Project Minerva:
Modular User Experience Playbook

Document Control

Change Record

Date	Author	Version	Change Summary
13 February 2018	Heather Howell (UX lead) Michael Hough (UX designer)	1.0	Draft

Table of Contents

Purpose of the Modular UX Playbook

The purpose of the Project Minerva Modular UX playbook is to establish a detailed specification library for all user experience flows which are used on the Customer Service Hub website being established under Project Minerva. This playbook is primarily intended for use by developers and other project team members to determine the UX elements and style details for any needed business flow (e.g. case creation, case update, escalation etc) on the Customer Service Hub. It is important to note that for Change Management/Comms purposes, screenshots and images should preferentially be sourced from Stage development environment rather than this playbook, as the appearance or behavior of some elements featured here may vary in actual implementation.

The playbook is organized by page elements, starting with Home page or universal features and diving into more specific page elements thereafter. Some areas are:
- Home page
- Universal elements (e.g. used/repeated on all web pages)
- Case Creation elements
- Modals
- Case Details elements
- Special items (e.g. "feedback" elements)
- Icons

This playbook is intended to be a living document and items will be added and updated as needed throughout project evolution.

How to Use This Playbook

- Designs and specifications herein are presented as guidelines but should be strictly adhered to wherever possible using out-of-box solutions to implement. Where deviations are necessary due to technical or other constraints, business should be consulted and UX impact evaluated against these constraints before development changes are made.
- Modules or features described in this document are intended to be ala carte selections and can be mixed and matched to suit business requirements. Final page flows should be reviewed by business to assess if there are any UX issues which arise from ala carte selection of elements. Development should request that the business provide the order of elements (e.g. top-to-bottom on a page/horizontal orientation) if there is any ambiguity about placement.
- Modules & elements within this document were designed to (as much as possible) be in adherence to the current Cisco UI kit (version 1.22, at the time of the initial draft of this document). As such, as UI kit elements evolve and change this document may not always align. Where there is any doubt please defer to Cisco's UI kit standard, unless deviation is specifically called out and requested by business.
- For Project Minerva, the platform being utilized is Pega. View PegaSystems UI kit . Note that Cisco UI kit is primary and should take precedence.

UI Design Contract

Below is a list of agreed upon "Design Contract" elements between Development and Business:
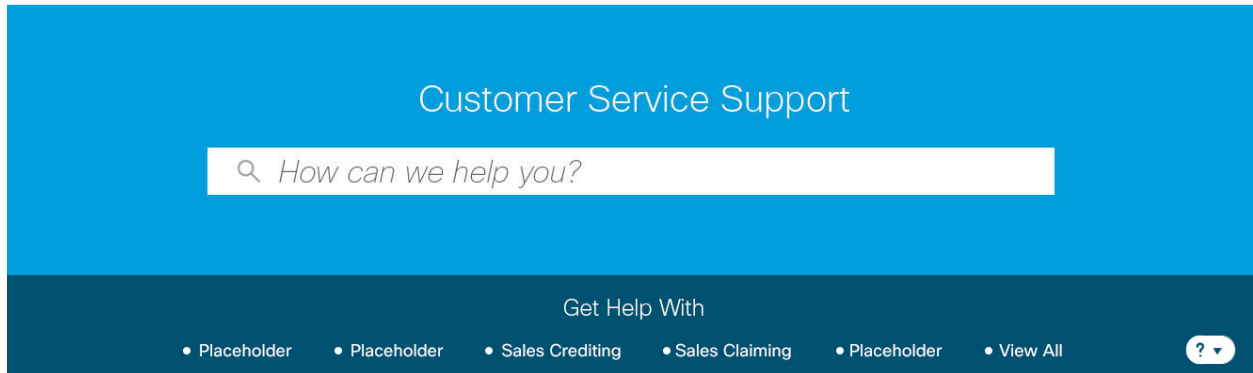
- Case Subtype, when present, will always be a dropdown list
- If more granularity than Subtype is needed, then it will be addressed with more Subtype entries
- On load, or upon selection of the Subtype, the appropriate fields will be displayed according to the configuration table, split in two areas: Mandatory and Optional
- The Mandatory section will always contain at least one field* (note: subject to change if all mandatory data can be collected from integrated systems and does not require user input)
- The Optional section will always contain at least one field (email recipients)
- On load, the Optional section will always be collapsed
- For each Case Type/Subtype, the configuration table shall name the input fields that are necessary and specify if they are Mandatory or Optional
- Common fields like Attachments & Description need only appear in the configuration table if they are Mandatory, otherwise they will always appear in the Optional section
- The sequence of the fields will be fixed for all Case Types/Subtypes, so if a field is visible, it will always have the same relative position to all other visible fields
- The exact same sequence will be repeated for the Confirmation screen
- As much as possible, all UI element styling shall comply with the corporate standards (as noted in "How to Use this Playbook" – with link to current UI Kit)
- A field may not always be just one input element. It can also represent a group of UI elements that go together as one logical unit
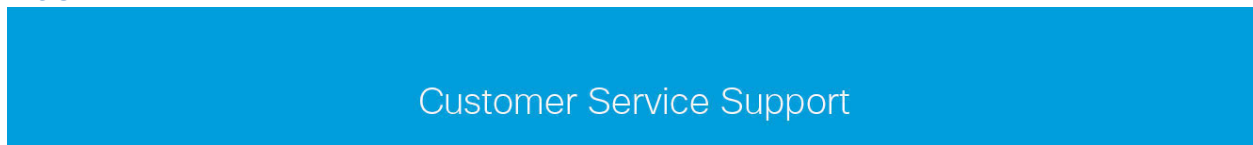
UX Design Modules

Home Screen Elements
The elements in this section are all used on the Customer Service Hub homepage

Header

Customer Service Support

How can we help you?

Get Help With

• Placeholder • Placeholder • Sales Crediting • Sales Claiming • Placeholder • View All   ? ▾

- Lighter Blue Background color - #049fd9

Title

Customer Service Support

- Customer Service Support - h1 large

Search Bar

How can we help you?
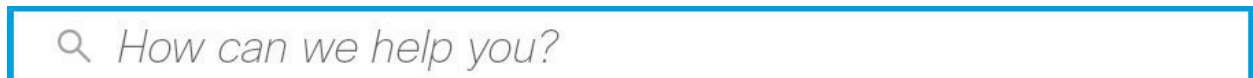
- 900 x 50 pixels
- CiscoSans ThinOblique 32 px #676767
- (input search)
- icon-search
- #9e9ea2

Search Bar Showing Results

- CiscoSansThin #676767
  Blue Stripe #0099d7
- Grey text bold
  CiscoSansRegular #0377a1
  (I made these 18px)
- highlight #e9faff
- icon-exit
  color - #049fd9
  When clicked clears Results

Search Bar Showing NO Results

- No Results Message – H6
- Other Title CiscoSansBold

Sub Navigation

- Indigo blue - #015171
- Get Help With – H2, CiscoSansLight 24px
- Cisco Sans Regular 14.2px, #ffffff
- Section based on - https://supportforums.cisco.com/t5/cisco-support-community/ct-p/5411-support-community-home

Sub Navigation Word Wrap

Get Help With

- Placeholder LongName shows word wrap
- Placeholder
- Sales Crediting
- Sales Claiming
- Placeholder
- View All
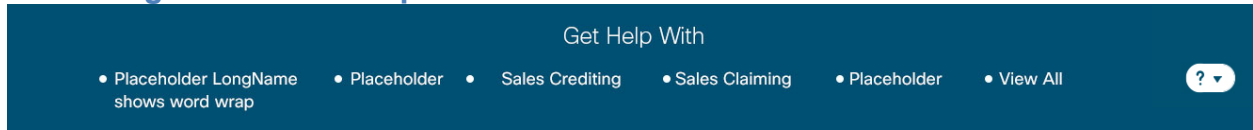
- Sub Nav Word Wrap - the sub nav can expand as much as it needs

Sub Nav "?" (Page Help) Dropdown
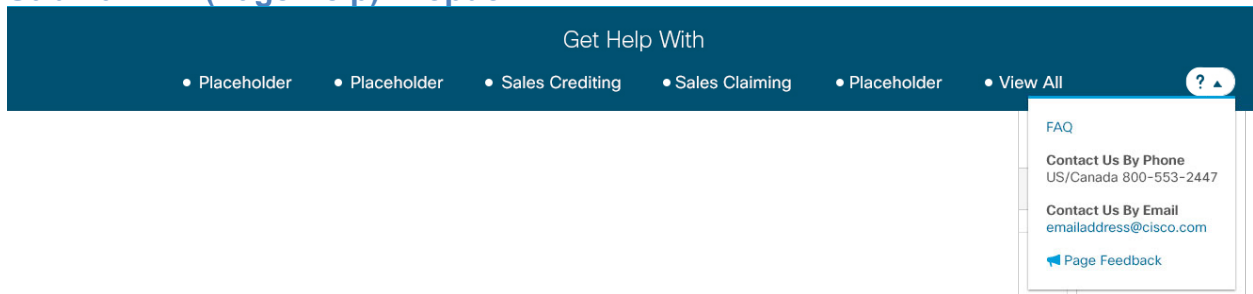

Get Help With

- Placeholder
- Placeholder
- Sales Crediting
- Sales Claiming
- Placeholder
- View All

FAQ

Contact Us By Phone
US/Canada 800-553-2447

Contact Us By Email
emailaddress@cisco.com

Page Feedback

- icon-help
- CiscoSansBold & CiscoSansRegular
- dropdown - http://cisco-ui.cisco.com/section-components.html#components-dropdown

Sub Nav - View All

View All Cases Title PLACEHOLDER

Sales Crediting

Sales Credit Re-assignment

Credit for transaction< $3K

Transaction Booked Outside Claiming Window

Adjustment Required at ERP Line Level

Credit Split Requiring Multiple Approval

Prioritisation for Fiscal End

Assign De-Book to Original Account

Mass Re-Allocation

Other

Bookings Inquiry

Assignment Inquiry

Credit Mis-Allocation

Credit Audit

CV Bulk Upload Request

Claiming

Global Claiming Tool (GCT) Support

Proxy Request

Proxy Bulk Request

Claiming Help

Tool Issue

Claim Non Response

Claim Dispute

- Page title - H1
- Section title - H4
- Sub title – CiscoSansBold
- Rest of copy CiscoSansRegular
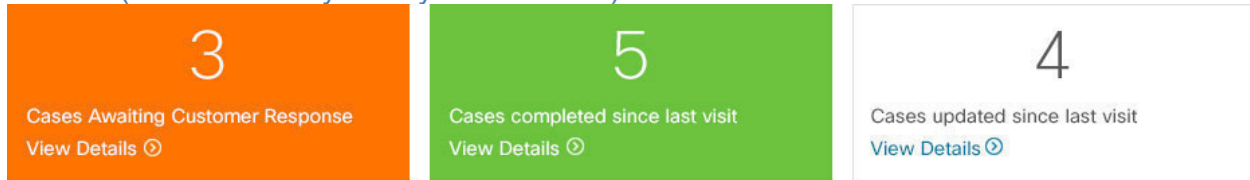
Drawer: Expanded in page

⌃ My Dashboard

- Outline - #cccccc
- Background - #f5f5f5
- Cisco Sans - H5 (medium)

Drawer: Collapsed in page

⌄ My Dashboard

For Styles See Above

Panels (Used Primarily in "My Dashboard")

3	5	4
Cases Awaiting Customer Response View Details ⊙	Cases completed since last visit View Details ⊙	Cases updated since last visit View Details ⊙

- Orange - Panel Warning #ff7300
- Green - Panel Success #6cc04a
- Default Panel
- Number - CiscoSans ExtraLight, 50 px (my style)
- Copy - H5 (medium)
- http://cisco-ui.cisco.com/section-base.html#base-panel

Table Tabs

My Cases   My Company Cases

My Cases/My Company Cases - H3 (medium)

Table Elements

	Case Number ▼	Subject ▼	Submitted ▼	Expected Resolution ▼	Status ▼
⌄	123456789	Booking Inquiry	Oct 07, 2017	Oct 20, 2017	Created
⌄	234567891	Sales Claiming	Oct 10, 2017	Oct 20, 2017	Assigned
⌄	345678912	Sales Crediting	Oct 11, 2017	Oct 20, 2017	In Process
⌄	456789123	Booking Inquiry	Oct 13, 2017	Oct 20, 2017	Awaiting Customer Re..
⌄	567891234	Sales Crediting	Oct 14, 2017	Oct 20, 2017	Resolved
⌄	345678912	Sales Crediting	Oct 11, 2017	Oct 20, 2017	Created
⌄	456789123	Booking Inquiry	Oct 13, 2017	Oct 20, 2017	Assigned

- Table with borders
- borders - #dfdfdf
- Headers - CiscoSansBold #58585b
- copy – CiscoSansRegular
- Filter icons and arrows based on Pega demo
- icon-arrow
- icon-filter
- See the table example in the UI kit - http://cisco-ui.cisco.com/section-base.html#base-input
- Link example - http://cisco-ui.cisco.com/section-base.html#base-link (includes rollover)

Table Filter

	Case Number ▼	Subject ▼	Submitted ▼	Expected Resolution ▼	Status ▼
∨	Clear Filter	Booking Inquiry	Oct 07, 2017	Oct 20, 2017	Created
∨	☐ 123456789	Sales Claiming	Oct 10, 2017	Oct 20, 2017	Assigned
∨	☐ 234567891	Sales Crediting	Oct 11, 2017	Oct 20, 2017	In Process
∨	☐ 345678912				
	☐ 456789123	Booking Inquiry	Oct 13, 2017	Oct 20, 2017	Awaiting Customer Re..
∨	Search Text	Sales Crediting	Oct 14, 2017	Oct 20, 2017	Resolved
∨	🔍	Sales Crediting	Oct 11, 2017	Oct 20, 2017	Created
∨	Apply Cancel	Booking Inquiry	Oct 13, 2017	Oct 20, 2017	Assigned

Note: filter was based on out-of-box Pega styles (deviates from Cisco UI kit)

Table Filter Results

Filtered By: Case #   ⊗ 123456789   ⊗ 345678912

	Case Number ▼	Subject ▼	Submitted ▼	Expected Resolution ▼	Status ▼
∨	123456789	Booking Inquiry	Oct 07, 2017	Oct 20, 2017	Created
∨	345678912	Sales Crediting	Oct 11, 2017	Oct 20, 2017	In Process

- Filtered By – CiscoSansBold
- Filters – CiscoSansRegular
- icon-presence-end - when user clicks it removes filter from selection

Table Search 1

Search by: [▼]   [🔍   ]

- Search by - CiscoSansBold (paragraph)
- Search bar - standard form field with a search icon
- icon - action2001
- form field at 50% opacity

Table Search 2

Search by:
| Case# |
| SO# |
| PO# |
| Case Status |
| Quote# |
| Service Contract# |
| Submitted By Email |
| Modified Date |

Note: Dropdown was modeled after the search input, if it is easier follow the expanded example in the dropdowns in the UI kit. http://cisco-ui.cisco.com/section-base.html#base-select

Table Search 3

Search by: Case# ▼

- icon-search
- once a "Search by:" is selected then the search bar is 100% opacity

Table Search 4

🔍 234   ✕

| 123456789 |
| 234567891 |
| 567891234 |

- CiscoSansThin #676767
- Blue Stripe #0099d7
- icon-search
- icon-exit -color - #049fd9 (when user clicks it clears the search)
- highlight #e9faff

Table Search 5

View All Cases

Search by:	Case# ▼		🔍 123456789	✕

	Case Number ▼	Subject ▼	Submitted ▼	Expected Resolution ▼	Status ▼
⌄	123456789	Booking Inquiry	Oct 07, 2017	Oct 20, 2017	Created

- View All Cases - Clears search results

Table Pagination

| ◀ ‹ Page 1 ▼ /2 › ▶| | | | | Showing 1 – 10 of 20 10 ▼ records per page | |

	Case Number ▼	Subject ▼	Submitted ▼	Expected Resolution ▼	Status ▼
⌄	123456789	Booking Inquiry	Oct 07, 2017 (21 days)	Oct 20, 2017	Created

- icon-step-backward
- icon-step-prev
- icon-step-next
- icon-step-forward

Table Rows Expanded

⌄	456789123	Booking Inquiry	Oct 13, 2017	Oct 20, 2017	Awaiting Customer...
⌃	567891234	Sales Crediting	Oct 14, 2017	Oct 20, 2017	in Process
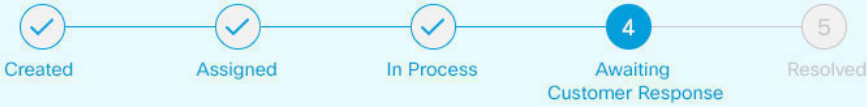
Case Actions: ≡ Expanded View | ✎ Update Case | ⊕ Escalate Case

✓ Created —— ✓ Assigned —— ③ In Process —— ④ Resolved

Submitted By
James Morrison

Case Attribute TBD
12345679

Unique ID
123456 Link TBD

TBD
Placeholder

Comments
Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla par.

- Case Action and all other titles - CiscoSansBold - 14.4
- All other copy CiscoSansRegular - 14.4
- Links – CiscoSansRegular
- Icon-transcript
- Icon-export
- background - #e9faff
- Steps - http://cisco-ui.cisco.com/section-components.html#components-step
  Added the check mark, if it is too difficult to add follow the example in the UI kit
  icon-check

Table Rows Expanded Awaiting Customer Response

	567891234	⚠	Sales Crediting	Oct 14, 2017	Oct 20, 2017	in Process

Case Actions: ≣ Expanded View | ✎ Update Case | ⊕ Escalate Case

✓ Created ─── ✓ Assigned ─── ✓ In Process ─── **4** Awaiting Customer Response ─── 5 Resolved

Submitted By
James Morrison

Unique ID
123456 Link TBD

Case Attribute TBD
12345679

TBD
Placeholder

⚠ Awaiting Customer Response

Comments
Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla par.

- icon-warning, color - #ff7300
- "Awaiting Customer Response" – H4
- icon-transcript
- icon-export

Table Rows Escalate Fields

	567891234	Sales Crediting	Oct 14, 2017	Oct 20, 2017	in Process

Escalate Case 567891234

Comments (optional)

☐ Make Comments Private

Escalate Case   Cancel

⌄	345678912	Sales Crediting	Oct 11, 2017	Oct 20, 2017	Resolved

- Escalate - H4 - 19.2
- CiscoSansOblique - 14.4
  input text area - http://cisco-ui.cisco.com/section-base.html#base-input
- Buttons: Blue - primary button, gray - default button

Table Rows Escalated

- When a case has been escalated icon-export in row
- Icon-transcript
- Icon-export

Universal Elements

The elements in this section are persistent elements used throughout the Customer Service Hub pages

Basic Buttons

- I used the standard blue buttons instead of green, use your best judgement which button to use.
- Primary and Default buttons
  (Note: Cisco has their buttons as default first primary 2nd, I switched them, use your best judgement when building)

Buttons Not Selected

- Disabled - http://cisco-ui.cisco.com/section-base.html#base-button
- http://cisco-ui.cisco.com/section-base.html#base-button

Default Divider

- http://cisco-ui.cisco.com/section-base.html#base-divider

Thicker Divider

- http://cisco-ui.cisco.com/section-base.html#base-divider

Case Creation Elements

The elements in this section are used in the Case Creation flows on the Customer Service Hub pages

Buttons Create Case

- Primary button then 2 secondary buttons

Buttons Create Case

- Previous - Default Button
- Upload - Secondary button

Modal Elements

The elements in this section are used in modal screens for the Customer Service Hub pages

Drawer: Expanded in Modal

- 580 wide and 45 pixels tall
  (this all depends on the width of the modal)
- H4 - 19.2
- background #f5f5f5

- icon-arrow

Drawer: Collapsed in Modal
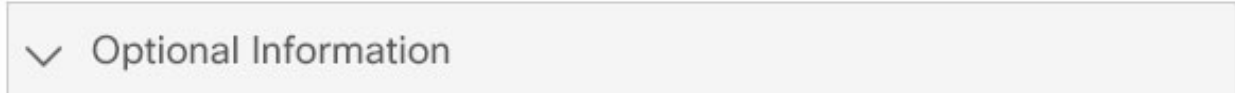
For Styles See Above

Basic Modal
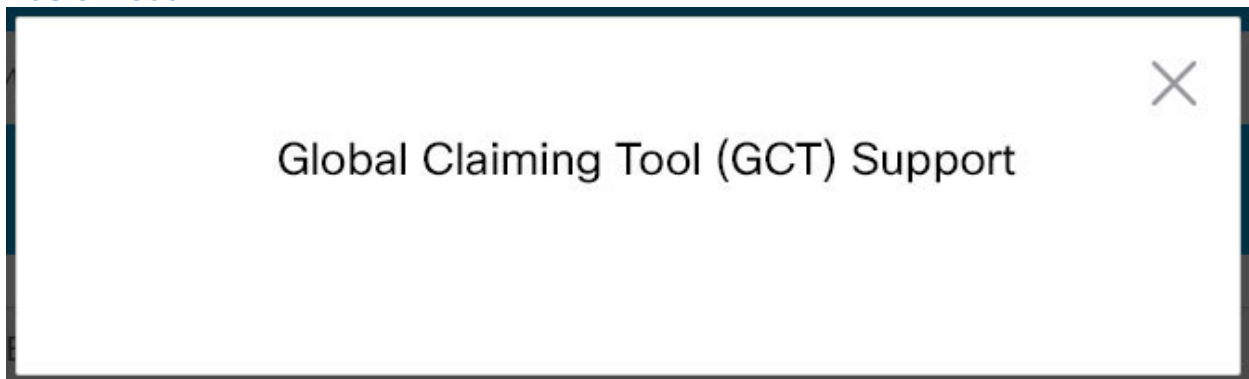
- http://cisco-ui.cisco.com/section-components.html#components-modal
- Followed the "Open Feedback" version
- Follow the background color on the UI Kit
- Title - h2 (I did my own style, CiscoSansRegular, the current style uses an h1, I thought H1 would be too big. Use your best judgement when building)
- icon-exit

Typography Forms: Radio Buttons

- Radio Buttons - http://cisco-ui.cisco.com/section-base.html#base-input
- Label CiscoSansOblique 14.4
- CiscoSansRegular 14.4

Typography

Global Claiming Tool (GCT) Support

Proxy Request

User ID   **Node**
123456789   Node Type 1

Attachments:
Excel File.xls, Word File.doc

Email Copy to:
JHetfield@cisco.com

Comments:
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. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur.

Create Case   Edit Info   Cancel

- All text on the page are CiscoSansBold for Labels and CiscoSansRegular for copy
- Vertical spacing use existing CSS for <p> tags
- horizontal spacing is 1/3, 1/3, 1/3

Dropdowns and Fields

Transaction ID

+Add Transaction ID

Split %

100%

Sales Rep ID

Node

Territory Type

Direct

- ALL form field labels CiscoSansOblique
- Dropdown form field is a standard
- If possible all wide form fields 580 wide and 30 pixels tall
- +Add… - cicscosansregular - 14.4
- If styles break too much from the UI kit follow the UI kit - http://cisco-ui.cisco.com/section-base.html#base-input

Add Additional Field

User ID

Q 123456789

Node

Q NODE Type 1

Q

Q
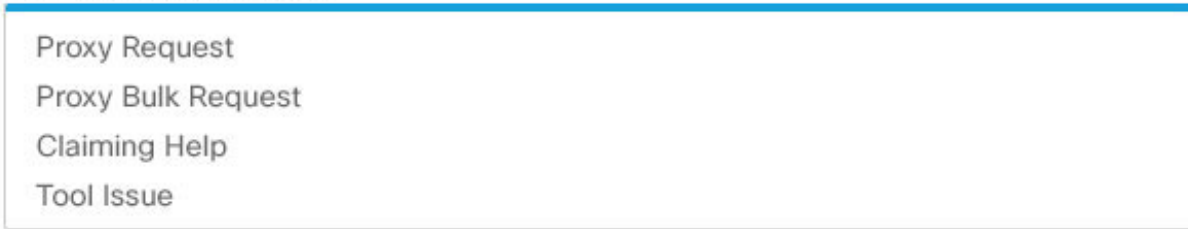
+Add Additional Sales Rep and Node

- icon-presence-end, Color - #cf2030
- when user Clicks "+Add…" additional rows appear and the red X appears and all rows are deletable and disappears when there is only one row left.

Dropdown Expanded
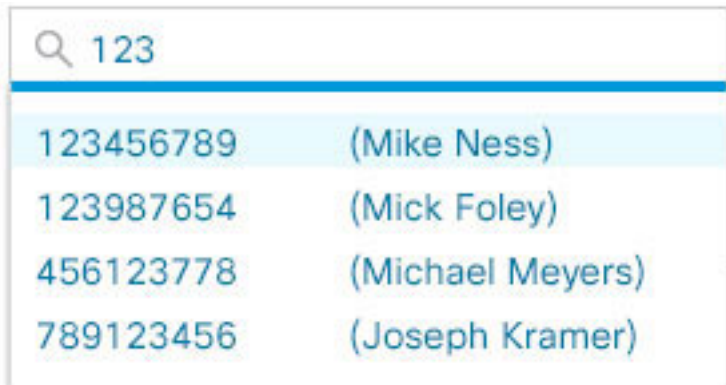
How Can We Help You?

Proxy Request

Proxy Bulk Request

Claiming Help

Tool Issue

- http://cisco-ui.cisco.com/section-base.html#base-select
- Blue Stripe #0099d7
- Selected choice - highlight #e9faff
- I modeled the dropdown after the search input, if it is easier follow the expanded example in the dropdowns in the UI kit.

Search with Predictive Text

Q 123

123456789	(Mike Ness)
123987654	(Mick Foley)
456123778	(Michael Meyers)
789123456	(Joseph Kramer)

- CiscoSansThin #676767
- Blue Stripe #0099d7
- highlight #e9faff
- color - #049fd9
- icon-search
- http://cisco-ui.cisco.com/section-base.html#base-input

Field Error

Additional Email

❌ Email Error Message

- Input States - http://cisco-ui.cisco.com/section-base.html#base-input
- icon-error

Attachments

Attachments

Word File.doc, 15.2 KB
Excel File.xls, 20.6 KB
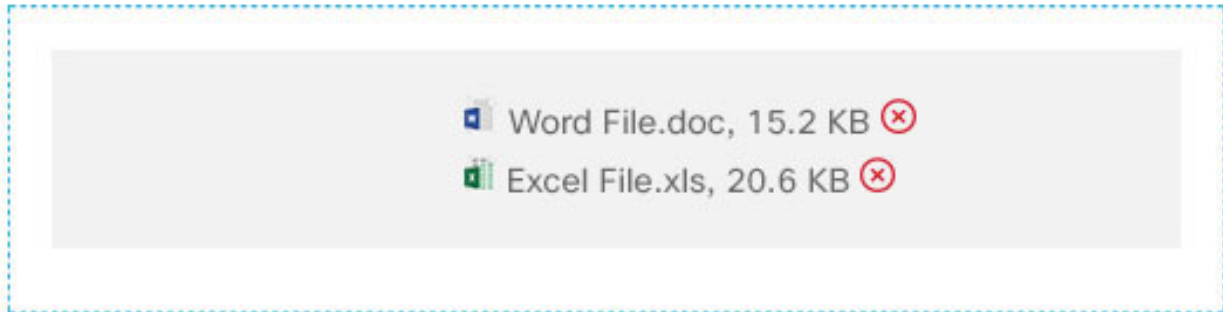
Upload

- This was based on a screenshot provided by Cisco.com team (Matt Zelmer) - applies to ALL attachments

Upload in Process Notification

Upload
Uploading file

- http://cisco-ui.cisco.com/section-components.html#components-toast

Drawer Form Fields

Comments

Email Copy to:

- Standard TextArea - http://cisco-ui.cisco.com/section-base.html#base-input
- width - 520 pixels, height open

Cancel Message

Are you sure you want to Cancel?
Any information you entered will be lost.

Yes   No

- http://cisco-ui.cisco.com/section-components.html#components-toast
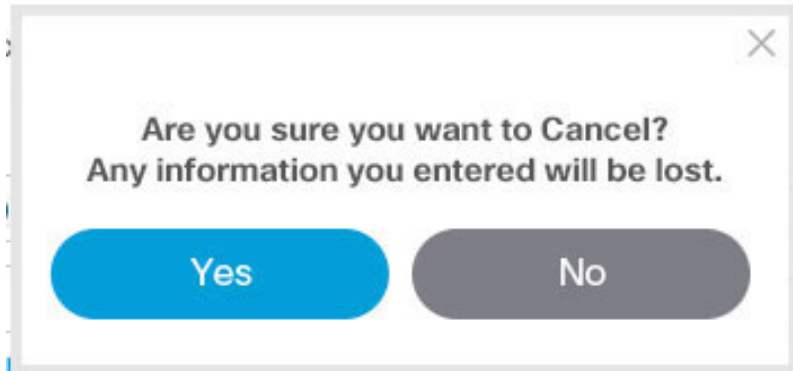
Download/Upload Template

Download the Excel template, complete it and upload it below
to create your case.

↓ Excel_Template.xls

Attachments

↑ Upload your completed Excel template here.
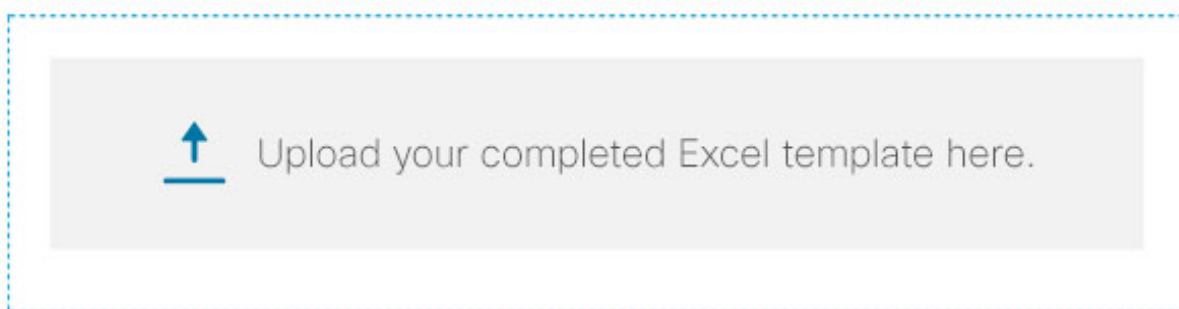
Upload

- icon-info-circle, color #2b5592
- "Download the Excel…" – CiscoSansExtraLight 19.2
- Button – primary ghost
- Icon-download
- Icon-upload

Multiple entry of same field set

Credit Split

Transaction ID

[   ] ⊗

Split %

[100%]

Sales Rep ID   Node

[🔍   ]   [▼]

Territory Type

[Direct   ▼]

Credit Split2

Transaction ID

[   ] ⊗

Split %

[100%]

Sales Rep ID   Node

[🔍   ]   [▼]

Territory Type

[Direct   ▼]

+Add Additional Credit Split

- "Credit Split" – CiscoSansBold
- icon-presence-end, Color - #cf2030
- "+Add Additional Credit Split" - cicscosansregular - 14.4

Case Details Elements

The elements in this section are used in the Case Details sections on the Customer Service Hub pages

Typography - Case Headline

Case# 123456789

- H1

Typography – Awaiting Customer Response

⚠ Case# 123456789 (Awaiting Customer Response)

- icon-warning
- color - http://cisco-ui.cisco.com/section-base.html#base-color
- Status Orange - #ff7300

Typography – Case Escalated

🔴 Case# 123456789 (Case Escalated)

- Icon-export
- Color - http://cisco-ui.cisco.com/section-base.html#base-color
- Status Red - #cf2030

Typography – All Copy

Subject: Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor.

Email Copy to
username@url.com

Attachments
Random File Name.doc, Another File.xls, Final File.ppt

Comments
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. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

- Titles – CiscoSansBold
- ALL copy CiscoSansRegular 14.4, Standard Text Color #585858

Typography – Link

⊕ Update Case | Add Private Comment

- Disabled Link #cccccc
- Standard Link Color #0377a1
- Standard Link Rollover color - # 049fd9

Panel Headers

Submitted By

| Mike Hough (mihough) | ✉ mihough@cisco.com |
| 📞 +1 312-456-7890 | |

Alternate Contact

+ Add Alternate Contact(s)

- Headers - h4 - 22.4

Panels

Submitted By

| Mike Hough (mihough) | ✉ mihough@cisco.com |
| 📞 +1 312-456-7890 | |

Alternate Contact

+ Add Alternate Contact(s)

- Default Panel - http://cisco-ui.cisco.com/section-base.html#base-panel
- Headers - h4 - 22.4
- icon-contact
- icon-email
- icon-phone

Alternate Contact Added

✏ Edit   ⊗ Delete

Lemmy Kilmeister (lekillmester)   lekillmester@cisco.com

+1 312-980-7654

- icon-edit
- icon-presence-end
- Color - #cf2030

Drawers Collapsed

⌄	08:30 am, CST	Nov 11, 2017	James Douglas Morrison	📎 2	
⌄	07:30 am, CST	Nov 09, 2017	Robby Kreiger		
⌄	06:30 am, CST	Nov 07, 2017	John Densmore		Internal View Only

- 40 px tall
- Outline - #cccccc
- Background - #f5f5f5
- CiscoSansRegular - 14.4
- icon-arrow
- icon-attachment
- Internal View Only - CiscoSansBold

- NOTE: It is important the information is presented as columns and are aligned, it makes a huge difference in the user's ability to read scan the details

Drawers Expanded

- CiscoSansRegular 14.4

Drawers Requires Attention

- icon-warning
- color - http://cisco-ui.cisco.com/section-base.html#base-color
- Status Orange - #ff7300

Email List

- Panel Default - http://cisco-ui.cisco.com/section-base.html#base-panel
- icon-presence-end
- Color - #cf2030

Case Update

- http://cisco-ui.cisco.com/section-components.html#components-toast

Special Elements

The elements in this section special/unique elements not otherwise categorized

Submit Feedback Smiley Faces
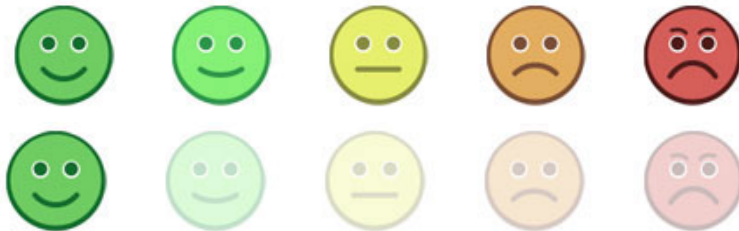
- Smiley face icons are placeholders, we would like to use these are unsure if this will work
- When user selects face, the other faces reduce to 50% opacity.

Iconography

This section contains icons used throughout the Customer Service Hub pages. Additional icons for future scope not featured here (if needed) can be sourced from the Cisco UI Kit Pattern Library – Icons.

Icon names listed here are the same as the naming in the Cisco UI Kit. Note that icon names may not always align with how they are used (e.g. "Icon-transcript" is used to signify Epanded case view)

Icon-presence-end	Icon-edit	Icon-error	Icon-exit
Icon-search	Icon-back	Icon-arrow (note: the arrow must be rotated)	Icon-attachment
Icon-help	Icon-filter	Icon-check	Icon-warning
Icon-email	Icon-contact	Icon-add-contain	Icon-home

Icon-info-circle	Icon-download	Icon-upload	Icon-feedback
Icon-transcript	Icon-step-forward	Icon-step-backward	Icon-export

Quality Control & Testing

Guidelines for BAT/UAT testing of UI elements

Pending

What to do if an element or style is not shown in this playbook?

Review the Cisco UI Kit (Pattern Library) to see if the needed element is available there. If it is not, then consult with the business team about the needed flow and business will work with the UX designer to provide according to requirements.

Appendix