■ Mouse down

⋯➡ Drag

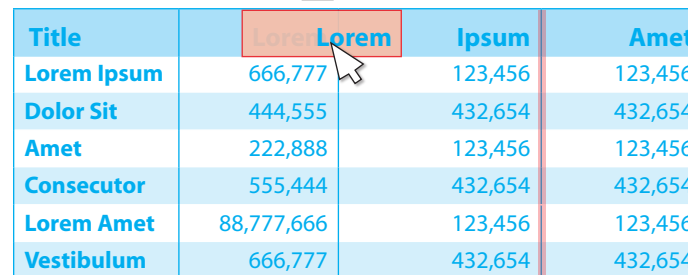
Figure 12.9

1



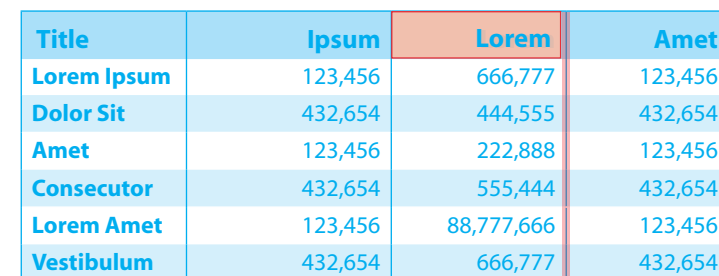
Title	Lorem	Ipsum	Amet
Lorem Ipsum	666,777	123,456	123,456
Dolor Sit	444,555	432,654	432,654
Amet	222,888	123,456	123,456
Consecutor	555,444	432,654	432,654
Lorem Amet	88,777,666	123,456	123,456
Vestibulum	666,777	432,654	432,654

2



Title	Lorem	Lorem	Ipsum	Amet
Lorem Ipsum	666,777		123,456	123,456
Dolor Sit	444,555		432,654	432,654
Amet	222,888		123,456	123,456
Consecutor	555,444		432,654	432,654
Lorem Amet	88,777,666		123,456	123,456
Vestibulum	666,777		432,654	432,654

3



Title	Ipsum	Lorem	Amet
Lorem Ipsum	123,456	666,777	123,456
Dolor Sit	432,654	444,555	432,654
Amet	123,456	222,888	123,456
Consecutor	432,654	555,444	432,654
Lorem Amet	123,456	88,777,666	123,456
Vestibulum	432,654	666,777	432,654

Table Interaction: Resizing Columns with Click-and-Drag

Content Flow

Content elements include the column header, read-only cell data, editable cell data and icons.

Columns cannot be resized smaller than 5 px wide.

If users resize a column narrower than the longest content element in the column, the following rules apply:

- If the column contains read-only data, the content will wrap
- If the column is too narrow to wrap the content, the content will flow on a single line and will be hidden
- If the column contains editable data, the column width will snap to the width of the widest content element

Step 1

Upon hovering over a vertical gridline in the column header, the cursor changes from the default arrow to a horizontal resize cursor.

Step 2

Upon mousedown, a duplicate, highlighted gridline appears, indicating that the gridline has been selected. The highlight extends the entire table height.

Step 3

While continuing to mousedown, the user drags the duplicate gridline in the desired direction. Motion is locked to the horizontal axis, so any vertical mouse movement will not move the gridline.

Step 4

When the desired width has been reached, and the mouse button is released, the column to the left of the dragged border is resized. All columns to the right resize algorithmically. The duplicate gridline disappears, and the actual gridline snaps to the location where the release occurred.

After resizing columns, the changes are maintained across sessions.

Figure 12.10

- 1** The resize cursor

Title	↔	Lorem
Lorem Ipsum		666,777
Dolor Sit		444,555
Amet		222,888
Consecutor		333,333

- 2** Highlighted column edge

Title	↔	Lorem
Lorem Ipsum		666,777
Dolor Sit		444,555
Amet		222,888
Consecutor		333,333

- 3** Column border being dragged to a new position

Title	▶ ◀	Lorem	Ipsum	Amet
Lorem Ipsum		666,777	123,456	123,456
Dolor Sit		444,555	432,654	432,654
Amet		222,888	123,456	123,456
Consecutor		333,333	432,654	155,666

- #### 4 The resized column

Title	Lorem	Ipsum	Amet
Lorem Ipsum	666,777	123,456	123,456
Dolor Sit	444,555	432,654	432,654
Amet	222,888	123,456	123,456
Consecutor	333,333	432,654	155,666

KEY

-  Hover
  Release
-  Mouse down
  Drag

Table Interaction: Sorting

The ability to sort data within columns is a common operation that users expect to perform in relevant situations.

Sort Indicator

- Display a sort indicator in the header cell of the sorted column to identify which column is sorted as well as the sort order (ascending or descending)
- Right-align the sort indicator within the column header

Changing Sort Order

When a user first loads a table, one column is sorted by default.

The user sorts columns, and toggles between columns, by clicking anywhere on the column header.

When a column is sorted for the first time, the sort order is determined by the data type, as described below:

- Columns containing text or a mix of alphanumeric characters are sorted in ascending order, as illustrated in the first column of Figure 12.11
- Columns consisting of numeric data are sorted in descending order, as illustrated in the second column of Figure 12.12

Alignment and Behavior

Columns consisting of numeric data align right with the sort icon, not with the column header text, as illustrated in the second column of Figure 12.12.

If rows have been added to the table, the new data is not integrated into the sort until it has been saved.

If a single row has been selected before sorting, the row remains selected and in view.

Figure 12.11: Ascending alphabetical sort

Table Title

1

Dolor Sit Amet ▲	Lorem	Ipsum	Amet
Atque Ipsum	999,456	123,456	123,456
Boro ipsum	888,654	432,654	432,654
Cavet ipsum	666,456	123,456	123,456
Dolor ipsum	444,654	432,654	432,654
Et ipsum	333,456	123,456	123,456
Lorem ipsum	222,564	432,654	432,654

Figure 12.12: Descending numerical sort

Table Title

2

Dolor Sit Amet	Lorem ▼	Ipsum	Amet
Qualem Ipsum	999,456	123,456	123,456
Boro ipsum	888,654	432,654	432,654
Remque ipsum	666,456	123,456	123,456
Dolor ipsum	444,654	432,654	432,654
Lorem ipsum	333,456	123,456	123,456
Clero ipsum	222,564	432,654	432,654

1 Ascending Sort Indicator

2 Descending Sort Indicator

Table Interaction: Filtering

Filtering is a fundamental operation in data tables.

GWM Web applications utilize two types of filtering: Single-select Filters and Multi-select Filters.

Filtering and Multiple Row Selection

When a data table offers multiple row selection to perform an action (such as deletion) the following behaviors apply:

- Only visible, selected rows will be included in an action
- Rows that have been removed from view due to filtering will not be included in any subsequent selections or actions
- If a previously removed row is restored to the table, it will not appear in a selected state. The row must be reselected before performing an action

Single-select Filter

The Single-select Filter enables users to apply one parameter, such as a date range, to the entire data table.

Users select an option from a list, as illustrated in Figure 12.13. After selection, the filter is immediately applied, so no Submit button is required. For further details, see [Single-select List Boxes](#).

Figure 12.13

Table Title

Filter: ▼

Dolor Sit Amet ▲	Lorem	Ipsum	Ip	
Atque Ipsum	Checking	999,456	123,4	
Boro ipsum	Savings	888,654	432,6	
Cavet ipsum	Savings	666,456	123,456	123,456
Dolor ipsum	Other	444,654	432,654	432,654
Et ipsum	Checking	333,456	123,456	123,456
Lorem ipsum	Checking	222,564	432,654	432,654

Table Interaction: Multi-select Filter

The Multi-select Filter provides the ability to filter on one or more discrete values within a single column.

Figure 12.14 illustrates the four steps of the Multi-select Filter process.

Step 1

Place a “Filter” icon in the column header.

When users hover over the icon, it switches to a highlighted state.

Step 2

Display a filter panel when users click the icon.

If the user has not previously made changes:

- Indicate that all data is currently displayed by putting checks in the “All” option and its sub-options
- “Reset” and “Apply” buttons appear in their inactive state. Make the “Cancel” button active
- When the user clicks “Cancel,” the filter panel closes

Step 3

Users select which information to filter by deselecting options from the list.

After users make a selection, the “All” checkbox remains active but becomes grayed-out, indicating that not all options are currently selected.

If every option is checked, do not allow users to deselect “All.” This will result in an empty table.

Users click the “Apply” button to close the panel and run the filter.

Step 4

The filter selections are displayed in the table.

The “Filter Available” icon in the column header cell switches to a “Filter Applied” icon.

User modifications are stored across browser sessions.

Reset

To restore filter options to the last applied state, users click “Reset”

If a user makes changes, without clicking “Apply”, a subsequent click on “Reset” reverts back to the previous set of filter selections.

Figure 12.14

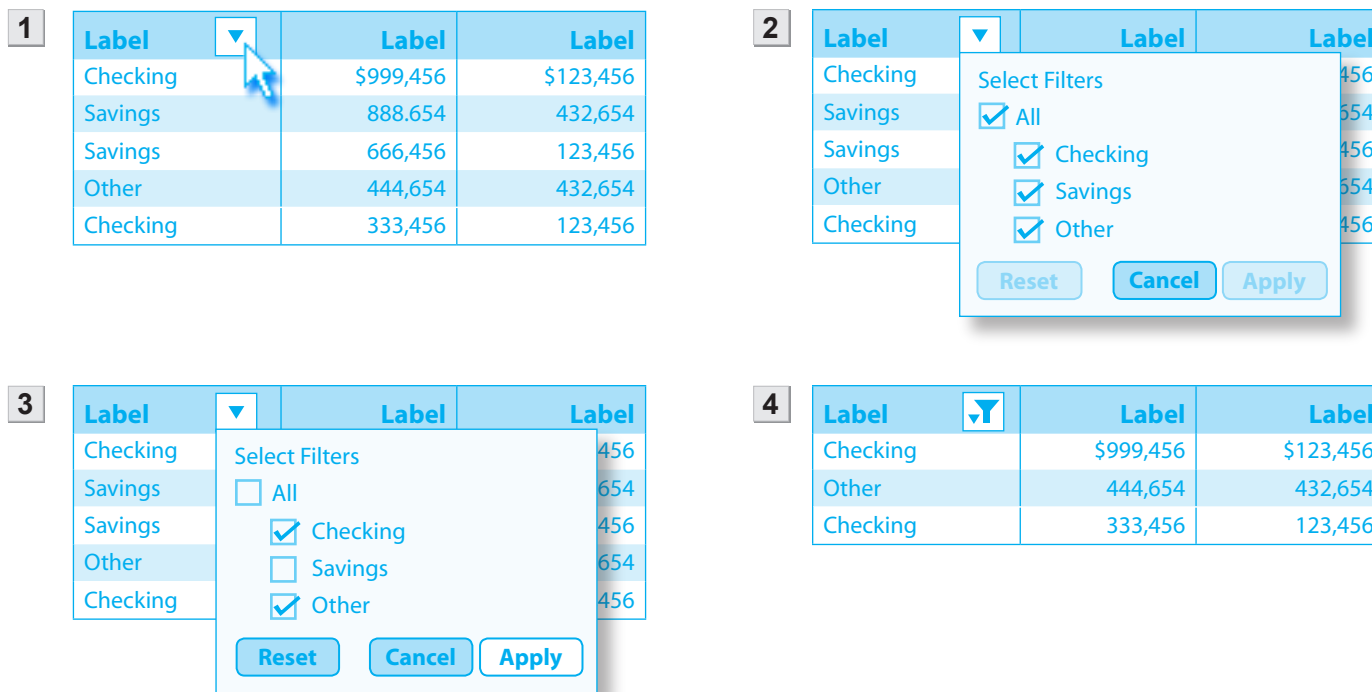


Table Interaction: Displaying Large Sets of Data

To save space, table cells containing large amounts of data may expand rows or scroll, as described on the following pages.

Expanding Row: Show/Hide All Content

Step 1

Display an icon to indicate that more data is available, as illustrated in Figure 12.15.

Step 2

When the user clicks the icon, the row expands to fully display the cell content, as illustrated in Figure 12.15.

When in an expanded state, the icon switches to indicate that the row can be collapsed to hide content.

Figure 12.15

1

Date	Account	Note	Type
14 NOV 2006	123-45678	Lorem ipsum	Lorem
21 NOV 2006	456-78901	Ipsum lorem	Lorem
24 NOV 2006	155-38383	Lorem ipsum	Lorem
02 DEC 2006	867-53099	Lorem ipsum contains additional information that can...	[+] Lorem
08 DEC 2006	010-89152	Ipsum sed lorem	Lorem

Icon indicates that row can be expanded to show more information.

2

Date	Account	Note	Type
14 NOV 2006	123-45678	Lorem ipsum	Lorem
21 NOV 2006	456-78901	Ipsum lorem	Lorem
24 NOV 2006	155-38383	Lorem ipsum	Lorem
02 DEC 2006	867-53099	Lorem ipsum contains additional information that can be lorem ipsum sequitur. This is the fully expanded note. This is the fully expanded note. Lorem ipsum sequitur. This is the fully expanded note. Click on the icon to return to the row contracted view.	[−] Lorem
08 DEC 2006	010-89152	Ipsum sed lorem	Lorem

Icon indicates that row can be collapsed.

Table Interaction: Displaying Large Sets of Data (Continued)

Expanding Row: Hierarchical Table

When tabular data is presented hierarchically, display icons which enable users to expand primary rows and collapse secondary rows, as illustrated in Figure 12.16.

Group the icons in the far left column and display them only when applicable.

Place an icon in the column header to allow users to expand or collapse all relevant rows with a single click.

After users click an icon, it switches to the opposite image.

This component is designed to support only two hierarchical levels. Deeper structures require an alternate interaction and visual design model.

Figure 12.16

Table Title

1 [+]	Description	Col Header Wraps	Lorem
2 [+]	Lorem ipsum sed squitur lorem	000000	000000
3 [-]	Lorem ipsum sed squitur lorem	000000	000000
	Lorem ipsum	000000	000000
	Lorem ipsum atque	000000	000000
	Lorem ipsumsed	000000	000000
	[-] Lorem ipsum sed squitur lorem	000000	000000
	Lorem ipsum atque	000000	000000
	Lorem atque	000000	000000
5	Lorem ipsum sed	000000	000000
	[+] Lorem ipsum sed squitur lorem	000000	000000
	[+] Lorem sed squitur lorem	000000	000000

1 **Icon in Column Header**
Expands or collapses all containers in the table

2 **Expand Control**

3 **Collapse Control**

4 **Expanded Row**
Container content is exposed

5 **Row With No Nested Information**
(control not necessary)

Table Interaction: Displaying Large Sets of Data (Continued)

Locked Columns and Headers

To maximize the use of screen real estate, data tables may include interior scrolling. While data scrolls in and out of view, key reference points, such as column headers, remain stationary.

Figure 12.17 illustrates single-axis interior scrolling.

Column headers remain fixed, while all data scrolls vertically.

Figure 12.18 illustrates interior scrolling on both the horizontal and vertical axes.

In addition to locked column headers, this mechanism allows for entire columns to be “locked,” so that users can scroll through data and column headers horizontally, with a fixed point of reference.

Scrolling horizontally moves all rows and their column headers to the right of the lock point.

Scrolling vertically moves all rows below the column header row, on both sides of any lock point.

Whether lock points are pre-set or user-adjustable depends on the application requirements.

If pre-setting lock points, ensure that locked columns consist of data which will provide the clearest indication of what the remaining data refers to.

Figure 12.17: Table with vertical scrolling

Table Title

Column Header	Label	Label	Label	Label	Label
Cell data	12-345-678	123,456	123,456	123,456	123,456
Cell data	21-334-654	432,654	432,654	432,654	432,654
Cell data	32-444-334	123,456	123,456	123,456	123,456
Cell data	76-473-098	432,654	432,654	432,654	432,654
Cell data	12-443-456	123,456	123,456	123,456	123,456
Cell data	54-654-678	432,654	432,654	432,654	432,654

Figure 12.18: Table with vertical and horizontal scrolling

Table Title

Column Header	Label	Label	Label	Label	Label
Cell data	12-345-678	123,456	123,456	123,456	123,456
Cell data	21-334-654	432,654	432,654	432,654	432,654
Cell data	32-444-334	123,456	123,456	123,456	123,456
Cell data	76-473-098	432,654	432,654	432,654	432,654
Cell data	12-443-456	123,456	123,456	123,456	123,456
Cell data	54-654-678	432,654	432,654	432,654	432,654

- 1 Lock Point
- 2 Horizontal Scrolling
- 3 Vertical Scrolling

Skin: Sortable Table

Figure 12.19

1 **Table Title**

2 Account Number 4 ▼	Year 1	Year 2	Year 3	Year 4	Year 5
123938864223-65	446,545	488,872	533,316	779,982	1,028,981
434325768888-54	646,535	704,333	823,998	930,976	995,009
752345235467-34	592,582	633,323	744,436	855,549	966,662
856456456465-55	474,065	426,659	555,549	684,439	831,329
900088872772-32	274,033	300,724	456,273	540,712	754,041

3

5

6

1 **Table Title**
Font: Arial, Bold, 14 px, #000000

2 **Table Column Head**
Font: Arial, Bold, 12 px, #000000
BG Gradient: #FFFFFF to #EBEEF0
Hover: #E7EFF7
Mousedown: #C3CED9
Padding: 3, 3, 3, 3

3 **Table Row**
Font: Arial, 12 px, #000000
BG (odd row): #FFFFFF
BG (even row): #F5F3EC
Row Hover: #E7EFF7
Row Select: #C3CED9
Padding: 3, 3, 3, 3

4 **Sort Indicator**
Right-aligned

5 **Table Border**
Outer Border: Solid, 1 px, #BABCC4
Inner Border: Solid, 1 px, #FFFFFF

6 **Grid Line**
Solid, 1 px, #D9DADC

Skin: Multi-Select Filter

Figure 12.20

Account	Name	Type	Manager	Equities (USD)
123-45678	Joint Account	NPI		00.00
234-56789	Joint Account	IRA		00.00
345-67890	Joint Account	SMA		00.00
456-78901	Joint Account	SA		00.00
567-89012	Joint Account	SMA		00.00
678-90123	Joint Account	SMA		00.00

1 Icon States

-  Default, no filter applied
-  on Hover
-  Selected
-  Filter applied

2 Filter Panel

Header: Arial, Bold, 12, #000000
 Field Labels: Arial, 12, #000000
 BG: #818181
 Border: Solid, 1, #9099A3
 HR: 1, #BABCC4

3 Command Buttons

See [Forms > Form Buttons](#) for detailed specifications.

13. User Controls

Task Buttons

Task buttons initiate ancillary actions, such as “Edit Portfolio” or “Add Note,” and are associated with tables or forms.

Organize task buttons into button bars.

Use the same styles for task buttons as command buttons. See Forms > Form Buttons for details.

Figure 13.1: Task buttons in a primary module

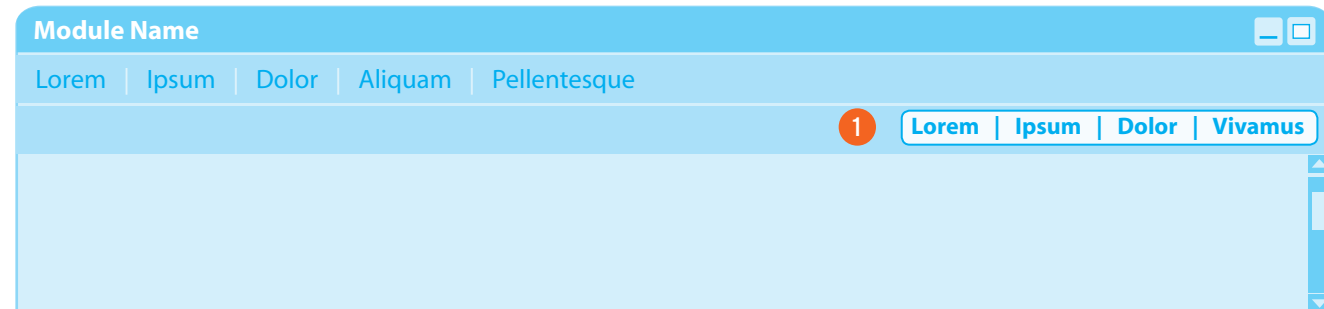
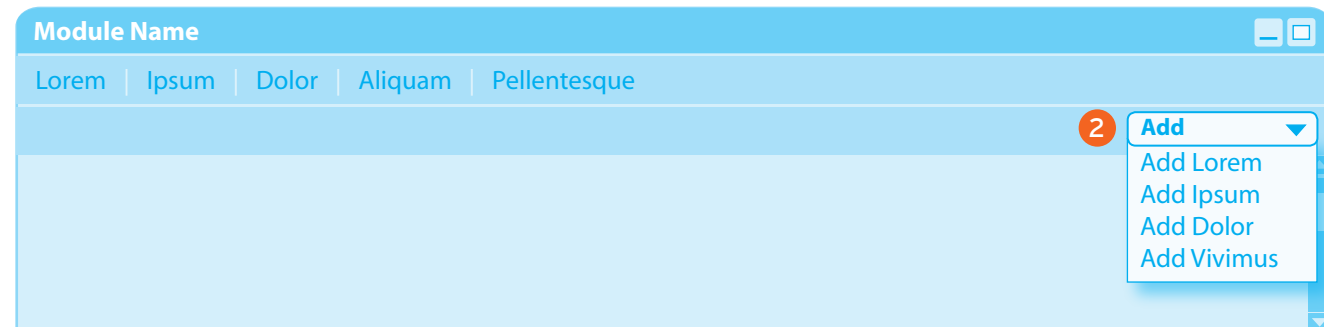


Figure 13.2: Jump menu used as an alternative to Task Buttons



1 Task Buttons

2 Jump Menu

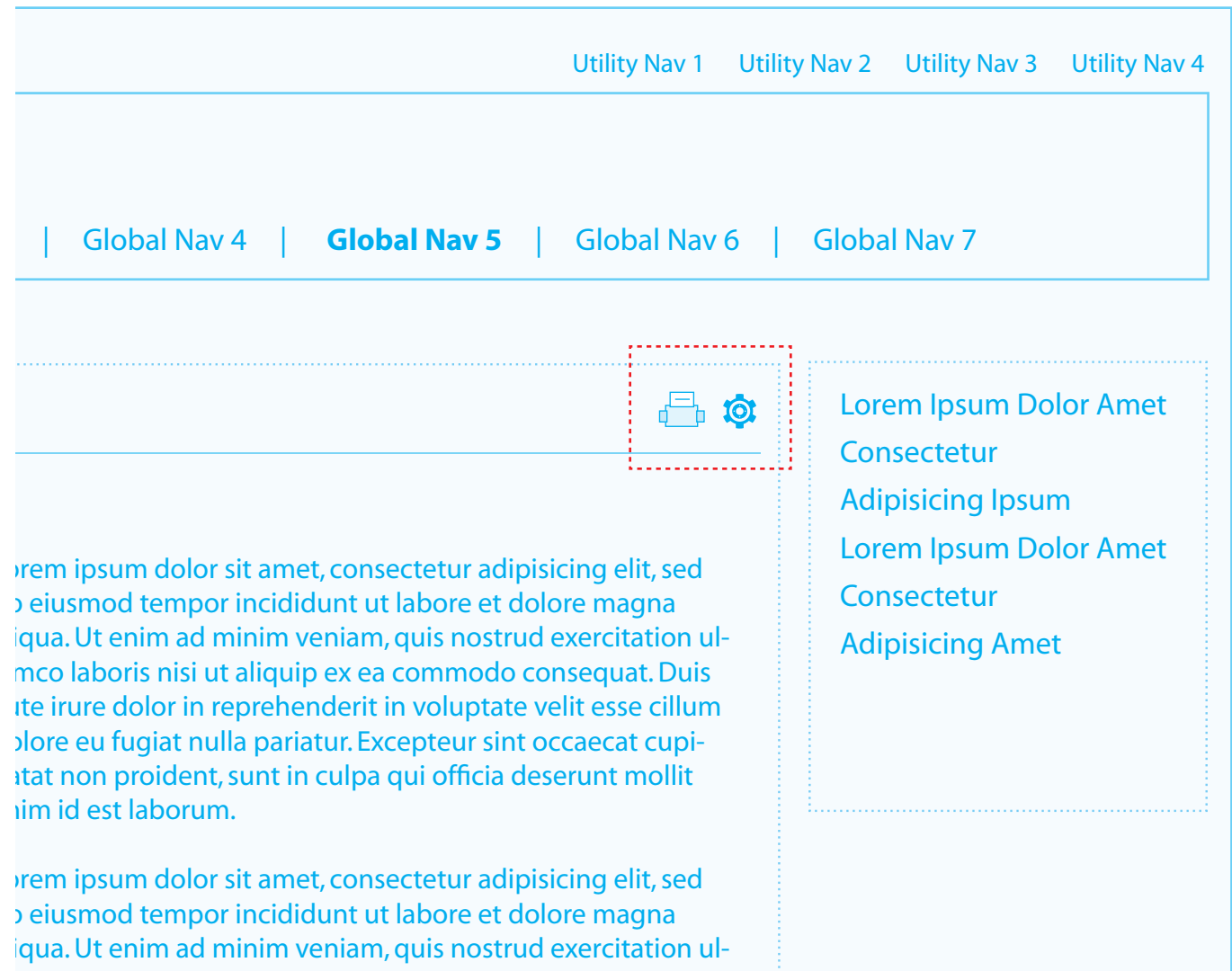
Task Icons

Task icons initiate ancillary actions, such as Print and Configure, associated with the content of the page.

Organize task icons into Icon Bars.

For further details on icon styles, see the Icon section.

Figure 13.3



Jump Menu

Use jump menus for navigation when contextual links to similar sites or applications need to be available, and there is not enough space to display a list of links.

Figure 13.4: Jump menu in a primary module

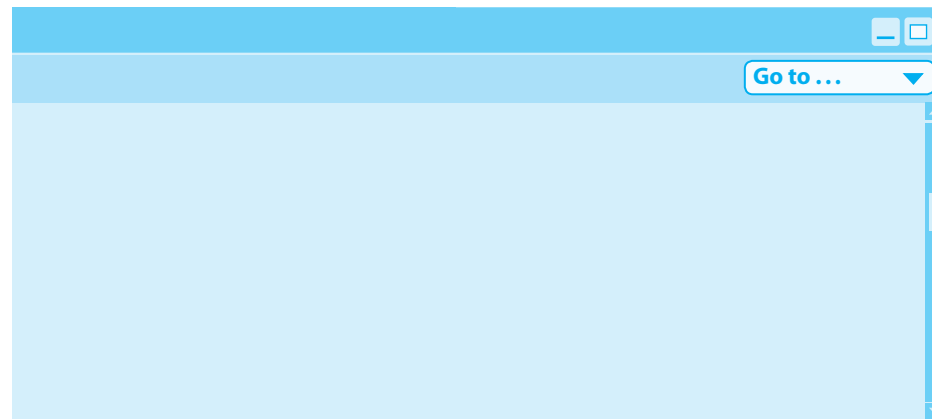
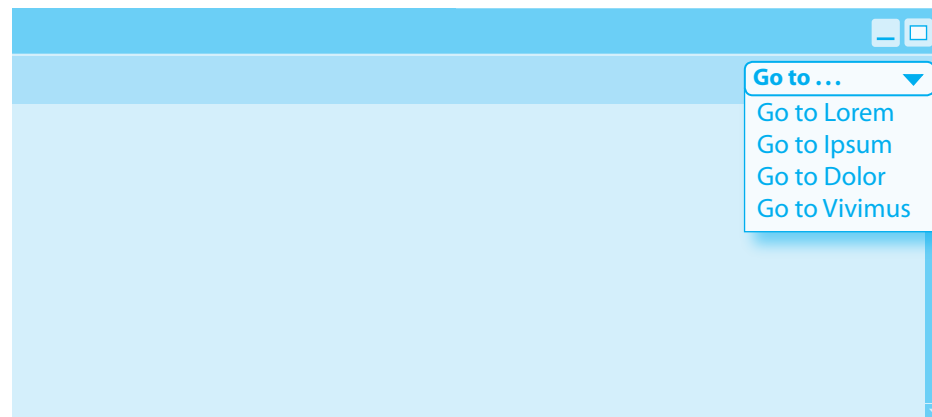


Figure 13.5: Jump menu with drop-down menu exposed



Tabs

Tabs enable users to navigate through one or more panes of content when there is only space to show one pane at a time.

Figure 13.6 illustrates basic tab properties while Figure 13.7 shows a tabset in context.

Use tabs only if the different panes of content do not need to be viewed in context with each other.

Visually connect and set boundaries around the content associated with the tab. Usually this is delineated with a box.

Maintain the tab location as the user clicks from one tab to another.

Figure 13.6

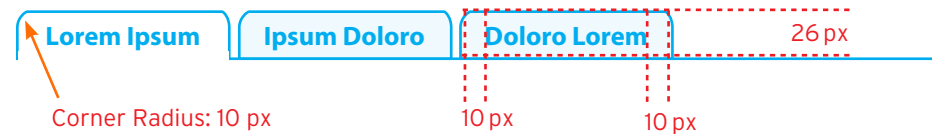


Figure 13.7

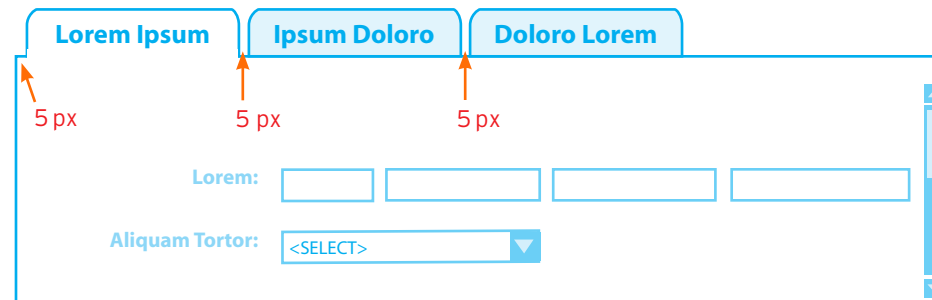


Figure 13.8

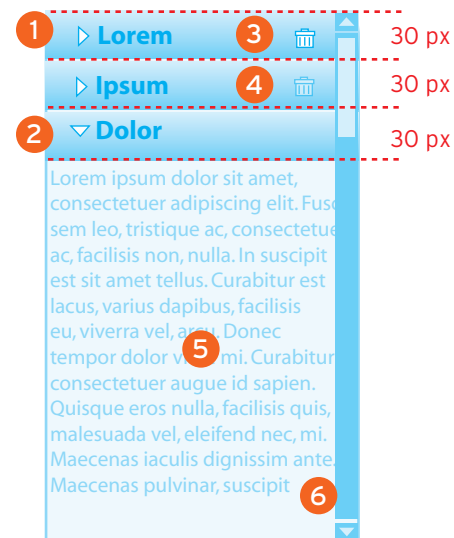


Accordion Headers

Use accordions as an alternative to tabsets when space dictates. While an accordion can contain multiple panels, it will only display the contents of a single panel at a time.

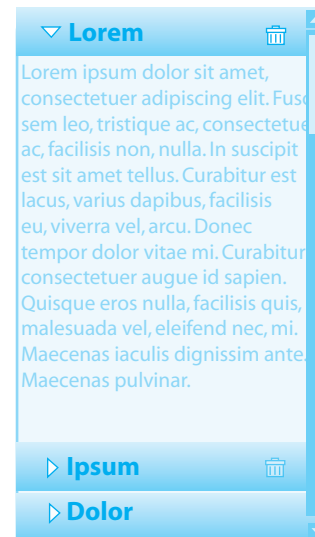
Panels open and close when users click the panel header text links.

Figure 13.9: Anatomy of an accordion module



- 1 View Control**
Closed state
- 2 View Control**
Open state
- 3 Delete / Remove**
Enabled state
- 4 Delete / Remove**
Disabled state
- 5 Content Area**
- 6 Scrollbar**

Figure 13.10: Top accordion in open state



Pagination

Pagination is used when viewing a set of search results that is too large to easily display within the search results area.

Numbering

Show page links in sets of 10 or fewer.

When the user visits page 7 and onward, list the five previous pages, the current page and the four subsequent pages.

Display the current page number as disabled.

Previous

Introduce a “Previous” link and arrow on pages 7 and higher.

Use a “Previous 10” link on pages beyond 10.

Next

Use the “Next 10” link and arrow when more than 10 pages of results remain.

When fewer than 10 pages of results remain, use “Next” and an arrow.

Figure 13.11

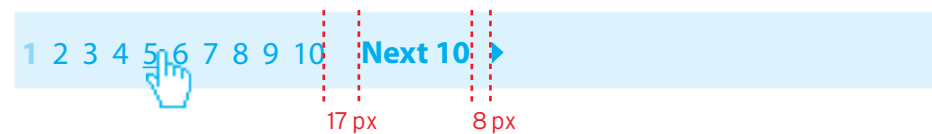


Figure 13.12

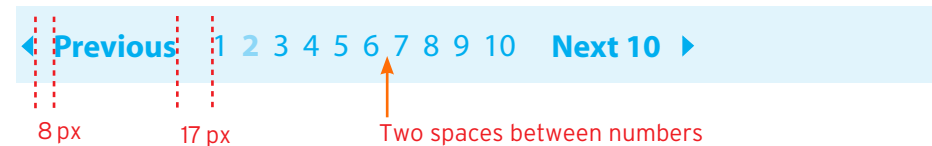


Figure 13.13

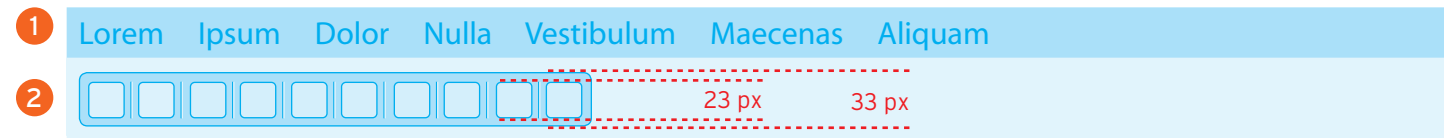


Figure 13.14



Toolbar

Figure 13.15



1 Navigation

2 Toolbar

The area reserved for each button is 33 px by 33 px.

The vertical rule that appears between each icon is 23 px high.

See [Image Usage > Icons](#) for details about icon usage with toolbars.

Skin: Task Buttons and Jump Menu

Figure 13.16: Task buttons shown within a primary module

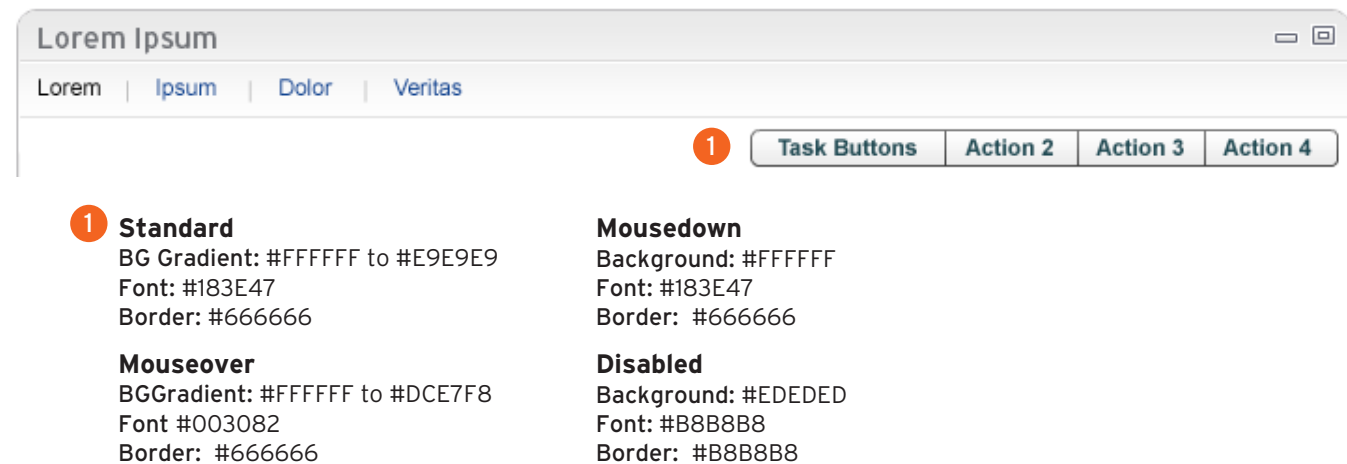
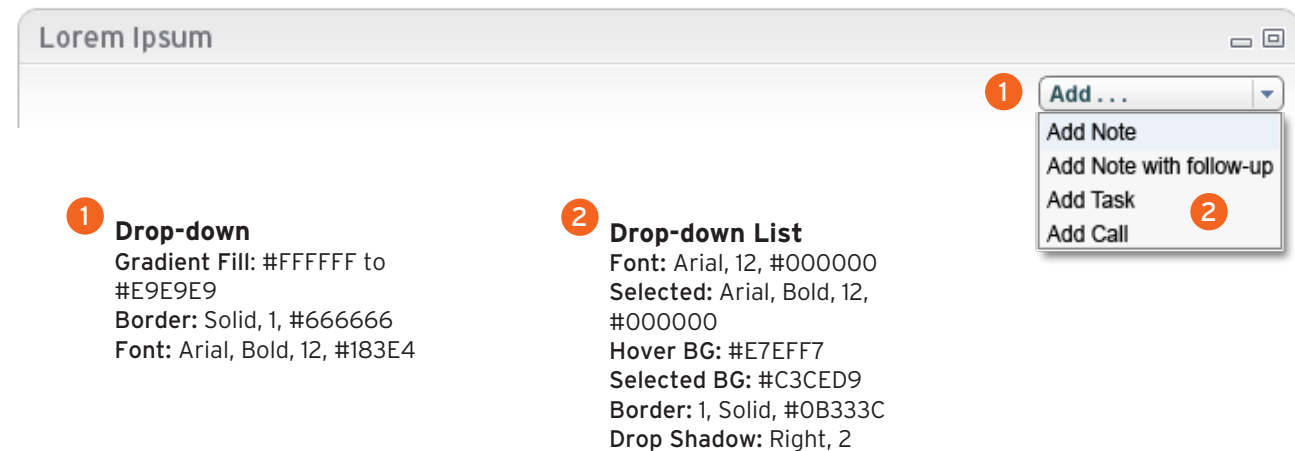
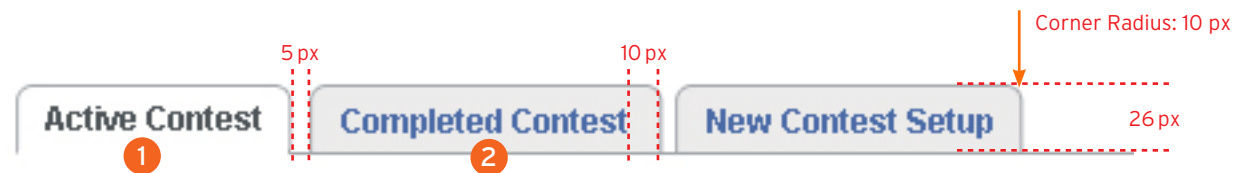


Figure 13.17: Jump menu



Skin: Tabs

Figure 13.18: Tab styles



- 1 Selected Tab**
 Font: Arial Bold; 12 px; #626469
 Tab BG: #FFFFFF
 Tab Border: #A0A4A9

- 2 Unselected Tab**
 Font: Arial Bold; 12 px; #4B6BA7
 Tab BG: #ECECEC
 Tab Border: #A0A4A9

Figure 13.19: Tab spacing

Diagram illustrating tab spacing in a form:

- Personal Information (Selected)
- Contact Information

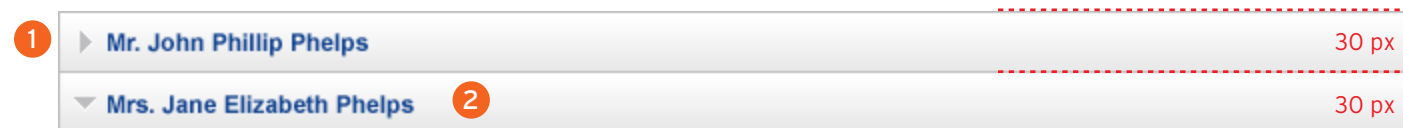
Form fields:

- General Info
- Name: Mrs. Jane Elizabeth Phelps <Suffix>
- Preferred Name:
- Date of Birth: DD MMM YYYY
- Gender: Male Female

Dimensions: 5 px spacing between tabs.

Skin: Accordion Headers

Figure 13.20



1 View Controls

2 Panel Header

Border: Solid, 1, #B6B5B7

BG Gradient: #FCFCFC, #E3E3E4

Height: 30 px

Font: Arial, Bold, 12, #003082

14. User Interactions

Inline Editing

Inline editing - which allows users to edit a text field - does not clutter the interface with edit controls. It also maintains the context by not redirecting users to another screen.

Inline editing steps are illustrated in Figure 14.1.

Step 1

The single, read-only field appears as normal content.

Step 2

The editable field becomes highlighted when a user positions the mouse pointer above the field. A tooltip invitation appears to alert the user that the field is editable.

Step 3

After the user clicks in the highlighted area, an inline dialog and editable form field appear.

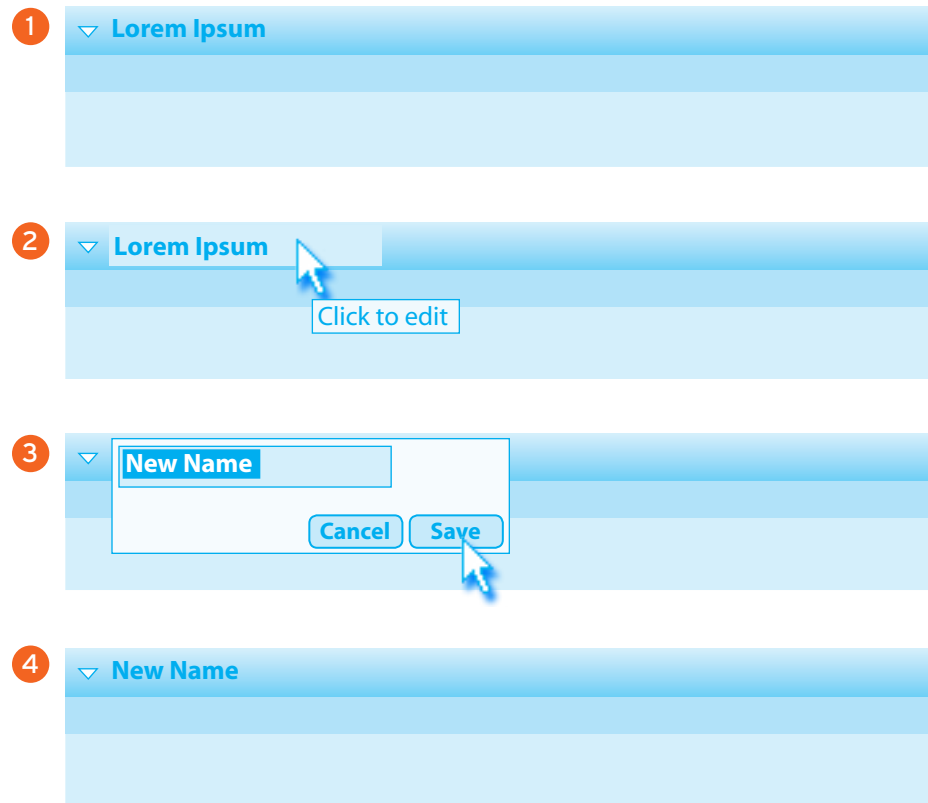
Save and Cancel buttons enable the user to complete the operation.

The Cancel button closes the inline dialog and restores the original read-only field value.

Step 4

After the user clicks the Save button, the inline dialog closes. The field value is replaced with the new value.

Figure 14.1



Drag and Drop

Drag and drop is an ease-of-use technique that allows users to drag objects from one module to another. Users can also employ this technique to reorder rows or columns in a table.

The drag-and-drop operation provides feedback to users when they select the object, drag the object, reach an appropriate destination, and drop the object.

Steps in the drag-and-drop process are illustrated in Figure 14.2.

Step 1

If an object is draggable, the cursor changes from an arrow to a hand

Step 2

The background of the selected item becomes 50% transparent. A 2 px black bounding box is displayed around it.

Step 3

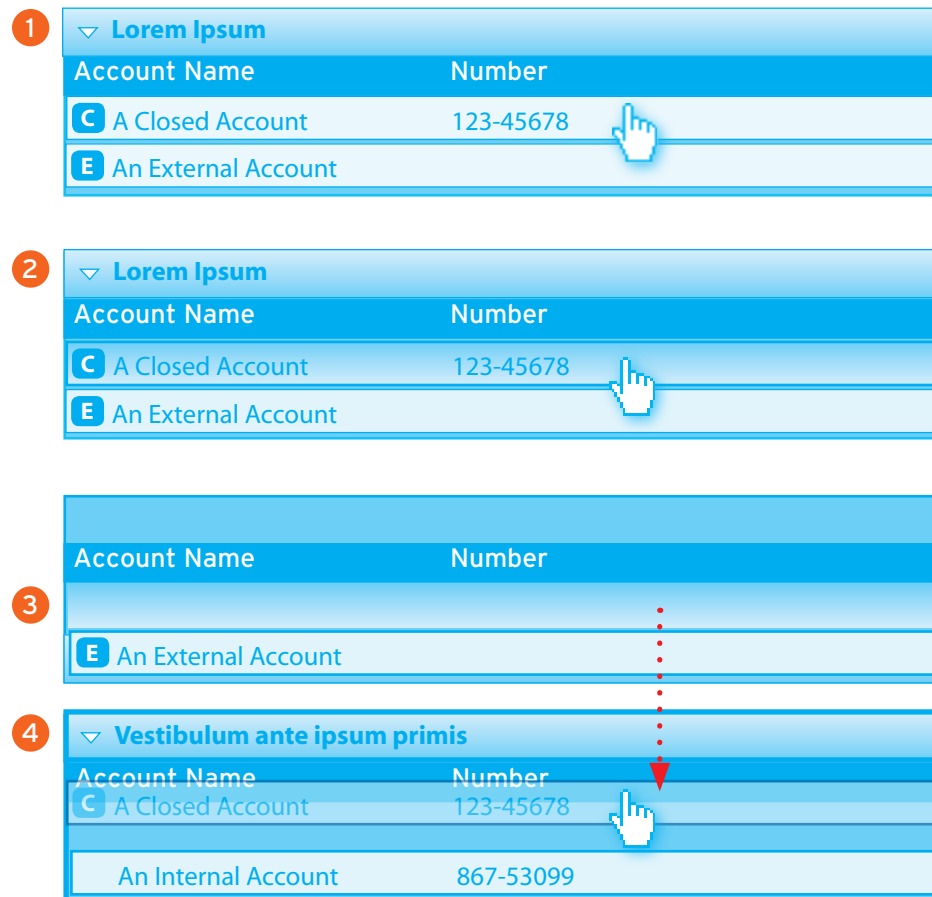
During the drag, a gradient remains in the item's original position.

Step 4

When the object hovers over an appropriate destination, a 2 px black bounding box appears.

Note: If a drag-and-drop operation is not reversible and/or will impact other operations upon drop, display a confirmation dialog before final implementation.

Figure 14.2



List Builder

The list builder is used for creating or maintaining a list of items.

It is composed of two exposed listboxes where users view and select items.

Place two pairs of buttons between the listboxes.

Figure 14.3 Transferring items using the transfer buttons

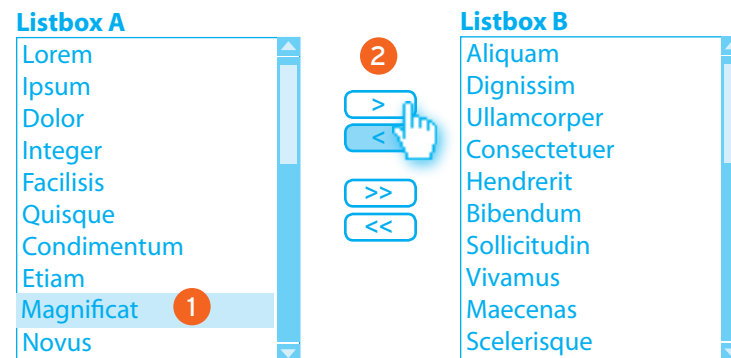
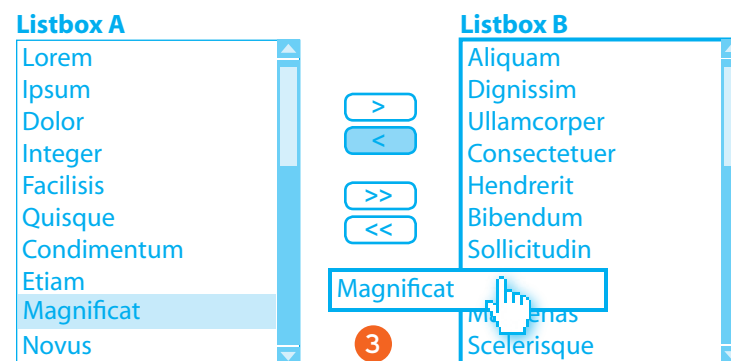


Figure 14.4: Transferring items using Drag and Drop



Buttons

- 1 Select an item(s) in Listbox A

- 2 The ">" button transfers the selected item(s) to Listbox B

The ">>" button transfers all Listbox A items to Listbox B

The "<" button removes the selected item(s) from Listbox B

The "<<" button removes all Listbox B items that originated in Listbox A

Drag and Drop

- 3 Move items between listboxes or re-order items within a listbox through drag and drop. See [User Controls > Drag and Drop](#) for style and interaction details.

Inline Addition and Deletion of Rows

Use inline addition and deletion of rows when identical data needs to be added to or deleted from multiple locations in a form or table.

Steps to add rows are illustrated in Figure 14.5 and described below:

Step 1

Users click the “+” button to the right of the first row of input data.

Step 2

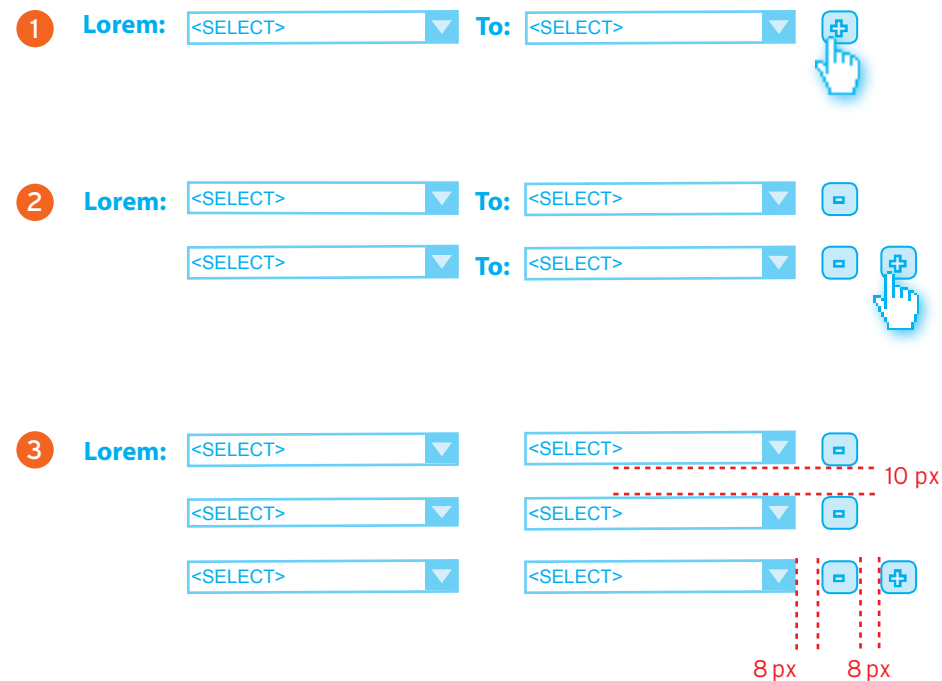
A new row of data appears directly below the original row. To add another row, users click the “+” button to the right of the second row.

To delete a row, users click the “-” button.

Step 3

A third row appears.

Figure 14.5



15. Messaging and Indicators

Skin: Alerts, Errors and Confirmation Messages

Figure 15.1: Alert message



Border: Solid, 1, #DD9888
BG: #FEFFD5
Align: Left
V Align: Middle
Padding: 8 px
Icon: Alert

Figure 15.2: Error message



Border: Solid, 1, #DD9888
BG: #FEFFD5
Align: Left
V Align: Middle
Padding: 8 px
Icon: Error

Figure 15.3: Confirmation message



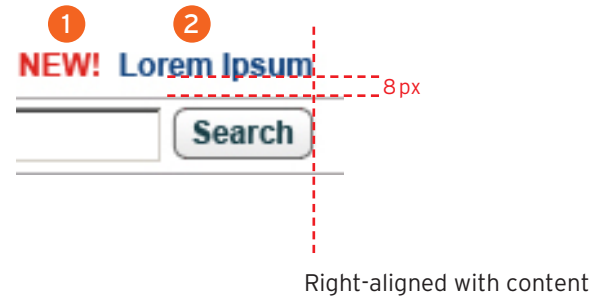
Border: Solid, 1, #75AE47
BG: #EAF4D2
Align: Left
V Align: Middle
Padding: 8 px
Icon: Check (Complete)

Skin: Alerts, Errors and Confirmation Messages

Figure 15.4 provides an example of an alert announcing new site content.

The alert remains in place for one or two months, depending on the nature of the content.

Figure 15.4: Alert message



- 1 NEW! Text**
Font: Arial, Bold, 12, #DC241F
Two spaces between NEW! and additional text
- 2 Additional Text**
Font: Arial, Bold, 12, #003082

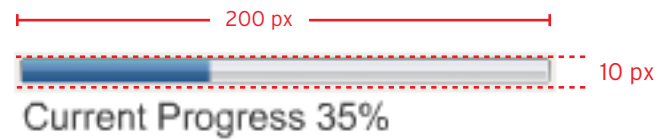
Skin: Progress Bar

The progress bar indicates the percentage of data loading as it is delivered from the server.

The progress bar can be used in alert type windows as well as within modules.

Fix width should at 200 px, regardless of the context.

Figure 15.5



Progress Bar

Bar: 200, 10, #205EA0
Label: Solid, 1, #B7BABC
Track Colors: #DFE1E9, #FFFFFF
Padding: 0

Label

Font: Arial, 11, #000000
Label Margin: 7, 0, 0, 0
Text Indent: 0

16. Common Functions

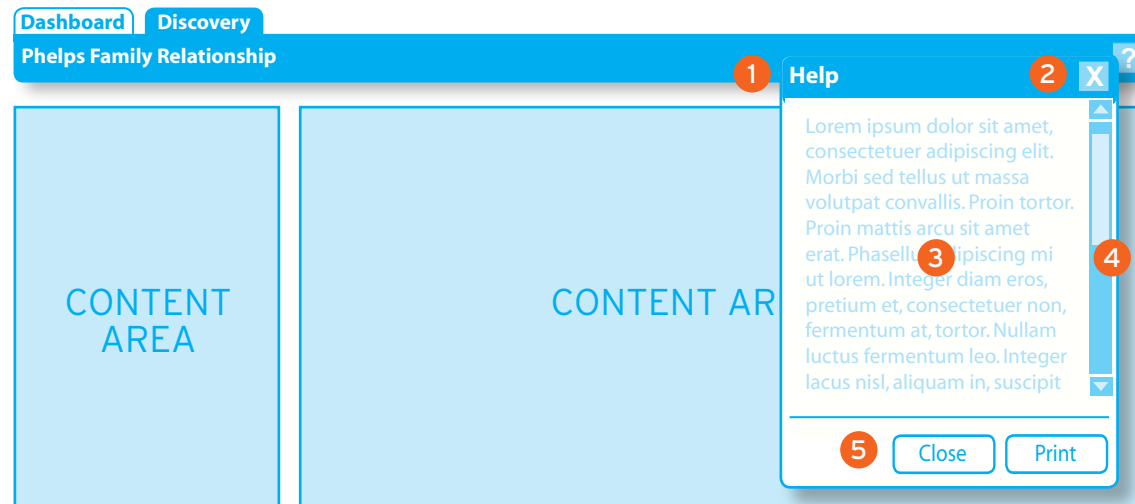
Help: Contextual Help

Contextual help is a method of assisting users without redirecting them to a new window or requiring that they leave the panel in which they are working.

Place the contextual help panel near the element to which it refers. Users open contextual help by mousing over the help icon.

Figure 16.1 displays the panel as it appears after the user has rolled over the help icon.

Figure 16.1



- 1 Title Area
- 2 Close Icon
- 3 Content Area
- 4 Scrollbar
- 5 Command Area

Help: Basic Window Properties

The Help section has its own organizational structure and navigational schema. The navigation and search area is on the left, while the content loads in a pane on the right.

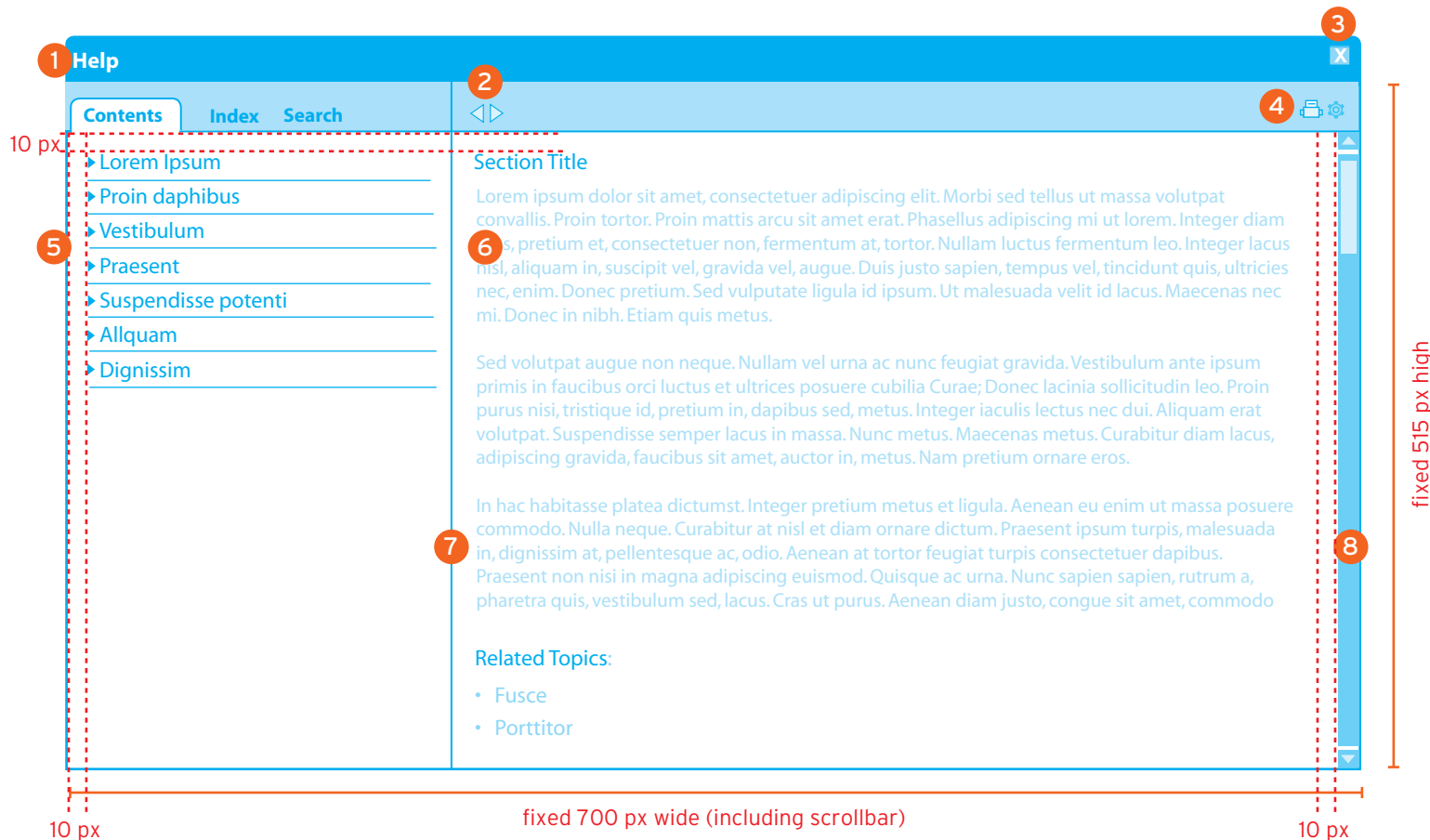
There are three different ways to access content:

- through a table of contents organized by category
- through an alphabetical index
- through a keyword search

The Help section launches in its own window which is 700 px wide by 515 px high. Content that extends beyond these parameters triggers scrollbars.

Do not fix column widths. Allow users to expand and contract each column using the expand/contract bar.

Figure 16.2



1 Title Bar

2 Previous/Next Controls

3 Close Button

4 Print and Configure Controls

The configure control is disabled in Contents tab.

5 Navigation Area

6 Content Panel

7 Expand/Contract Bar

8 Vertical Scrollbar

Help: Contents Tab

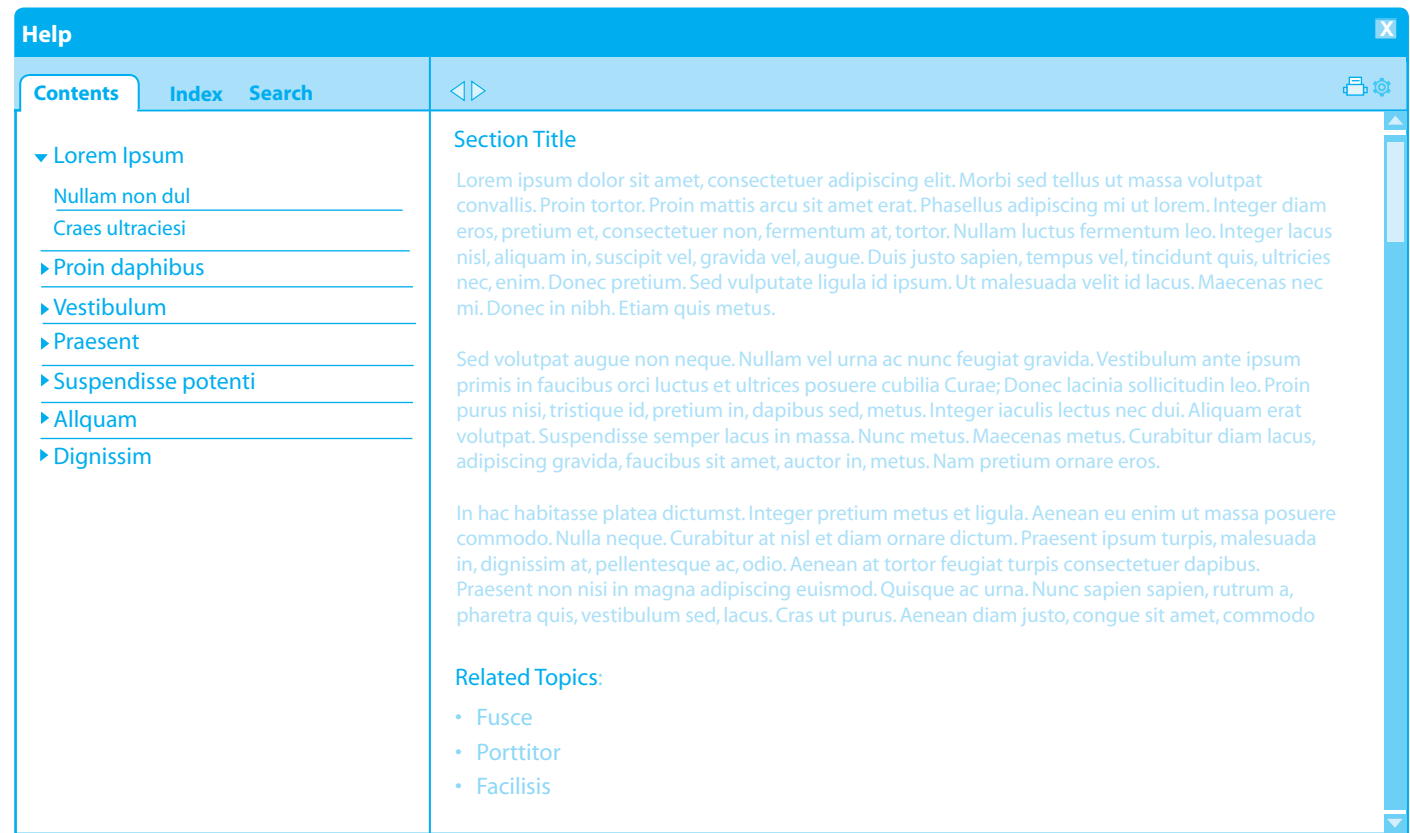
In the contents tab of the Help section, an expanding tree navigation lists all categories and sub-categories.

If a category is collapsed, the arrow points to the right. The category expands when clicked, revealing its sub-links.

Clicking a link loads content in the pane to the right.

If a category is expanded, the arrow points down. Clicking on the category name, in the expanded state, will collapse it.

Figure 16.3



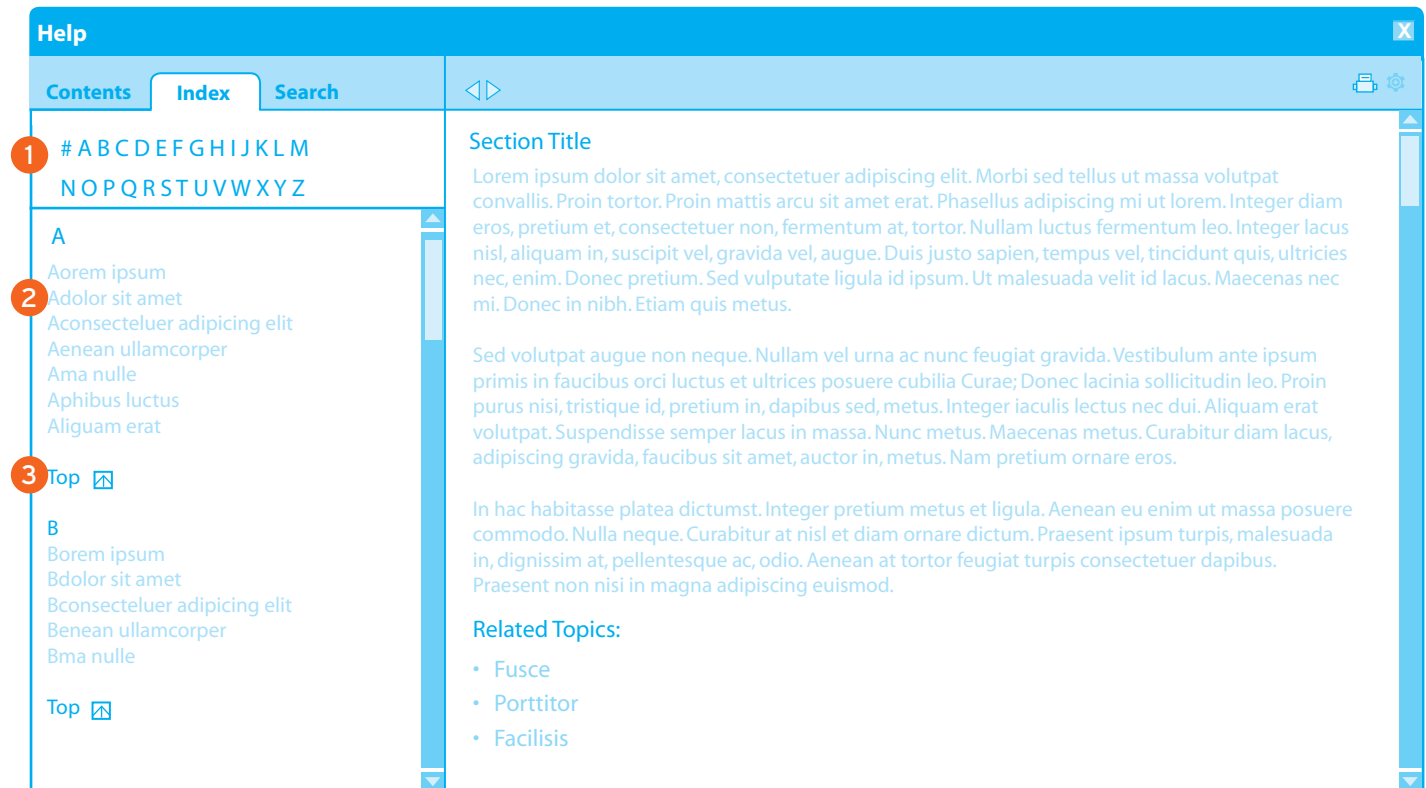
Help: Index Tab

An alphabetical index provides another access point for Help section contents.

Clicking on any link will load the corresponding content in the pane to the right.

“Top” links and accompanying arrows in the left pane take users to the top of the index.

Figure 16.4



- 1 Alphabetical Index
- 2 Index Links
- 3 Link Button with Arrow

Help: Search Tab

To perform a keyword search, users input text in a search box; a drop-down list appears, populated with suggested matches. (Firefox calls this method “Find As You Type”).

If users select one of the suggested matches from the drop-down, the content will load in the pane to the right.

Users can also enter a keyword, without selecting a suggested result from the drop-down list, and then click the “Search” button.

Search results are returned in order of relevance, directly below the search entry field. Clicking on a search result link will load the corresponding content in the right panel.

Figure 16.5: Find as you type

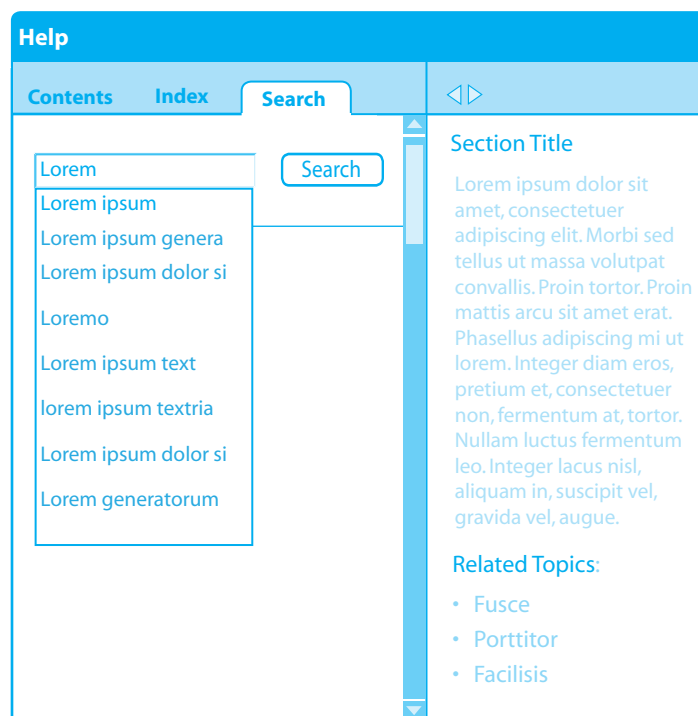
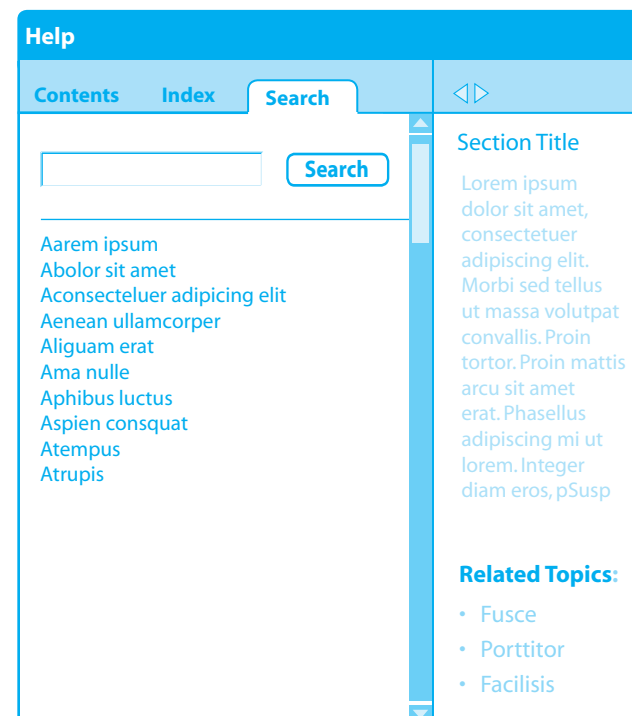


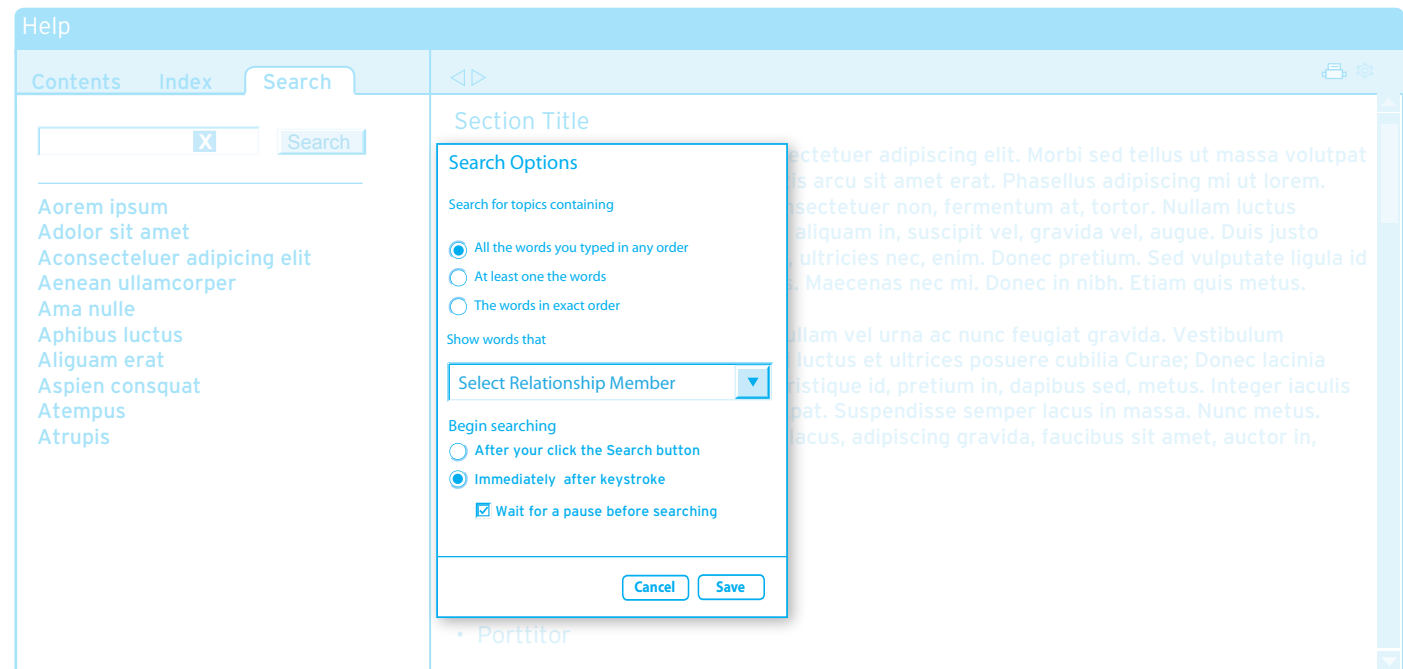
Figure 16.6: Search results



Help: Options

When users click the Configure icon, located in the upper right in the Help window, a Search Options panel launches. The Search Options panel is an overlay where users may select search criteria.

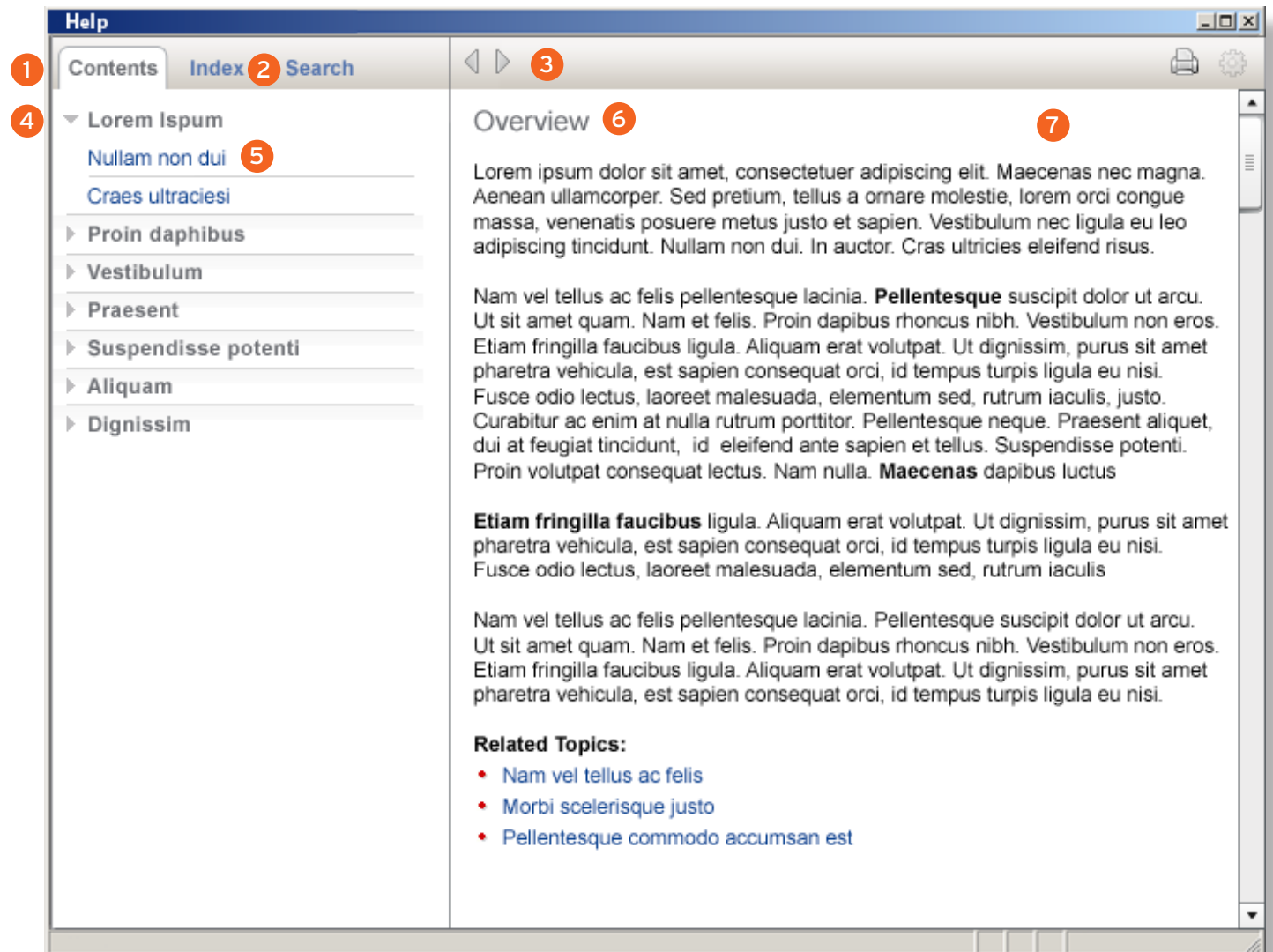
Figure 16.7



Skin: Help

- 1 Selected Tab**
Font: Arial Bold; 12 px; #626469
BG: #FFFFFF
Border: Solid, 1, #A0A4A9
- 2 Unselected Tab**
Font: Arial Bold; 12 px; #4B6bA7
Border: None
- 3 Button Bar**
BG Gradient: #F6F4F3 to #CBC5BC
- 4 Expanding Tree**
See [Module Types > Secondary Module with Expanding Tree Navigation](#) for style details
- 5 Links**
Font: Arial, 12, #003082
- 6 Section Head**
Font: Arial, 16, #626469
- 7 Text Panel**
Font: Arial, 12, #000000
Padding: 8,8,8,8

Figure 16.8



Login: Usage

In addition to Username and Password fields, the Login area may include:

- A link to contextual help
- A remember Username option
- A “jump to” field
- A forgot Username/Password link
- A link to register

The thumbnail below illustrates the homepage login area in the upper left corner of the page.



Figure 16.9

- | | |
|--------------------------------|-----------------------------|
| 1 Title (Optional) | 7 Secure Sign-In |
| 2 Contextual Help | 8 Forget Username/Password? |
| 3 Username and Password Fields | 9 Not a member? (optional) |
| 4 Remember Username | |
| 5 Jump to... (optional) | |
| 6 Command Button | |

Login: Logging in During a Session

For users to log in during a session, provide a “Log in” link in the utility navigation bar in the upper right corner of the screen.

When the link is clicked, a login window loads in the middle of the screen, as illustrated in the thumbnail below. The module also appears in this location if a user is prompted to log in to access a secure area of the site.

The login module may contain instructions to help orient users.

Figure 16.10

Login Title

[Help](#)

Please log in to access lorem ipsum dolor sit amet consectetur vestibulum.

Username:

Password:

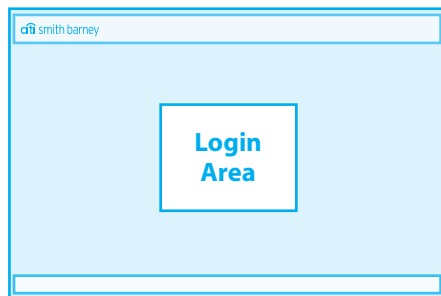
☐ Remember Username

Jump to...



[Forgot your username / password?](#)

[Not a member? Sign up now...](#)



Simple Search

Simple search allows users to quickly search for data using keywords.

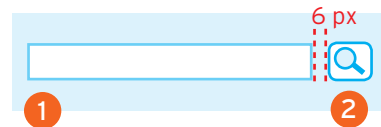
Simple search consists of an unlabeled text field for entering search terms and a command button for submitting the query. The command button is labeled "Search."

Positioning of these elements follows the guidelines for command buttons. Layout is defined in the Forms section of this document, and is shown in Figure 16.11.

Choice Lists

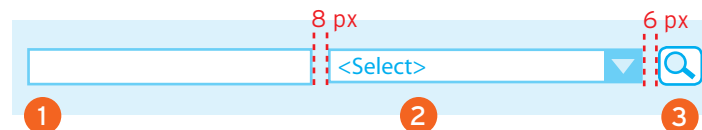
A choice list containing search query options may be included with a Simple Search field. For example, a choice list might be used to allow a user to search an entire site, or just a subsection of that site.

Figure 16.11: Simple search



- 1 Search Text Input
- 2 Command Button

Figure 16.12: Simple search with choice list



- 1 Search Text Input
- 2 Choice List
- 3 Command Button

Search Results Page Grid

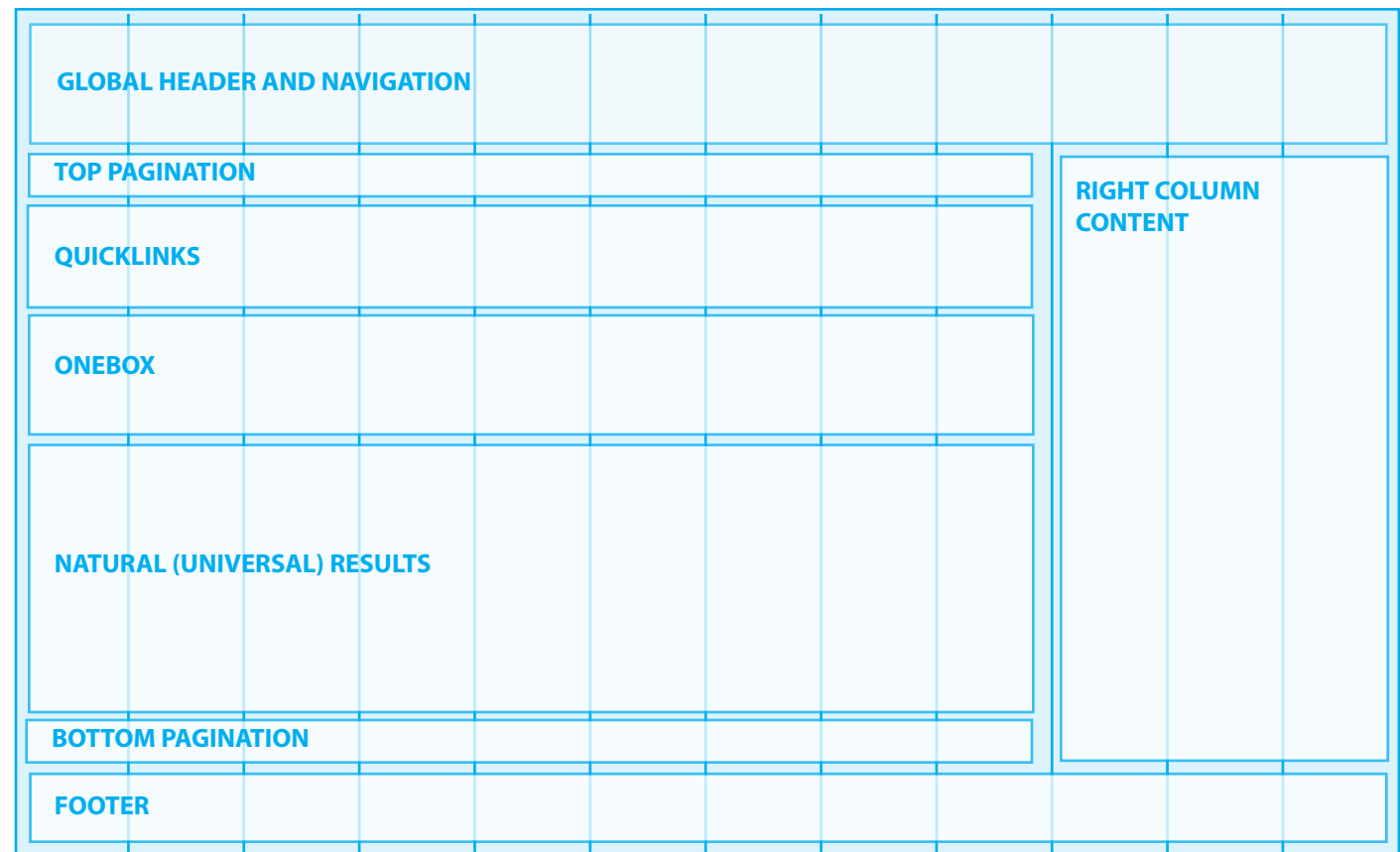
The main content of search results pages appears in a wide left column.

The initial results page will display universal results, and may also include:

- a Quicklinks box
- a OneBox

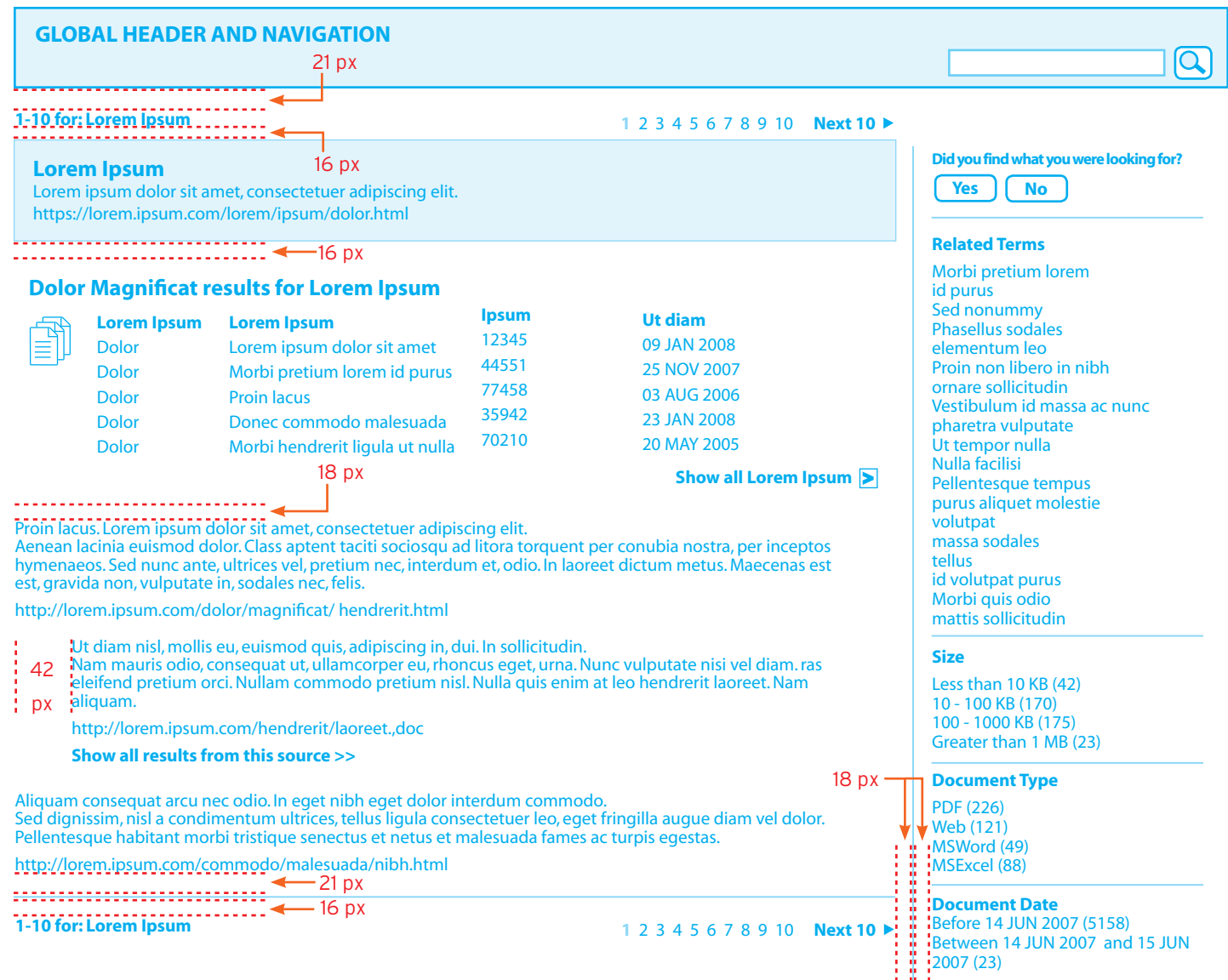
Pagination links to all results pages appear at both top and bottom of the left column. For more details about pagination, see the User Controls section of these Guidelines.

Figure 16.13: Search results page components superimposed on the standard 12 column layout grid



Search Results Page Components: Spacing

Figure 16.14

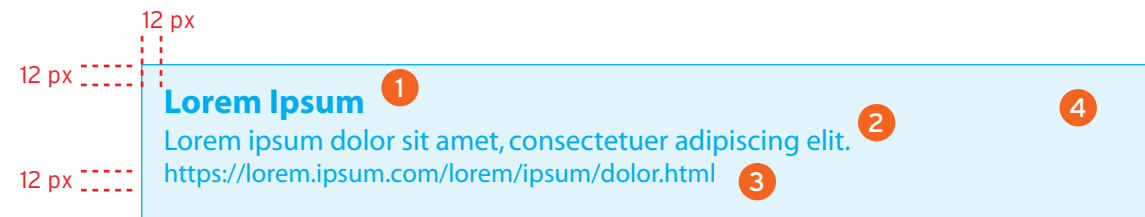


Search Results Page Components: Quicklinks

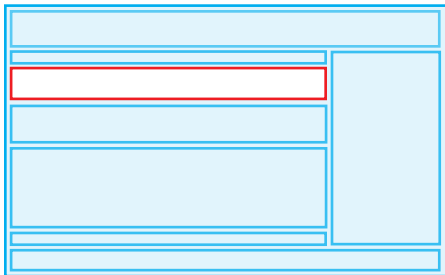
Use a Quicklinks area to highlight featured links.

Place the Quicklinks box at the top of the first results page, above the OneBox.

Figure 16.15



- 1 Heading**
Font: Arial, 14, Bold
Color: #12437E
- 2 Description**
Font: Arial, 12
Color: #000000
- 3 Link**
Font: Arial, 11
Color: #008000
- 4 Background**
Color: #E7EBF7
Stroke: 1 px, #DDDDDD



Search Results Page Components: Onebox

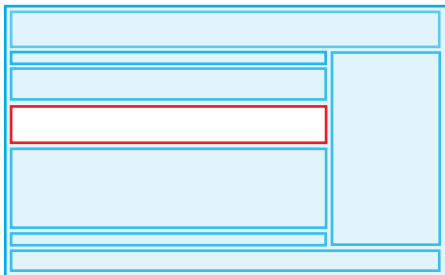
Use a Onebox, on the first page of search results, to aggregate and provide direct links to the most relevant results.

Figure 16.16

1 Search Results for Lorem Ipsum

	16 px	72 px		
	2 Lorem Ipsum	3 Lorem Ipsum	Ipsum	Ut diam
	Dolor	Lorem ipsum dolor sit amet	12345	09 JAN 2008
	Dolor	Morbi pretium lorem id purus	44551	25 NOV 2007
	Dolor	Proin lacus	77458	03 AUG 2006
	Dolor	Donec commodo malesuada	35942	23 JAN 2008
	Dolor	Morbi hendrerit ligula ut nulla	70210	20 MAY 2005
			4 Show all Lorem Ipsum ▶	

- 1 Heading**
Font: Arial, 16
Color: #000000
Link: Bold, #12437E
- 2 Icon**
Maximum height: 40 px
Maximum width: 52 px
- 3 Text in Table**
Font: Arial, 12, with Bold
Color: #000000
Links: #12437E
- 4 "Show All" link**
Font: Arial, 12, Bold
Color: #12437E



Site Previews: Basic Grid/Layout – Inner Pages

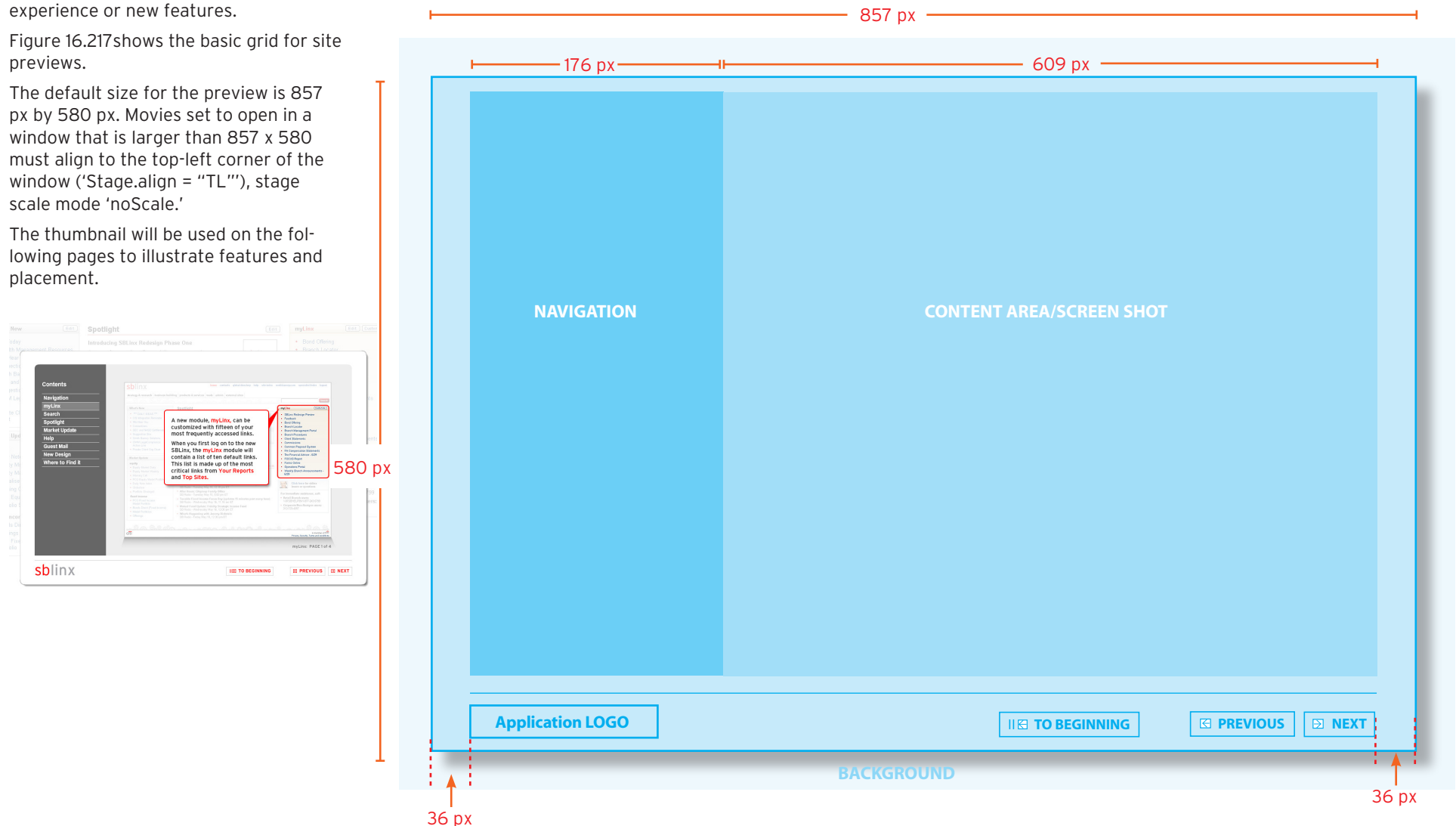
Site previews, or site tours, present users an overview of a different Web experience or new features.

Figure 16.217 shows the basic grid for site previews.

The default size for the preview is 857 px by 580 px. Movies set to open in a window that is larger than 857 x 580 must align to the top-left corner of the window ('Stage.align = "TL"', stage scale mode 'noScale.'

The thumbnail will be used on the following pages to illustrate features and placement.

Figure 16.17



Site Previews: Left Navigation Panel

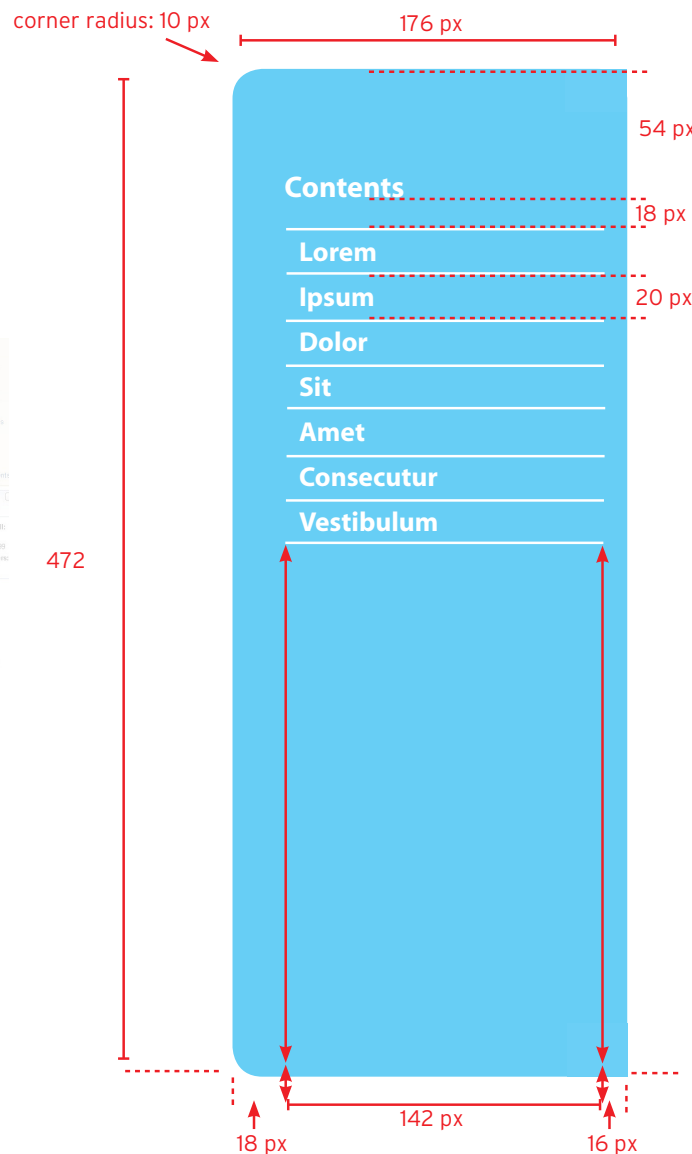
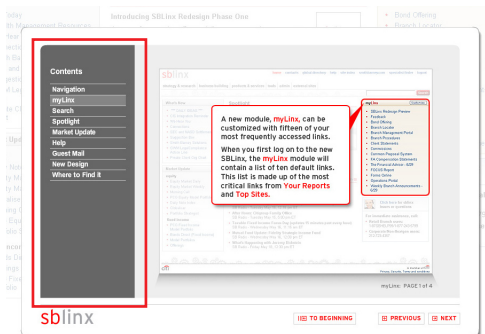
The left navigation panel enables users to move through sections of the site preview.

Use dynamic text, rather than graphics, to build navigation in site previews created using Flash/XML.

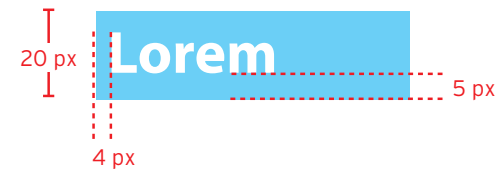
See Figure 16.18 for sizing and spacing of the panel and its elements.

Figure 16.18

corner radius: 10 px



Button Detail



Site Previews: Footer and Buttons

View the diagrams in Figures 17.19 and 17.20 for placement and sizing of logo and footer area buttons. For complete page specifications, see [Site Preview > Basic Grid](#).

In the footer area of the preview, include:

- The application logo
- “Previous” and “Next” buttons
- A “To Beginning” button

Figure 16.19 shows the sizing and spacing of the panel and its elements.

Figure 16.20 shows button detail.

Figure 16.19

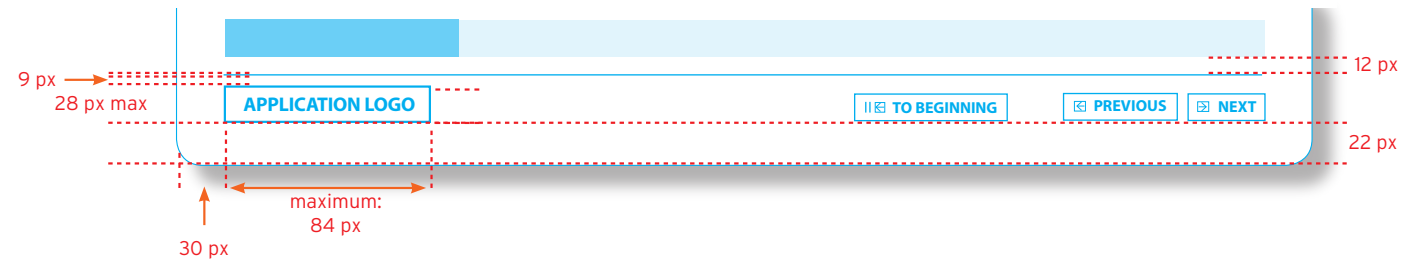
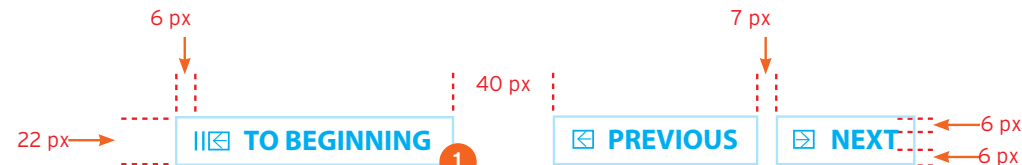
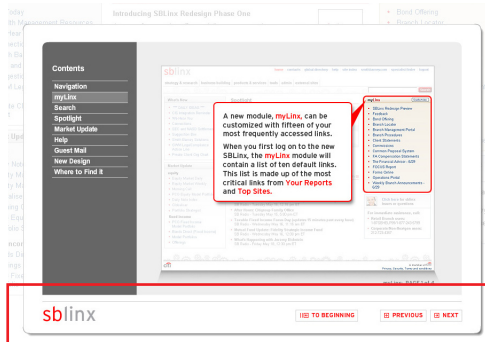


Figure 16.20

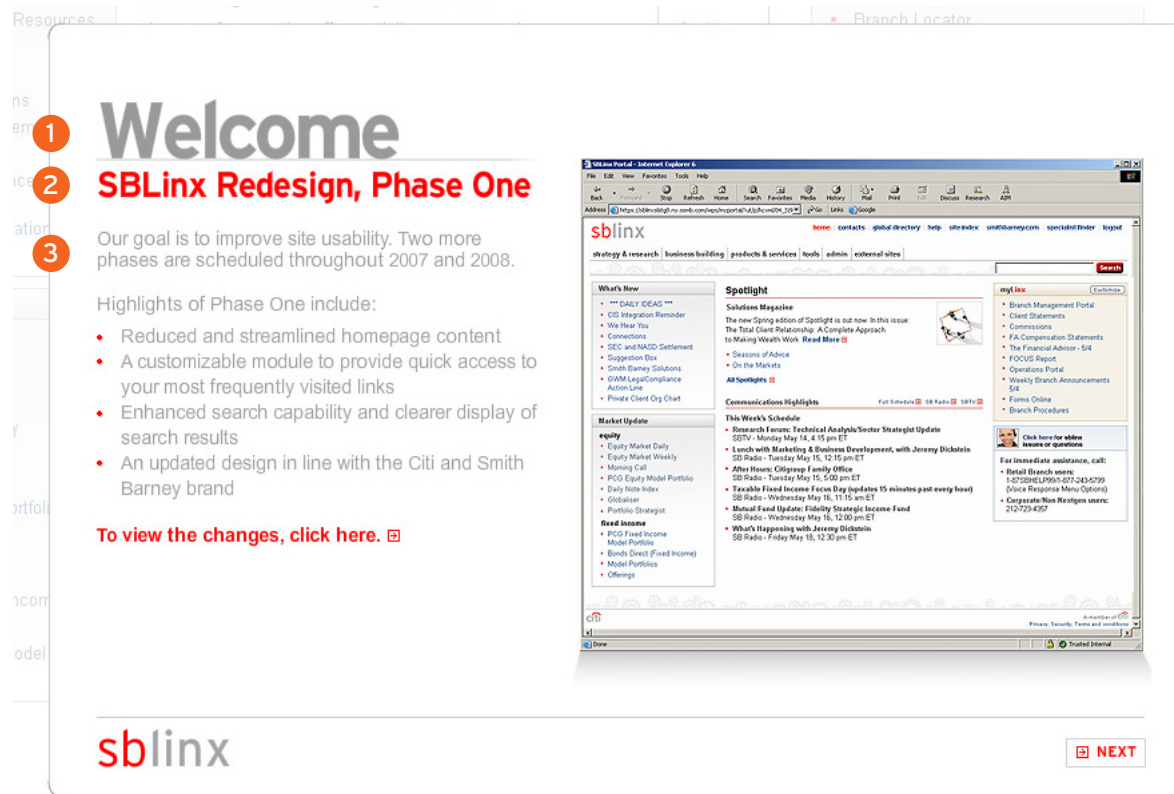


- 1 Link Buttons**
 Font: Interstate, Bold, 11, #FD0000
 Border: 1 px, #D0D1D3



Skin: Site Previews: Basic Grid/Layout: Homepage

Figure 16.21



- 1** **Headline**
Color: #949494
Font: Interstate, 60, Bold
- 2** **Subhead**
Color: #FF0000
Font: Interstate, 30, Bold

- 3** **Body Copy**
Color: #949494 (with red
#FF0000)
Font: Arial, 14

Skin: Site Previews: Left Navigation

Present the left navigation panel in gray.

As users roll over each menu item, the background color changes to a lighter gray.

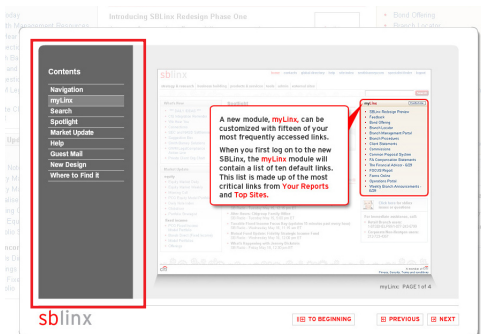
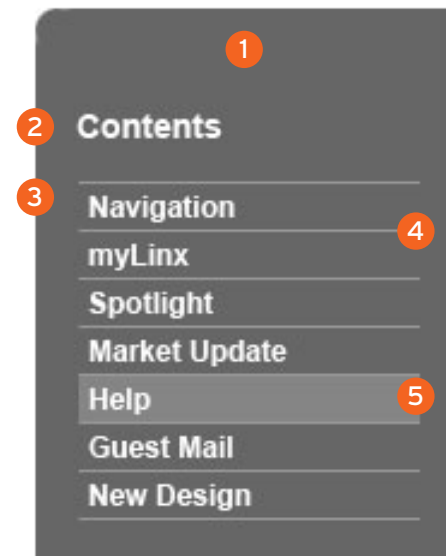


Figure 16.22



- 1 Background**
Color: #666666
- 2 Heading**
Font: Arial, Bold, 14, #FFFFFF
- 3 Navigation Text**
Font: Arial, Bold, 12, #FFFFFF
- 4 Pinlines**
1 px by 142 px,: #9B9B9B
- 5 Button States**
Hover BG: #858585
Selected BG: #858585

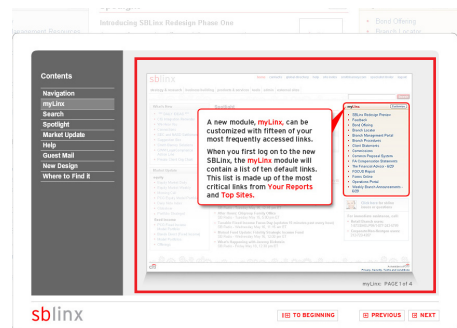
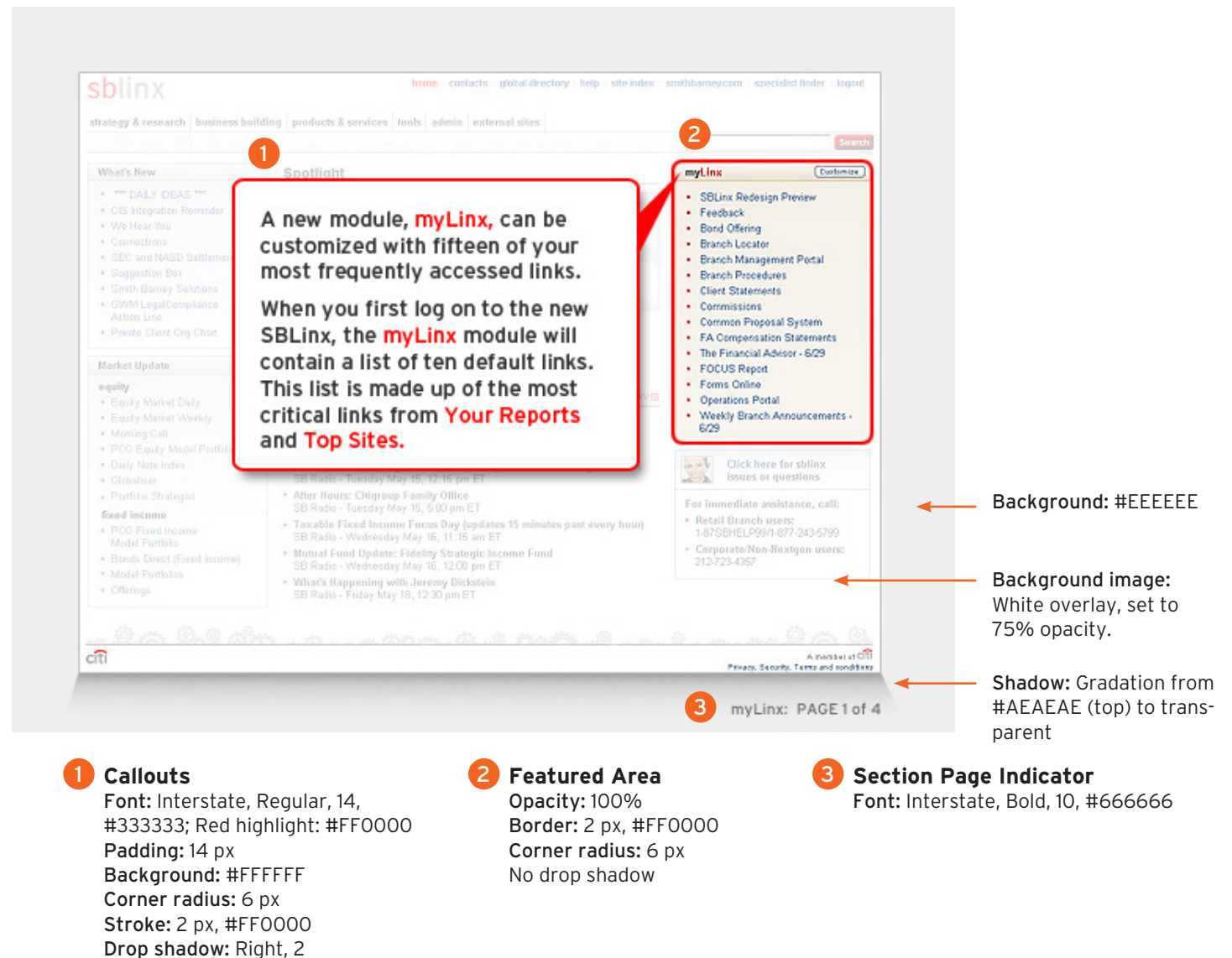
Skin: Site Previews: Screen Shots

Screen shots in the content area illustrate special features.

Enclose areas of focus within a curved red border. De-emphasize everything outside of that border by screening back or dimming panels with a white overlay set to 75% opacity.

Callouts or highlighted areas are also enclosed within a curved red border and connected to the featured area by a red arrow.

Figure 16.23



Site Previews: Text-only Pages and Flash Notes

Text-only Pages

When there is no screen shot, place text in a white panel on a gray background. Use Interstate font on text-only pages.

Flash: Transitions

Be sure to import the necessary classes:

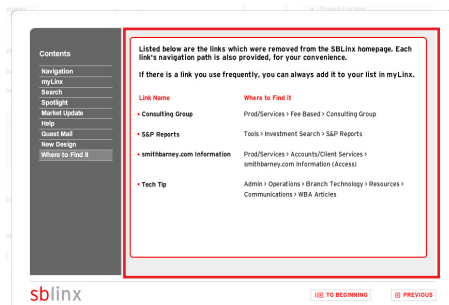
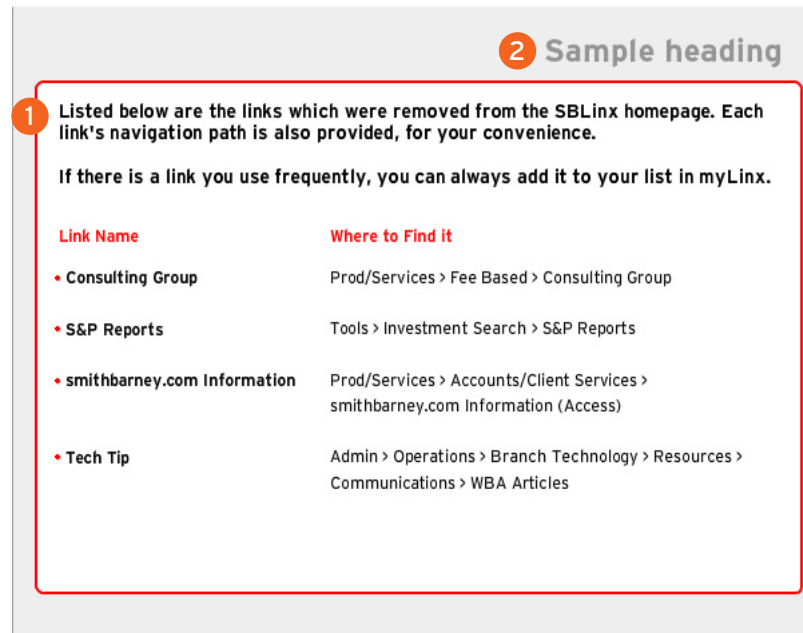
```
import mx.transitions.*;
import mx.transitions.easing.*;
```

Set the duration of the transition to '.625' and the easing to 'Regular: easeln.'

Flash: Text Settings

With Flash, set font anti-aliasing to 'Anti-alias for readability' and embed fonts.

Figure 16.24



1 Body Copy

Font: Interstate, Regular, 14,
#333333 (with red #FF0000)

Padding: 14 px

Panel BG: #FFFFFF

Corner radius: 6 px

Stroke: 2 px, #FF0000

Page BG: #EEEEEE

2 Headlines and Captions

Font: Interstate, shown: 24 px,
Bold, #959595

Form Wizard: Components

A wizard is a series of windows that leads the user through a long or complex process and breaks the process into a series of simpler steps.

When appropriate, split the process at decision points, so that choices made by the user change the “downstream” steps dynamically.

In each window include a title bar and a step designation that shows the user’s progress through the process.

Ensure the main content of each window contains instructional text and form elements.

Use the command area at the bottom of each window for navigation through the progression.

Figure 16.25

Account Creation

Step 2 of 3: Administrator Settings

Liqu ismodo odoloborem dunt augiam nim nulluptat. Et, vulla am del inibh eugiamet, sit laore volorpero.

Volor: Acipis:

Alisi:

Lorem Ipsum:

Lorem:

Vulla am del inibh eugiamet, sit laore volorpero. Enim dolobore dolum num-modions num irilit, vulput non henim dolortis ad tie commolorem iriuscincil ipit la feumsandre vel.

Back **Cancel** **Next**

- 1 Title Bar**
See [Containers](#) section for specifications
- 2 Step Designation**
- 3 Content Area**
See [Forms](#) section for specifications
- 4 Command Area**
See [Forms](#) section for specifications

Form Wizard: Progression

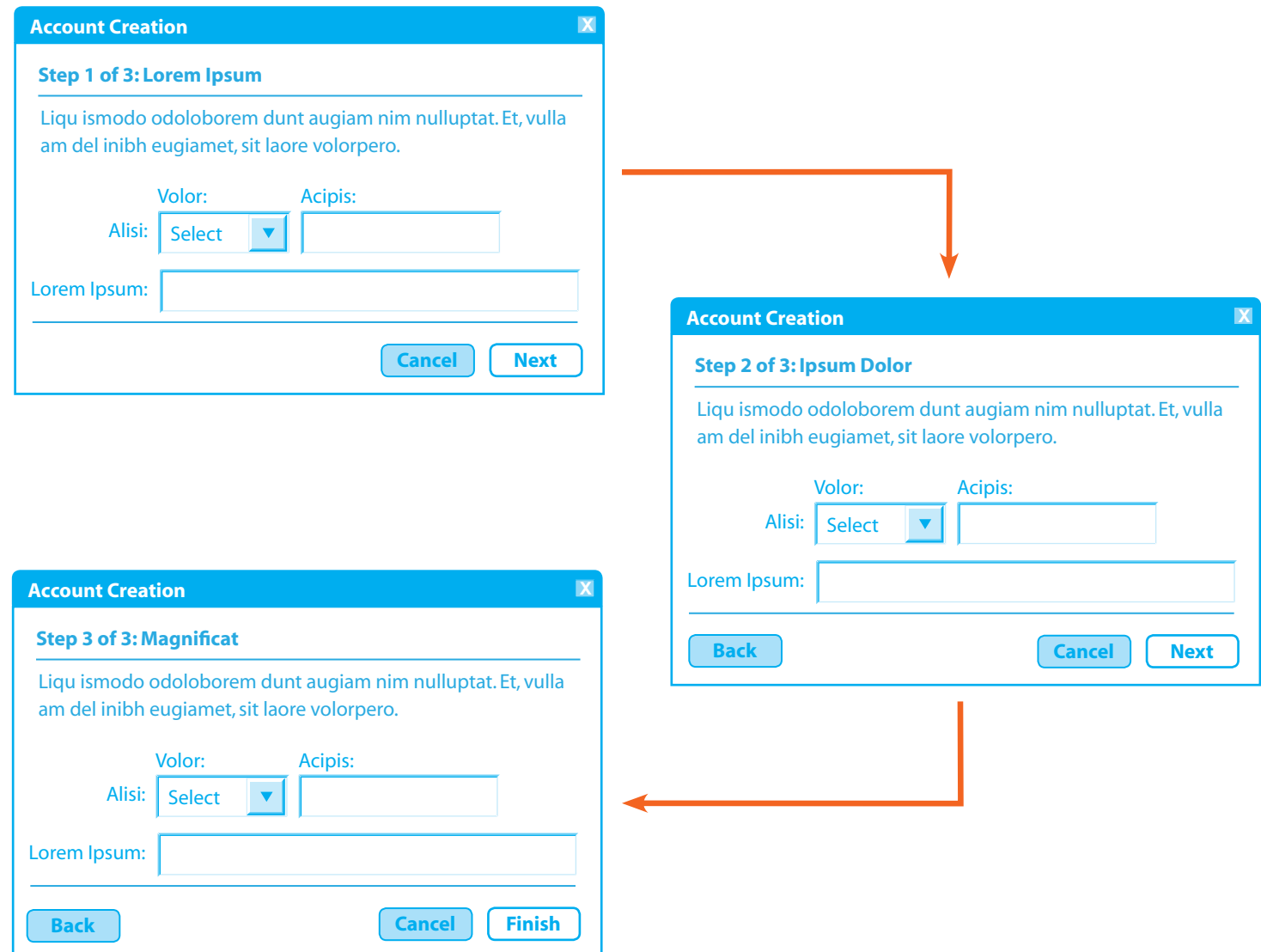
In all wizard windows, use consistent titling and provide navigation and step designations.

Replicate the command area for each window, with the exception of the first first and last windows.

Do not include a “Back” button in the first window.

In the final window, replace the Next button with a Finish button.

Figure 16.26



Polls and Surveys

Quick research mechanisms for Polls and Surveys include:

- Multiple choice radio buttons
 - Multiple choice drop-down
 - Multiple selections checkboxes
- Polling modules have two states:

- The initial or question state
- The results state

Figure 16.27: Poll question

1 **Poll Title**

2 **Question here?**

3 ☐ Lorem ipsum dolor sit
☐ Ipsum dolor sit
☐ Dolor sit
☐ Lorem ipsum sit

4 **Vote**

5 [or View Results](#)

- 1 **Poll Title Text**
- 2 **Poll Question Text**
- 3 **Radio Button**
- 4 **“Vote” Button**
Users can vote only once.
- 5 **“View Results” Link**
Link to poll results, even if user did not vote.

Figure 16.28: Poll results

Poll Title

Question repeated here?

Lorem ipsum dolor sit
20% (20 Votes)

Ipsum dolor sit
50% (50 Votes)

Dolor sit
20% (20 Votes)

Lorem ipsum sit
10% (10 Votes)

6 **Vote Results**

7 **Total Votes: 100**

8 [Return to Poll](#)

- 6 **Vote Results**
- 7 **“Total Votes” Count**
- 8 **“Return to Poll” Link**
Link to the poll question (only visible if the user has not voted).

Polls: Star Ratings

The star ratings mechanism can be used to gather user opinions quickly. Users rate by clicking on the appropriate star.

The ranking module has two states: the initial or question state and the results state.

Results are displayed both graphically and numerically.

Figure 16.29

The figure shows two side-by-side mockups of a star rating poll interface. Both have a blue header with the text 'Poll Title'.

Left Mockup (Initial State):

- Title: 'How would you rate such and such?' in blue text.
- Five empty star icons in blue.
- A horizontal line below the stars.
- A blue 'Vote' button at the bottom right.

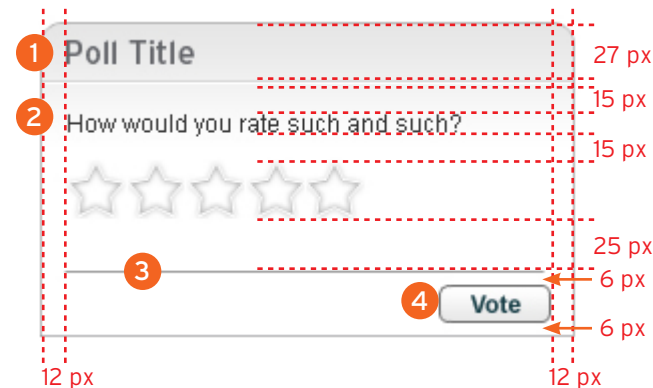
Right Mockup (Results State):

- Title: 'How would you rate such and such?' in blue text.
- Five star icons in blue, with the first three filled and the last two empty.
- Text: 'Rating: 3.5 / 5 (1,400 votes cast)' in blue.
- A horizontal line below the rating.
- Text: 'Total Votes: 2,000' in blue.

Skin: Polls

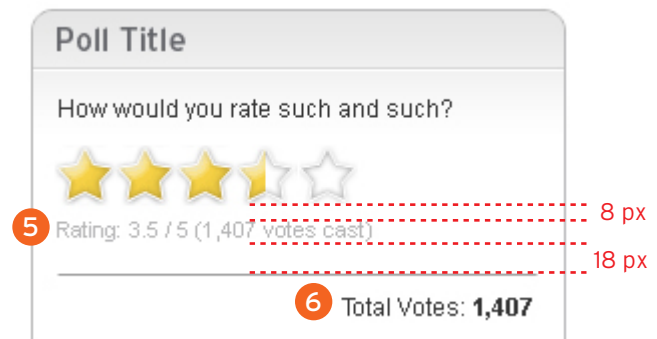
The look and feel of the poll follows the guidelines established in the [Containers](#) section. The width of the module depends on the page where it appears. The height is determined by the poll content.

Figure 16.30: Poll question



- 1 Title Bar**
 Border: Solid, 1, #FFFFFF
 Corner radius: 10
 BG: #E7E7E7, #F3F3F3
 Font: Interstate (graphical font) Regular, 16 px, #626469
 H rule: 2 px, #D9D8D8, #FFFFFF
- 2 Poll Question**
 Font: Arial, Regular, 12, #333333
- 3 H Rule**
 Solid, 1 px, # 999999
- 4 Vote Button**
 See [Forms > Command Buttons](#) for details.

Figure 16.31: Poll results



- 5 Caption**
 Font: Arial, Regular, 11, #cccccc
- 6 Tally**
 Font: Arial, Regular (Bold for the number), 12, #333333

Appendix A: NextGen

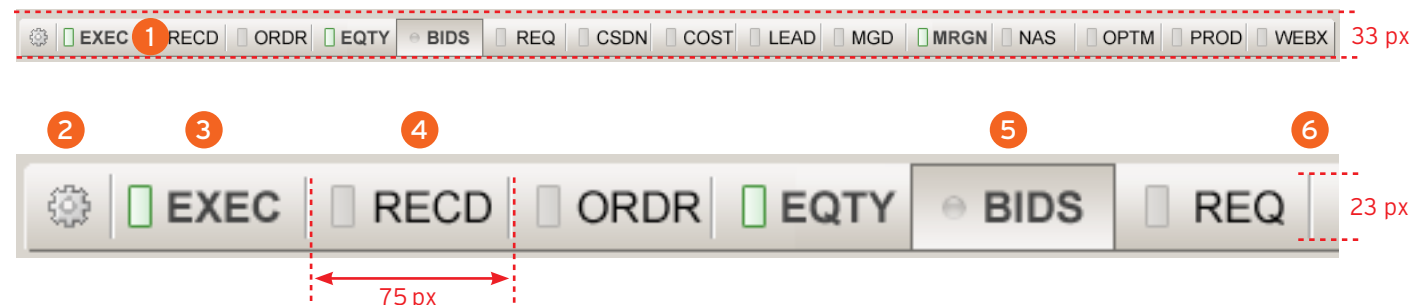
Alerts Status Bar

NextGen provides real-time notification for a variety of events through the Alerts Status Bar on the bottom of every NextGen screen.

To access an alert, users click on the appropriate button, such as EXEC, RECD or ORDR.

To configure alerts, users click the Configure button, which launches a new widow.

Figure A.1



- 1 Button Bar**
BG Gradient: #F6F4F3 to #CBC5BC
Border: Solid, 1, #696763, Right, Bottom
- 2 Configure Icon**
- 3 Button with Active Alert**
Font: Arial, Bold, 16, #3A3A3A
Icon: alertOn
- 4 Button without an Active Alert**
Font: Arial, 16, #000000
Icon: alertOff
- 5 Selected Button**
BG Gradient: #CBC5BC to #F6F4F3
Border: Solid, 1, 696763
Font: Arial, 16, #000000
Icon: alertOff
- 6 Pipe (Divider)**
VRule: 2, #A0A0A0, #FFFFFF

Button Bar

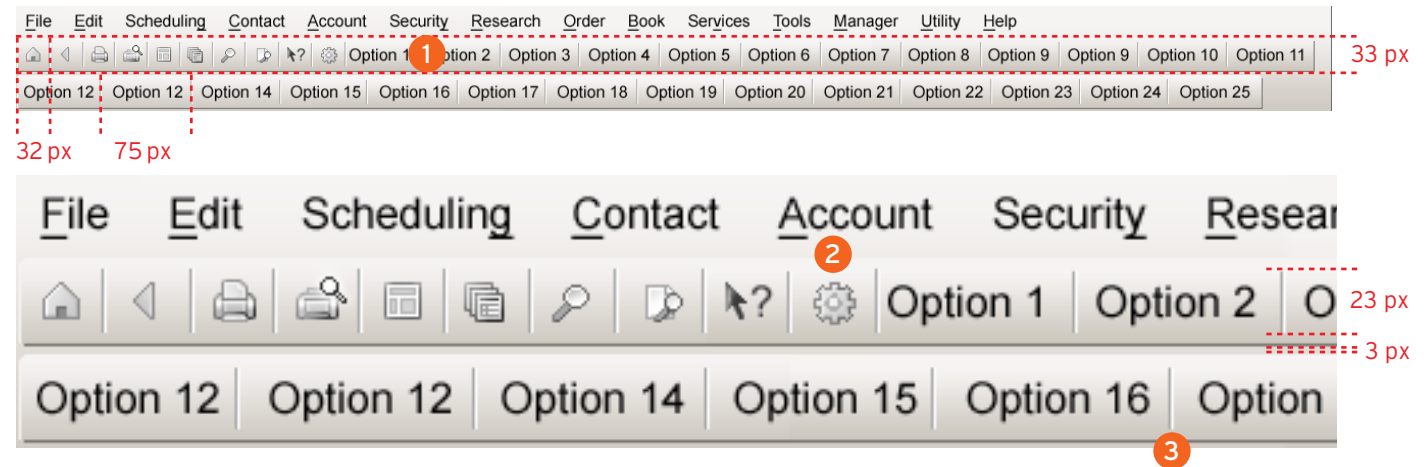
The NextGen Button Bar provides access to NextGen functions and applications.

Depict fixed items as icons. Optional shortcut buttons, however, are text-only.

Display a descriptive Info Tip when any icon is rolled over.

Users can select optional buttons to display by clicking the Configure button which launches a new window.

Figure A.2



- 1 Button Bar**
BG Gradient: #F6F4F3 to #CBC5BC
Border: Solid, 1, #696763, Right, Bottom

- 2 Configure Icon**

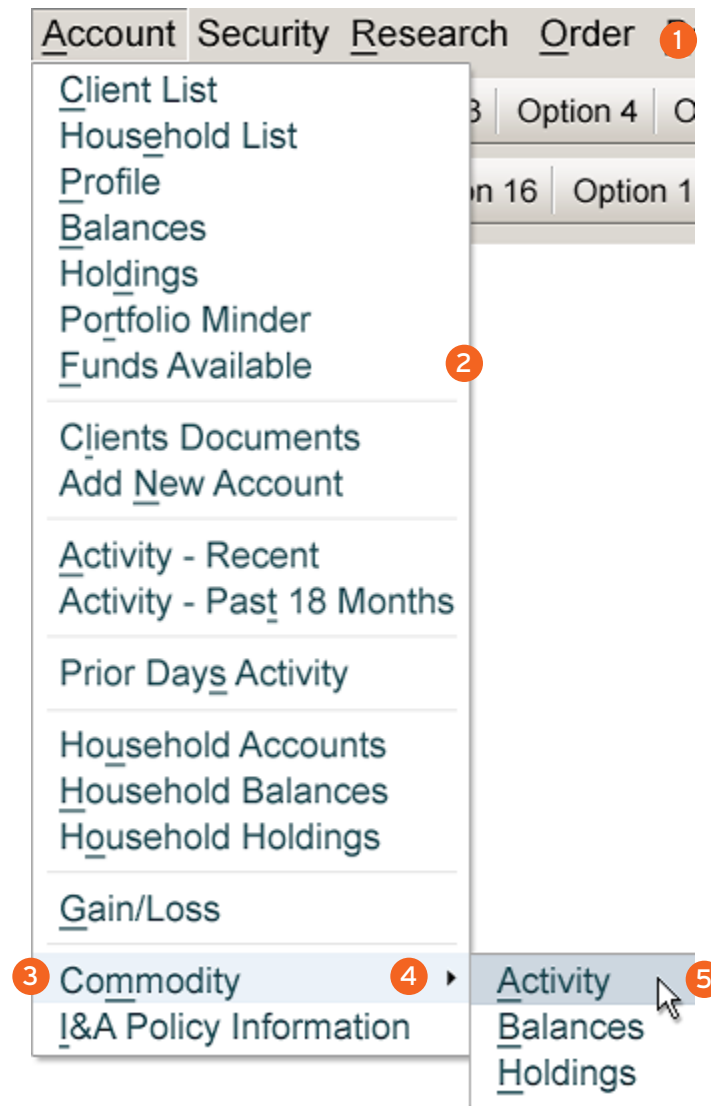
- 3 Pipe**
VRule: 2, #A0A0A0, #FFFFFF

Selected Button
BG Gradient: #CBC5BC to #F6F4F3
Border: Solid, 1, #696763
Font: Arial, 16, #000000

Cascading Menu

The Cascading Menu is a dropdown menu that displays submenus when selected.

Figure A.3



- 1 Menu Bar**
Gradient Fill: #F5F3F2 to #CAC4BB
Font: Arial, 18, #000000
- 2 Menu**
Font: Arial, 18, #0B333C
Border: 1, Solid, #0B333C
Drop Shadow: Right, 2
- 3 Hover BG**
#E7EFF7
- 4 Submenu Indicator**
- 5 Submenu Selected**
BG: #C3CED9

User UI Customization

Allowed Customization

Font size customization options, per current NextGen specifications, are 10, 11, 12 and 14 point.

Provide users with the option to view tables with alternating row colors or pinlines.

Disabled Customization

No user customization of colors is permitted.

Figure A.4: Alternating Colors

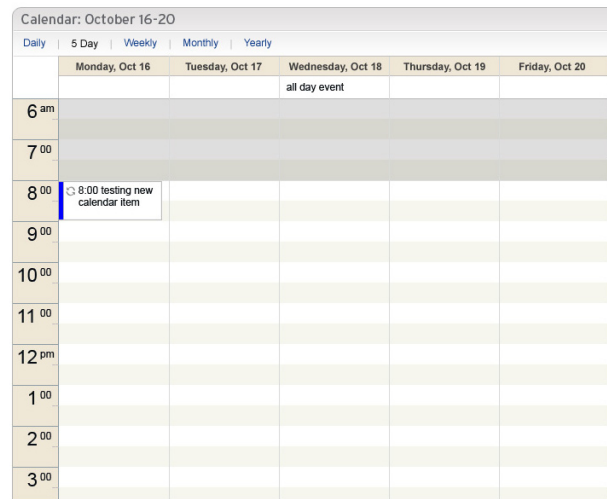
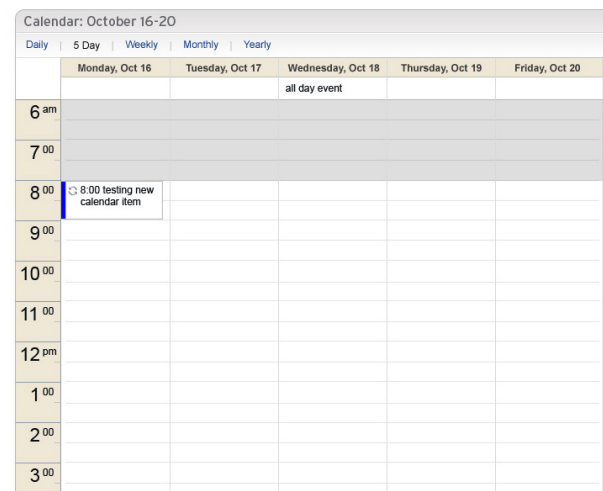


Figure A.5: Pinlines



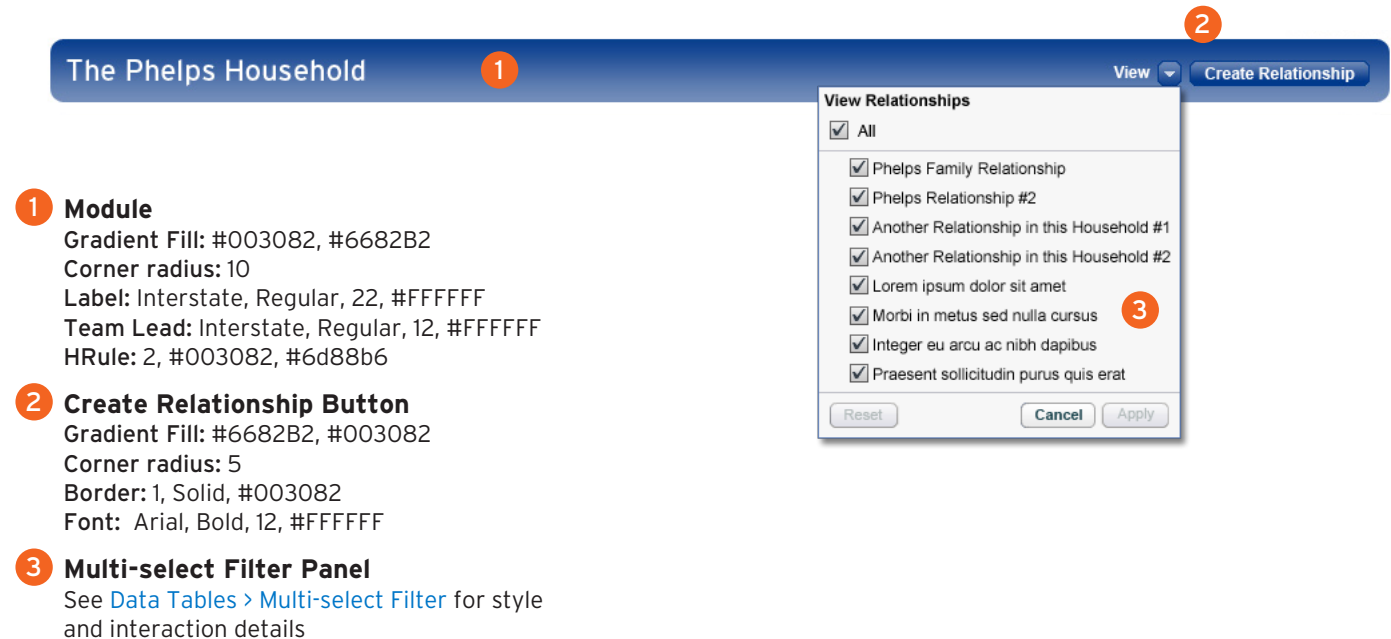
Appendix B: Solutions Gen 1

Household Header Module

Figure B.1: Relationship Manager tool header



Figure B.2: Relationship Manager header with filter panel exposed



Header Module with Navigation Tabs

Figure B.3: Solutions Discovery Header Module

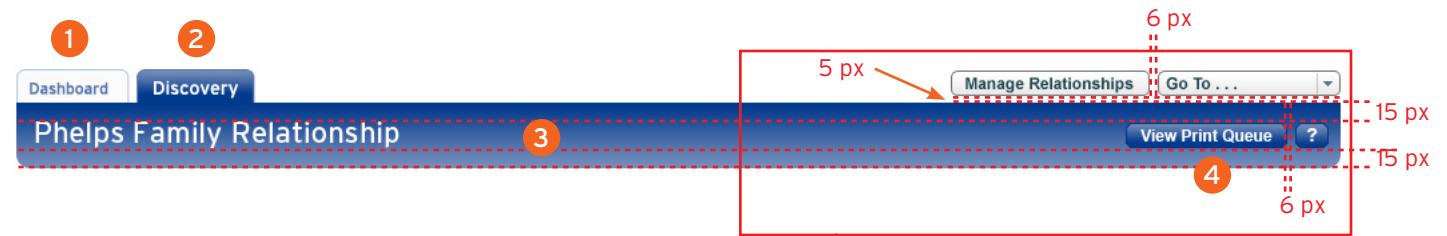
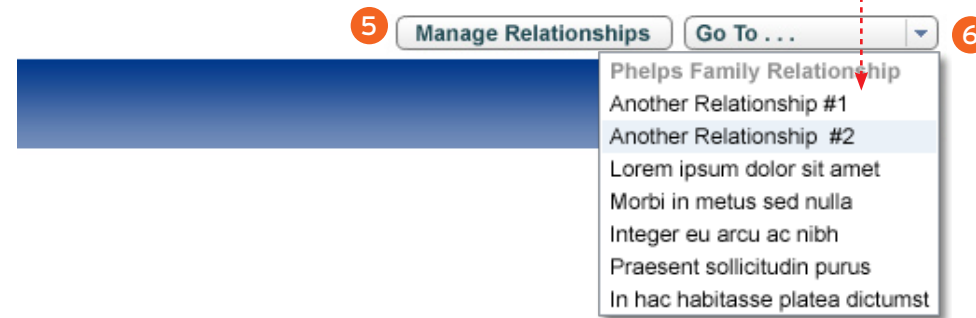


Figure B.4: Detail with Jump Menu drop-down exposed



- 1 Active Tab**
BG Gradient: #6682B2 to #003082
Corner Radius: 5
Border: Solid, 1, W4A69A5
Font: Interstate, Regular, 4, #FFFFFF
- 2 Inactive Tab**
BG Color: #FAFAFA
Corner Radius: 5
Border: Solid, 1, #ABBED9
Font: Interstate, Regular, 2, #4B6BA7

- 3 Module**
Gradient Fill: #003082 to #6682B2
Corner radius: 10
Label: Interstate, Regular, 22, #FFFFFF
- 4 View Print Queue & Help Button**
Gradient Fill: #6682B2, #003082
Corner radius: 5
Border: 1, Solid, #003082
Font: Arial, Bold, 12, #FFFFFF

- 5 Command Button**
See [Forms > Form Buttons](#)
- 6 Drop-down Jump Menu**
See [User Controls > Jump Menu](#)

Header Module with Expandable Drawer: Closed State

Figure B.5



Figure B.6: Detail of tabs and buttons



1 Module

BG Gradient: #003082 to #6682B2
 Corner radius: 10
 Large Label: Interstate, Regular, 22, #FFFFFF
 Small Label: Interstate, Regular, 12, #FFFFFF
 HR: 2, #003082, #6d88b6

2 Active Tab

BG Gradient: #6682B2 to #003082
 Corner radius: 5
 Border: 1, Solid, #4A69A5
 Font: Interstate, Regular, 14, #FFFFFF

3 Inactive Tab

BG: #FAFAFA
 Corner radius: 5
 Border: 1, Solid, #ABBED9
 Font: Interstate, 12, #4B6BA7

4 Buttons

BG Gradient: #355A9A to #093786
 Border: 1, Solid, #003366
 Inset Border (Left, Top): 1, Solid, #6D88B6
 Font: Arial, 12, #FFFFFF

Header Module with Expandable Drawer: Open State

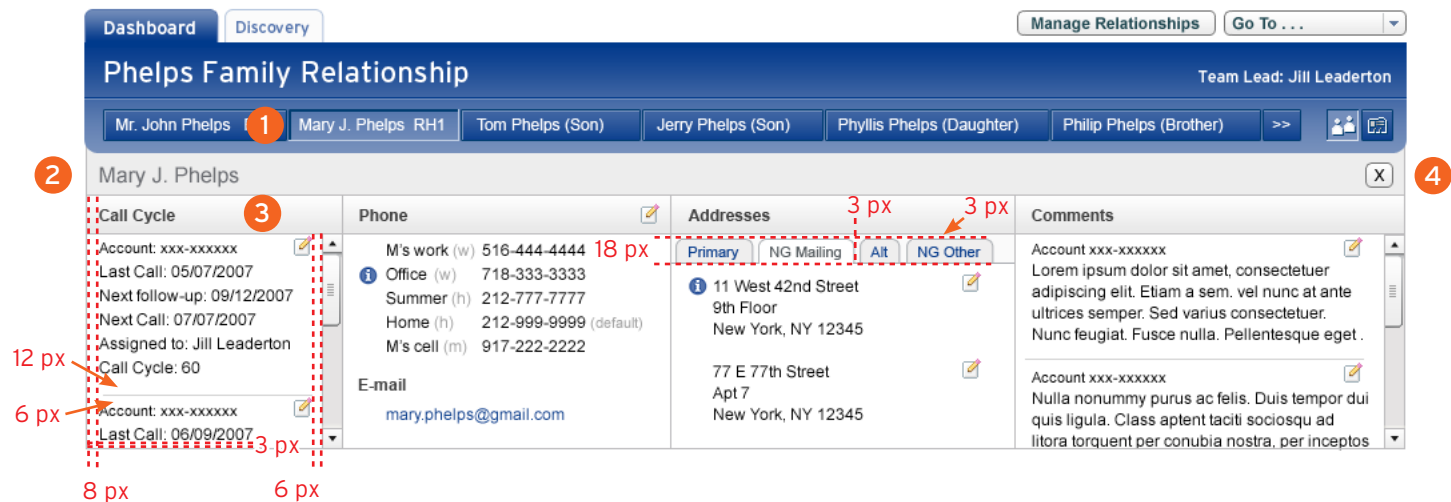
The Expandable Drawer opens when users select a button, such as the Mary J. Phelps button in Figure B.7.

The selected button will appear in the selected state.

Selecting another button while the drawer is open loads new content, replacing the previous content.

The close button closes the Expandable Drawer.

Figure B.7



- 1 **Selected Button**
BG Gradient: #4C6DA6 to #6380B1
Right & Top Border: 2, Solid, #003366
Left & Bottom Border: 1, Solid, #B7C6DF
Font: Arial, 12, #FFFFFF

- 2 **Drawer Header**
Border: Solid, 1, #B6B5B7
BG: #EBEBEB
Height: 30
Font: Arial, 16, #626469

- 3 **Panel Header**
Border: Solid, 1, #B6B5B7
BG Gradient: #FCFCFC to #E3E3E4
Height: 30
Header: Arial, Bold, 12, #3A3A3A

- 4 **Close Button**

Account Labels
Font: Arial, 10, #000000

Data
Font: Arial, 12, #000000

Links
Font: Arial, 12, #003082

Panels
BG: #FFFFFF
Border: 1, Solid, #B6B5B7
Padding: 3, 6, 3, 8

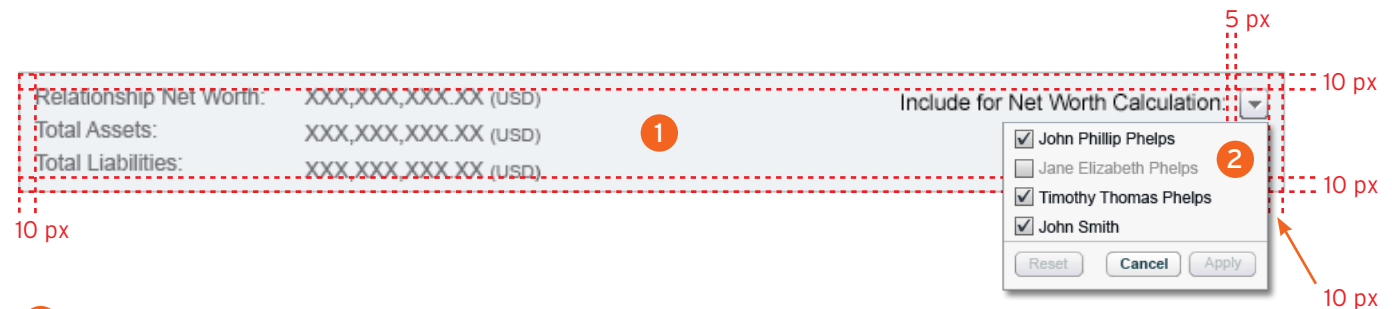
Tabs
See [User Controls > Tabs](#) for style details, except:
Font: Arial, 10
Height: 18 px
Tab Spacing: 3 px

Relationship Net Worth Panel

The “Include for Net Worth Calculation” drop-down provides control over which assets and liabilities are used to calculate the Net Worth for the Relationship that is currently in context in Discovery. If a Member’s portion of an account has been excluded, there will be an indication in the title bar of that asset.

Individual Assets and Liabilities can also be excluded by checking the “Exclude from Relationship’s Net Worth” checkbox that appears on every Asset and Liability. If an asset has been excluded, the message (Net Worth Allocation 0%) would appear in the asset’s title bar.

Figure B.8



1 Panel

BG Color: #ECEFF9

Font: Arial, 12, #626469

USD Label: Arial, 10, #626469

Icons: See [Data Tables > Multi-select Filter](#)

2 Multi-select Filter Panel

See [Data Tables > Multi-select Filter](#) for style and interaction details

Portfolio

Figure B.9: Portfolio with accounts

Account Name	Number	Type	Where Held	Value (USD)
A Closed Account	xxx-xxxxx	<type>	<where held>	XXX,XXX.XX
A Linked Account	xxx-xxxxx	<type>	<where held>	XXX,XXX.XX
An External Account Linked to a Plan	xxx-xxxxx	<type>	<where held>	XXX,XXX.XX
Fidelity 401K	xxx-xxxxx	<type>	<where held>	XXX,XXX.XX
John & Mary's Main Investment Account	xxx-xxxxx	<type>	<where held>	XXX,XXX.XX

Figure B.10: Portfolio without accounts

Portfolio #1	Portfolio Market Value: X,XXX,XXX.XX (USD)	Add / Link Accounts
Drag Accounts here to add to this portfolio		

1 Header

Border: Solid, 1, #909DA6

BG: #FDFDFD, #E7E7E7

Portfolio Name: Interstate, Bold, 12, #0A3886

Portfolio Market Value: Interstate, Bold, 12, #000000

2 Account Area

BG: #909DA6

Column Headers: Arial, 10, #FFFFFF

'Drag Accounts' Message: Arial, 10, #FFFFFF

Accounts

Figure B.11



BG: #FFFFFF

Font: Arial, Regular, 12, #000000

Figure B.12: Account type icon placement and spacing



Figure B.13: Placement and spacing of Edit and Remove controls

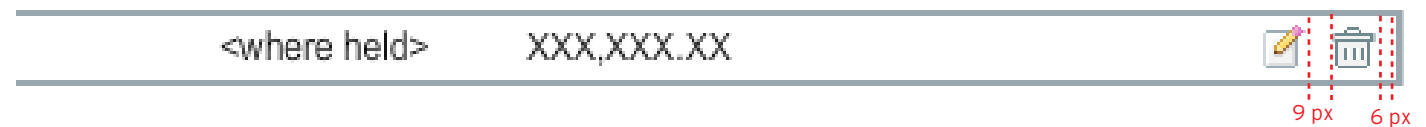


Figure B.14: Account type icons

- C Closed Account
- E External Account
- L Linked Account
- P External Account associated with a Plan

Appendix C: SBLinx and FA Comp

Contextual Images

The SBLink homepage includes contextual images next to Spotlight, to accompany feature articles, as illustrated in Figure C.1.

Contextual images may also appear in the header of certain modules, as shown in Figure C.2, or as column headers, as depicted in Figure C.3.

- Crop images closely
- Minimize distracting background elements
- Emphasize the relationship between the image and the content
- Vary the width of the small images

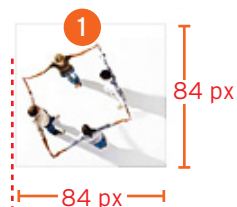
Figure C.1

TEN+ List

Lorem ipsum dolor sit amet, consectetur adipiscing elit. In eu quam et lacus ultrices aliquet. In placerat eleifend augue libero.

[Click here for the full report](#)

20 px minimum distance
between image and text

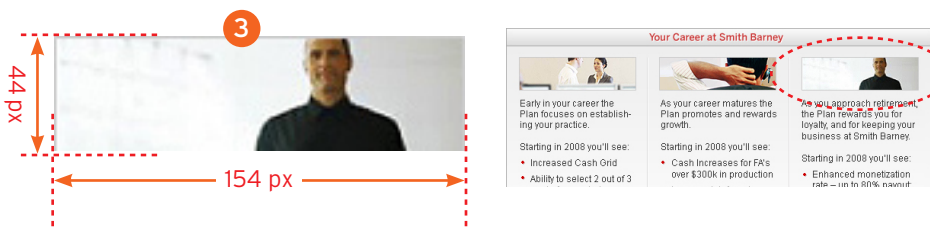


- 1 Outline**
1 px, Solid, #EEEEEE
 - 2 Outline**
1 px, Solid, #666666
 - 3 Outline**
1 px, Solid, #cccccc
- Inner Border**
1 px, Solid, #FFFFFF

Figure C.2



Figure C.3

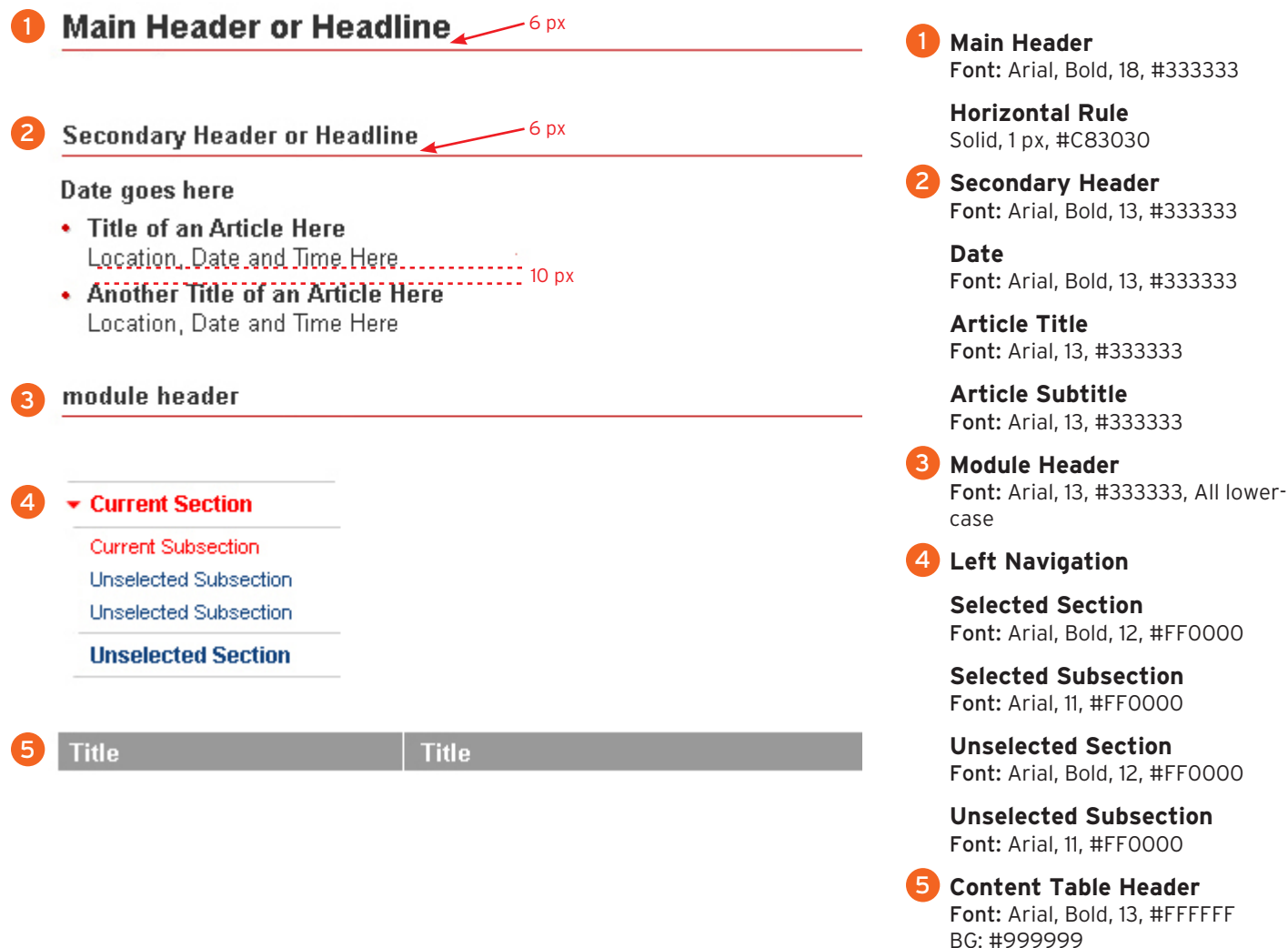


Text Styles

Figure C.4 depicts examples of text styles from SBLinx.

For specifications regarding line spacing and other layout considerations, see the [Containers](#) section.

Figure C.4



Footer

Figure C.5



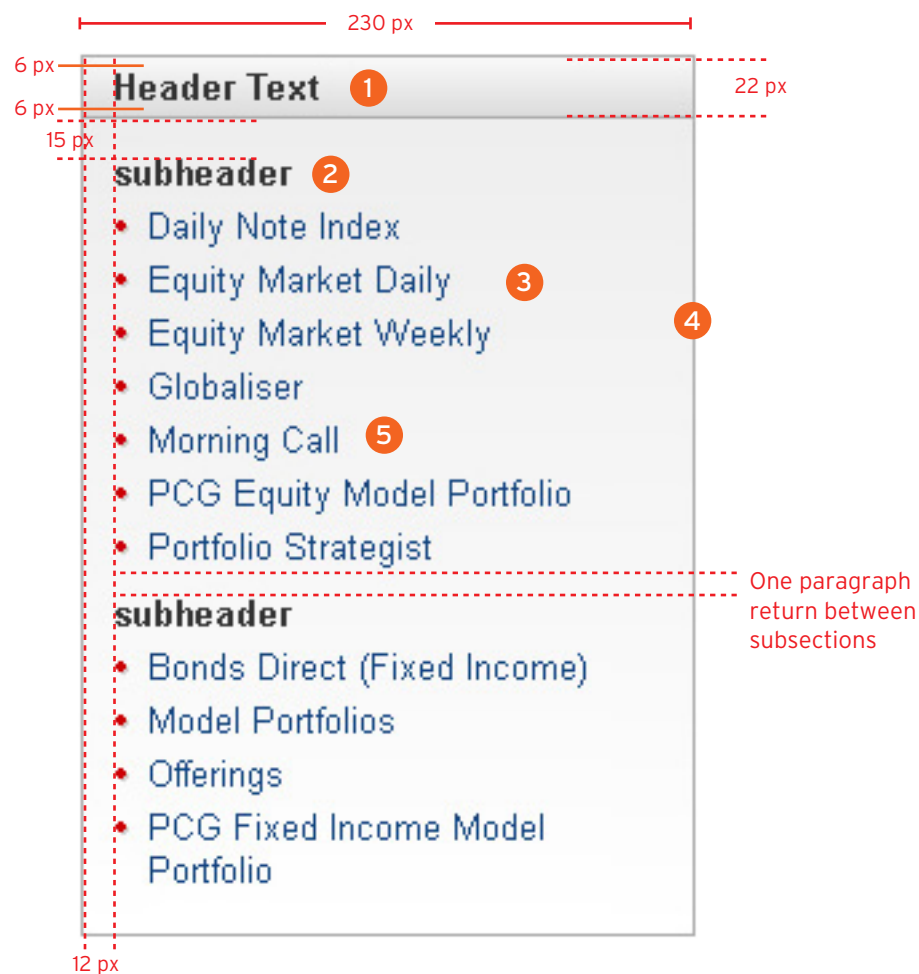
- 1 Gear Bar**
 Height: 30 px including gray pinlines
 Color: Black - 7% transparency
- 2 Gray Pinline**
 Color: #ADABAE
 Height: 1 px
 White pinline
 Height: 2 px
- 3 Footer**
 Font: Arial, 9, #666666
Footer Links
 Font: Arial, 10, #003082

Basic Module with Bulleted List

The basic module style is used in the left column of the SBLinx homepage, as illustrated in the thumbnail below and in Figure C.6.



Figure C.6



- 1 Table Header Text**
Font: Arial, Bold, 13, #333333
BG Gradient: #F9F9F9 to #DCDCDC
- 2 Subheader**
Font: Arial, Bold, 13, #333333, All lowercase
- 3 Table Background Gradient**
Height: Variable, #EEEEEE to #FFFFFF
- 4 Table Border**
Solid, 1 px, #ABABAB
- 5 Bulleted Links**
(See [Text and Hyperlink Guidelines](#) for full specs)

Featured Article



Figure C.7



- 1 **Horizontal Rule**
480 px, 1 px, #C8302F
- 2 **Text**
See [Text and Hyperlink Guidelines](#) for full specs
- 3 **Links**
See [User Controls](#) for full specs
- 4 **Image**
Width: 84 px
Height: 80 px
Border: Solid, 1 px, #EEEEEE

Communications Highlights



Figure C.8

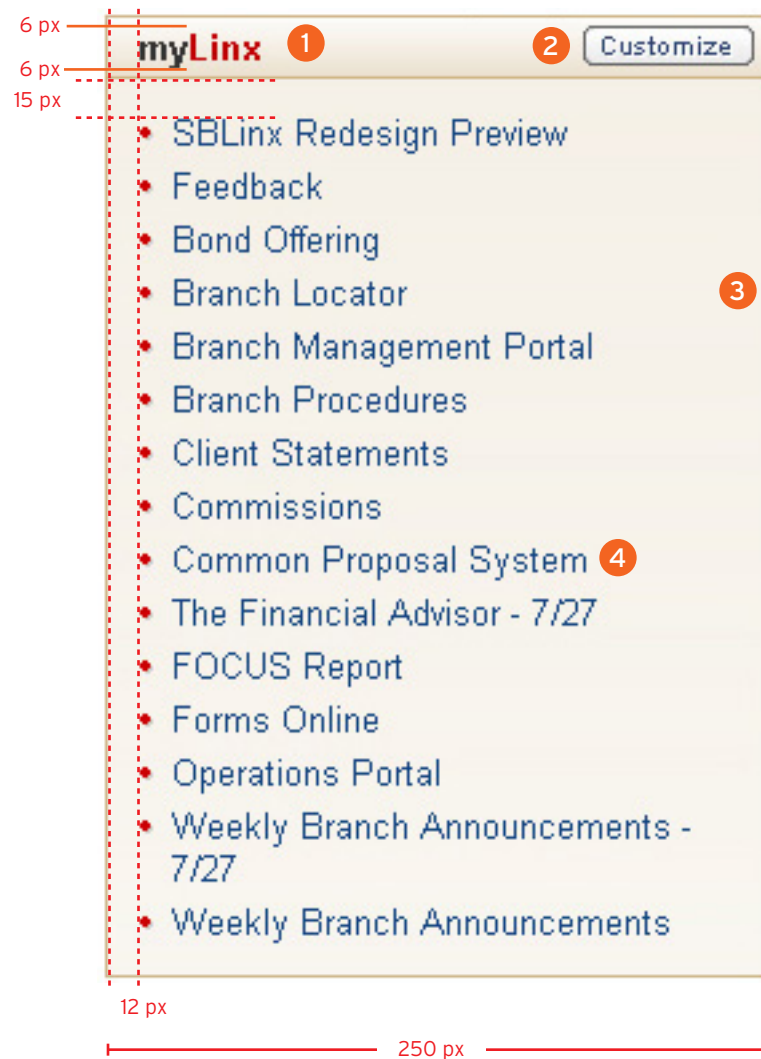


- 1 **Horizontal Rule**
Solid, 1px by 480 px, #C8302F
- 2 **Links**
See [User Controls](#) for full specs
- 3 **Bulleted Article Titles**
See [General Text Guidelines](#) for full specs
- 4 **Text**
See [Text and Hyperlink Guidelines](#) for full specs

Links Module



Figure C.9



- 1 Table Header**
Font: Arial, Bold, 13, #333333

Table Header Background Gradient
Height: 22px
Top: #FDFCFA
Bottom: #ECE2D1

- 2 "Customize" Button**
See [Forms > Form Buttons](#) for full specs

- 3 Table**
BG: #F6F2E9
Border: 1 px, Solid, #CEB488

- 4 Bulleted Links**
See [General Text Guidelines](#) and [General Hyperlink Guidelines](#) for full specs

Links Module

Figure C.10

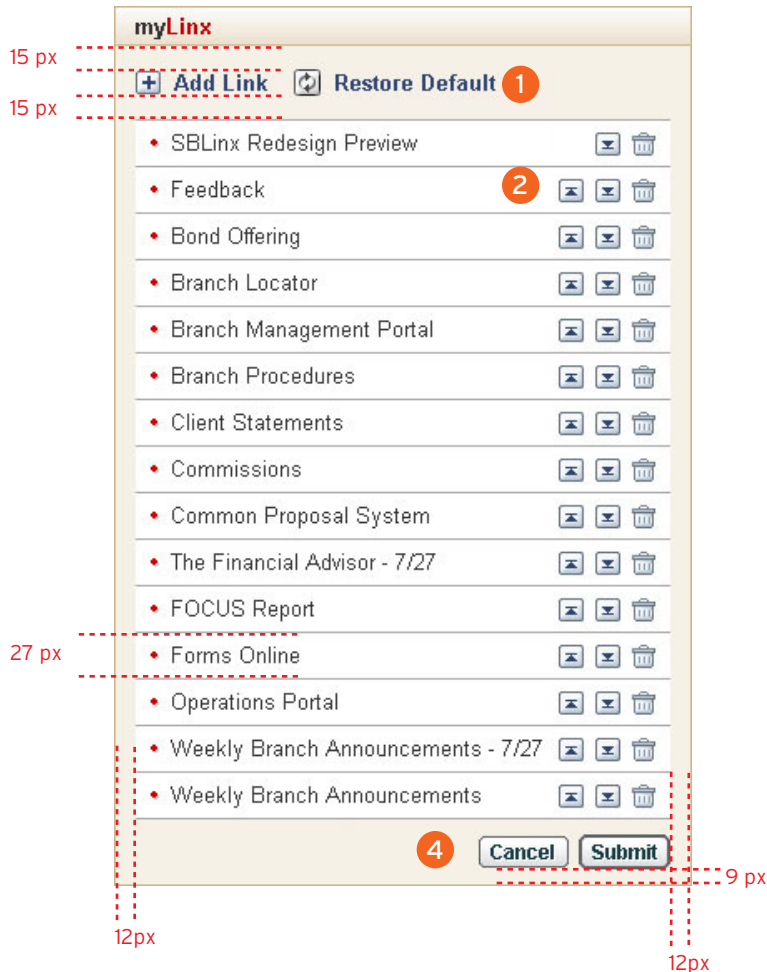
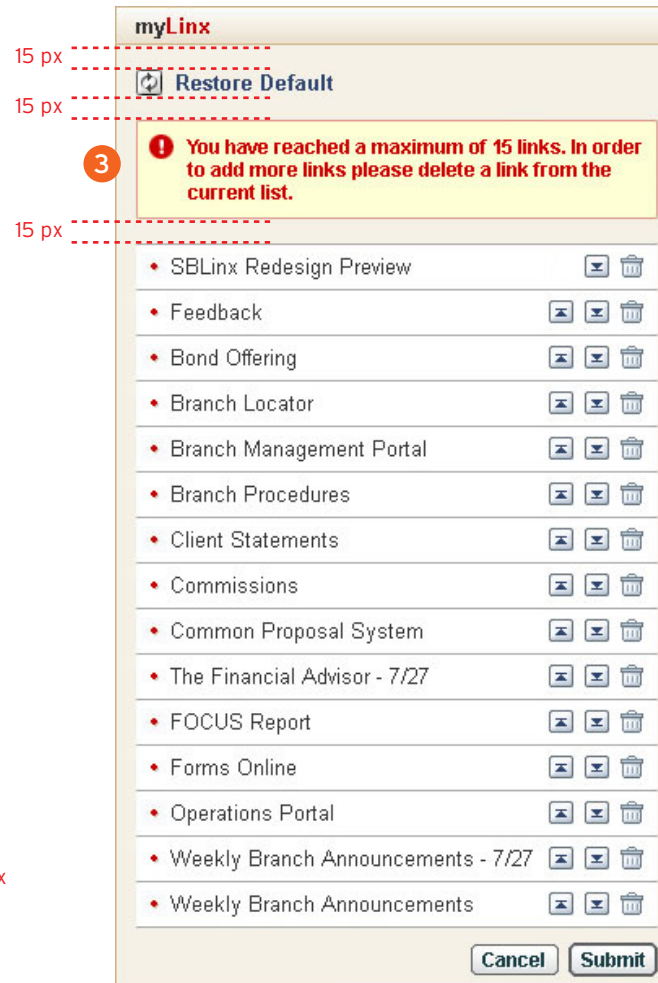


Figure C.11: Maximum number of links reached

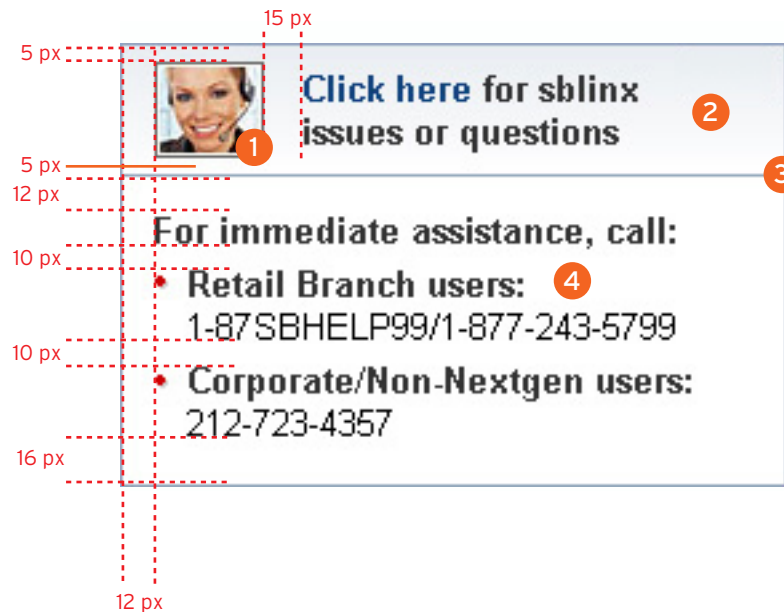


- 1 Task Icons with Text**
See [Image Usage > Icons](#) for full specs
- 2 Task Icons**
See [Image Usage > Icons](#) for full specs
- 3 Error Message**
See [Text Guidelines > Messaging > Error Messages](#) for full specs
- 4 Command Buttons**
The "Submit" and "Cancel" buttons only appear in the customize view. See [Forms > Form Buttons](#) for full specs.

Promotional Module with Image in Header



Figure C.12



- 1 **Image**
Width: 35 px
Height: 40 px
Border: 1px, #EEEEEE
- 2 **Table Header Background Gradient**
Height: 22px
Top: #EBEEF3
Bottom: #DCDCDC
- 3 **Border**
Solid, 1 px, #95A6C2
- 4 **Bulleted List**
See [General Text Guidelines](#) and [General Hyperlink Guidelines](#) for text and links specs

Login



Figure C.13

Login 1

If you have an FCI single sign-on ID, please use that ID to login to SB Linx. If you do not have an FCI login ID, please click here for instructions on how to request one. If you have any questions, please call your Help Desk. 2

8 px

20 px

12 px

6 px

20 px

3

4

Submit

Log in ID:

Password: (Max. 6 chars)

CENTERED

- 1 Table Header**
Font: Arial, Bold, 13, #333333

Table Header Background Gradient
Height: 22px
Top: #EBEEF3
Bottom: #DCDCDC

- 2 Background Color**
#F6F2E9

Text
See [Text Guidelines](#) in for full specs

- 3 Border**
Solid, 1 px, #95A6C2

- 4 Command Button**
See [Forms: Form Buttons](#) for button specs

Link List Module Landing Pages



Figure C.14

- investment products** 1
- 6 px
- 15 px
- 10 px
- Annuities
 - Bonds Direct (Fixed Income)
 - Convertibles
 - Equities
 - Equity Structured Products
 - 2 • Equity Syndicate
 - Fixed Income Structured Products
 - Foreign Exchange
 - Futures
 - Mutual Funds
 - Options
 - Unit Investment Trusts
 - 401(k) Products
 - 529 College Savings Plans

1 Table Header

Font: Arial, Bold, 13, #333333
Text header is all lowercase

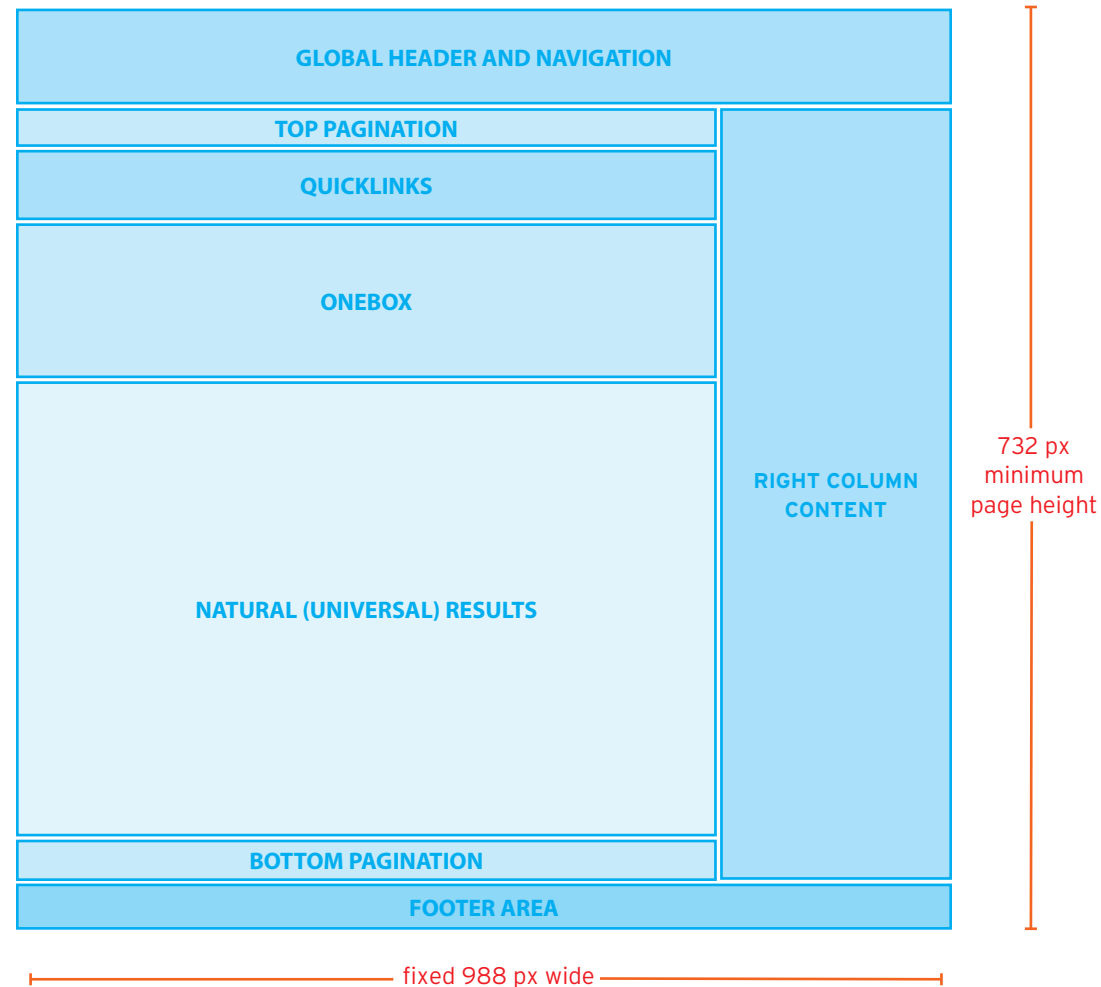
2 Bulleted Links

See [General Text Guidelines](#) and [General Hyperlink Guidelines](#) for full specs

Search Results: Page Components

The main content of all Search Results pages appear in a wide left column.

Figure C.15



Search Results: Forms

- 1 **Quicklinks**
For complete specifications, see
[Search Reults: Quicklinks](#)
- 2 **Onebox**
For complete specifications, see
[Search Reults: Onebox](#)
- 3 **Right Column**
For complete specifications, see
[Search Reults: Right Column](#)
- 4 **"Show All" Link**
Font: Arial, 12, Bold, #12437E

Figure C.16

sbLink
strategy & research | business building | products & services | tools | admin | external sites

home | contacts | global directory | help | site index | smithbarney.com | specialist finder | logout

form 6044 **Search**

1 to 6 for: **form 6044** - Search returned in 0.0262 seconds. 1 2 3 4 5 6 7 8 9 10

Form 6044 - Client Verbal Instructions
Form 6044 - Client Verbal Instructions
<https://formsrtg.nj.smb.com/servlet/FRFormServlet?Form=6044>

Search Results from **Forms Online**:

Action	Title	Number	CPI#	Date
DRAFT	Client Verbal Instructions	6044		Jan 1, 2007
DRAFT	Reallocation Request Form	5851F		Dec 1, 2006
DRAFT	Donor Contribution Agreement - GIFT	5851C		Dec 1, 2006
DRAFT	Reallocation Request Form	5851F		Dec 1, 2006
DRAFT	Donor Contribution Agreement - GIFT	5851C		Dec 1, 2006

4 Show all forms

FMA Missing Signature Cards (New Accts/Acct Main)
Agreement, Etc. Form 3026a- International FMA Application and Agreement Form 3026sa- International FMA Application and Agreement (Spanish version) Form 4122- FMA Checking Signature Card Update
<https://odl.wlb.nam.nsroot.net/ODL/ODL062/FMA%20Missing%20Signature%20Cards.htm> - 5 KB - Jun 13, 2007

Quick Ref by Form Number
Client Agreement And FMA Application Blue Correction Form 3164 4158 FMA Conversion Form (Carded To Cardless)/Amex 5218 FMA Upgrade Form 5271
https://odl.wlb.nam.nsroot.net/ODL/ODL062/OPS_NEW_Doc_quick_reference_by_form_number.htm - 33 KB - Jun 14, 2007

Acceptability of Checks (Fd Pro/Receipts)
primary purpose of the new form is to permit the deposit certification. FMA Check A check account and set up a new FMA account since there is Improper ACH Entries* form (FC Linx>Product & Services> FMA >Operations) detailing
<https://odl.wlb.nam.nsroot.net/ODL/ODL062/Funds%20Pro-Receipts-Acceptability%20of%20Checks1.htm> - 71 KB - Jun 13, 2007

IRA Tax Withholding on Tfrs (Acct Main/AFT)
eligible for AFT. Form Updates The IRA/ FMA Application for Individual Retirement Accounts (Form RPF5603) has been updated to client must submit a new IRA/ FMA Application form to authorize modifications
https://odl.wlb.nam.nsroot.net/ODL/ODL062/OPS_NEW_Doc_quick_reference_by_form_number.htm - 33 KB - Jun 14, 2007

Show all 69 results from this source

FMA Card
service New FMA Accounts Complete appropriate section of Form 3026 (Client Agreement and Account Application), or Form 5218 (FMA Upgrade Application). completing stand-alone Form 5205 (FMA Card Application).
<https://odl.wlb.nam.nsroot.net/ODL/ODL062/FMA%20Missing%20Signature%20Cards.htm> - 5 KB - Jun 13, 2007

1 to 6 for: **form 6044** - Search returned in 0.0262 seconds. 1 2 3 4 5 6 7 8 9 10

Related Terms
money purchase
fma account
cpi
client
fma
signature pages
barney platinum select
account
account owner
bill pay
collateral accounts
financial advisors
asset allocation
affiliated program bank
fc linx products
citigroup global markets
contribution information
program bank deposit
form

Size
Less than 10 KB (42)
10 - 100 KB (170)
100 - 1000 KB (175)
Greater than 1MB (25)

Document Type
PDF (226)
Web (121)
MSWord (49)
Excel (9)
Powerpoint (7)

Document Date
Before 2007-06-14 (115)
Between 2007-06-14 and 2007-06-15 (284)
Between 2007-06-15 and 2007-06-16 (8)
2007-06-16 or after (5)

Dimensions:
21 px (header)
16 px (search bar)
18 px (table header)
42 px (table body)
21 px (FMA Card)
16 px (FMA Card)
988 px (table width)
722 px (FMA Card)
230 px (Related Terms)
18 px (Footer)
18 px (Footer)

Search Results: Show All Results

- 1 **Heading**
Font: Arial, 16, #000000
Link: Bold, #12437E
- 2 **Results Table**
Font: Arial, 12, #000000
Link color: #12437E
Divider rules: #EEEEEE
- 3 **Column Heads**
Font: Arial, 12, with Bold, #000000
Links: #12437E
- 4 **Icon**
Maximum height: 40 px
Maximum width: 52 px
- 5 **Horizontal Rules**
Solid, 1 px, #DDDDDD
Weight: 1 px

Figure C.17

sb linx

home | contacts | global directory | help | site index | smithbarney.com | specialist finder | logout

strategy & research | business building | products & services | tools | admin | external sites

form 6044 Search

1 to 20 for: form 6044 - Search returned in 0.0262 seconds. 1 2 3 4 5 6 7 8 9 10

Search Results from **Forms Online:**

Action	Title	Number	CPI#	Date
DRAFT	Client Verbal Instructions	6044		Jan 1, 2007
DRAFT	Reallocation Request Form	5851F		Dec 1, 2006
DRAFT	Donor Contribution Agreement - GIFT	5851C		Dec 1, 2006
DRAFT	Reallocation Request Form	5851F		Dec 1, 2006
DRAFT	Donor Contribution Agreement - GIFT	5851C		Dec 1, 2006
DRAFT	Donor Contribution Agreement	5851C		Sep 1, 2005
DRAFT	Client Verbal Instructions	6044		Jan 1, 2007
DRAFT	Reallocation Request Form	5851F		Dec 1, 2006
DRAFT	Donor Contribution Agreement - GIFT	5851C		Dec 1, 2006
DRAFT	Reallocation Request Form	5851F		Dec 1, 2006
DRAFT	Donor Contribution Agreement - GIFT	5851C		Dec 1, 2006
DRAFT	Donor Contribution Agreement	5851C		Sep 1, 2005
DRAFT	Client Verbal Instructions	6044		Jan 1, 2007
DRAFT	Reallocation Request Form	5851F		Dec 1, 2006
DRAFT	Donor Contribution Agreement - GIFT	5851C		Dec 1, 2006
DRAFT	Reallocation Request Form	5851F		Dec 1, 2006
DRAFT	Donor Contribution Agreement - GIFT	5851C		Dec 1, 2006
DRAFT	Donor Contribution Agreement	5851C		Sep 1, 2005
DRAFT	Donor Contribution Agreement - GIFT	5851C		Dec 1, 2006
DRAFT	Donor Contribution Agreement	5851C		Sep 1, 2005

1 to 20 for: form 6044 - Search returned in 0.0262 seconds. 1 2 3 4 5 6 7 8 9 10

Did you find what you were looking for?
Yes No

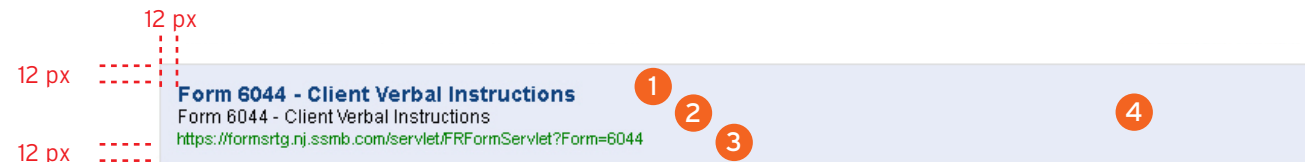
Related Terms

- money purchase
- fma account
- cpi
- client
- fma
- signature pages
- barney platinum select
- account
- account owner
- bill pay
- collateral accounts
- financial advisors
- asset allocation
- affiliated program bank
- fc linx products
- clitgroup global markets
- contribution information
- program bank deposit
- form

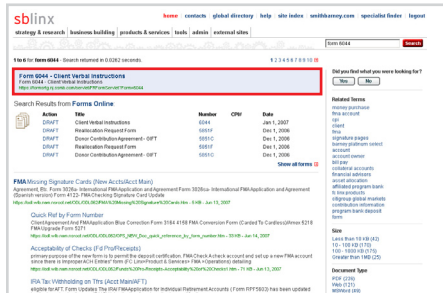
A member of Citi
Privacy, Security, Terms and conditions

Search Results: Quicklinks

Figure C.18



- 1 **Heading**
Font: Arial, 14, Bold, #12437E
- 2 **Description**
Font: Arial, 12, #000000
- 3 **Link**
Font: Arial, 11, #008000
- 4 **Background**
Color: #E7EBF7
Stroke: 1 px, #DDDDDD



Search Results: Forms Onebox

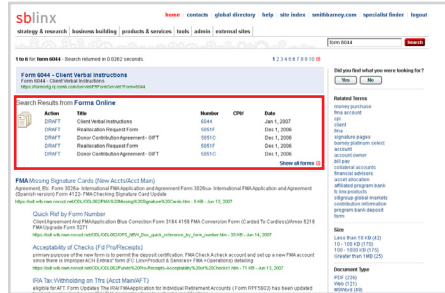
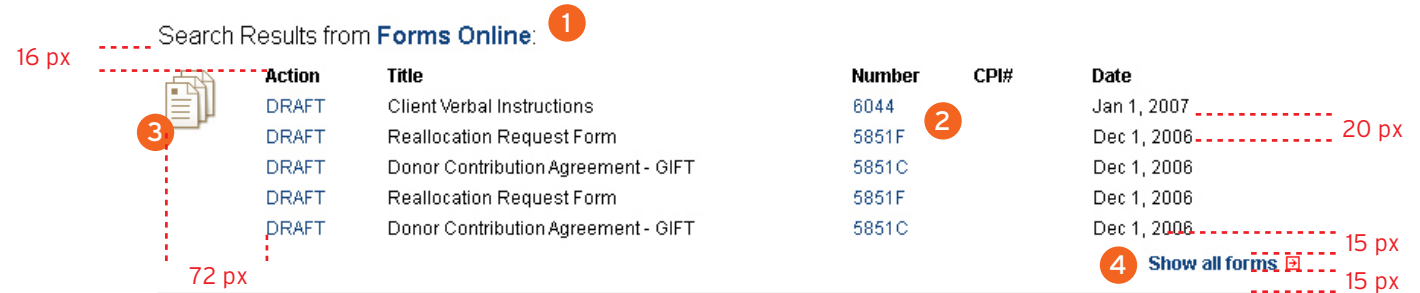


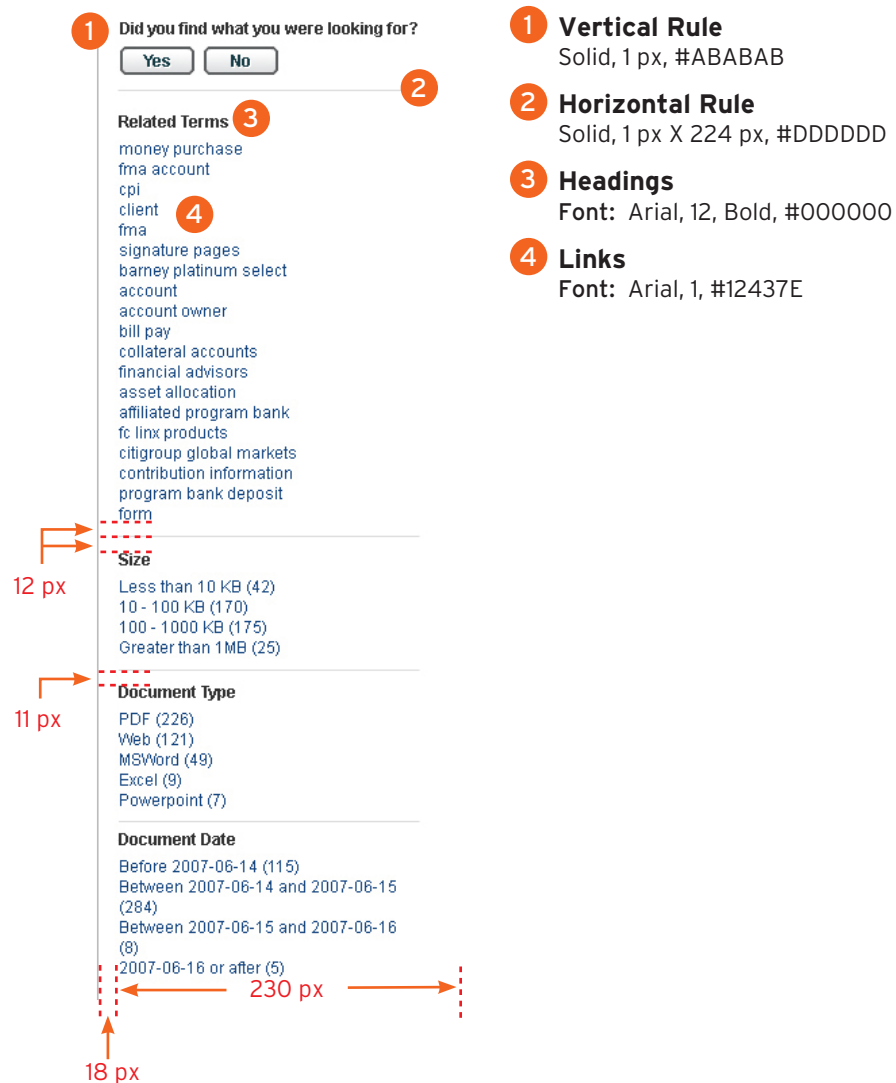
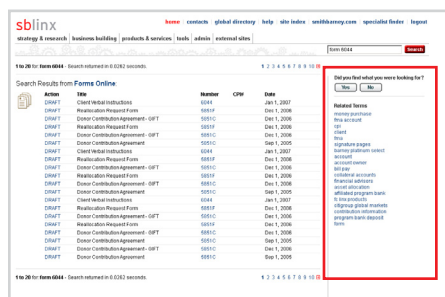
Figure C.19



- Heading**
Font: Arial, 16, #000000
Link: Bold, #12437E
- Text In Table**
Font: Arial, 12, With Bold, #000000
Link: #12437E
- Icon**
Maximum Height: 40 px
Maximum Width: 52 px
- "Show All" Link**
Font: Arial, 12, Bold, #12437E

Search Results: Right Column

Figure C.20



- 1 Vertical Rule**
Solid, 1 px, #ABABAB
- 2 Horizontal Rule**
Solid, 1 px X 224 px, #DDDDDD
- 3 Headings**
Font: Arial, 12, Bold, #000000
- 4 Links**
Font: Arial, 1, #12437E

FA Comp: Home Page Basic Grid/Layout

Sites with Left-hand Navigation: Home Page

Gutters and Spacing

The lines in the thumbnail below demonstrate the underlying homepage grid.

The screenshot in Figure C.24 details gutters and spacing.

Please note that the height of content modules will vary based upon the amount of content.

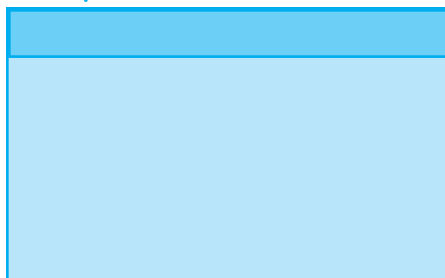
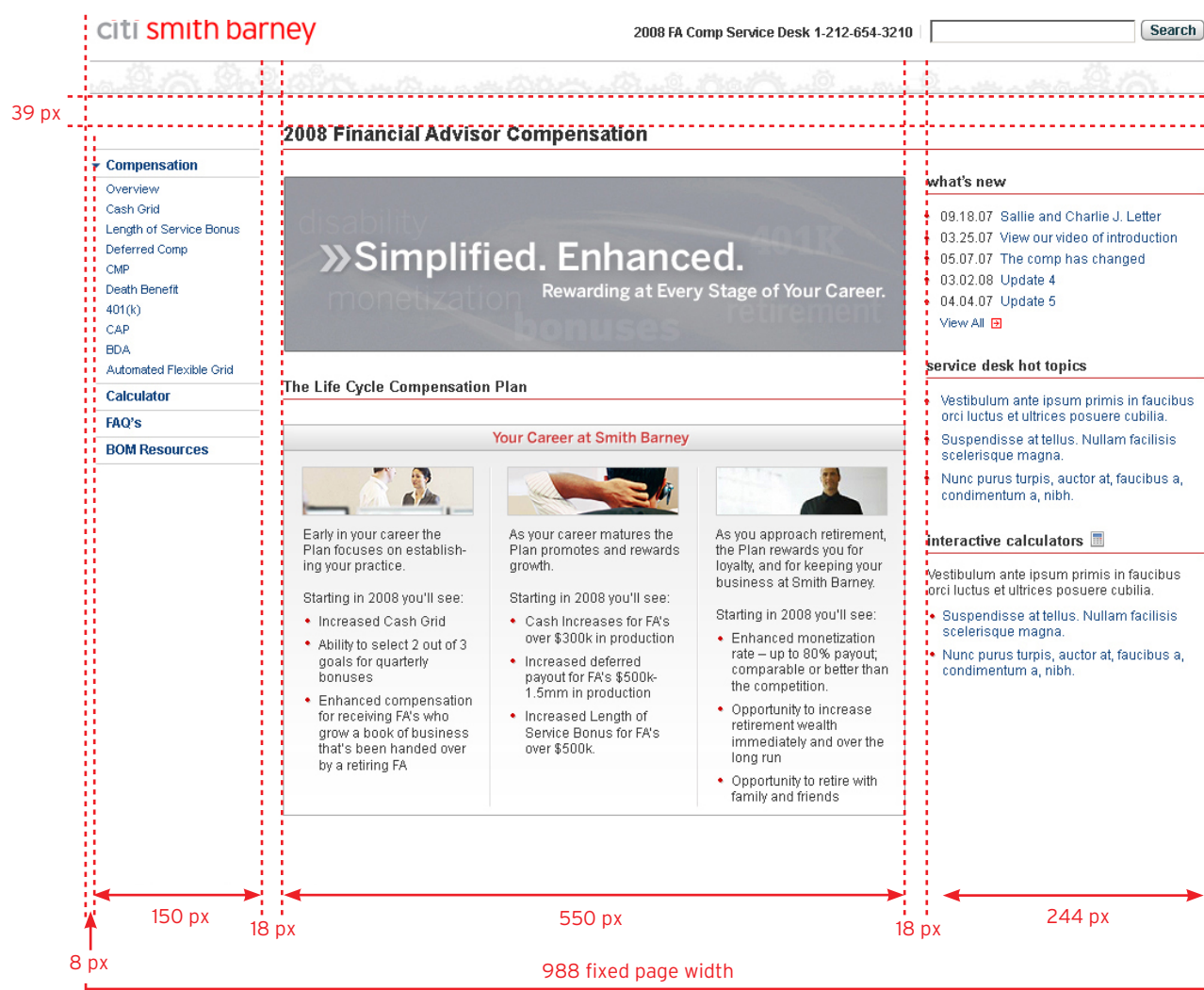


Figure C.21



FA Comp: Interior Page Basic Grid/Layout

Sites with Left-hand Navigation: Interior Pages

Gutters and Spacing

The lines in the thumbnail below demonstrate the underlying interior page grid.

The screenshot in Figure C.25 details gutters and spacing.

Please note that the height of content modules will vary based upon the amount of content.

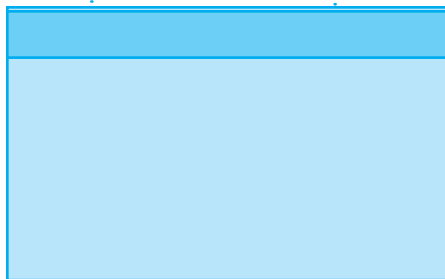
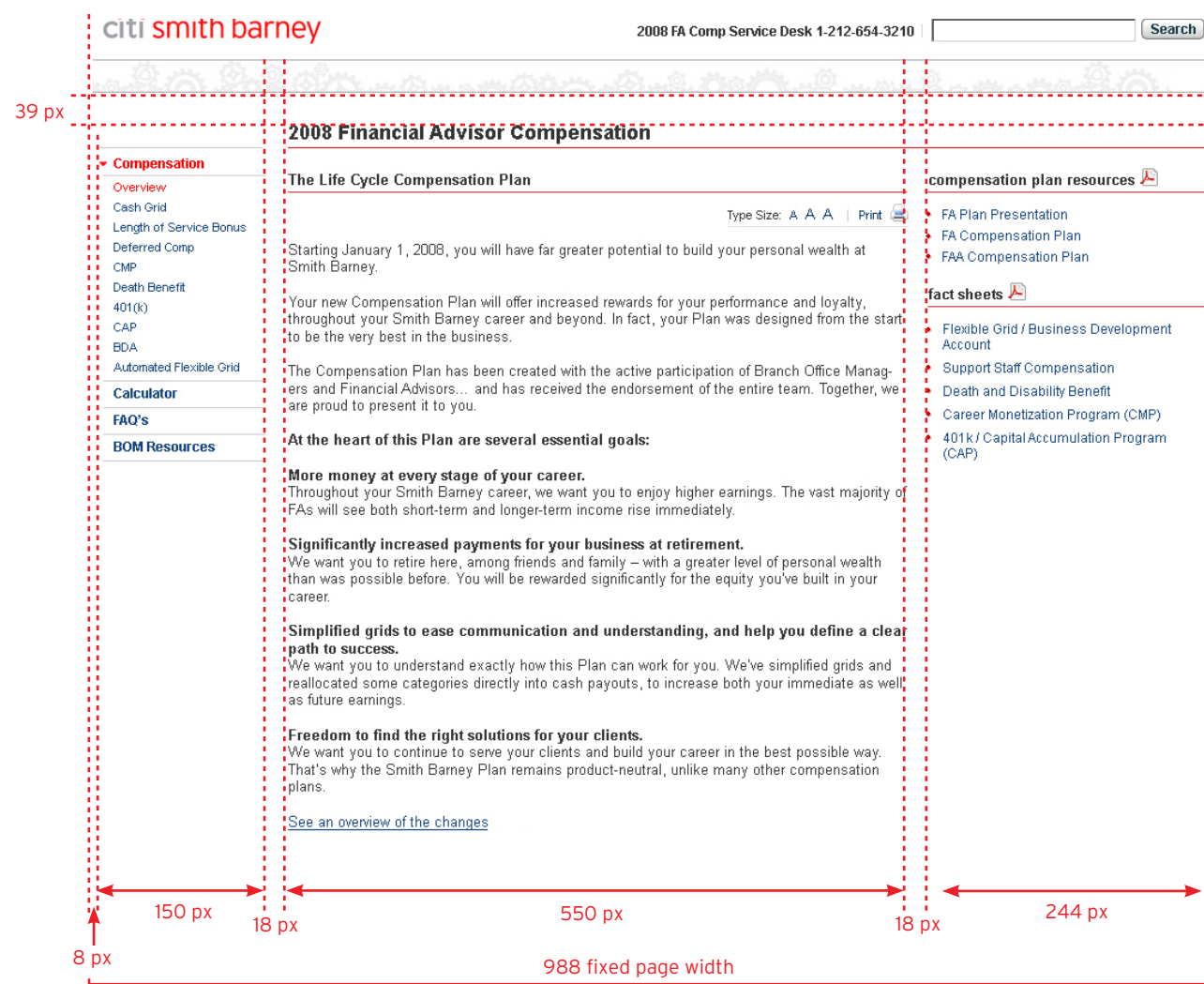


Figure C.22



Appendix D: Charts and Graphs

This section is a draft. A finalized Charts & Graphs section, which will include structural blueprints, will be published in version 1.2 of the Guidelines. In the meantime, however, we are including our work in progress for those who would like the information now..

Chart Module Common Elements

Chart modules display within larger section modules, as shown in Figure D.1.

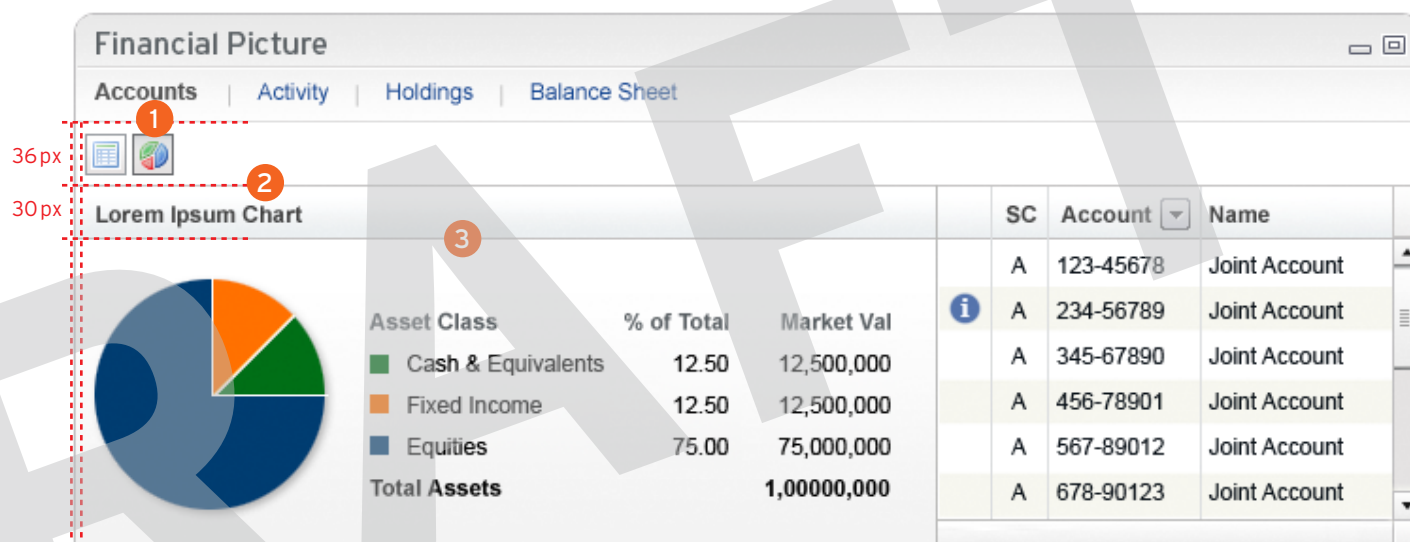
Chart module size and position depends on the surrounding section module. See the [Containers](#) section for sizing options.

Unless otherwise noted, all font sizes are exact values, not minimums.

Icons

Indicate view options with icons. For further information, see [Image Usage > Icons](#). Apply chosen icons to all charts within the section module.

Figure D.1



1 View Selector
Height: 36 px
Bar Background: #FFFFFF

2 Chart Title
Height: 30 px
Text H Position: 7 px from left edge
Text V Position: Centered
Text wrap: None; Truncate to last character with ellipsis ("...")
Font: Arial, Bold, 12, #333333
Background: Gradient, top-to-bottom, #FFFFFF to #E9EDEF

3 Chart Area
Background: Gradient, top-to-bottom, #FFFFFF to #F2F2F2
Top Margin: 7 px
Bottom Margin: 7 px
Left Margin: 7 px
Right Margin: 7 px
Chart H Position: Left
Chart V Position: Centered

Borders
Weight: 1 px
Style: Solid
Color: #BCBCBC

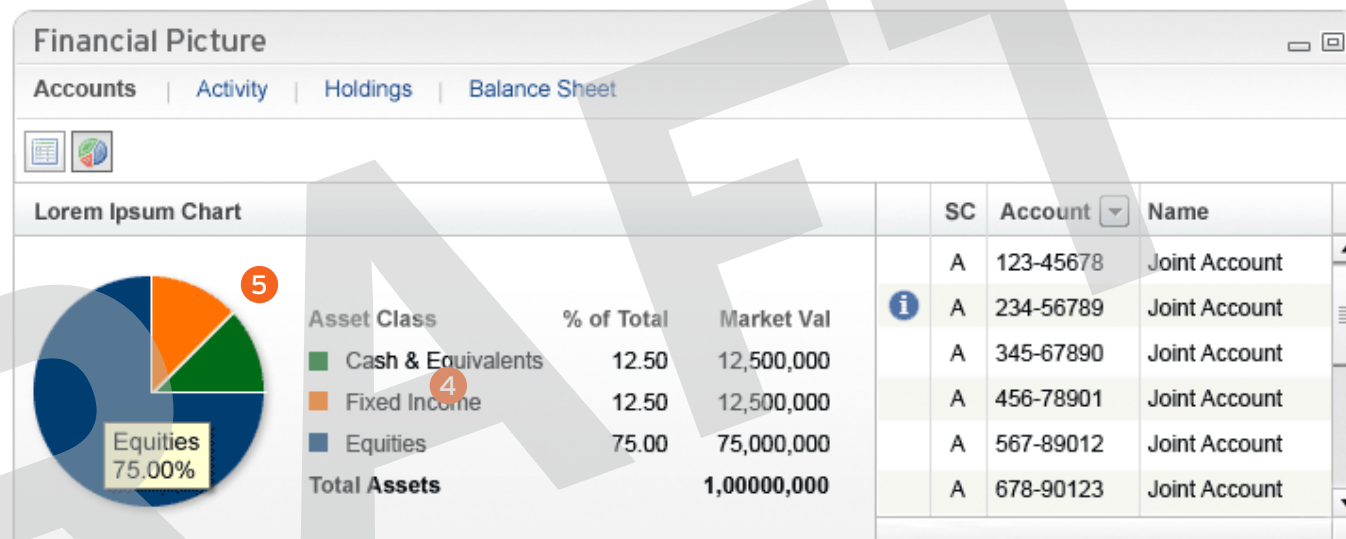
Chart Module Common Elements (continued)

Legend

Legend position will be determined by the individual chart type; the default position is to the right of the chart, top-aligned.

The overall module width, and the amount of data, determines the chart's height and width.

Figure D.2



4

Legend

Font: Arial, 12, #000000

Label font: Arial, Bold, 12, #626469

Total font: Arial, Bold, 12, #000000

Line spacing: 23 px

5

Tooltips

Font: Arial, 13, #000000

Background: #FFFFCC

Border: 1px, Solid, #626469

Margin: 5 px

Shadow: #000000, 3 px X/Y offset, 60% alpha, 3 px feather (soft edge)

Position: Subject to chart type

Bar Charts: Vertical

Measurements

Employ consistent gap and bar measurements:

- Minimum gap width: 9 px
- Medium gap width: 18 px
- Maximum gap width: 36 px

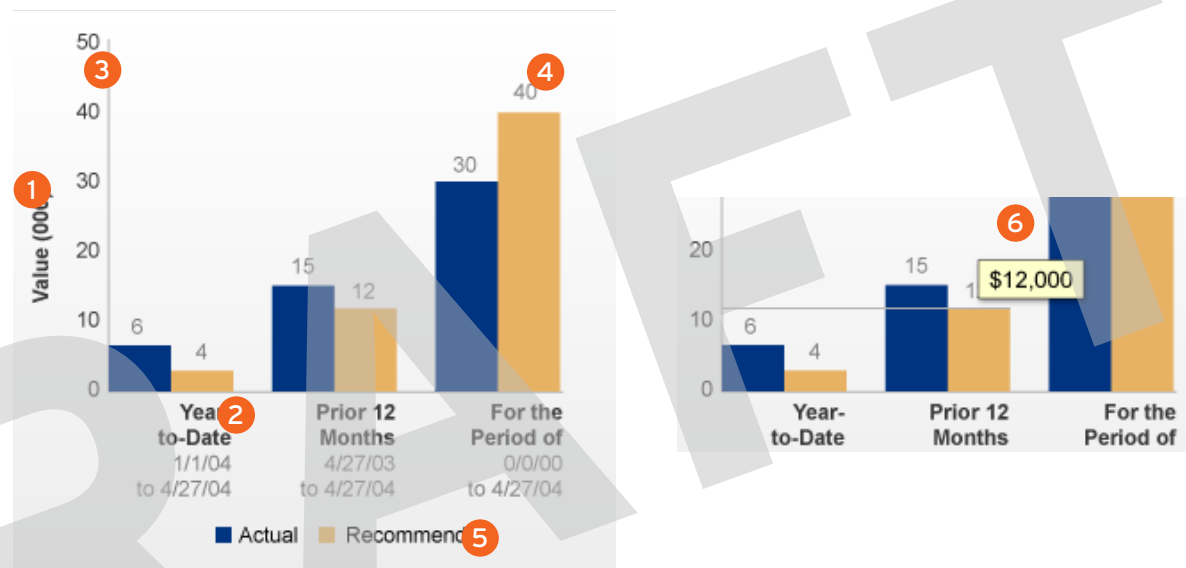
The width of each bar adjusts based on the gap, the module size and the final count of bars, subject to following constraints:

- Minimum bar width: 9 px
- Maximum bar width: variable

Abbreviations

Use standard abbreviations in graphs, and indicate their meaning in the Title, Legend or Axis label. For example: "1.5MM = 1,500,000."

Figure D.3



- 1 Y- Axis Title**
 Font: Arial, Bold, 12, #000000
 H Position: 12 px between title baseline and left edge of axis labels
 V Position: Centered to axis

- 2 X-Axis Value Labels**
 Font: Arial, Bold, 12, #000000, right-aligned to right side of the right-most bar in the group
 Secondary font: Arial, #808080
 Position: 6 px between top of text and axis
 Axis line: 1 px, #B3B3B3
 Tick marks: None

- 3 Y-Axis Scale and Value Labels**
 Font: Arial, 12, #000000, right-aligned
 H Position: 6 px between text right-edge and axis
 V Position: Vertically centered to value on chart
 Maximum axis value: Next unit greater than data values
 Axis line: 1 px, #B3B3B3
 Tick marks: None

- 4 Bar Data Labels**
 Font: Arial, 12, #808080
 H Position: Centered to bar
 V Position: Baseline is 6 px above top of bar

- 5 Legend**
 Font: Arial, 12, #000000
 V Position: Below chart, Top edge of legend is 18 px below baseline of x-axis label
 H Position: centered to x-axis
 Distribution: 9 px between entries
 Boxes: 9 px square

- 6 Bar Tooltip**
 H Position: Left border of tooltip box aligns to center of bar
 V Position: Bottom border of tooltip box 5 px above top of bar
 Draw horizontal line from bar top to y-axis; 1 px, #B3B3B3

Bar Charts: Stacked Bar Charts

Absolute stacks

Stack series in the same order across each dimension, using the actual value. The total height of a stack is the sum of its segments.

Percentage stacks

Figures 13.4 and 13.5 illustrate 100% stacked bar charts.

Show the percentage value relative to the whole as the height of the bar segments.

Labels

Label the value at the top of the bar with the total value of all the series.

When charting percentages that add up to 100 percent, include only the labels 0 and 100.

Incorporate “%” in the column header or chart title when applicable, rather than including it after each number.

Do not use decimals when plotting chart ranges, but do include decimals in the resulting bars.

Tooltip

A tooltip displays the sum of all series in the dimension, or the label and value of a segment, when the mouse hovers over the respective area.

Bars

Do not place lines or space between bar segments. Follow the same specifications for bar widths and distance between bars as for standard bar charts.

Figure D.4

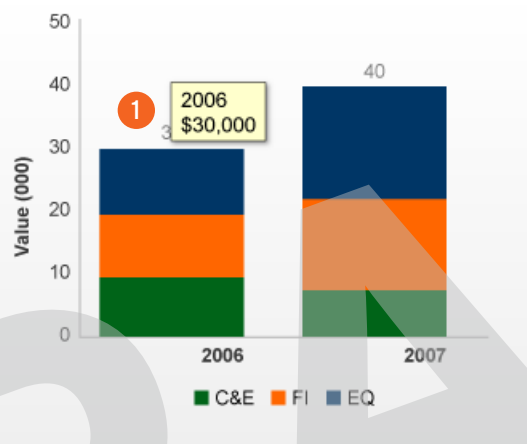
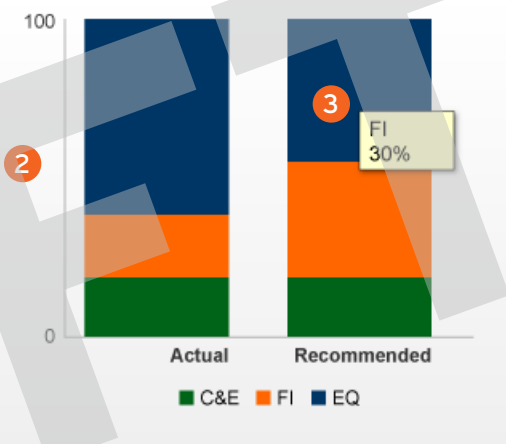


Figure D.5



1 Bar Value Label

Tooltip H Position: Align the left edge of the tooltip aligns to the center of the bar

Tooltip V Position: Place the bottom edge of the tooltip 5 px above the top bar segment edge.

2 Y- Axis

Bar Segments

Tooltip H Position: Left edge of tooltip aligns to center of bar

Tooltip V Position: Bottom edge of tooltip 5 px below top of segment

Bar Charts: Horizontal

Use a horizontal bar chart, as illustrated in Figure D.6, to illustrate an accompanying table.

X-Axis

The x-axis represents values.

If a chart appears next to a data table, do not title the x-axis.

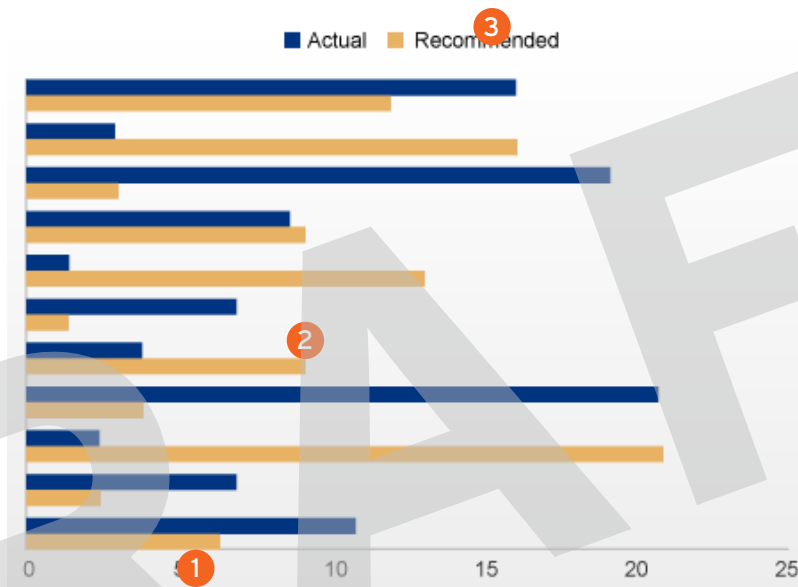
If no accompanying data table is present, label the axis following the standards for vertical bar charts.

Bar Data Labels

Do not label bar data because when a chart appears next to a corresponding data table.

When no data table is present, label the axis following the standards for vertical bar charts.

Figure D.6



1 X-Axis

2 Bar Data Labels

H position: Place 5 px to the right of the bar
V position: Center to the bar

3 Legend

Font: Arial, 12, #000000

V Position: Above chart, Baseline of legend is 18 px above top edge of top bar

H Position: Center to x-axis

Distribution: 9 px between entries

Boxes: 9 px square

4 Bar Tooltip

H Position: Left border of tooltip box 5 px inside bar from right edge

V Position: Bottom border of tooltip box 5 px inside from top of bar edge

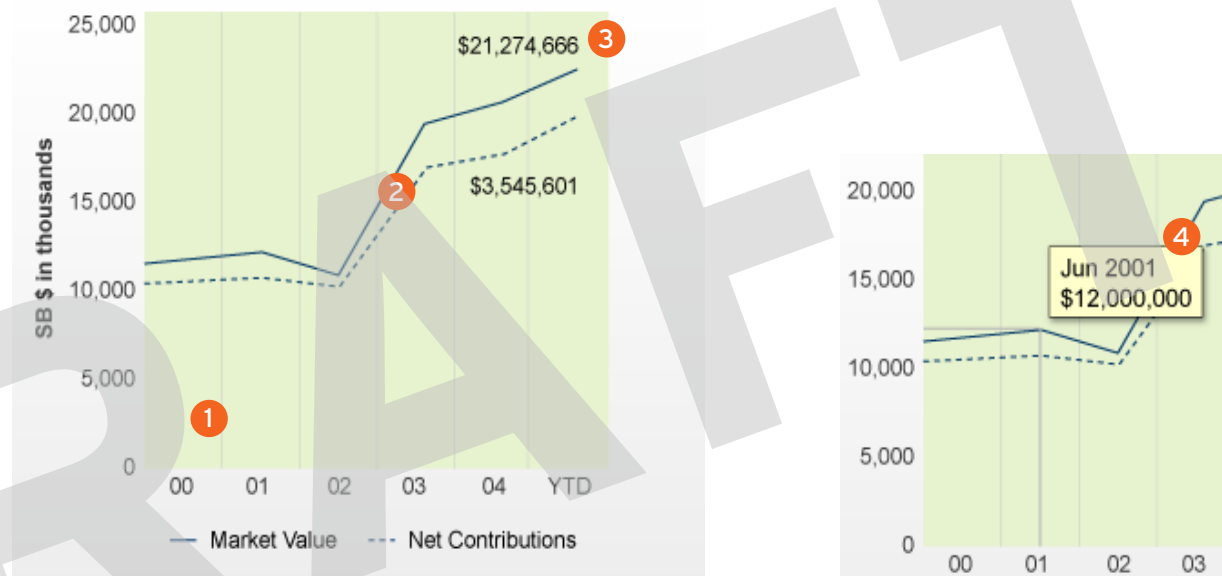
Alpine Charts

Use Alpine charts when comparing market value and net contributions across multiple years.

Expand or contract the width of each year according to the total number of years included in the chart.

In addition to guidelines noted at right, follow bar chart guidelines for chart elements..

Figure D.7



- 1 Chart Area**
 Background color: #E9F3D1
 Border: none
 Grid: 1 px vertical lines only
 Grid color: #CCCCCC

- 2 Data Lines**
 Width: 1 px
 Color: #003366
 Style: Solid or 3px dash

- 3 Line Labels**
 Font: Arial, 12, #000000, right aligned to data endpoint
 Position: Label text 3 px from data line at its closest point to the line. Note that labels should not cross data lines if possible

- 4 Tooltip**
 Displays X and Y values for data-point nearest the mouse pointer at 5 pixel tolerance, and draws 1 px line, #B3B3B3 from data point to X and Y axes
 H/V Position: Lower-left corner of tooltip should be 5 px up and right from datapoint

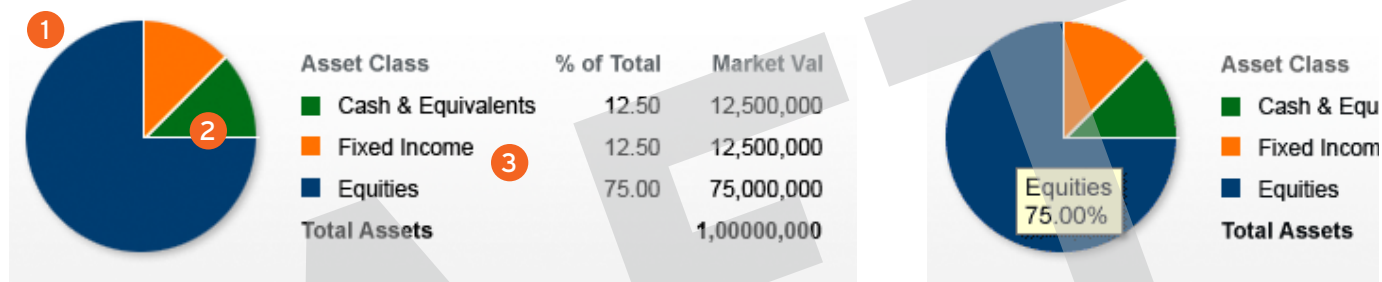
Pie Charts

Use pie charts only when representing asset allocation.

Always display asset allocations in the following order:

- Cash and Equivalents
- Fixed Income
- Equities
- Alternative Income
- Other

Figure D.8



- 1 Chart Areas**
Left-align the pie chart in the module. Chart size will depend on overall chart module.
Shadow: #000000, 3 px X/Y offset, 60% alpha, 3 px feather (soft edge)
Start point: Slices originate at 12:00 position and progress clockwise around chart

- 2 Slices**
Color: Charting colors provided previously in this document
Slice border: 1 px line, #FFFFFF
Tooltip position: Lower-left corner of tooltip at radial center of slice while the mouse pointer is over the

- 3 Legend/Table**
Legend displays if module size permits
Position: 18 px to right side of chart

Scattergram Charts

Use scattergram charts for risk return analysis. Indicate linear positions along two axes in four quadrants with letter markers.

Letter usage

There are two types of charts:

P Client Portfolio analysis

M Manager analysis

The scattergram chart illustrated in Figure D.9 is for manager analysis.

In addition to the information noted at right, follow bar chart guidelines for chart elements such as axis lines, axis labels, value labels and legend.

Figure D.9



- 1 Quadrant Labels**
 Font: Arial, 12,
 Color: #808080
 Position: 9 px horizontal and vertical inset from chart border

- 2 Analysis Markers**
 Font: Arial, Bold, 14 px
 Manager/Portfolio Marker Color:
 Color of the asset class from the chart color guidelines
 Index Marker Color: #3A85BC
 Other Markers Color: #000000

If two or more markers overlap, they should be positioned away from each other with a leader line for legibility.

Leader Line Color: Same color as Marker

Leader Line Width: 1 px

Leader Line Anchor size: 5 px diameter

- 3 Legend**
 Display only if no data grid appears adjacent to chart.
 Position: 30 px right of chart, aligned to top of chart area

Quadrant Charts

Quadrant charts are also known as styles boxes.

Place style boxes together, as a module.

Figure D.10

1 Fixed Income (%)

2 Domestic

Short	Interm	Long	
59.6	22.7	1.9	High Quality
0.4	2.1	0.0	Medium Quality
0.2	0.3	0.0	Low Quality
International			Alt./Other
0.0			13.0

1 Chart Asset Class Titles

Font: Arial, 14, Bold
Color: #1C4782
Alignment: Left with chart

2 Domicile Titles

Font: Arial, 12, Bold
Color: #000000
Alignment: Left with box
V Position: 18 px below Title or Box above; 23 px from baseline to Box below

Equities (%)

Domestic

Value	Core	Growth	
18.7	18.7	7.1	Large Size
13.2	0.5	3.9	Medium Size
2.2	0.0	3.3	Small Size
International			Alt./Other
Core	Emerg.		
0.0	26.0	6.3	

3 Box Borders

Line color: Color of asset class
Line width: 1 px
Style: Solid/3 px dashed as shown above

4 Box Numbers

Font: Arial, 14, Bold
Color: Asset class, except;
If the value equals 0.0 percent, then the number is indicated and printed in #929496

Glossary

Glossary

Accordion Module

An accordion module displays content in a space-efficient manner with collapsible panes.

Accordion Navigators

An accordion navigator is a menu that resembles vertically stacked tab navigation, with only one panel of menu options open at one time.

Alert

An alert is a message or visual cue that indicates that an error has occurred or that an item needs immediate attention.

Application Navigation

Application navigation enables users to move between various sections of an application or application suite.

Bar Chart

A bar chart is a type of graph where the data is displayed in the form of bars arranged vertically or horizontally.

Background (BG)

Background is displayed behind graphics and text, either on a Web page or within a table. A background can be a color, gradient or graphic.

Cascading Menu

A cascading menu is a dropdown menu that contains submenus.

Check Boxes

Check boxes allow the user to select multiple items from a group of options.

Chrome

Chrome refers to the borders of a module or window, possibly including the window frames, menus, toolbars and scroll bars.

ComboBox

See Editable Dropdown List

Command Area

The command area, located at the bottom of a panel or window, contains command buttons.

Command Buttons

With a command button, users initiate an immediate action.

Conditional Functionality

Conditional functionality is a situation where functionality is available but is dependent on the completion of other actions.

Confirmation Dialog

A confirmation is a dialog box that asks if the user wants to proceed with an action.

Core Colors

Citi Silver and Citi Red are the core colors of our color palette.

Corner Radius

The corner radius is the amount of curve used to make a rounded corner.

Data View Controls

Data view controls allow users to select data presentation options, such as a graph or table, and to switch from one method to another.

Date Picker

The date picker is form feature that yields a calendar panel from which a user may select a date to populate the field.

Default Action

The default action is the intended action, such as "Submit," "OK," "Go," "Confirm" or "I accept."

Dialog

A dialog is a special window that displays information for the user or solicits a response.

Dismissal Action

The dismissal action, triggered by choice of the negative option button, immediately discards all data entered in a window or form.

Disclaimer

A disclaimer is generally any statement intended to specify or delimit the scope of rights and obligations that may be exercised and enforced by parties.

Drag and Drop

Drag and drop is an ease-of-use technique that allows users to drag objects from one module to another. It can also be used to reorder rows or columns in a table.

Drawer

A drawer is a child window that slides out from a parent window. The user can open or close (show or hide) drawers while the parent window is open.

Dropdown

A dropdown menu of commands or options appears when the user selects an item – typically at the top of the display screen – with a mouse.

Editable Dropdown List (ComboBox)

An editable dropdown list is a text-entry field combined with a dropdown list, displaying a list of likely choices but also allowing the user to type an item that is not in the list.

Error Message

An error message is a warning which is displayed whenever an error occurs during the operation of the program.

Expanding Row Table

An expanding row table allows the user to expand each row in height to reveal data beyond the default row height. Rows are expanded and collapsed independently, so multiple rows can be in an expanded state simultaneously.

Expanding Tree Navigation

Expanding tree navigation is the data model used to represent hierarchical file structures, with the main categories at the top level and sub-categories below.

Filter

A filter is provided so the user may view only a subset of the source data.

Fixed-Width Layouts

In a fixed layout, the size of each “containing” element on the Web page is specified exactly. The layout will not change when resized on a browser window.

Focus

A button that is in focus will execute the chosen command when the user presses Enter. A form field that is in focus is wherever the user’s cursor is.

Footer

A footer is the text that appears at the bottom of every page of a document.

Global Navigation

Global navigation refers to the set of prominent links that take users to the major sections of a site or application. They remain constant across the site or application.

Gutter

The gutter is the space between columns in a multiple-column document.

HEX (Hexadecimal)

Hexadecimal describes a base-16 number system. In programming, color values are often referred to in hexadecimal code. Each six-digit hex color has an RGB equivalent.

Hover

Hover is the static state of a cursor over hypertext or a linked image.

Hyperlink Visited

A hyperlink visited typically appears in purple, denoting that a user has clicked on it.

Hyperlink Mousedown

The state of hypertext or a linked image while the user is clicking on it is known as hyperlink mousedown.

Info Panel

The info panel is used for displaying small amounts of additional information about content.

Info Tip

An info tip appears to briefly explain an icon’s function if the user hovers over an icon for one second or more.

Inline Editing

Inline editing occurs in a single, read-only field that becomes highlighted.

Jump Menu

A jump menu is a select box used specifically for navigation to a page.

Line Chart

A line chart displays each non-numeric value as a point on the chart. Points represent categorical data such as text labels and are connected by a line.

Line Height

Line height is the distance between text baselines in a block of text. This is also known as leading.

Linkbar

A link bar is a horizontal or vertical display of hyperlinks.

Liquid Layouts

In a liquid layout, the size of the containing elements changes depending on the browser size and user preferences.

Listbox

A listbox is a user interface component that allows the user to select one or more items from a list contained within a static, multiple-line text box.

List Builder

A list builder enables the user to create a list by selecting items from a source list.

Look and Feel

In reference to graphical user interface, the “look” aspect comprises design, including colors, shapes, layout, and typefaces. The “feel” includes behavior of dynamic elements such as buttons, boxes, and menus.

Modal Dialog

A modal dialog is a window that requires the user to interact with it before returning to operate the parent application.

Modeless or Non-modal Dialog

Modeless or non-modal dialog boxes are used when the requested information is not essential to continue, so the window can be left open while work continues elsewhere.

Mouseover

Mouseover is a change of state, which occurs when users place the cursor over an object.

Multi-line Text Input (Textarea)

A multi-line text input is an unconstrained input field used to enter or edit long text strings.

Multi-select Filter

This component is used to filter data based on multiple options, such as date, file type or keyword.

Multi-select Table

A multi-select table allows users to perform a single operation on multiple row items.

Numeric spinner

A numeric spinner is a single-line textbox that allows numeric-only entry and includes buttons to continuously increase or decrease the input value.

Overlay

An overlay is a panel or window that typically appears on top of a related window. It contains tasks related to the parent window.

Pagination

Pagination is a method of navigating by page number, commonly used when displaying search results.

PANTONE®

The PANTONE MATCHING SYSTEM is the definitive international reference for selecting, specifying, matching and controlling ink colors. For more information, see <http://www.pantone.com/>.

Pie Chart

A pie chart is a graphic presentation of data in which slices of a circle represent the proportions of each attribute.

Popup

A popup is a new browser window that automatically opens when users perform a specified action such as opening a page, clicking a link or closing a page.

Primary Modules

Primary modules contain the content or data that represents the principal activities or tasks of the application.

Progress bar

The progress bar indicates the percentage of data loaded as it is delivered from the server.

Progressive Disclosure

With progressive disclosure, information is displayed to users based on their choices while completing a form.

Radio Buttons

Radio buttons allow the user to choose only one of a number of options.

RGB

RGB (red, green and blue) refers to a system for representing the colors to be used on a computer display.

Role-based Functionality

Role-based functionality occurs when users have different levels of access to an application based on pre-defined permissions.

Secondary Action

A secondary action is an ancillary task such as “reset” or “add another.”

Secondary Colors

Secondary colors extend and support the core colors.

Secondary Modules

Secondary modules display ancillary activities, tasks and reminders that support the main activities of the application.

Single-line Text Input

Single-line text input is an editable text field in which the user enters text or modifies existing text.

Skin

In computing, skin refers to the appearance of an application’s interface. Changing the skin of an application makes the interface look completely different without altering its functionality. The process of writing or applying a skin is known as skinning.

Sort

Sorting data refers to organizing the records in a data list so that they are presented in a certain order..

Tab Navigator

Tabs provide a way to present related information on separate labeled containers.

Target Area

When a clickable area extends beyond an object itself, the border of the clickable area is the target area.

Task Buttons

Task buttons, such as Edit Portfolios or Add Note, initiate a task flow.

Textarea

See Multi-line Text Input.

Title Bar

The title bar contains the title and view controls of a module or window. It also functions as the drag area for movable panels.

Title Windows

A title window is designed to work as a popup that users can drag around the application window.

Toggle

To toggle is to switch from one setting to another.

Tree View

The tree control lets a user view hierarchical data arranged as an expandable tree.

Utility Navigation

Utility navigation is the set of supplementary navigation links including the site map, site index, search and staff directory.

View Control (Title Bar Buttons)

View control is a mechanism that controls the view state of a module; that is, collapsed, minimized, maximized or full.

Wizard

A wizard is a sequence of instructions that guides users through a multi-step task.

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