Process Design Best Practices for LiveCycle Workspace ES

Adobe® LiveCycle® ES

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Adobe® LiveCycle® ES 8.0 Process Design Best Practices for LiveCycle Workspace ES for Microsoft® Windows®.
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About This Document

This document provides guidelines for creating layouts for Adobe® LiveCycle® Workspace ES in Adobe LiveCycle Workbench ES and Adobe LiveCycle Administration Console that enhance the user's experience.

Who should read this document?

This document is intended for process designers and administrators who create and administer processes. It is assumed that you have a working knowledge of creating human-centric processes in Workbench ES or administering services through the LiveCycle Administration Console.

Additional information

Adobe has a wide variety of resources about form guides, targeted at a variety of audiences.

For information about	See
Creating processes	*LiveCycle Workbench ES Help*, available within Workbench ES and also available at http://www.adobe.com/go/learn_lc_workbench
Working with Archive Administration	*Archive Administration Help*, available in LiveCycle Administration Console and also available at http://www.adobe.com/go/learn_lc_adminAAC
Configuring email settings	*Process Management ES Help*, available in LiveCycle Administration Console and also available at http://www.adobe.com/go/learn_lc_adminProcessMgmt
LiveCycle ES terminology	*LiveCycle ES Glossary*, available at www.adobe.com/go/learn_lc_glossary
Patch updates, technical notes, and additional information on this product version	www.adobe.com/support/products/enterprise/index.html

Process Design Best Practices for Workspace ES

When developing human-centric processes for Workspace ES, there are a number of techniques that process designers and administrators can employ to ensure that their designs provide an engaging user experience in Workspace ES. This includes the following techniques:

- Specifying category names so that they appear properly in the Workspace ES navigation pane.
- Determining an optimal number of processes to appear in each category.
- Formatting the content of the card layout so that users can quickly scan and absorb information.
- Specifying an optimal size for process card images that improves load times and maximizes the user's experience.

Category names

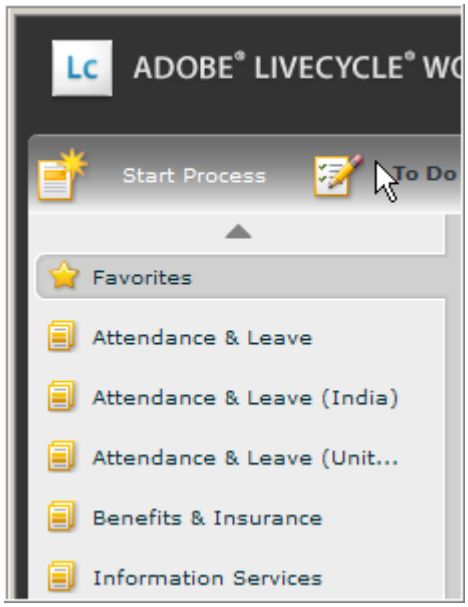
Within Workspace ES, category names appear in the left navigation pane and are used to designate groups of processes. You specify category names in the Category Management area of Archive Administration.

If the category name is too long to fit within the fixed width of the left navigation pane, it is truncated, and the full name appears only when the mouse pointer is paused over it. By default, the navigation pane has a fixed width of 210 pixels, which is approximately 24 characters. Try to avoid category names that will be truncated:

Category name that fits: Attendance & Leave

Category name that is truncated: Attendance & Leave (United States)

Figure 1.1 - Left navigation pane with truncated & and non-truncated category names

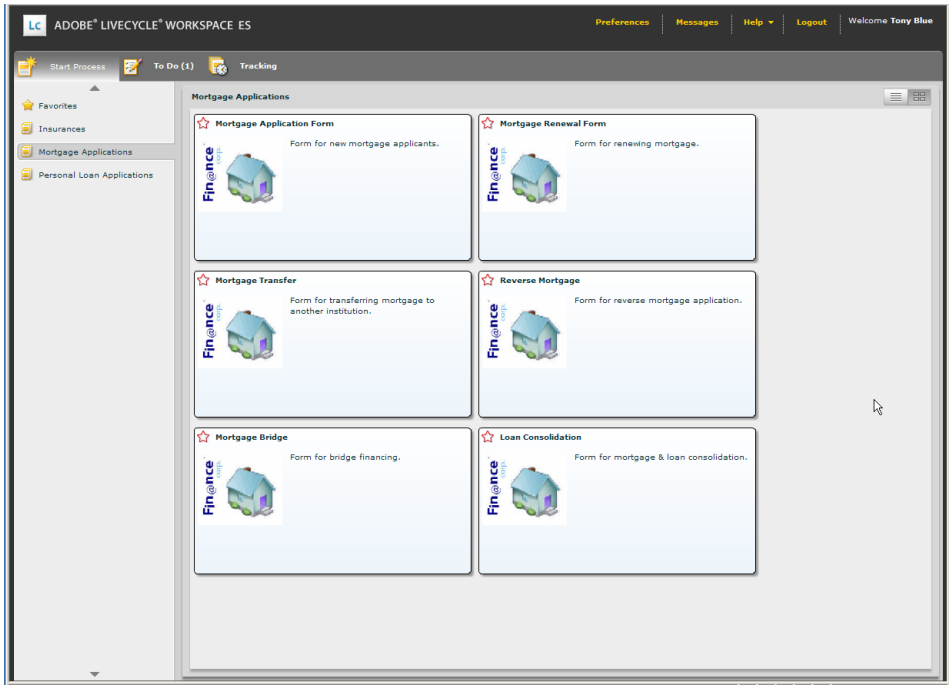


Number of process cards per category

In Workspace ES, processes within a category are typically displayed as cards on the Start Process page. You assign processes to a category by creating endpoints using the Service Management area of the Archive Administration component in LiveCycle Administration Console.

In general, six cards can be displayed on the screen for a category before you are required to scroll to view any remaining cards. Since scrolling makes it more difficult to find a process, consider limiting each category to six processes or, depending on your resolution, the number of processes that display on the screen without requiring any scrolling.

Figure 2.1 - Start Processes card view at 1024x768 resolution



Card layout

The card layout in Workspace ES exposes key information to users that allows them to quickly scan tasks, make intelligent decisions based on the exposed information, and interact with business processes without having to open the task itself.

Card title

The card title should be descriptive but limited in length to prevent truncation. Keep the titles unique to help users locate the card quickly:

Card title that fits: Expense Report

Card title that is truncated: Please approve this Expense Report

You might want to test the card title to ensure that it can be easily distinguished from other cards. Keep in mind that card titles may need to be shorter than you might expect due to the status icons that can appear to the left of the title.

For the Start Processes page, the card title is specified by the administrator in LiveCycle Administration Console. For the To Do page, the card title is specified by the process designer in Workbench ES.

Card content

The card content should provide meaningful data and expose process variables that are otherwise only found in the details view. The content for the cards on the To Do page comes from the Task Instructions that are specified by the process designer in Workbench ES. The content for the cards on the Start Process page comes from the Endpoint Name and Description fields that are specified by the administrator in Archive Administration.

In general, when authoring Task Instructions, it is preferable to author HTML formatted card content. Line breaks and the boldface typestyle should be used carefully to lay out the card content such that information ~~is~~ can be easily scanned. For cards on the To Do page, the informations is specified in Workbench ES is the following areas:

Card title: For an AssignTask operation, Properties view > General category> Name field

Image: New Process wizard > Process Image field

Metadata: For an AssignTask operation, Properties view > Task Instructions category> Task Instructions field

The figures below illustrate several card layout options that result in a more engaging user experience.

Figure 3.1: Metadata using plain labels, line breaks, and bold variables

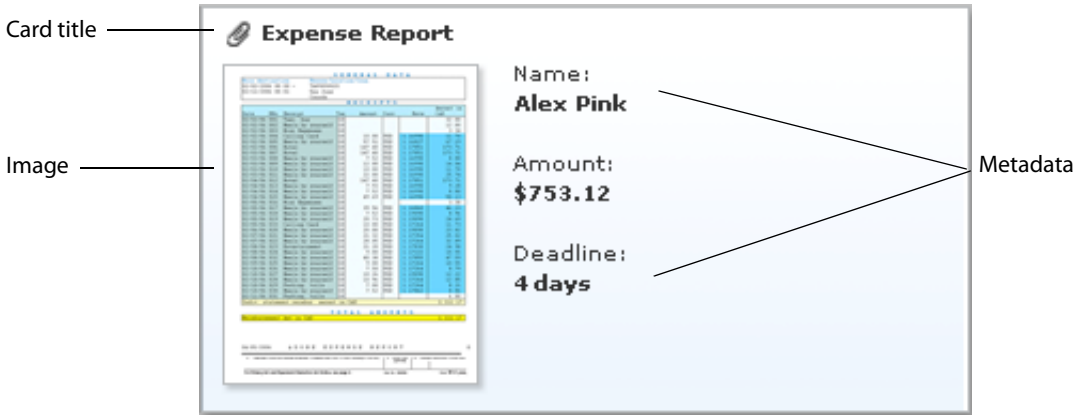


Figure 3.2: Metadata using plain labels, colons, bold variable, and line breaks

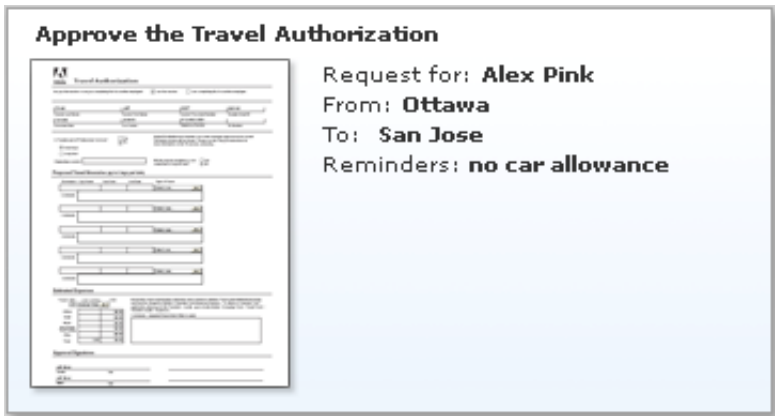


Figure 3.3: Metadata using bold variables within static text

Email notifications

If your processes are designed and implemented using email, consider how the content of the email will appear to the recipient. Task Instructions, as defined in Workbench ES, can be included in the body of the email using the Adobe LiveCycle Process Management ES variable @@instructions@@. If your email is configured to include the @@instructions@@ variable, consider how that content will appear when the email notification is sent to the recipient. If necessary, customize and format the email notification using Process Management ES variables and HTML tags.

You configure email settings in the Process Management ES area in LiveCycle Administration Console. (See "Configuring notifications" in *Process Management ES Help* at http://www.adobe.com/go/learn_lc_adminProcessMgmt.)

Image size in process cards

When you create a process in Workbench ES, you can specify an image to be used for the process that will be displayed in the process cards within Workspace ES. The image formats supported are JPG and PNG. The color should not be prescribed.

It is recommended that you reduce your image to 150 x 150 pixels. You can compress the image without losing quality before you add it to your process using tools such as Adobe Fireworks CS3®, available from http://www.adobe.com.