

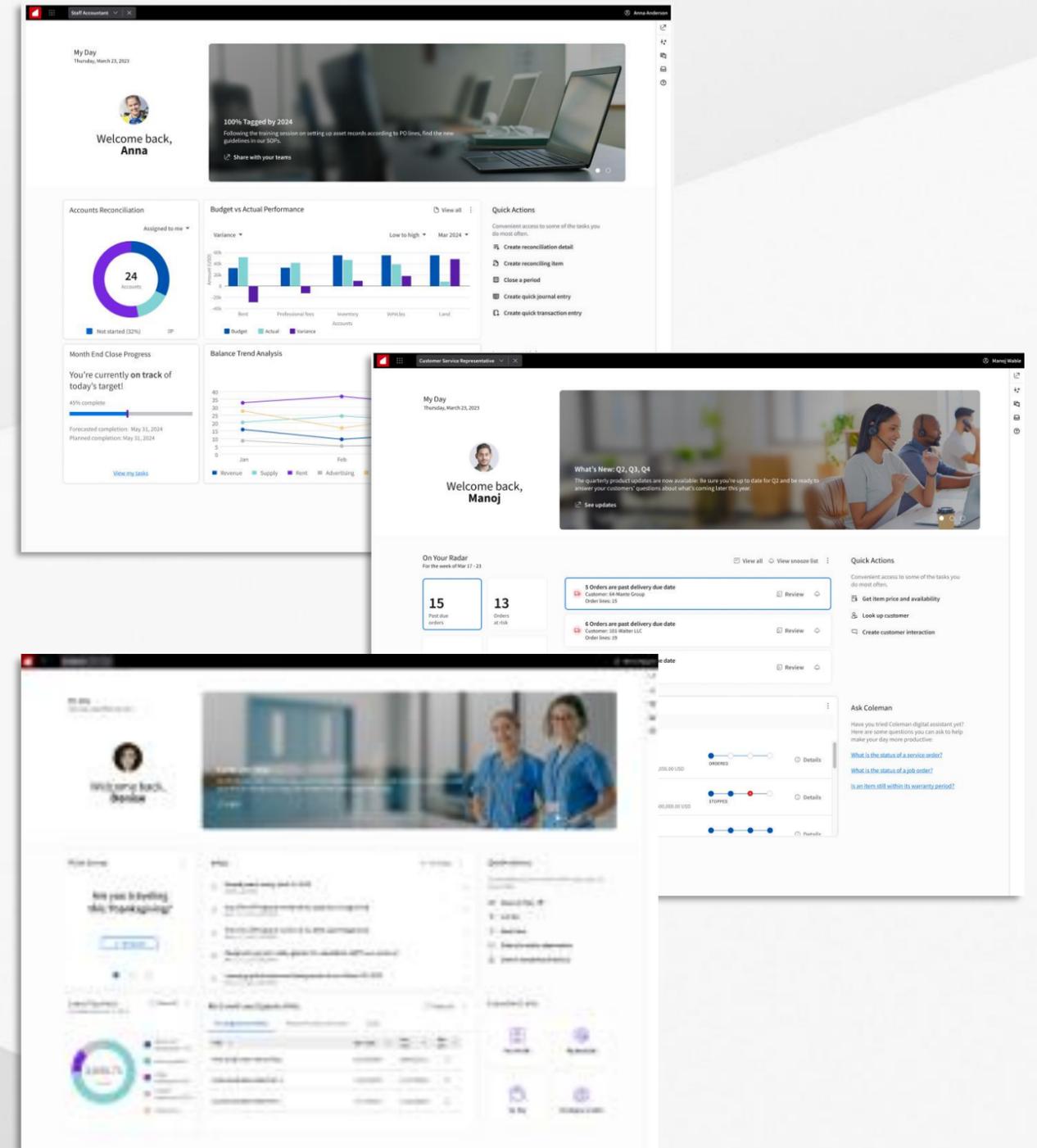


Infor Design Knowledge Share

Standard Role-Based Workspaces (RBWS) Content Design

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July 2024



Standard RBWS Learning Session Outcomes

In this session, you will learn about:

- ✓ What a standard RBWS is and how it works.
- ✓ The basic process for creating a valuable RBWS for your users.
- ✓ How to fill out the content structure template.
- ✓ Commonly used widgets and patterns from past RBWS.
- ✓ Lessons learned and tips.
- ✓ Where to find resources and templates.

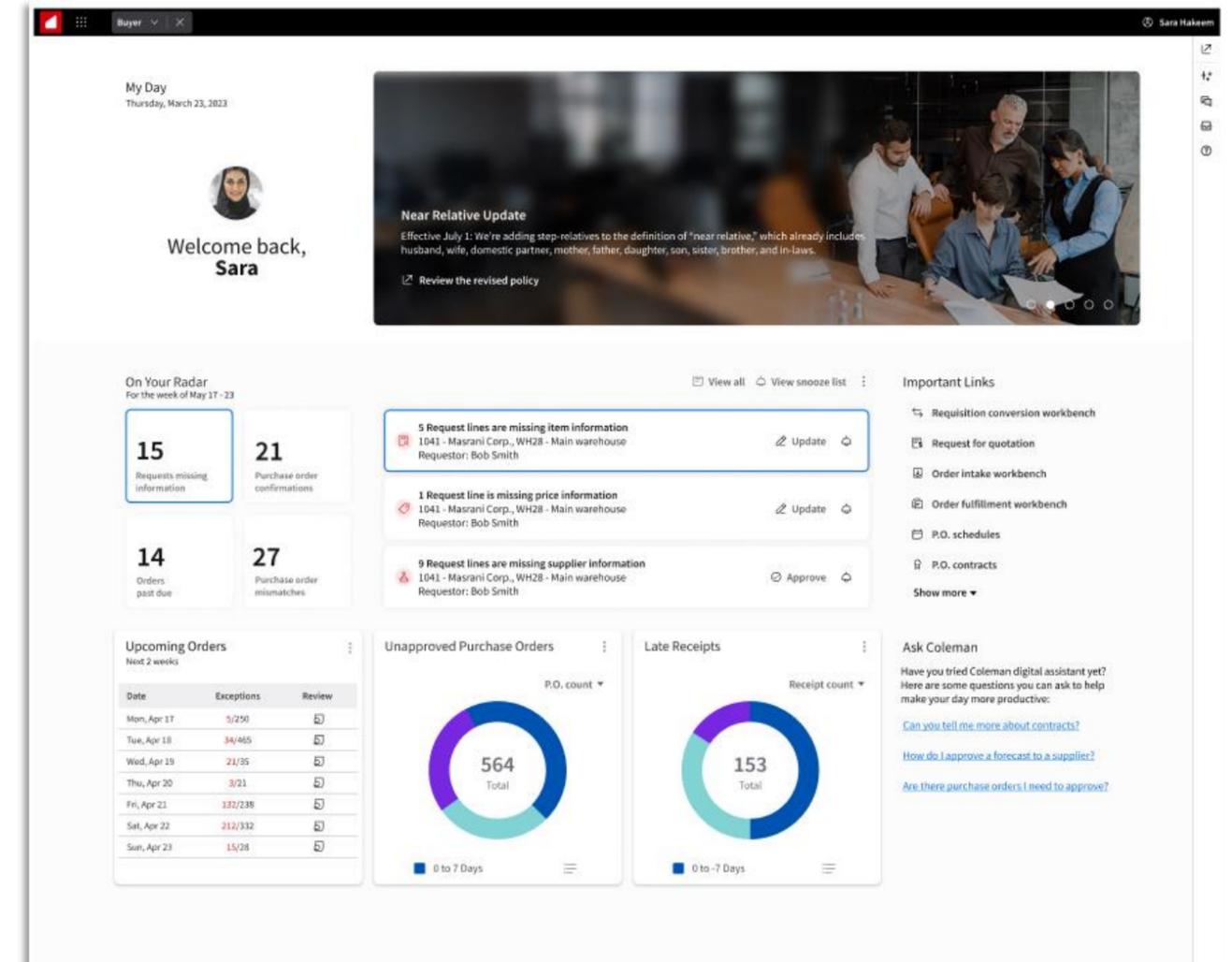
What is a Standard Role-Based Workspace?

A standard role-based Workspace (RBWS) is a preconfigured **widget-based** Workspace for a specific role and industry, provisioned by Infor out of the box.

It acts like a user's widget starter pack for the most common tasks and workflows by specific user role and industry.

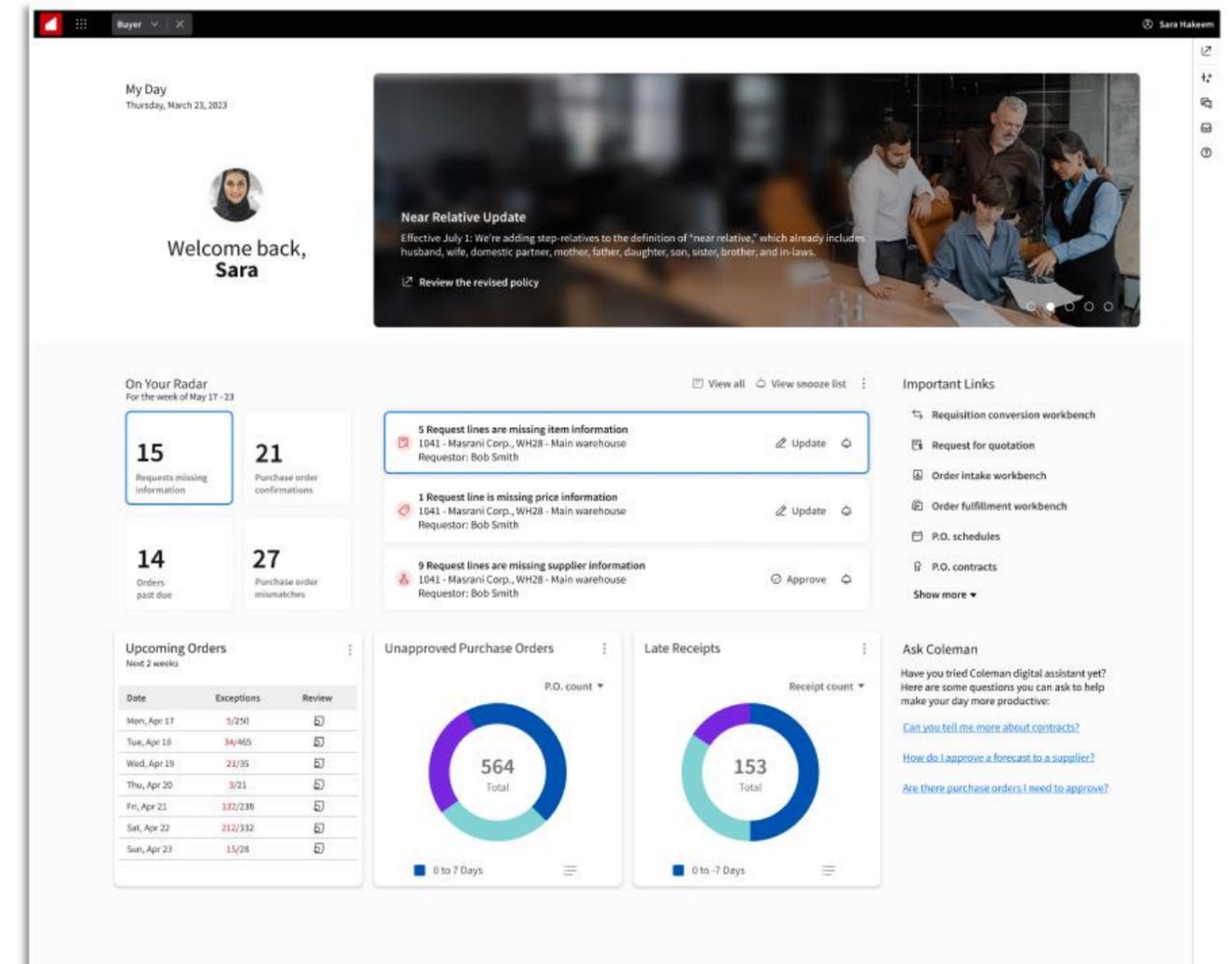
Why are they valuable?

- From day one, the user has relevant content ready for them; faster time to value.
- Help users stay organized, informed, and productive.
- Demonstrates Infor's industry expertise and business/role acumen.



How Does it Work?

- Only Product Management can publish a standard RBWS for their respective products.
- Widgets may come from any of the applications that the user has access to.
- Some widgets let the user take action without leaving their Workspace.
- Customers should copy and **modify** the standard RWBS to suit their unique needs.*
 - Standard RBWS should focus on the most used workflows, but the catalog can have more options.
 - Customers can add, delete, and reposition widgets within their own Workspaces.*
 - Users may have multiple Workspaces as required.



*Usually done by system admins. Users can only do this if they have the appropriate permissions.

How to Create a Standard RBWS

Steps

Define Persona

Revenue manager
Kelli, Hospitality, 10 years of experience
Making sure the price is right.

Domain expertise: ●●●●●●●●
Tech savviness: ●●●●●●●●
Openness to change: ●●●●●●●●
Amount of travel: ●●●●●●●●

Goals:

- Optimize financial results by anticipating demand and forecasting revenue adjustments.
- Regular monitoring of inventory to generate daily, weekly, monthly reports to her team and key partners.
- Build and maintain strong working relationships with team.

Value proposition: Kelli is responsible for setting prices of multiple midscale hotels to maximize hotel's profitability and meet their strategic goals. Because she's the one revenue manager of her company, she's the in-house expert of the technology used and serves as the main contact between the hotel and online travel agencies. She leads the critical financial processes and has oversight of all aspects relating to revenue accounting. She partners with marketing team, sales staff, financial specialists, and external vendors to optimize revenue and increase the commercial capabilities of the hotels in both the high and low seasons, depending on the complexity of the market and services provided, and adjusts strategies accordingly.

Typical day:

- Kelli checks her emails and starts to pull reports of the previous business day's financial performance/trends.
- She prepares a report with relevant past data/KPIs and projections to send to management and team.
- Throughout the day, she monitors the performance of different distributions.

Ideal experience:

- A system that helps with strategic management rather than tactical management.
- Automate the repetitive tasks (e.g. pricing and reporting).
- Accuracy of system's algorithm and insights (e.g. outlook, price recommendations, current business).

Pain points:

- Manually importing data into spreadsheets is time consuming.
- Overload of data.
- Importing/exporting large data files leads to slower load times.
- Not enough data as rate decisions should be based on more than forecasted occupancy.

What I care about:

- Budgets:**
 - Review progress on completion on time and under budget.
 - Efficiently manage budgets and communicate responsibilities and goals with the project team and ensure timely review and approval of the budget.
 - Increase overall profitability through budget change orders of the budget if a project manager budget change order which may require a change to cover the expense of the project which means more profit.
- Customer Care:**
 - Clear the overall process, look meet with customers to hear their concerns for a specific project. Throughout the project lifecycle, communicate with my customers to ensure that their expectations and needs are met.
 - Efficient communication.
 - Prove yourself, look for ways to improve the overall efficiency and performance of the projects that I manage. This often include cost saving opportunities, reducing time spent, and optimal scheduling practices. The aspect of the job comes with experience and becomes second nature once established a track record for my role.
 - Always on.
 - At my day ends, I will take a final look at my email and upcoming tasks for the following day, closing out or communicating any critical items as necessary.
- Collaboration:**
 - Oversee progress of all ongoing needs, ability to lead on vendor reports or POs, budget or actual report comments and communicate report.
 - Ability to quickly and great coordination of all information is a must for project completion. Budget health.
 - Quick how that of available manager's report to identify which expenses have been reported from customer PO, notification from available manager, asking me if customer has not yet provided budget change order.
 - Alert notifying when customer has signed the budget change order.
- Customer Care:**
 - Oversee progress of all ongoing needs, ability to lead on vendor reports or POs, budget or actual report comments and communicate report.
 - Ability to quickly and great coordination of all information is a must for project completion. Budget health.
 - Quick how that of available manager's report to identify which expenses have been reported from customer PO, notification from available manager, asking me if customer has not yet provided budget change order.
 - Alert notifying when customer has signed the budget change order.

- Who is the persona behind the role?
- What are their goals?
- What does their typical day look like?
- What are their pain points?

Design

Widget	Content	Details	Suggested layout below is for Worker (E)
(1) Greetings	1 Display profile photo, with a "Good Morning/Afternoon/Evening/Welcome Back" message and personalized with the user's name.	Welcome to personalized workspace.	
(2) Announcements	2 Display organization-wide announcements.	Customers can provide their end users with relevant information/updates and target by role.	
(3) On Your Radar	1 Category: Description of what information this will display to alert the user. 2 Category: Description of what information this will display to alert the user. 3 Category: Description of what information this will display to alert the user. 4 Category: Description of what information this will display to alert the user.	Value: Description of the business value to the user (what it helps them accomplish). Info: Other information useful for the user to have context to take action. Action: Key action(s) the user can take from this widget.	
(4 a) Quick Actions	1 Action name 2 Action name 3 Action name 4 Action name 5 Action name 6 Action name 7 Action name		
(4 b) Important Links	1 Link name 2 Link name 3 Link name 4 Link name 5 Link name 6 Link name 7 Link name		
(5) Widget Title	1 What the widget does and widget type (e.g. list, chart, or data visualization)		
(6) Widget Title	1 What the widget does and widget type (e.g. list, chart, or data visualization)		
(7) Widget Title	1 What the widget does and widget type (e.g. list, chart, or data visualization)		

- What is the content structure/hierarchy?
- Where does the information need to go?
- How much information is needed?
- What are the key actions?

Build

My Day
Monday, July 24, 2023

Good evening,
Joelyn

977 Requests missing information

0 Acknowledgment deviations

1 Past due orders

0 Mismatched receipts/invoices

Date	Planned deliveries	Exceptions	Review
Monday, Apr 17	200	1	[Review]
Tuesday, Apr 18	12	34	[Review]
Wednesday, Apr 19	33	45	[Review]
Thursday, Apr 20	56	98	[Review]
Friday, Apr 21	346	98	[Review]
Saturday, Apr 22	328	98	[Review]
Sunday, Apr 23	336	98	[Review]

At each step, Product Managers are expected to get feedback from the appropriate stakeholders. (For example: IPC team, sales, development, customers.)

Define Persona

Understand the user and their goals, typical day, and pain points.

Why?

- Provides a human face to the end user, which helps make a more user-centered design (rather than system-centered).
- Documenting this helps bring alignment throughout the design process with all parties involved.

How?

- Guidelines, templates, and examples are available to leverage:
 - [Persona Guidelines](#)
 - [PPT Template](#)
 - [Examples from T2V Program](#)

TIP: A persona is best when it's short and concise, but rich enough to differentiate it from other personas/roles.

Revenue manager

Kelli, Hospitality, 10 years of experience
"Making sure the price is right."

Domain expertise: ●●●●●●●●●●

Tech savviness: ●●●●●●●●●●

Openness to change: ●●●●●●●●●●

Amount of travel: ●●●●●●●●●●

Goals:

1. Optimize financial results by anticipating demand and forecasting revenue adjustments
2. Regular monitoring of inventory to generate daily, weekly, monthly reports to her team and key partners
3. Build and maintain strong working relationships with team

Device usage:

- In-office desktop, smartphone
- Brings laptop and smartphone everywhere if she's not at her office

Primary tools & software:

- EzRMS
- HMS
- MS Office

Value proposition: Kelli is responsible for setting prices of multiple midscale hotels to maximize hotel's profitability and meet their strategic goals. Because she's the one revenue manager of her company, she's the in-house expert of the technology used and serves as the main contact between the hotel and online travel agencies. She leads the critical financial processes and has oversight of all aspects relating to revenue accounting. She partners with marketing team, sales staff, financial specialists, and external vendors to optimize revenue and increase the commercial capabilities of the hotels in both the high and low seasons, depending on the complexity of the market and services provided, and adjusts strategies accordingly.

Typical day:

- Kelli checks her emails and starts to pull reports of the previous business day's financial performance/trends
- She prepares a report with relevant past data/KPIs and projections to send to management and team
- Throughout the day, she monitors the performance of different distribution channels (e.g. direct bookings & online travel agencies) to determine which are performing best/evaluate ROI
- After compiling this information, she meets with the sales & marketing staff and financial specialists to discuss strategies to achieve peak financial performance

Ideal experience:

- A system that helps with strategic management rather than tactical management
- Automate the repetitive tasks (e.g. pricing and reporting)
- Accuracy of system's algorithm and insights (e.g. outlook, price recommendations, current business trends)
- Ability to customize system generated reports
- Seamless communication/reporting process to maximize efficiency
- Maintain external relationships (e.g. tourism operating partners) while also closing out wholesale allotment/availability

Pain points:

- Manually importing data into spreadsheets is time consuming
- Overload of data
- Importing/exporting large data files leads to slower load times
- Not enough data as rate decisions should be based on more than forecasted occupancy
- Fake websites that offer "better" deals & deceive potential travelers

Hi, I am Pamela and I am a Project Manager

Value proposition: I take on planning, organizing, and directing the completion of specific projects that aim to improve profitability and patient outcomes for the organization. I ensure these projects are on time, on budget, within scope and within granularities based on company concerns (limited budget, resources, and personnel), customer requests, and government regulations. Most importantly, I ensure these projects deliver the intended project objectives, including increasing revenue, reducing costs, increasing capacity, improving patient care and quality, and improving customer satisfaction.

Core objective: My focus is to oversee a project from inception to completion. Many times, I am balancing multiple projects at once through different stages of the project life cycle: initiating, planning, executing, monitoring and controlling, and closing. I act as a liaison between my company, including management and project team, customers and vendors, and government.

[Catch-up]
My typical day starts with catching up on e-mails to ensure I have no urgent tasks or requests from upper management or customers.

[Team Leadership]
I lead, I collaborate with specific team members/project staff/team members really depend on the type of project they can include consultants, doctors, lab analysts, principal investigators, buyers, billing manager/clients, receivables managers, project accountants, etc.) through a morning huddle where we go through the plan for the day, what the challenges are, and which projects we should prioritize. I do not necessarily meet with all these team members at the same time every day, rather my morning huddle includes meeting with whoever is needed at the time.
Additionally, I delegate work and assignments to team members based on expertise/work experience. I also ensure my team members have their certifications and trainings up to date, and time constraints as Project Manager. It is my job to ensure that we are hitting our deadlines.

[Scheduling and Organizing]
I lead, I dedicate a large portion of my time to making schedule updates to the various projects that I am balancing. Scheduling is a big deal in project management, so making sure that I know exactly where I stand within the project lifecycle helps me plan and complete the project on time. This includes ensuring that project staff perform their tasks in a timely manner and have all their questions answered and that they are accurately tracking their time spent performing job duties.

[Financials - Budgeting and Cost Management]
A good portion of my day is dedicated to managing my project financials. This includes budgeting from the customer requirements until the forecasting of project revenues, cost analysis, and estimate expected costs for the project. Additionally, this includes cost management, ensuring we are getting the best prices for raw materials and using the best personnel who are not overqualified for the position (i.e., Doctor vs. Nurse).

[Budget Change Orders]
A part of my financial planning process involves initiating budget change orders. A budget change order is an amendment to the original project contract. It addresses any changes outside of the scope of the project that arise during the project life cycle, whether they are changes in the scope of work, material costs, or contract terms. Initiating the budget change order involves approaching my customer (internal or external) to explain the change and get it approved so that work can continue.

[Reporting]
For certain projects, I ensure staff working on government grants are promptly and accurately performing labor distribution and effort certification. I also provide the effort certification report to the federal government to ensure that the organization gets reimbursed for work performed. I periodically monitor and provide budget-to-actual reports for each project.
Another portion of my reporting duties involve notifying upper management of my projects and their respective statuses through written documents, meetings, and emails.

[Risk Analysis]
From time to time, I will conduct risk assessments and report identified risks to management. In turn, I provide recommendations for the mitigation of risk in order to prevent blockers from delaying a project.

[Customer Calls]
Over the course of the week, I will meet with customers to hear their concerns for a specific project. Throughout the project lifecycle, I communicate with my customers to ensure that their specifications and deadlines are met.

[Efficiency Improvement]
If time permits, I will look for ways to improve the overall efficiency and performance of the projects that I manage. These efforts include cost saving opportunities, reducing time spent, and optimal scheduling practices. This aspect of the job comes with experience and becomes second nature once I establish a battle rhythm for my role.

[Wrap-up]
At my day ends, I will take a final look at my email inbox and upcoming tasks for the following day, closing out or communicating any critical items as necessary.

b) What I care about:

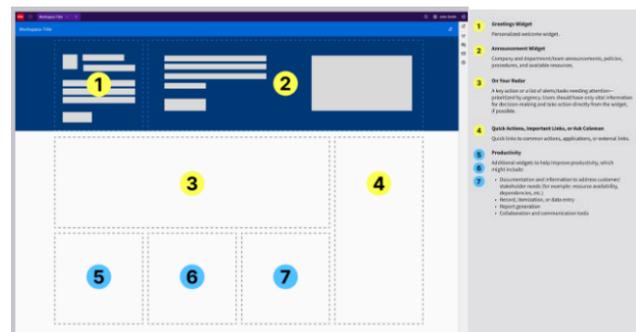
<p>Success</p> <ul style="list-style-type: none"> • Ensure projects are completed on time and under budget (1) • Effectively manage, delegate, and communicate responsibilities and tasks with key project stakeholders and resources (internal and external) based on the project (2) • Increase overall profitability through budget change orders if the budget of a project changes, budget change orders ensure more revenue is coming in to cover the expenses of the project, which means more profit (3) 	<p>Unmet needs</p> <ul style="list-style-type: none"> • One-stop shop for all reporting needs - ability to view or monitor reports or KPIs (budget to actual report, commitments and encumbrance report) (1) (2) • Ability to quickly alert project stakeholders of any information that is vital for project completion, budget health (1) (2) • Quick view (or link) of receivables manager's report to identify which payments have been received from customers OR notification from receivables manager alerting me if customer has not paid or processed budget change order (3) • Alert notifying when customer has signed the budget change order (3) 	<p>Unmet needs</p> <ul style="list-style-type: none"> • Spending too much time checking reports and talking to stakeholders to ensure a project is under budget • Time spent evaluating and fixing project issues and errors (created system due to IT upgrade, implementing release errors that cause a ton of trouble, checking for materials and equipment due to external factors - COVID, etc.) • Time spent generating several reports to measure project and budget status (budget to actual report, commitments and encumbrance report) • Supply chain issues that disrupt the project life cycle (e.g., supply shortages, worker shortages, environmental health factors, etc.)
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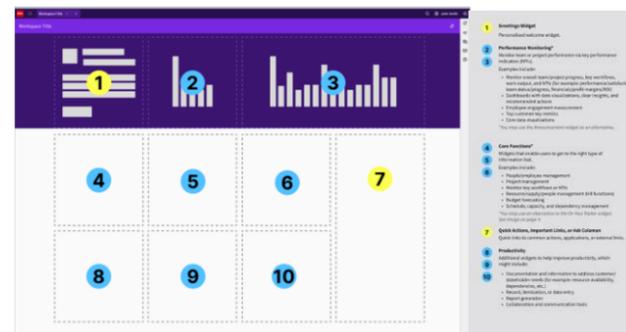
User Types

Generally, a role can be classified as a specific user group: Individual Contributor, Supervisor, or Executive. [User type layouts](#) have been created for you to leverage as a starting point.*

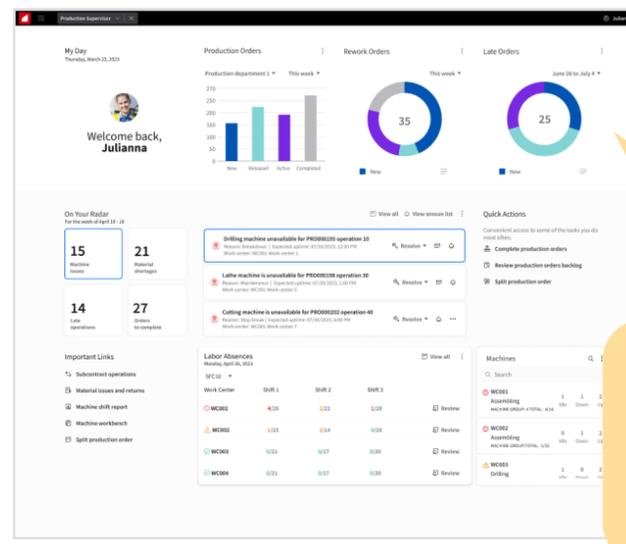
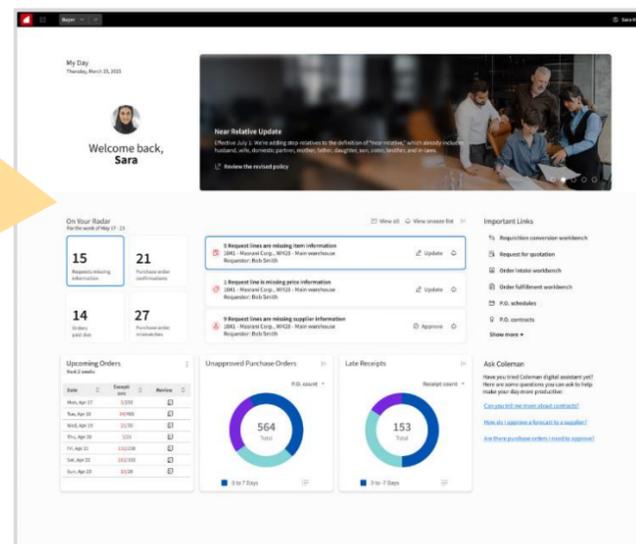
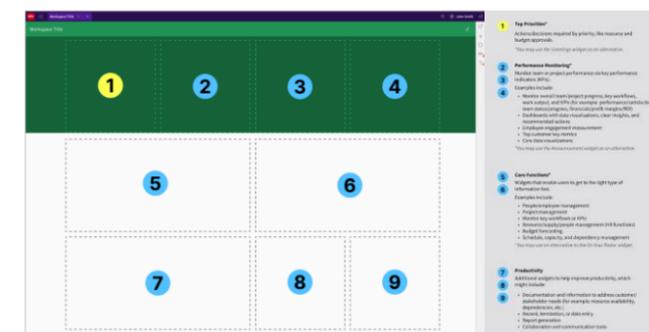
Individual Contributor (Worker)



Supervisor (Manager)



Executive (C-Level)



The Announcements and On Your Radar widgets are recommended for Individual Contributor roles.

Examples are currently WIP. Data visualizations and KPIs may be more appropriate to use instead of the Announcements widget for management roles.

*Note: PMs have ultimate decision power over what their RBWS includes. These are recommendations that we believe will help with attracting prospects.

Content Structure Design

Organize the page content based on persona, user type, and priority.

Why?

- Helps define the hierarchy and contextual relationships of information within the Workspace.
- Facilitates discussion among stakeholders to agree on a plan for what belongs on the RBWS for the user.

How?

- Leverage the [Content Structure Excel Template](#)
 - [You may also refer to this Figma Example*](#)

Content Structure			Workspace (Individual Contributor) Template	
Widget	Content	Details	Suggested layout below is for Worker (IC)	
(1) Greetings	1x1 Display profile photo, with a "Good Morning/ Afternoon/ Evening/ Welcome Back" message and personalized with the user's name.	Welcome to personalized workspace.		
(2) Announcements	3x1 Display organization-wide announcements.	Customers can provide their end users with relevant information/updates and target by role.		
(3) On Your Radar	1	Category Description of what information this will display to alert the user Value: Description of the business value to the user (what it helps them accomplish) Info: Other information useful for the user to have context to take action Action: Key action(s) the user can take from this widget		
	2	Category Description of what information this will display to alert the user Value: Info: Action:		
	3	Category Description of what information this will display to alert the user Value: Info: Action:		
	4	Category Description of what information this will display to alert the user Value: Info: Action:		
(4a) Quick Actions	1	Action name		
	2	Action name		
	3	Action name		
	4	Action name		
	5	Action name		
	6	Action name		
	7	Action name		
(4b) Important Links	1	Link name	Description of the business value to the user (what it helps them accomplish)	
	2	Link name		
	3	Link name		
	4	Link name		
	5	Link name		
	6	Link name		
	7	Link name		
(5) Widget Title	1x1 What the widget does and widget type (e.g. list, chart, other data visualization)	Value: Description of the business value to the user (what it helps them accomplish) Info: Other information useful for the user to have context to take action Action: Key action(s) the user can take from this widget		
(6) Widget Title	1x1 What the widget does and widget type (e.g. list, chart, other data visualization)	Value: Info: Action:		
(7) Widget Title	1x1 What the widget does and widget type (e.g. list, chart, other data visualization)	Value: Info: Action:		

TIP: Focus on actionability and how the information will deliver the most business value to the persona.

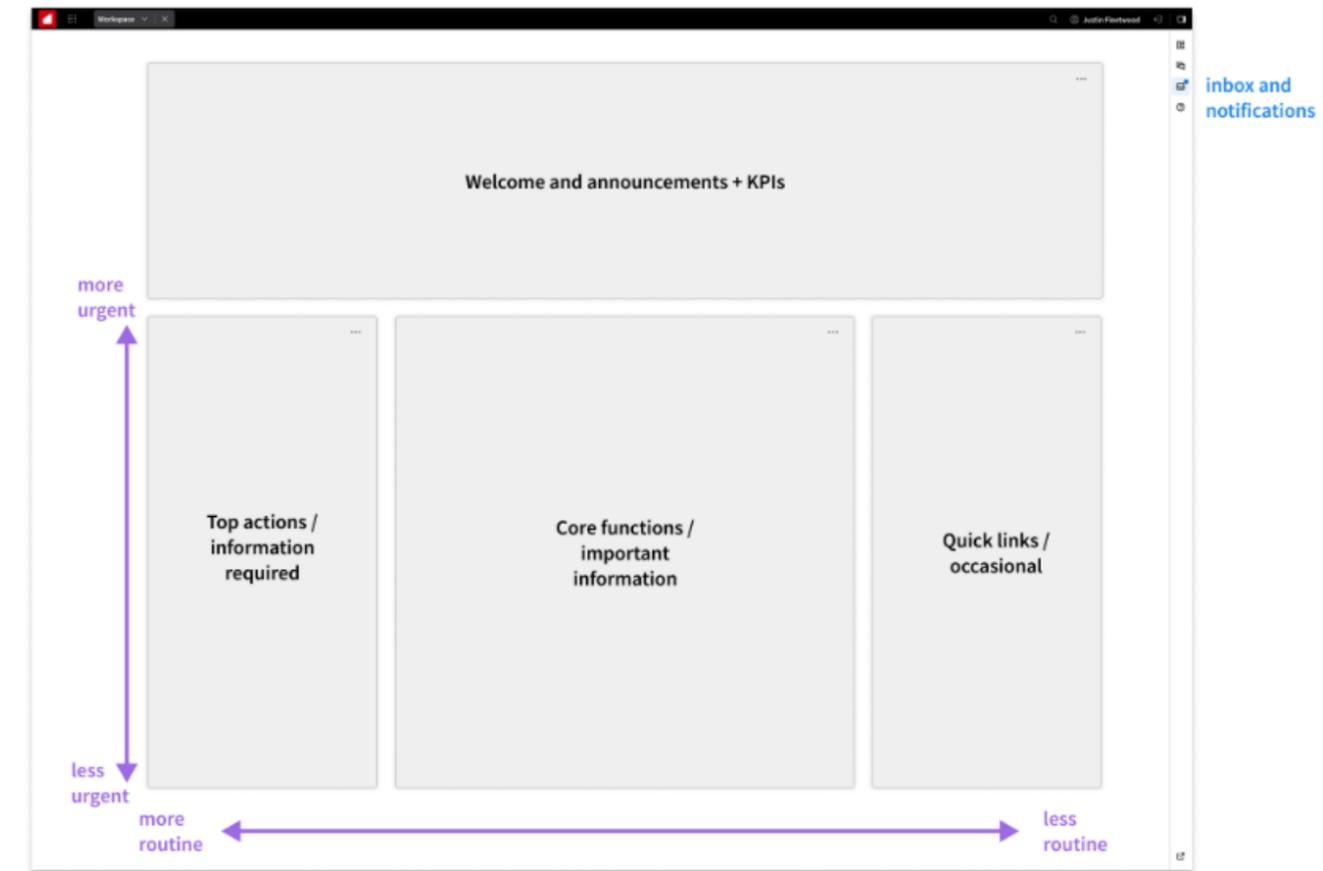
* Based on previous releases, may be used instead if you have a designer available

Content Structure Template

Content Structure		<i>Worker (Individual Contributor) Template</i>	
Widget	Content	Details	Suggested layout below is for Worker (IC)
(1) Greetings	1x1 Display profile photo, with a "Good Morning/ Afternoon/ Evening/ Welcome Back" message and personalized with the user's name.	Welcome to personalized workspace.	
(2) Announcements	3x1 Display organization-wide announcements.	Customers can provide their end users with relevant information/updates and target by role.	
(3) On Your Radar	1 Category	Description of what information this will display to alert the user	
		Value: Description of the business value to the user (what it helps them accomplish)	
		Info: Other information useful for the user to have context to take action	
		Action: Key action(s) the user can take from this widget	
2 Category	Description of what information this will display to alert the user	Value:	
		Info:	
		Action:	
3 Category	Description of what information this will display to alert the user	Value:	
		Info:	
		Action:	
4 Category	Description of what information this will display to alert the user	Value:	
		Info:	
		Action:	
(4a) Quick Actions	1 Action name	Description of action(s) and business value to the user (what it helps them accomplish)	
	2 Action name		
	3 Action name		
	4 Action name		

Tips

1. **Less is more.** Aim to reduce the user's cognitive load.
2. **Prioritize top tasks.** Sort based on urgency and routine.
3. **Focus on exceptions** that need immediate action. Give the user the option to find more information only if needed.
4. **Make sure the information is actionable.** Provide just enough context for the user to take action or make a decision.
5. **Take a holistic approach.** Leverage the other features in Portal, such as the global Inbox.
6. **Use terminology that's easy to understand.** Avoid jargon and numbers/codes without context.
 - Review the [UX Writing Guidelines](#) for standards and best practices.



Interaction Design

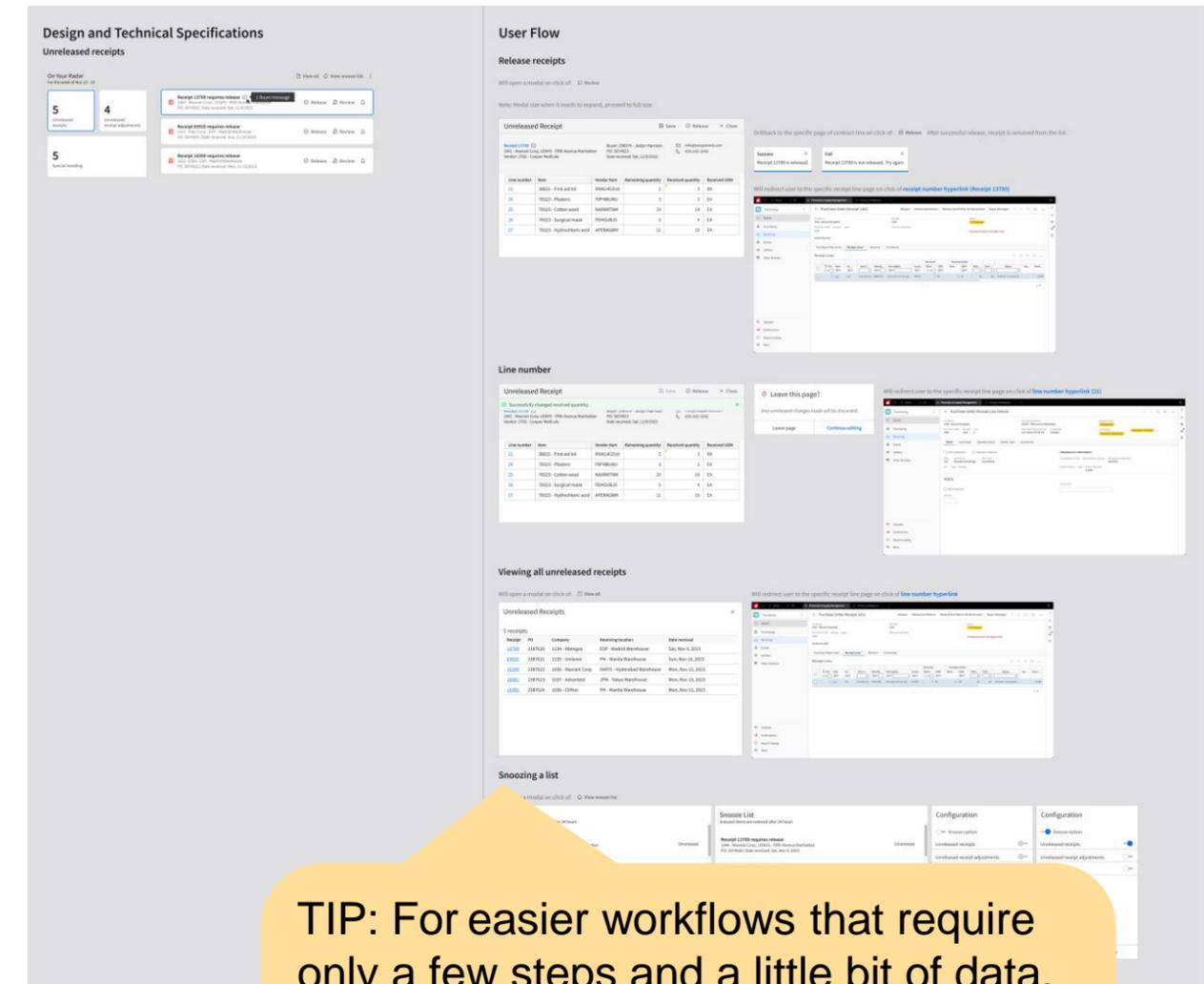
Define the details of what's in each widget and what happens when the user interacts with the content in the widget.

Why?

- Maps out the end-to-end workflow to ensure that the persona can accomplish their goals.
- Drives functional requirements for development. (For example: APIs.)

How?

- Write out the labels, icons, buttons, and actions that go in a widget.
- Draw out the step-by-step information that the user sees as they interact with the widget. (For example: Filters, hovers, modal popups, empty states.)
- Leverage this template: [Interaction Design Requirements](#)
 - [You may also refer to this Figma Example*](#)



TIP: For easier workflows that require only a few steps and a little bit of data, consider using an in-widget drill back or a modal popup. For more complex, data-intensive workflows, link directly to the workflow in the application.

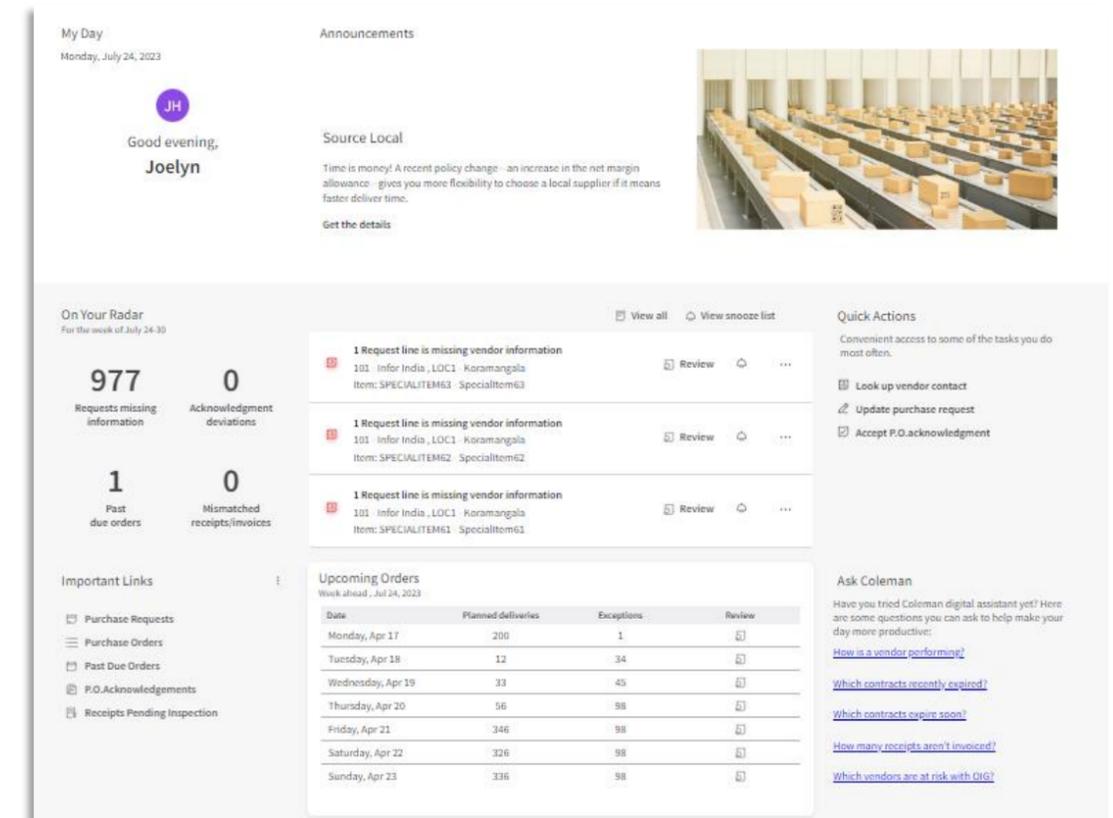
* Based on previous releases, Figma was used in conjunction with an excel file

Review

Ensure that the content is right and the solution is technically feasible.

How?

- Iteratively collect feedback about your designs from the appropriate stakeholders. (For example: IPC team, sales, development)
- If you have a mockup or prototype, consider reviewing it with customers/current users.
 - Check out this guide about [RBWS testing](#) or email uxinsights@infor.com for guidance.



Things to Ask

Remember to take a moment during each iteration to step back, look at the standard RBWS holistically, and ask these important questions:

- Can the persona easily achieve their top goals?
- Does this reduce the user's cognitive load?
- Is this information actionable?
- Is this information critical for the user to make a decision?
- Is this terminology universal? Is it human-centric instead of system-centric?

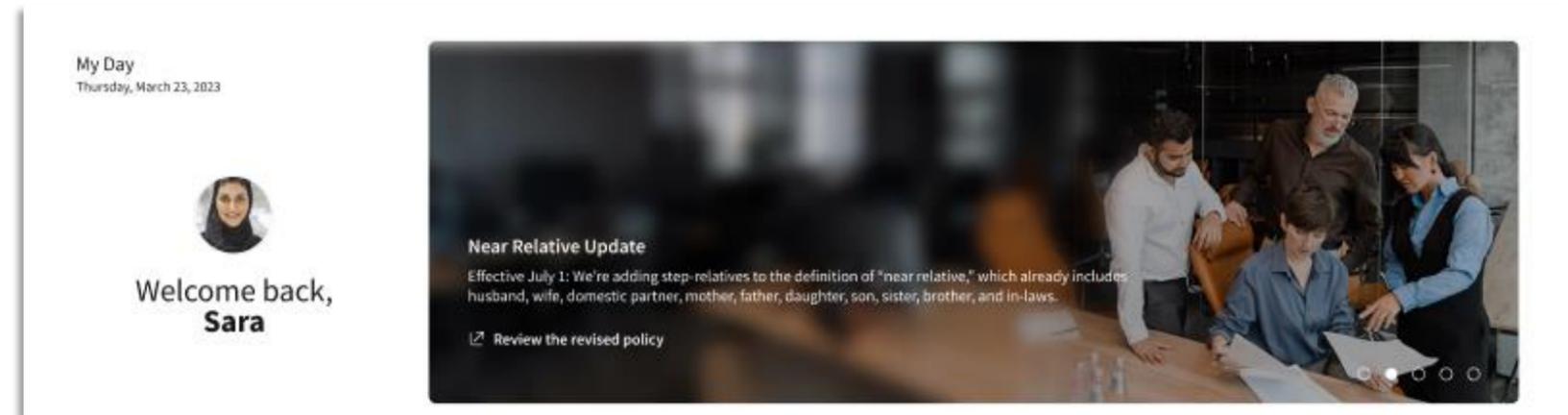


Quiz time!

Commonly Used Widgets

Banner Widgets

The Greetings and Announcements widgets are recommended for use in the Workspace banner area for Individual Contributor roles.*

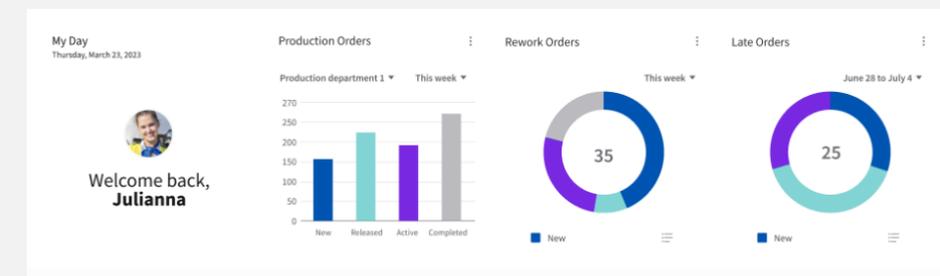


Why?

Based on past feedback from customers and prospects—along with competitive research—cleaner and more spacious homepages are preferred over dense/cluttered screens filled with text and lists.

- **Greetings** help personalize the page for the user. It utilizes white space effectively, giving the page a modern, clean look.
- **Announcements** allows organizations and management to communicate important messages broadly. [See library for approved images for demo purposes.](#)

For Supervisors (Managers), it's recommended to replace the Announcements banner with data visualizations and KPIs that give a quick snapshot of their team's or department's performance.*



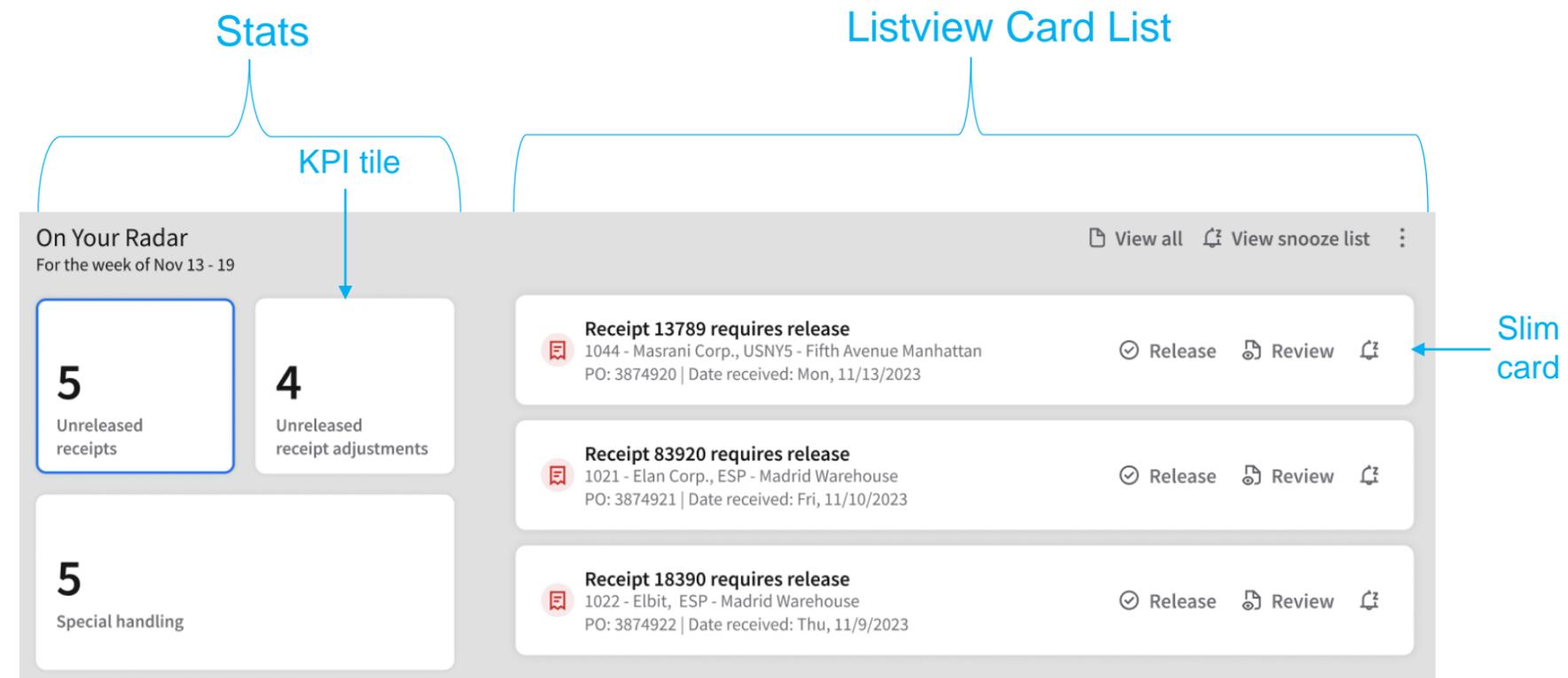
On Your Radar

Two related borderless widgets: **Stats** (1x1) and **Listview Card List** (2x1).

How Does it Work?

When the **Stats** widget (left) is selected, the content within the **Listview Card List** widget (right) changes to reflect relevant information related to that tile.

- Includes essential information for quick decision-making.
- Enables direct action whenever possible.
- Typically, the timeframe is for the upcoming week.
- Use cases: Exceptions, disruptions, delays, errors, overdue items; reviews or approvals; opportunities to mitigate potential risks.



Read more guidelines for the [On Your Radar widget](#).

On Your Radar: KPIs

- 2 to 4 KPI tiles are permitted per Stats widget.
- Label should be no longer than two lines
 - Follow sentence case (only first letter capitalized)
 - Follows a format such as:

“Quantity + Items + Status”

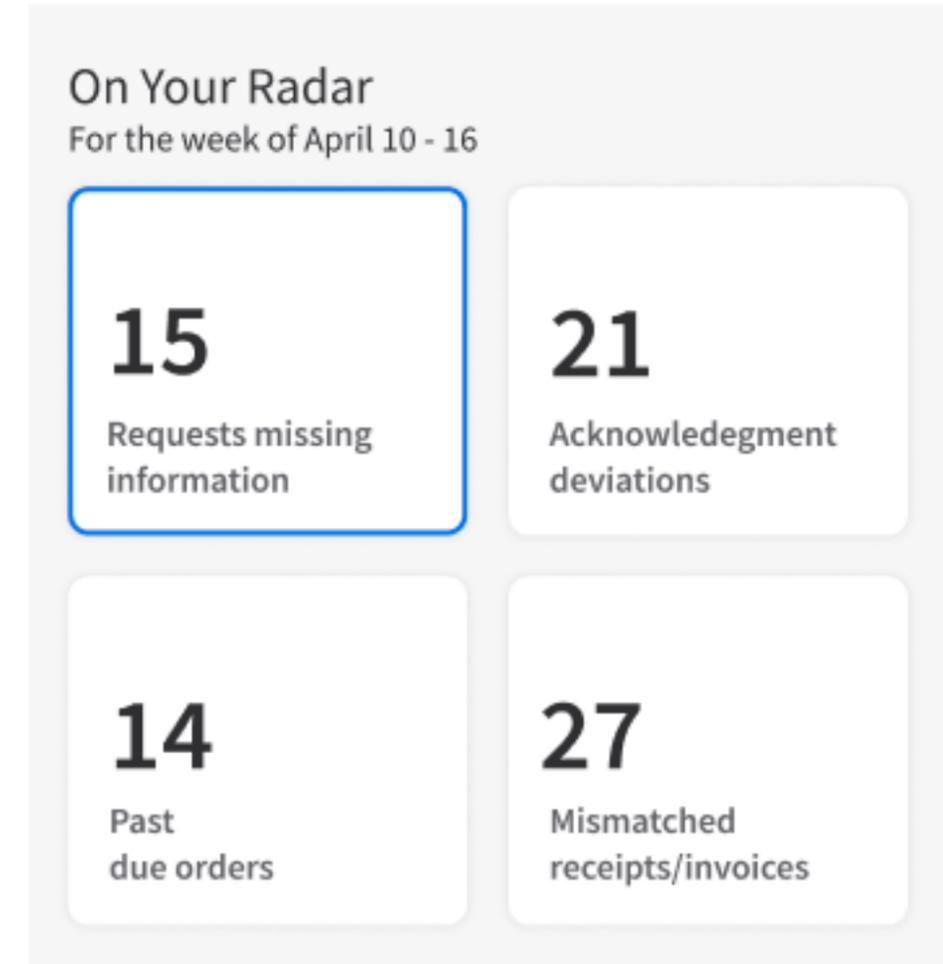
OR

“Quantity + Status + Items”

Examples:

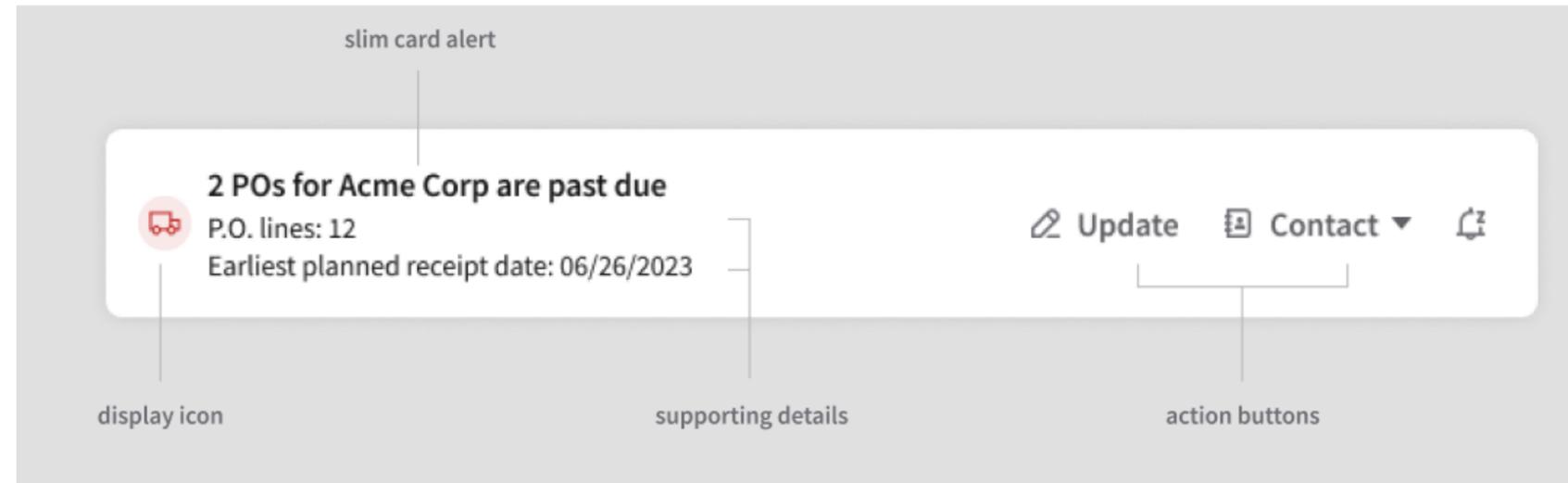
- 15 Requests missing information
- 14 Past due orders
- 27 Mismatched receipts/invoices

Read more guidelines for the [On Your Radar widget](#).

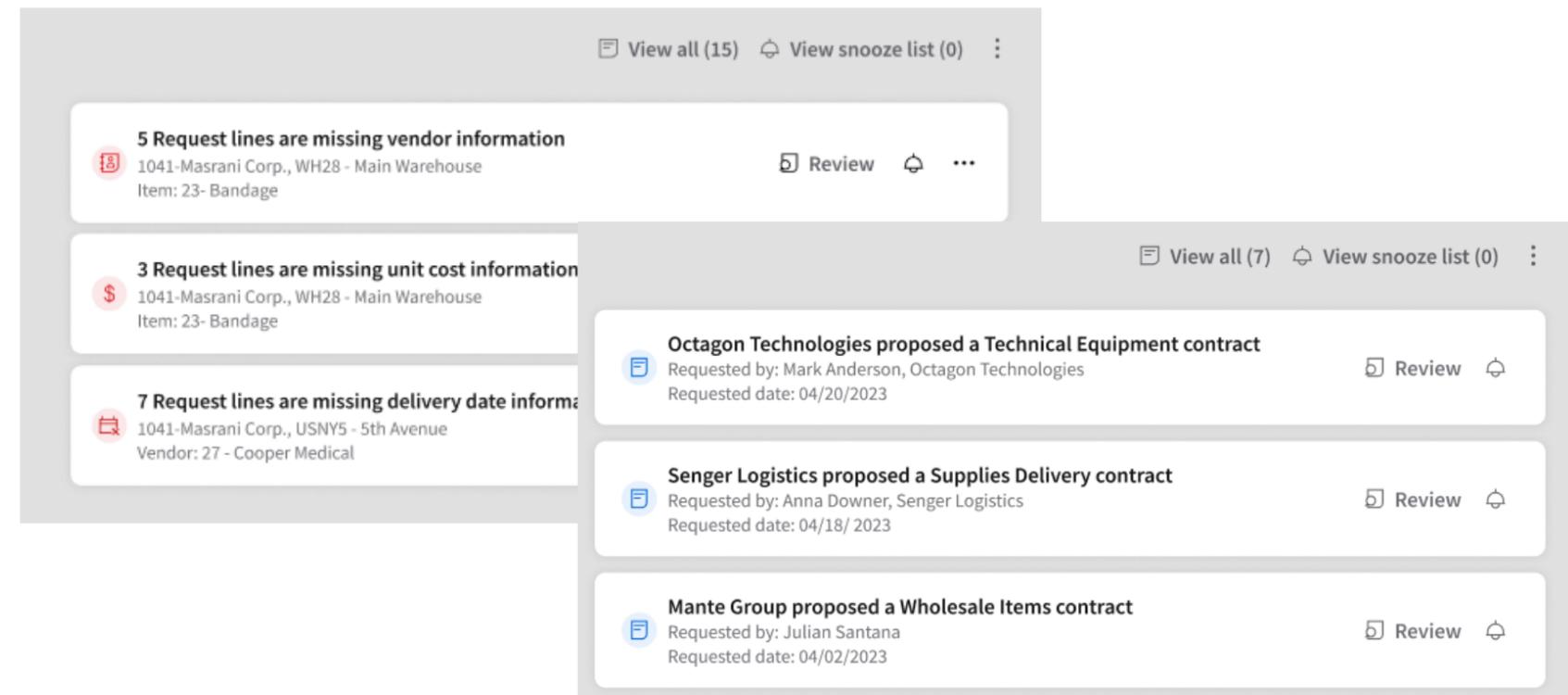


On Your Radar: Slim Cards

- There are a maximum of 3 slim cards displayed by default per Listview Card List widget.
- The other items can be found using the “View All” link at the top, which opens a popup modal.
- Limit the slim card alert to one line.
 - Add quantity of items, if applicable.
 - State the item first, followed by its status.
 - Follow sentence case and use active voice.
- Add up to 2 lines of supporting details, but only if it helps with the action.
- Consider grouping items when the action can be done in bulk. (For example: By vendor, customer, category.)



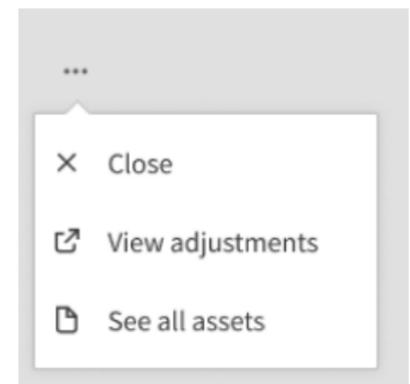
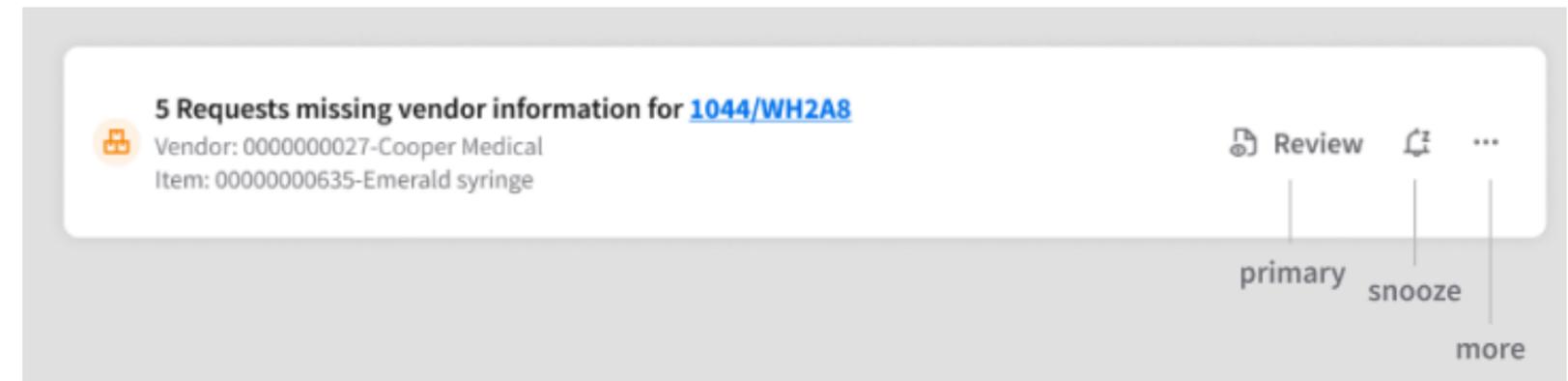
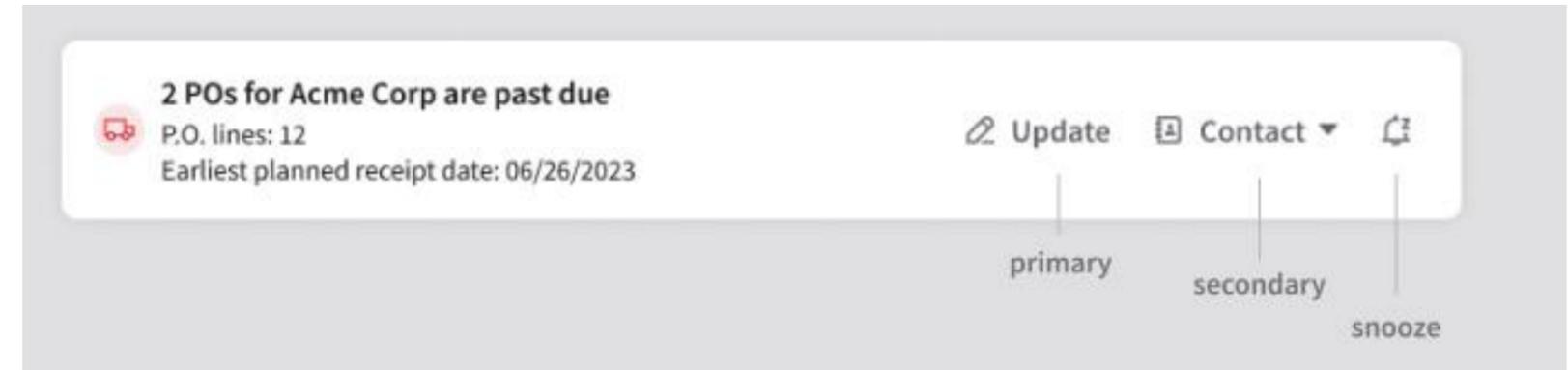
Examples:



Read more guidelines for the [On Your Radar widget](#).

On Your Radar: Actions

- Use no more than 3 action buttons: Primary action, secondary action (optional), and Snooze.
 - If you must use more than 3 action buttons, only display the primary action and Snooze. Use the more button (...) to hide the other actions.
- Use concise, action-oriented words for button labels related to alert status.
 - Capitalize the first letter of the button label.
 - Commonly used actions include: Review, Release, Approve, and Follow up.
- Buttons can either complete a task, provide a pop-up window, or link to an application screen.



For more guidance about using action-oriented words, refer to the [UX Writing Guidelines for buttons and links](#). System icons are available in the [Design System icon library](#).

Modals vs. Contextual Action Panels (CAPs)

The decision to use a modal or a contextual action panel for your pop-up window depends on the action that the user needs to take.

Use a **modal** if you're showing another list or a read-only data grid and direct users to a specific screen in the application. Use for "View all" and "Snooze" lists.

Use a **contextual action panel (CAP)** if you're showing a form or a data grid with columns that need user input.

Read more guidelines for the [On Your Radar widget](#).

Modal examples

The image shows two modal windows. The left modal, titled 'Asset Transfers', displays a list of three asset transfer records. Each record includes the asset name (e.g., '0001 - Dell laptop'), type, user, and transfer date, with 'Release' and 'Reset' action buttons. The right modal, titled 'Deviations', shows a table of asset deviations with columns for Asset, Book, Life, Life remaining, Current, and Previous depreciation values.

Asset	Book	Life	Life remaining	Depreciation	
				Current	Previous
2345 - Dell laptop	GAAP	60 mos	30 mos	150	120
2346 - Scanner	Book 1	60 mos	30 mos	170	135
2345 - Dell laptop	GAAP	60 mos	30 mos	250	200
2345 - Dell laptop	GAAP	60 mos	30 mos	250	190
2345 - Dell laptop	Book 2	60 mos	30 mos	250	220

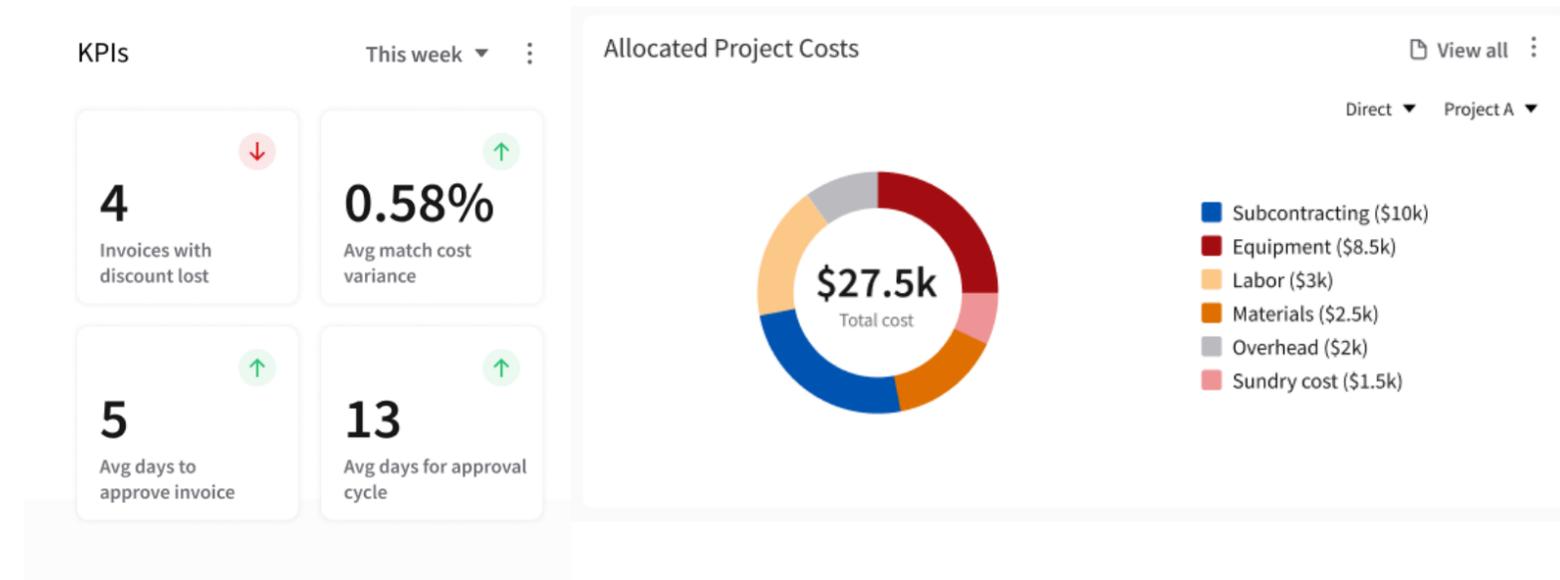
Contextual action panel examples

The image shows two contextual action panels. The left panel, titled 'Asset ABC123', contains a form with three date input fields: 'Capitalization date', 'Current period', and 'In-service date', each with a calendar icon. Below the form is a checkbox labeled 'Suppress journal entries'. The right panel, titled 'Requests Missing Information', displays a table of requisition and inventory control records with columns for Source, Document/line, Quantity, Currency, Unit cost, Delivery, and Vendor.

Source	Document/line	Quantity	Currency	Unit cost	Delivery	Vendor
Requisition	123/1	23 EA	USD	1,294.00	04/05/2023	Select
Requisition	141/7	3 EA	CAD	3,382.00	04/05/2023	Select
Requisition	131/3	19 EA	CAD	7,922.00	05/02/2023	Select
Inventory Control	112/5	5 EA	CAD	9,280.00	05/02/2023	Select
Inventory Control	98/2	11 EA	USD	15,204.00	05/08/2023	Select

Metrics and Data Visualizations

- Metrics and data visualizations can help the user make a quick assessment of a situation so they can act upon it.
- The Stats widget can be used as a standalone 1x1 widget for key metrics.
 - The widget should have a title such as “KPIs” or “Financial Performance” (not “On Your Radar”).
 - There can be 2 to 4 KPI tiles.
- You can also use data visualizations such as bar, line, or donut charts.
 - Use filters to help group your data and consider where presenting aggregate metrics makes more sense to meet the user’s needs.



The table 'My Program Performance' (updated today at 08:00AM) lists performance metrics for various programs and projects. The columns are Program, Project, Delivery date, CPI, SPI, VAC, and OTP. Each metric is accompanied by a trend indicator (up/down arrow) and a numerical value.

Program	Project	Delivery date	CPI	SPI	VAC	OTP
F35 - Global Strike Fighter	bxy123 - Fuselage	Jan 30, 2024	▲ 3.34	▲ 86.64	▲ 1.00	▲ 86.64
F35 - Global Strike Fighter	bxy 124 - Right Wing	Jan 30, 2024		▲ 93.21	▲ 1.00	▲ 93.21
F35 - Global Strike Fighter	bxy125 - Left Wing	Feb 15, 2024	▼ 0.23	▲ 2.056	▲ 1.25	▲ 2.056
F35A - Lockheed Martin	Tailplane activator	Mar 15, 2024	▼ 1.41	▲ 17.63	▼ 0.23	▲ 17.63
F35A - Lockheed Martin	Martin-Baker MK16	Mar 15, 2024	▲ 2.35	▼ 14.28	▲ 0.11	▼ 14.28

Read more about [charts from the Infor Design System](#)

Important Links

A 1x1 borderless widget that:

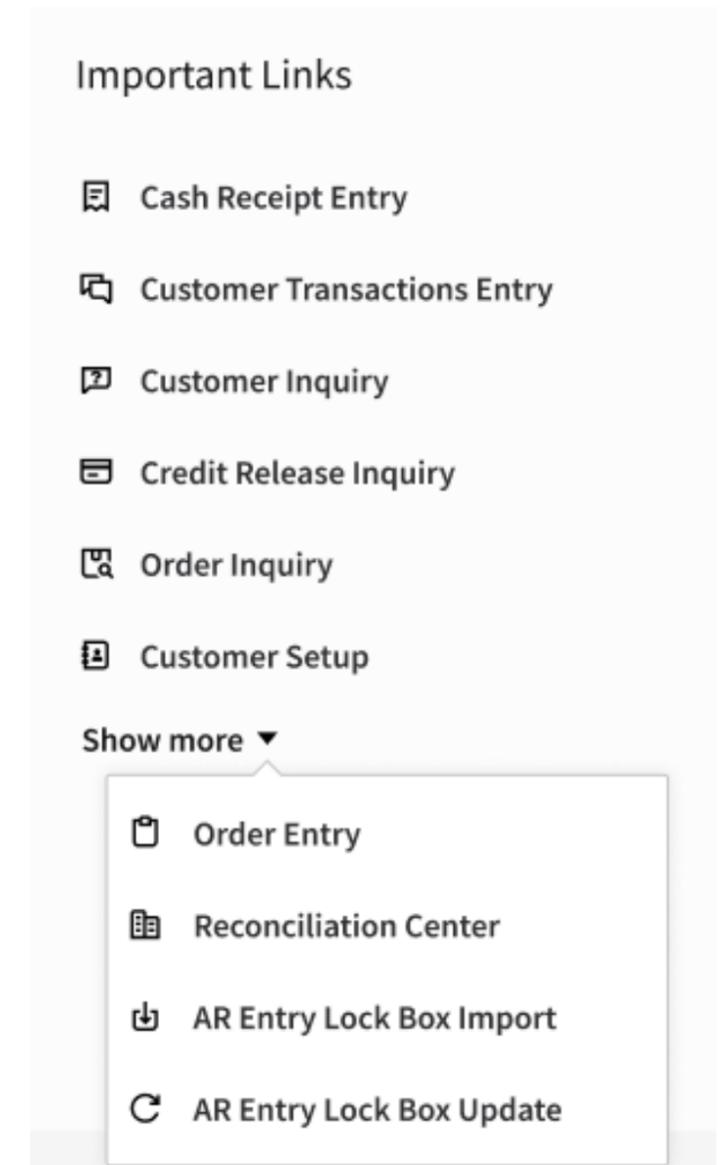
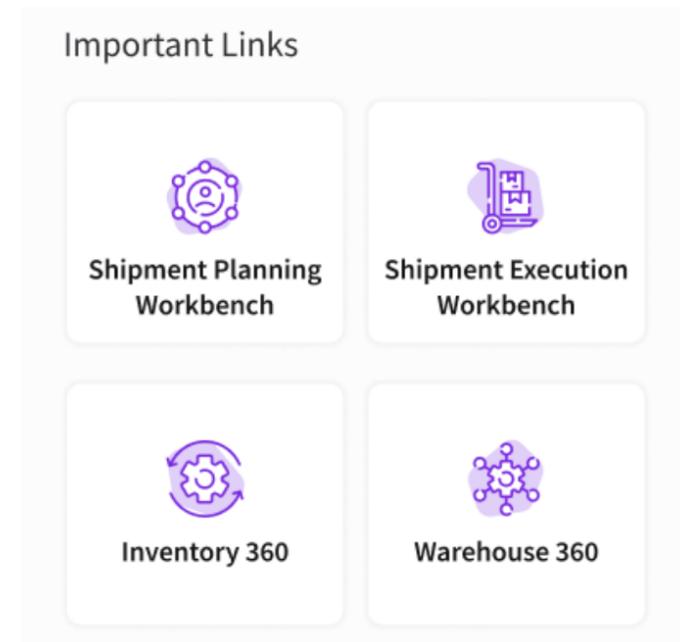
- Displays at least 2 links.
 - 2 to 4 links can use the tile pattern with special icons.*
 - The list of links can show up to 7 links OR display 6 links and a “Show more” option.
- Can link to relevant Infor application modules/screens or external links.
- Try to limit the link label to one line and follow title case.

*Icons can be requested in Jira via the IDS project.

Review the guidelines for [Important Links](#).

Refer to the [UX Writing Guidelines for buttons and links](#).

System icons are available in the [Design System icon library](#).



Quick Actions

A 1x1 borderless widget that displays simple actions that the user can complete in a contextual action panel (CAP).

Use	Don't Use
<ul style="list-style-type: none">• To perform simple actions. (For example: Look up contact information or update a date or status.)• Routine actions that don't require extensive contextual information from the application.	<ul style="list-style-type: none">• To perform lengthy or complex actions that require more context and are more efficiently performed through the application.• Analyze, sort, or filter data is required before taking action.*• Multiple actions are required.*

*Consider using Important Links to go to a specific screen in the application OR a dedicated widget instead.

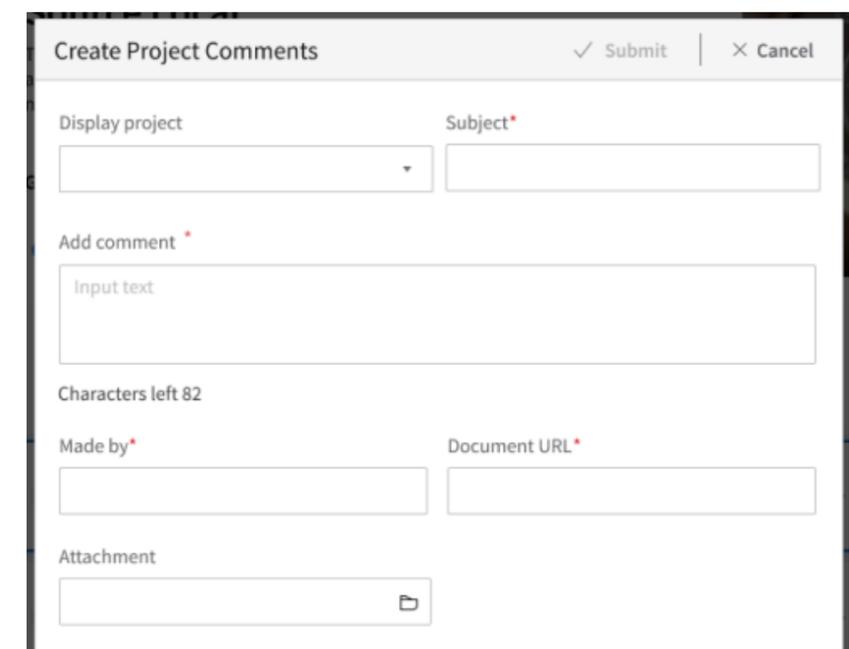
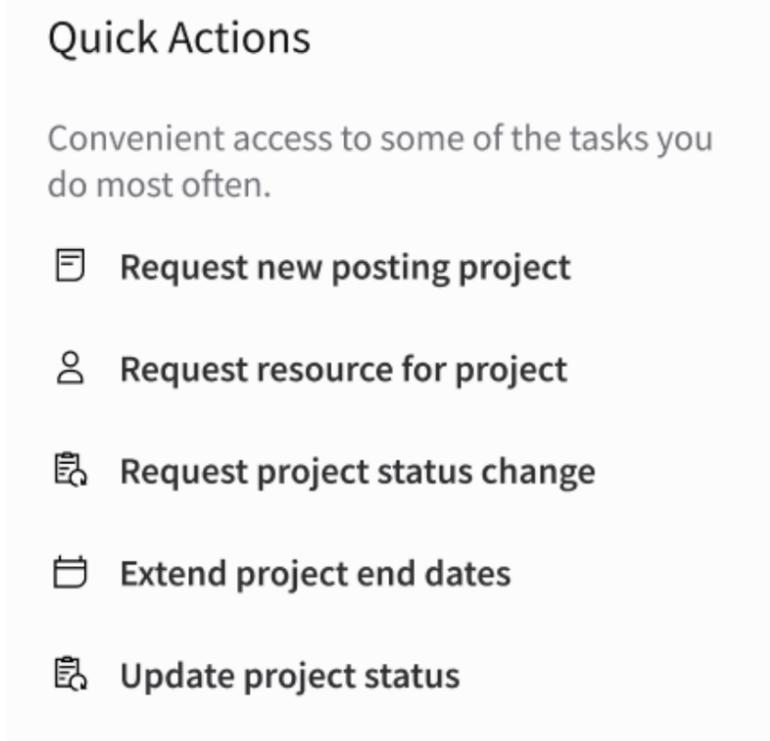
Writing Tips

- Start with a verb (action word) and end with an item.
- Limit the link name to one line and follow sentence case (only first word has a capital).

Review the guidelines for [Quick Actions](#).

Refer to the [UX Writing Guidelines for buttons and links](#).

System icons are available in the [Design System icon library](#).

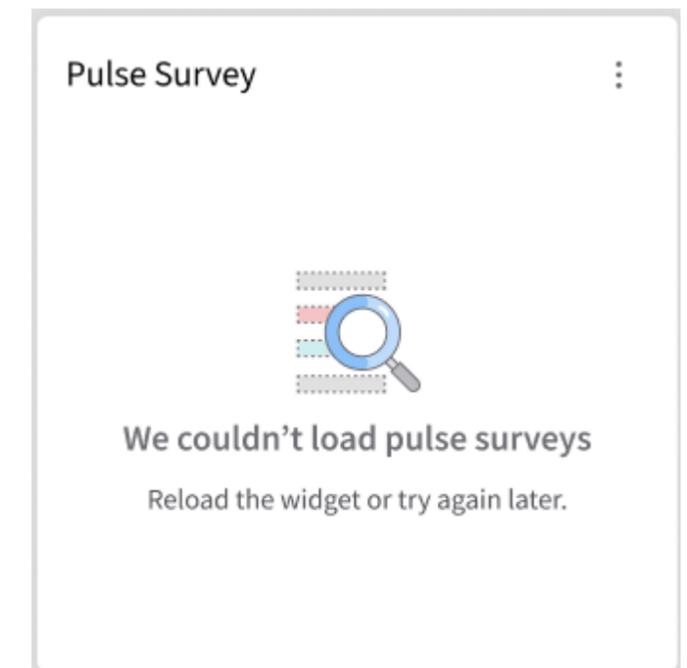
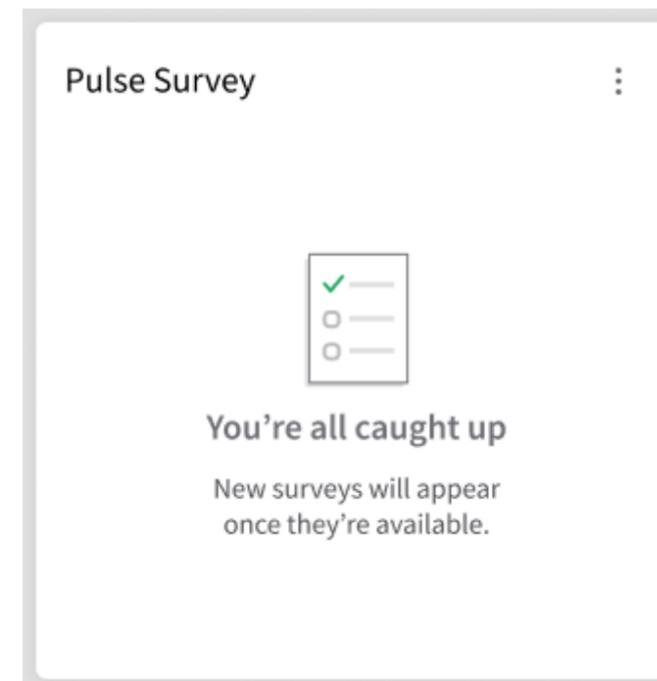
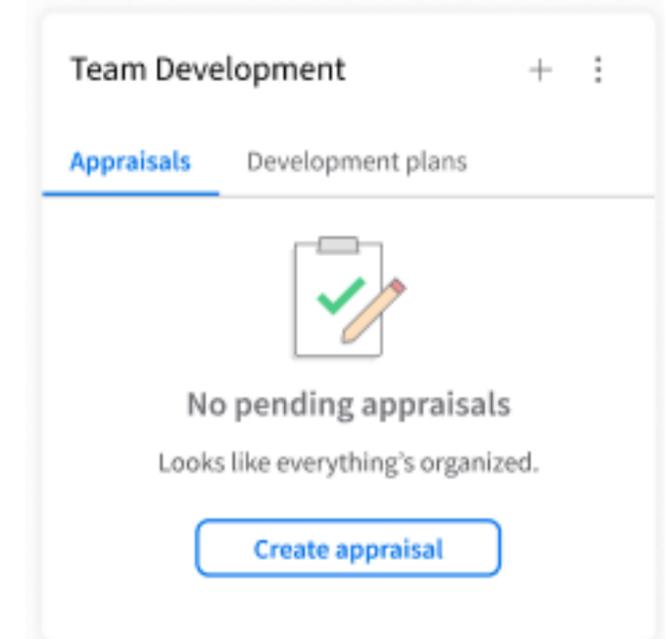
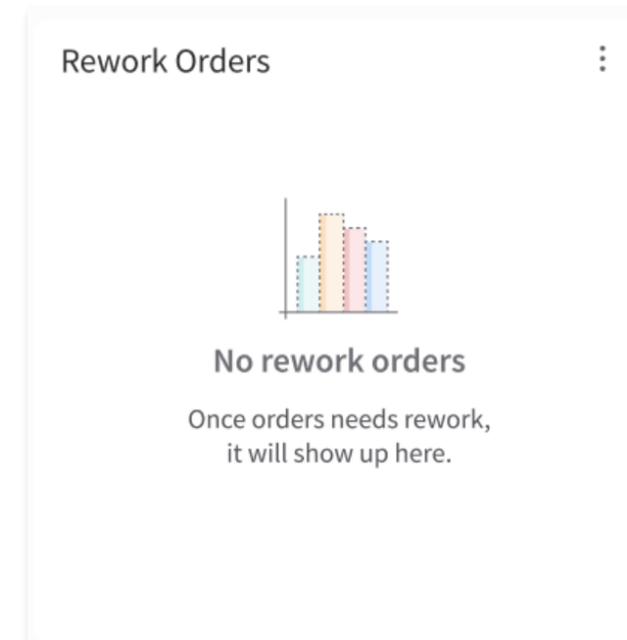


Empty States

- Don't forget to think about empty state messages for any widget that may result in an instance that has no data for the widget to display.
- Use an approved icon that's consistent with the widget function.*
- Supporting text should:
 - Include a short, clear, and meaningful description of the widget's purpose.
 - Communicate—in a simple and human voice—how to resolve the empty state, if necessary. Don't overwrite.

Refer to the [UX Writing Guidelines for empty states](#).

*Examples are [here](#).



Quiz time!

Putting it all together

My Day
Thursday, March 23, 2023

Welcome back, **Sara**

Near Relative Update
Effective July 1. We're adding step-relatives to the definition of "near relative," which already includes husband, wife, domestic partner, mother, father, daughter, son, sister, brother, and in-laws.
[Review the revised policy](#)

On Your Radar
For the week of May 17 - 23

- 15 Requests missing information
- 21 Purchase order confirmations
- 14 Orders past due
- 27 Purchase order mismatches

Important Links

- Requisition conversion workbench
- Request for quotation
- Order intake workbench
- Order fulfillment workbench
- P.O. schedules
- P.O. contracts
- Show more

Upcoming Orders
Next 2 weeks

Date	Exceptions	Review
Mon, Apr 17	3/250	Review
Tue, Apr 18	24/465	Review
Wed, Apr 19	21/35	Review
Thu, Apr 20	3/71	Review
Fri, Apr 21	132/238	Review
Sat, Apr 22	282/332	Review
Sun, Apr 23	13/28	Review

Unapproved Purchase Orders
P.O. count: 564 Total

Late Receipts
Receipt count: 153 Total

Ask Coleman
Have you tried Coleman digital assistant yet? Here are some questions you can ask to help make your day more productive:
[Can you tell me more about contracts?](#)
[How do I approve a forecast to a supplier?](#)
[Are there purchase orders I need to approve?](#)

My Day
Thursday, March 23, 2023

Welcome back, **Julianna**

Production Orders
Production department 1 | This week

Rework Orders
This week: 35

Late Orders
June 28 to July 4: 25

On Your Radar
For the week of April 10 - 16

- 15 Machine issues
- 21 Material shortages
- 14 Late operations
- 27 Orders to complete

Quick Actions

- Complete production orders
- Review production orders backlog
- Split production order

Important Links

- Subcontract operations
- Material issues and returns
- Machine shift report
- Machine workbench
- Split production order

Labor Absences
Monday, April 26, 2023

Work Center	Shift 1	Shift 2	Shift 3	Review
WC001	4/20	1/21	1/20	Review
WC002	1/23	1/14	0/20	Review
WC003	0/21	0/17	0/20	Review
WC004	0/21	0/17	0/20	Review

Machines

Machine	Idle	Down	Up
WC001 Assembling	1	1	2
WC002 Assembling	0	1	2
WC003 Drilling	1	0	2

Resources

We Have Some Examples...

8 All/Multiple Industries

- System Administrator
- General User
- Employee
- Employee (Shift-Based)
- Manager
- Manager (Shift-Based)
- Recruiter
- HR Professional

10 Discrete Manufacturing Industries

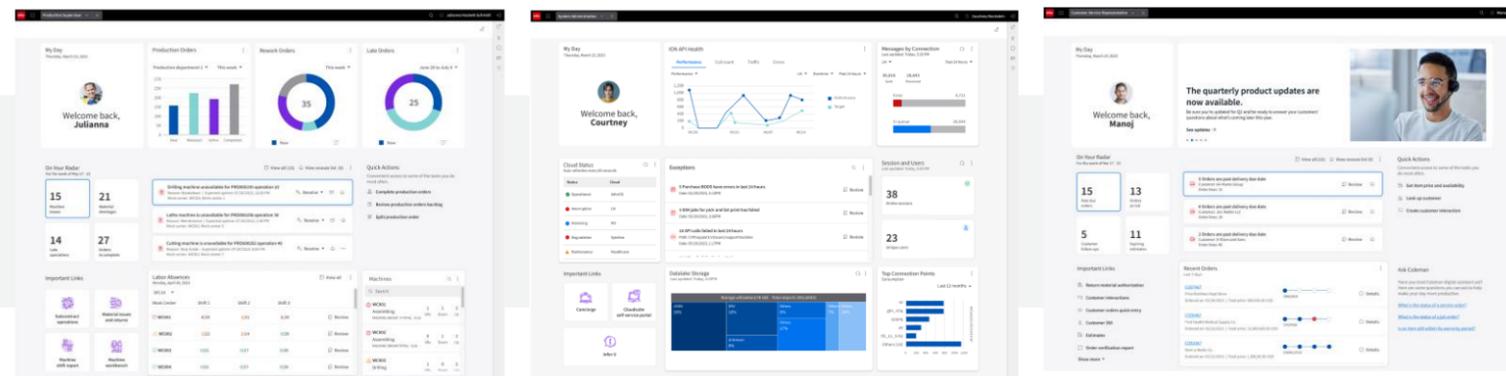
- Buyer
- Buyer (SMB)
- Production Supervisor
- Program Manager
- Payables Administrator
- Shipping Planner
- Project Accountant
- Fixed Asset Administrator
- Receivables Administrator
- Customer Service Representative (SMB)

11 Service Industries

- Buyer
- Contract Manager
- Project Manager
- Asset Accountant
- Inventory Manager
- Purchasing Manager
- Purchasing Receiver Coordinator
- Supply Chain Director
- Payables Manager
- Principal Investigator
- Staff Accountant

7 Process & Distribution Industries

- Purchase Manager
- Accounts Payables Controller
- Customer Service Representative
- Customer Service Representative (SMB)
- Buyer (SMB)
- Accounts Receivables Clerk (SMB)
- Warehouse Manager (SMB)



Standard RBWS Resources and Support

Want to learn more?

- All guidelines and templates for standard RBWS can be found here:
 - <https://inforonline.sharepoint.com/sites/IndustryCloudExperience/SitePages/Standard-RBWS.aspx>
 - This includes an [archive of past standard RBWS created by Infor Design](#)
- A more in-depth learning session will be scheduled on **July 23**. This will walk through common widgets used in past RBWS and best practices. It will be recorded and available on the [SharePoint site](#).

Need help with the guidelines? Want a review of your design?

- Please contact Daphne Liu or Alix Rosales.

Have feedback about our guidelines or templates?

- Email designfeedback@infor.com.

More Help About Workspaces and Portal

- [About Workspaces](#)
- [Customize Your Workspace Video](#)
- [Workspace Features \(for Dev\)](#)
- [Portal: Admin Flows](#)
- [Infor U OS Courses](#)
 - [OS Portal: Overview and Highlights](#)
 - [Infor OS: Workspaces Overview](#)

For questions about OS Portal and Workspace functionality, please contact Paul Horne.

Questions?