Infor Design Knowledge Share

Standard Role-Based Workspaces (RBWS) Content Design

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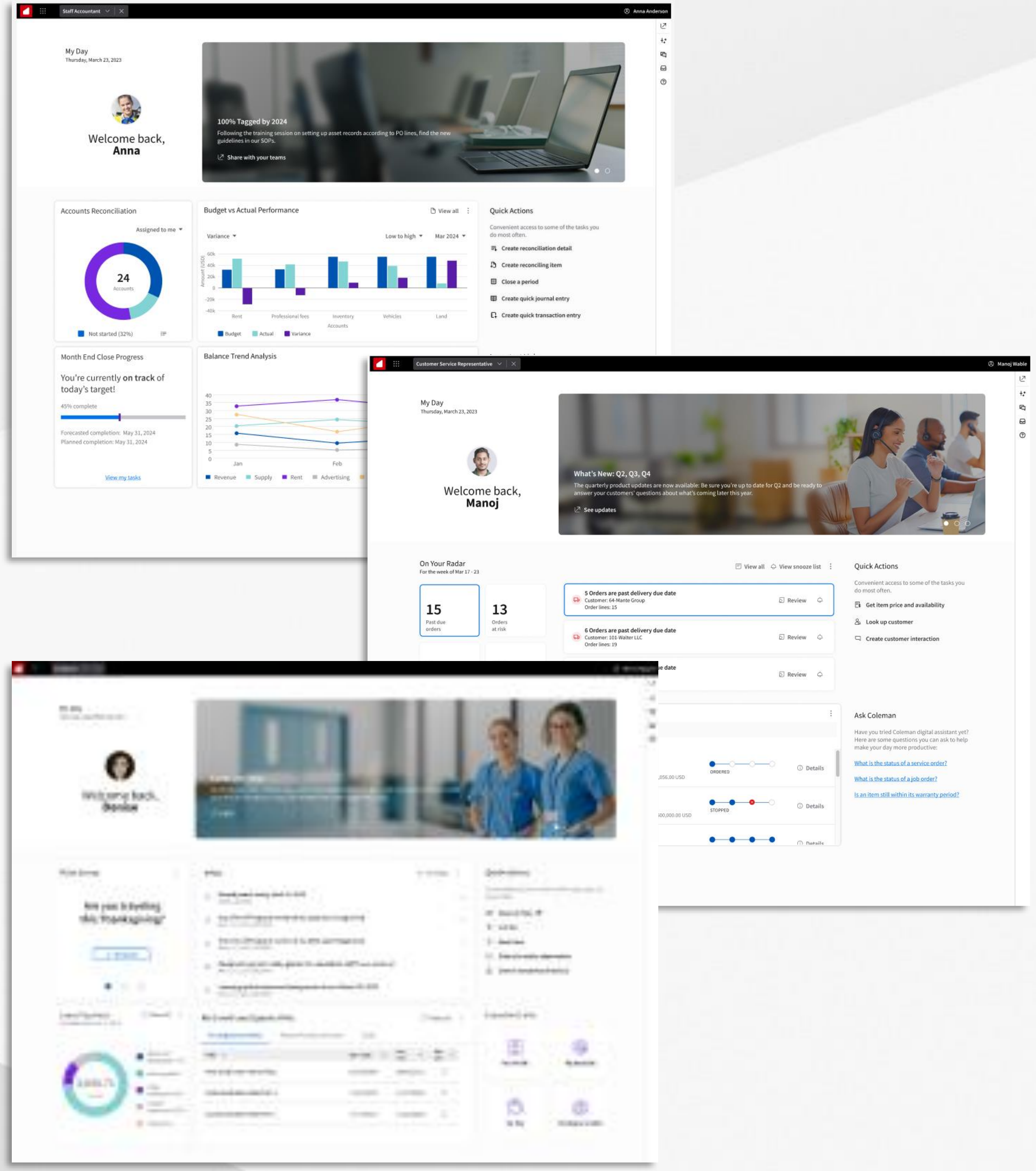
July 2024



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.

infor

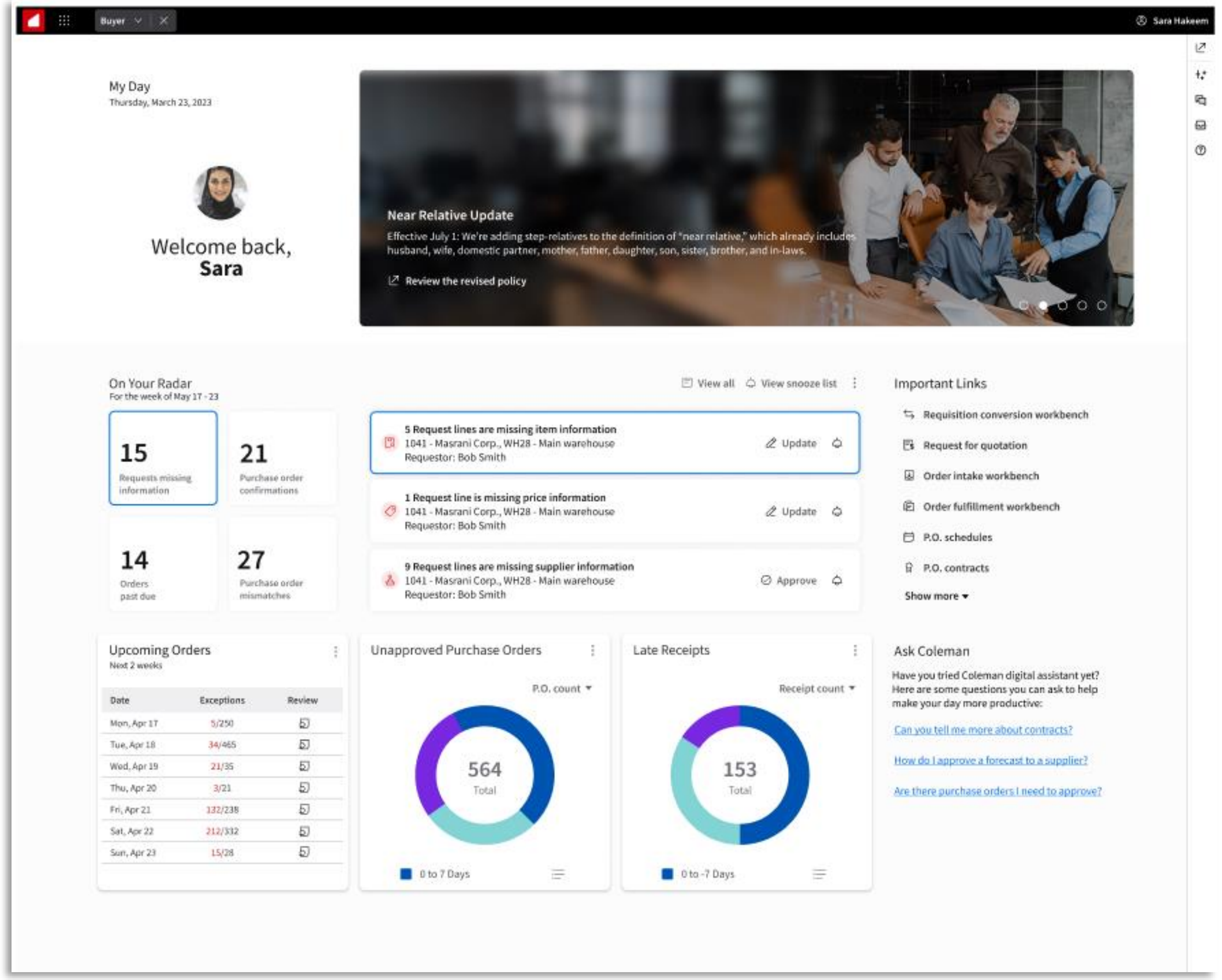
What is a Standard Role-Based Workspace?

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.

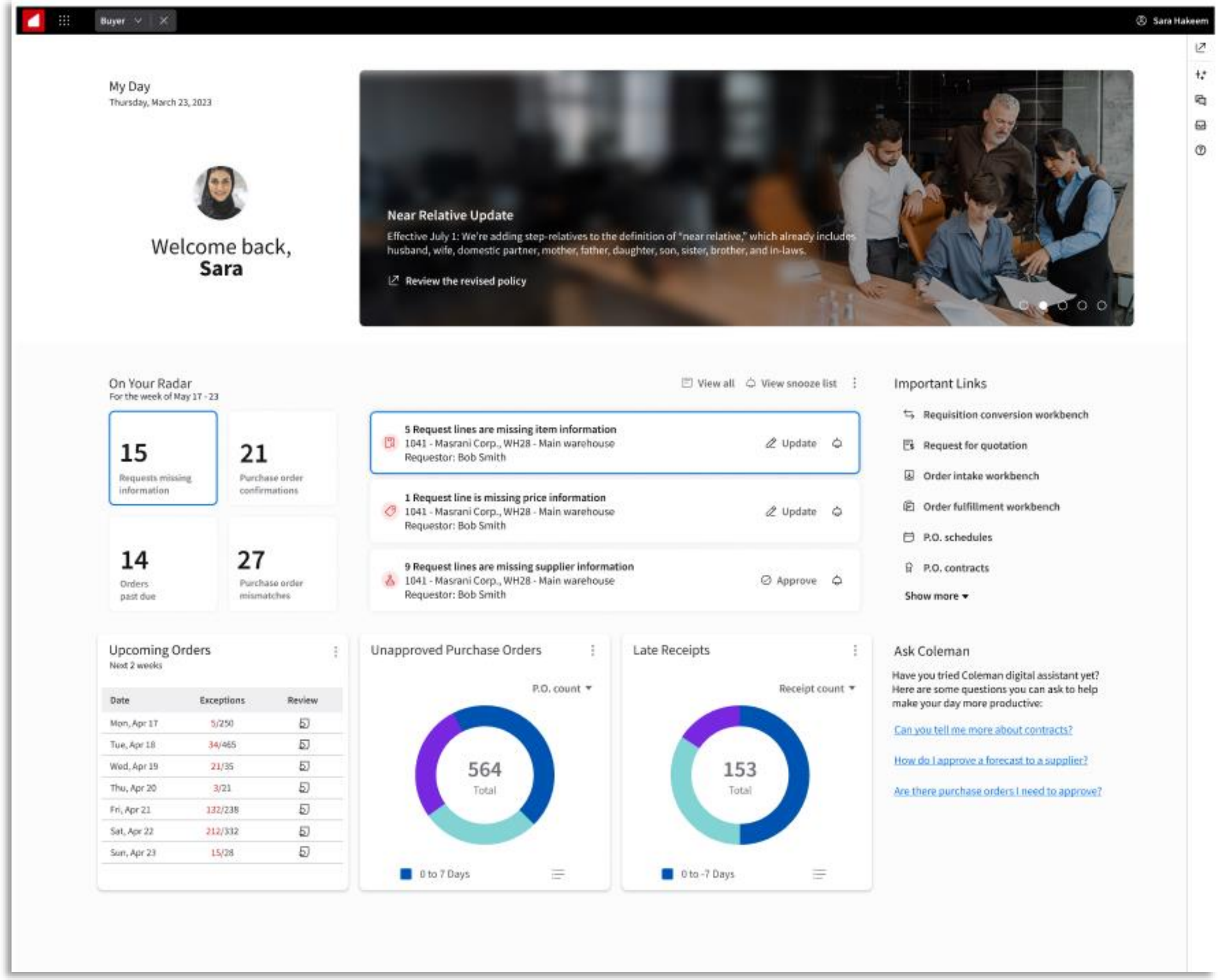
Why are they valuable?

- 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.

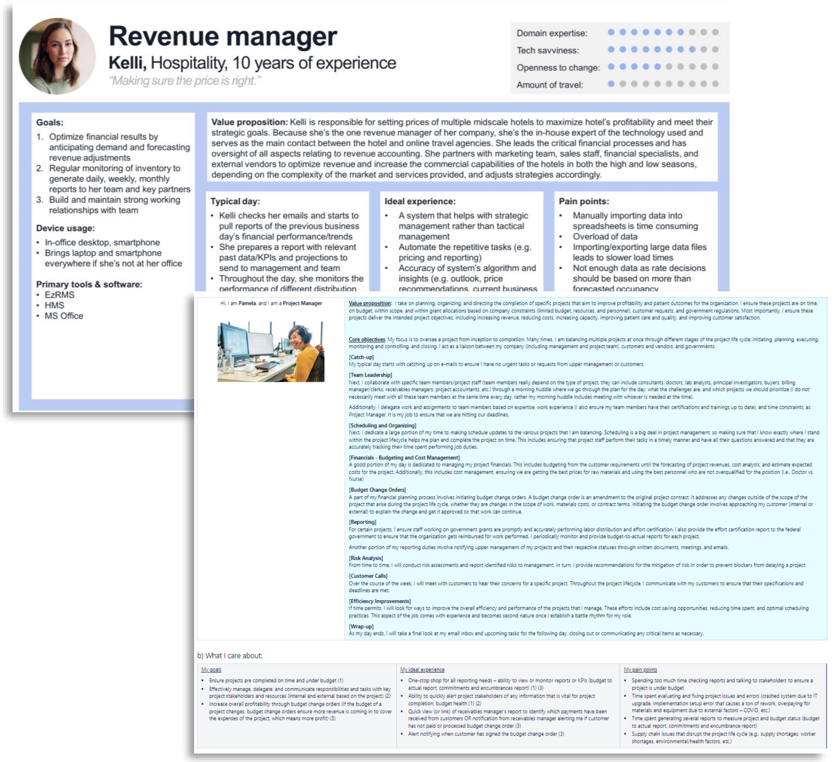
How to Create a Standard RBWS

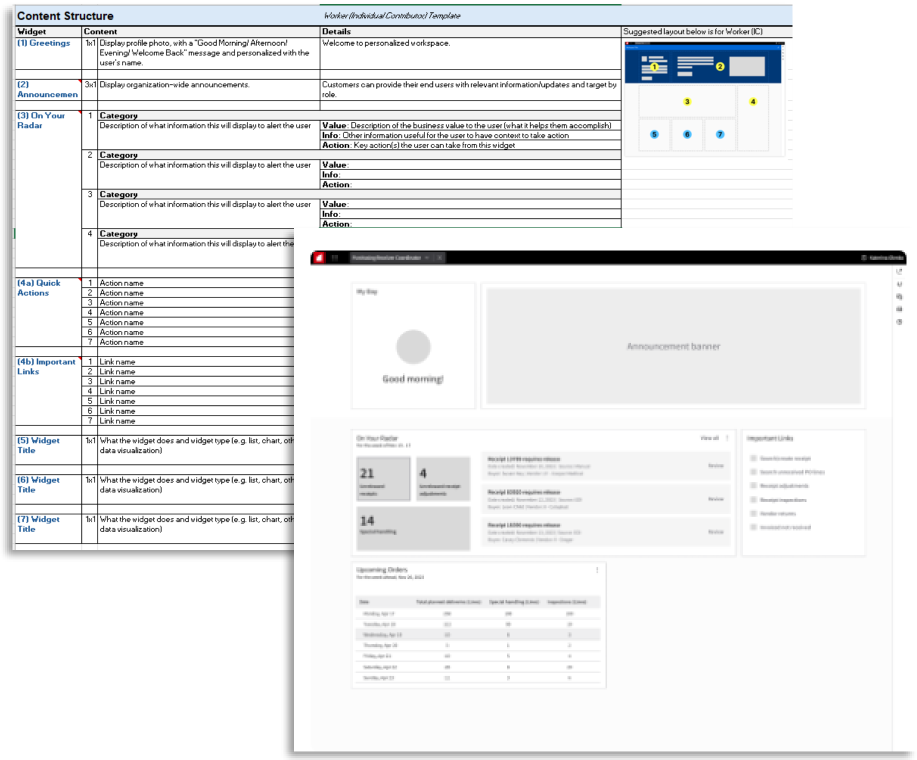
Steps

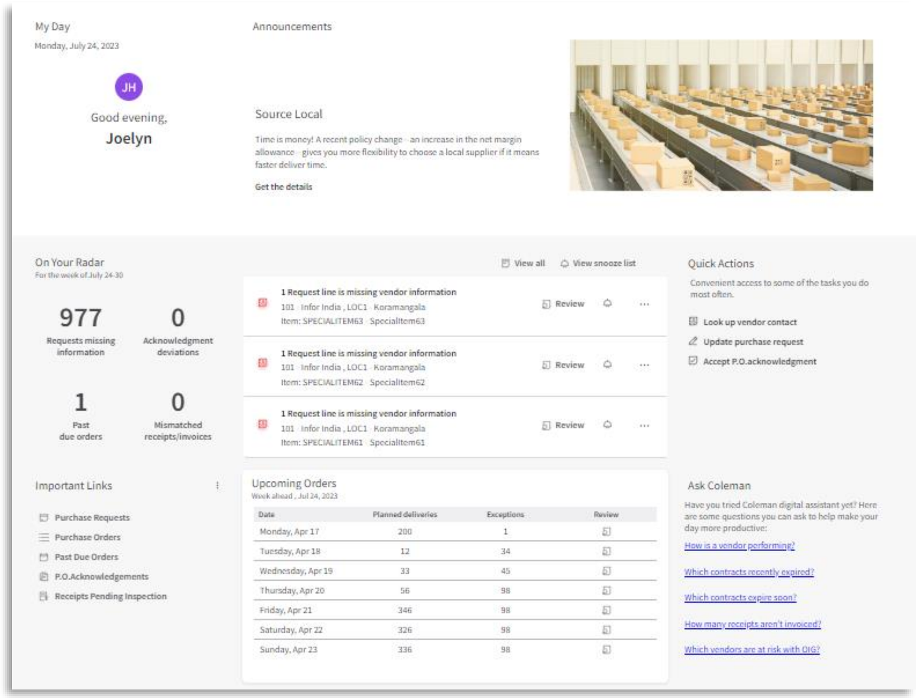
Define Persona

Design

Build







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

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

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

Define Persona

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

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.

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:

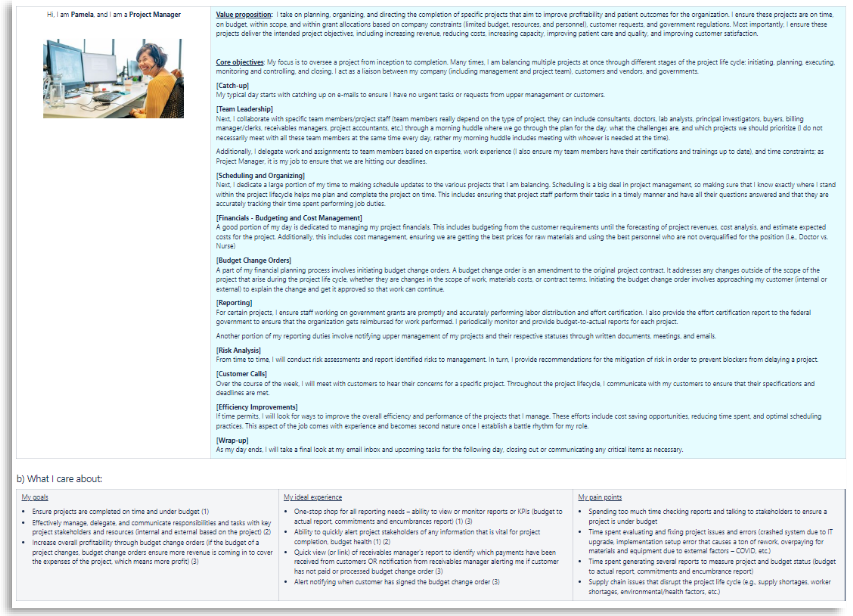
- Kelli checks her emails and starts to pull reports of the previous business day's financial performance/trends
- She prepares a report with relevant past data/KPIs and projections to send to management and team
- Throughout the day, she monitors the performance of different distribution channels (e.g.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



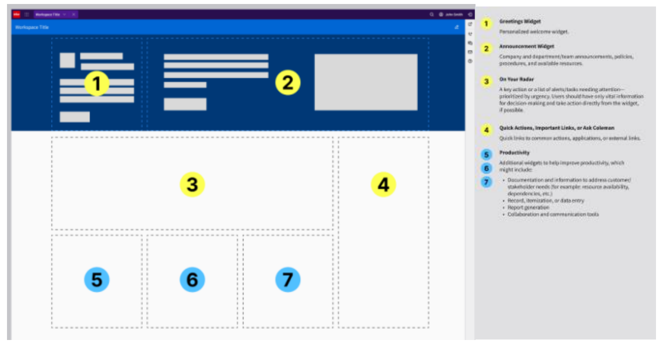
How?

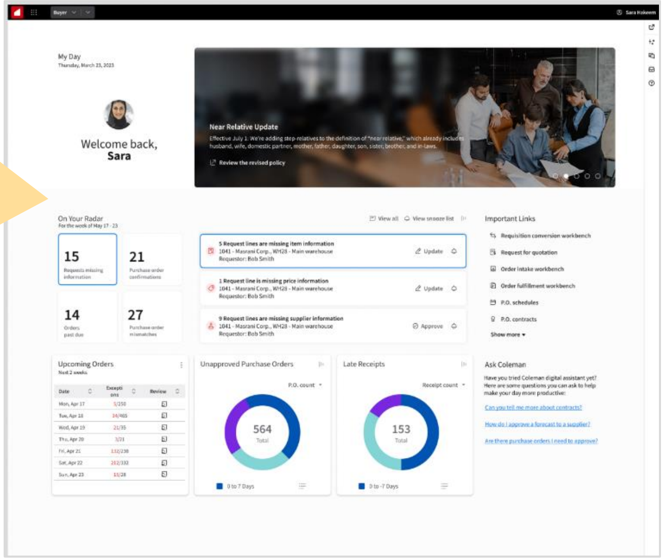
- Guidelines, templates, and examples are available to leverage:
  - ➢ [Persona Guidelines]
  - ➢ [PPT Template]
  - ➢ [Examples from T2V Program]

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.*

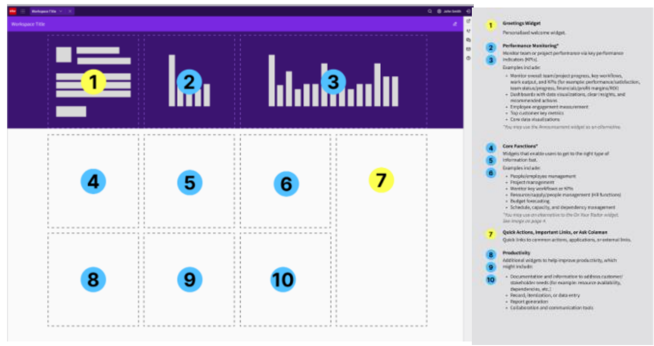
Individual Contributor (Worker)

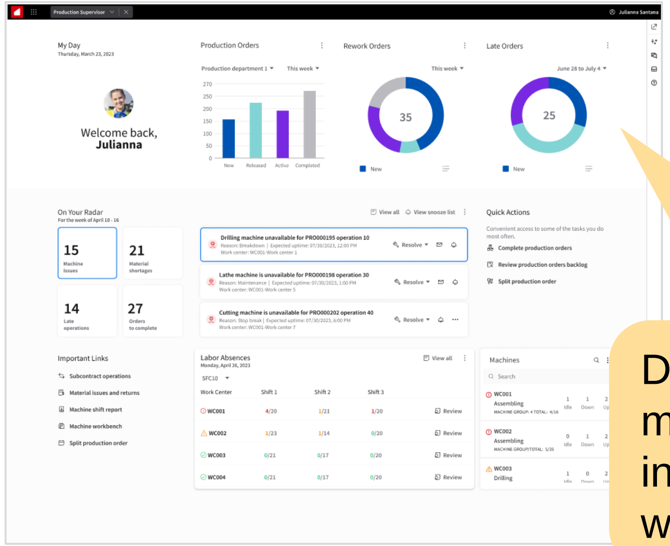




The Announcements and On Your Radar widgets are recommended for Individual Contributor roles.

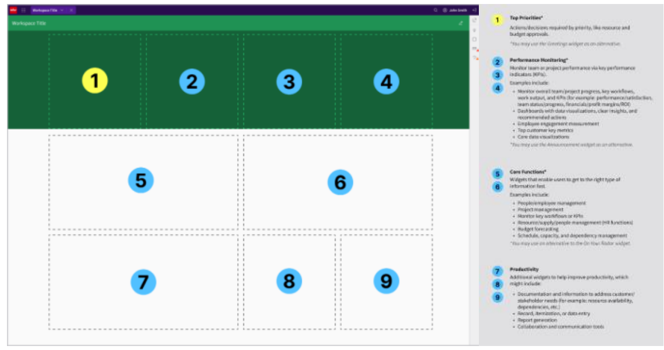
Supervisor (Manager)





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

Executive *(C-Level)*



Examples are currently WIP.

*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

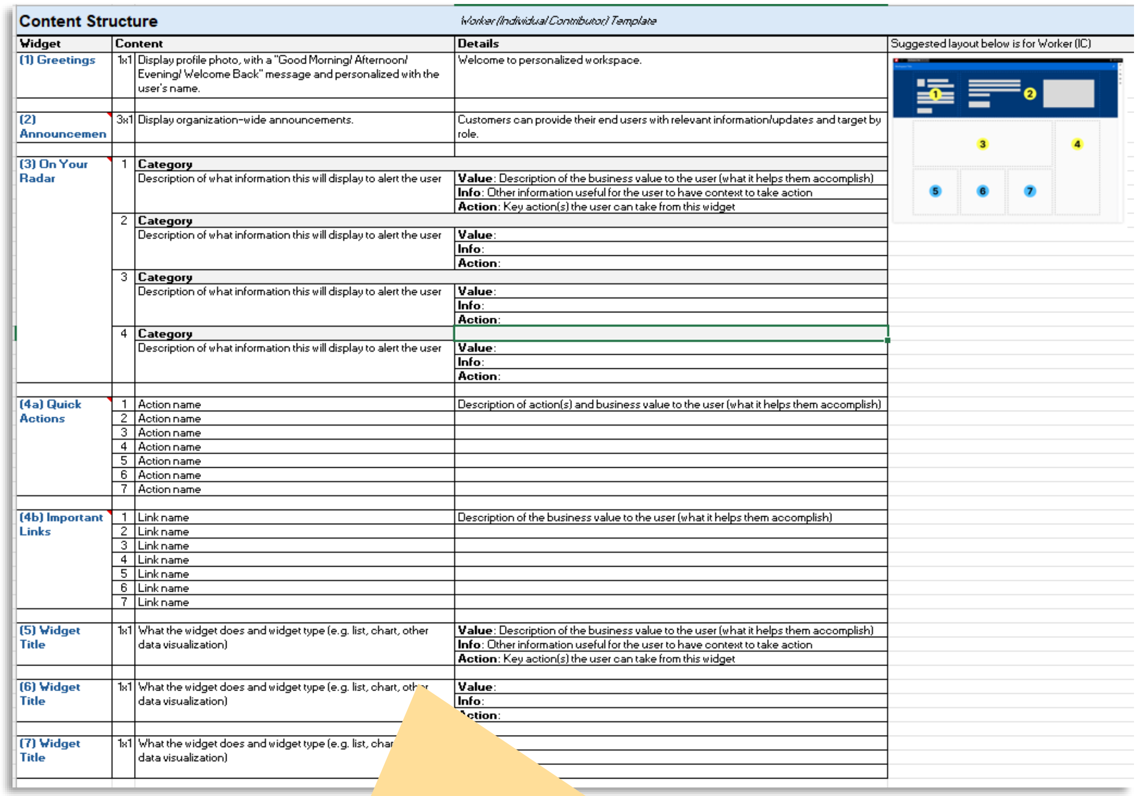
Organize the page content based on persona, user type, and priority.

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 — *Worker (Individual Contributor) Template*

Widget		Content	Details
(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) Announcemen	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	
	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, oth data visualization)	**Value**: **Info**: **ction**:
(7) Widget Title	1x1	What the widget does and widget type (e.g. list, char data visualization)	

Suggested layout below is for Worker (IC)

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			*Worker (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.	
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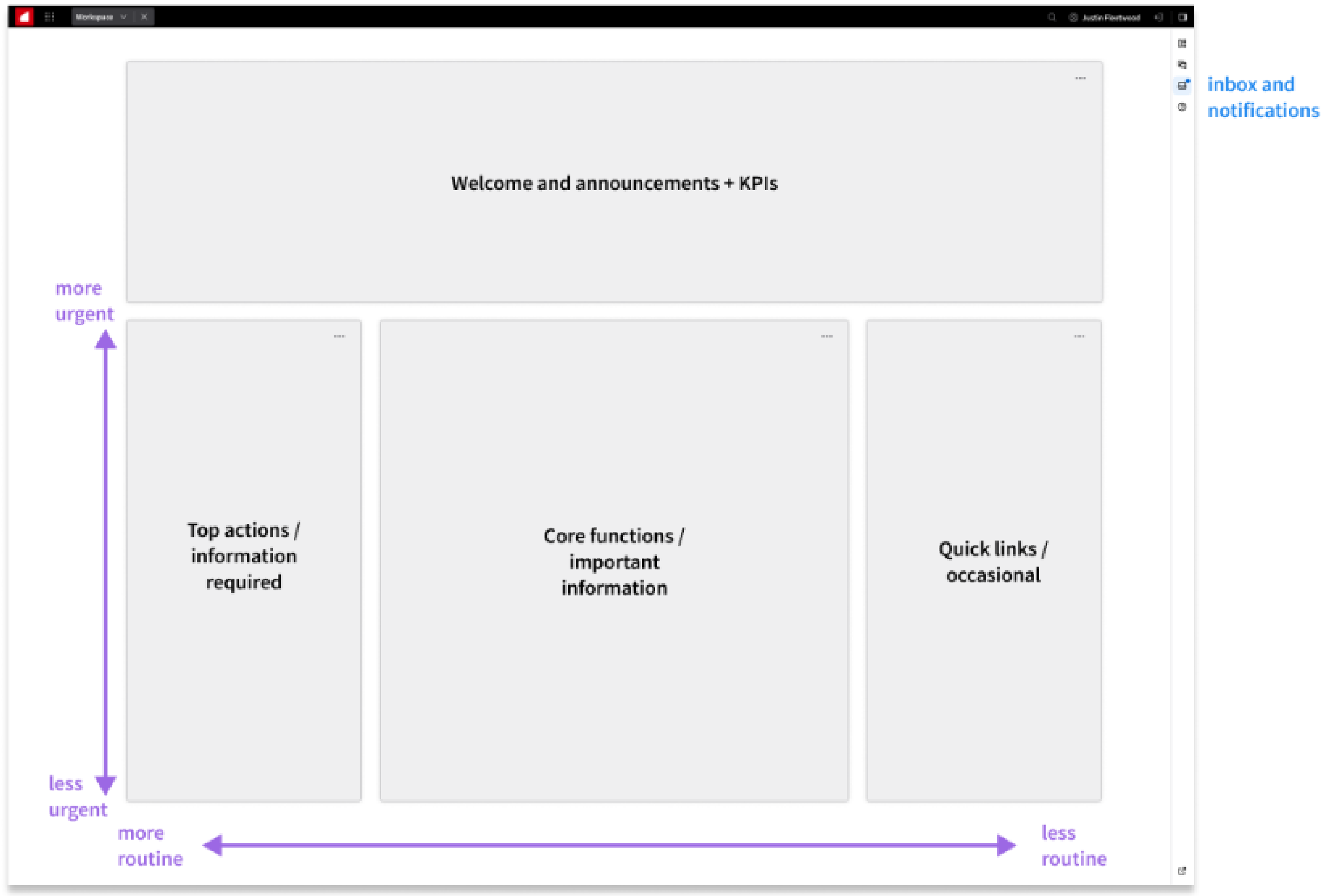
(3) On Your Radar	1	**Category**		
		Description of what information this will display to alert the user	**Value**: Description of the business value to the user (what it helps them accomplish)	
			Info: Other information useful for the user to have context to take action	
			Action: Key action(s) the 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

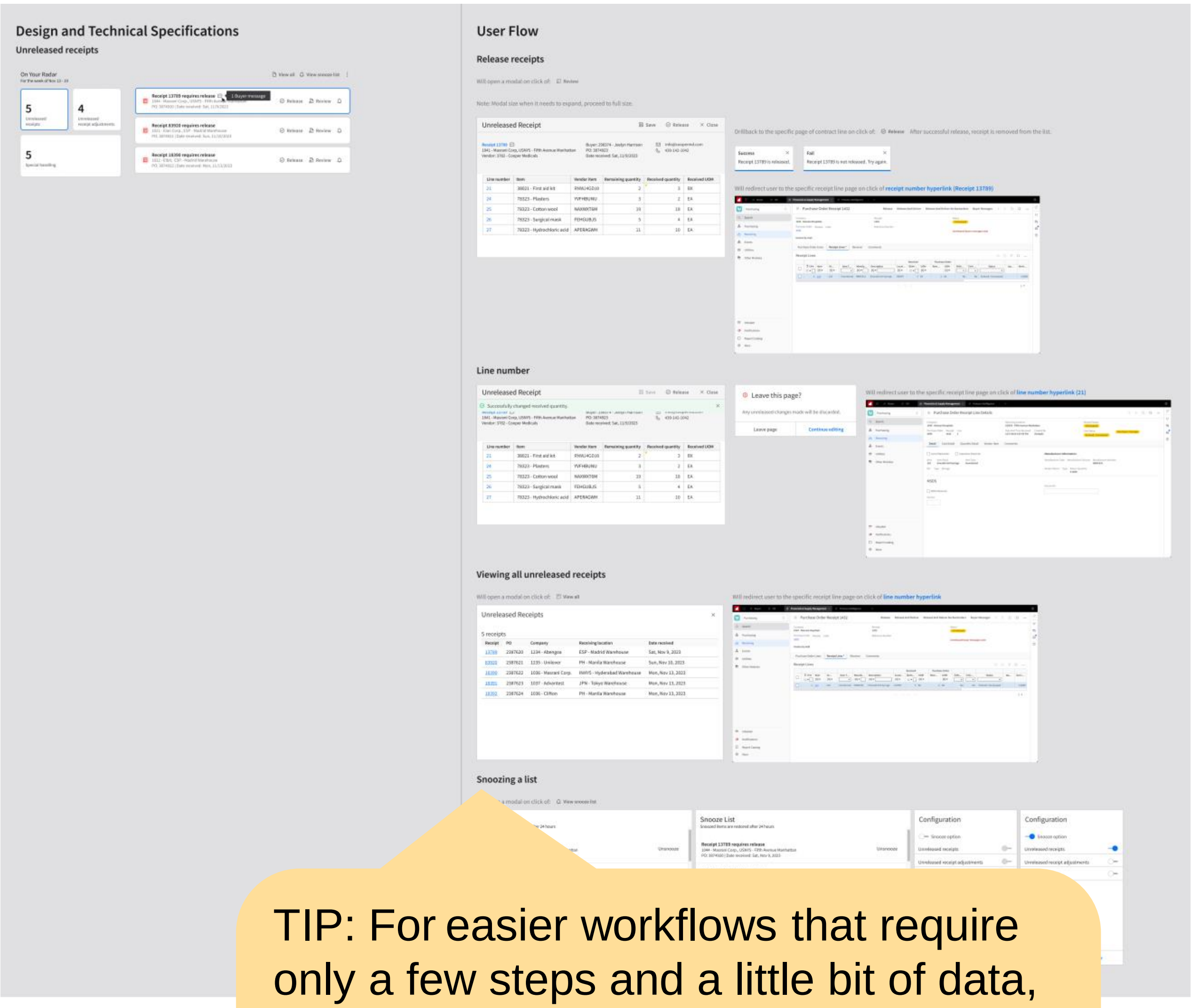
Define the details of what’s in each widget and what happens when the user interacts with the content in the widget.

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.

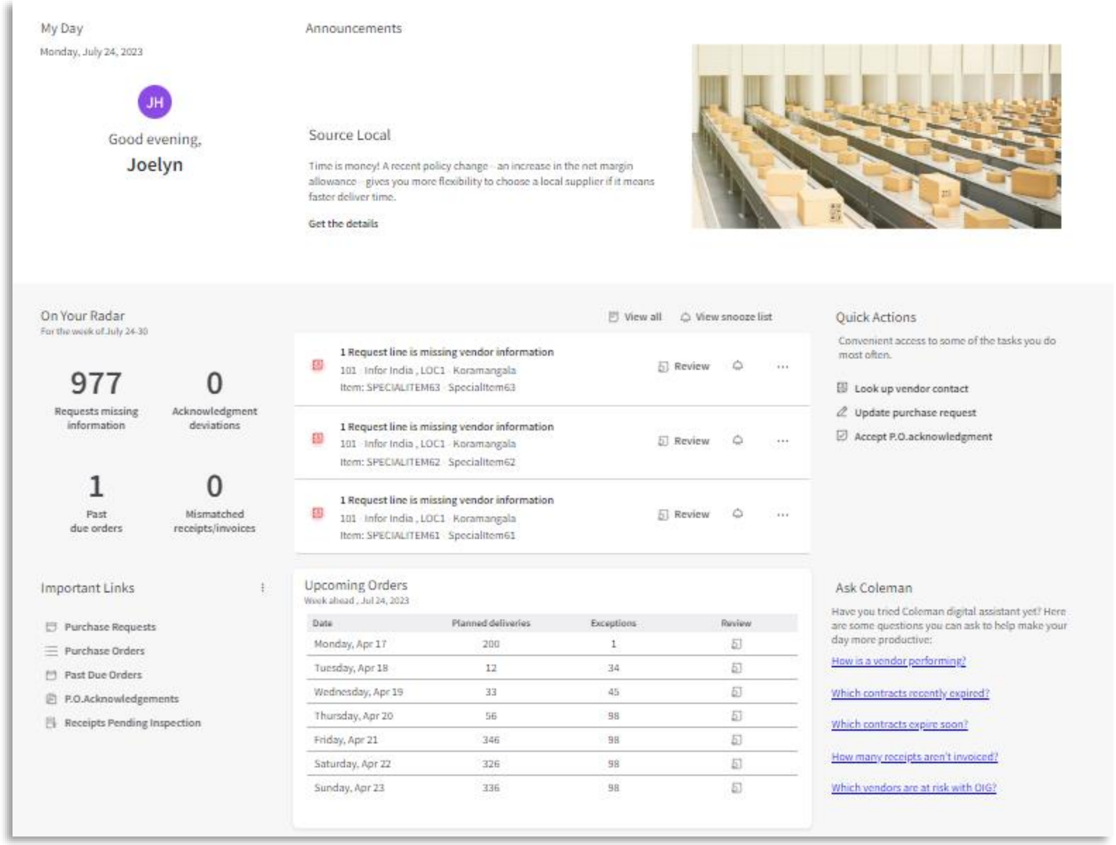
* Based on previous releases, Figma was used in conjunction with an excel file

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:

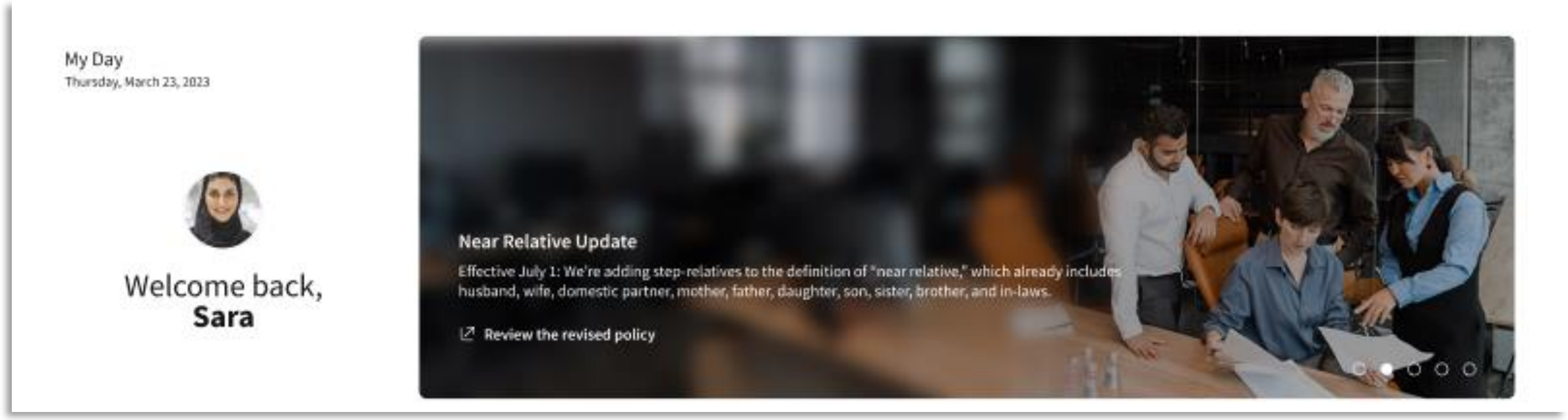
- Can the persona easily achieve their top goals?
- Does this reduce the user's cognitive load?
- Is this information actionable?
- Is this information critical for the user to make a decision?
- Is this terminology universal? Is it human-centric instead of system-centric?

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.*

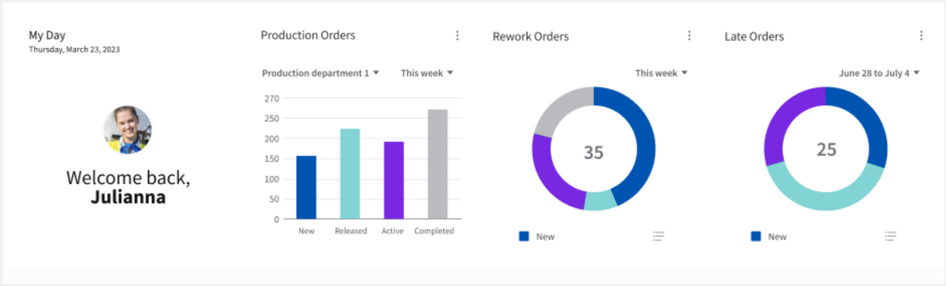


Why?

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.*



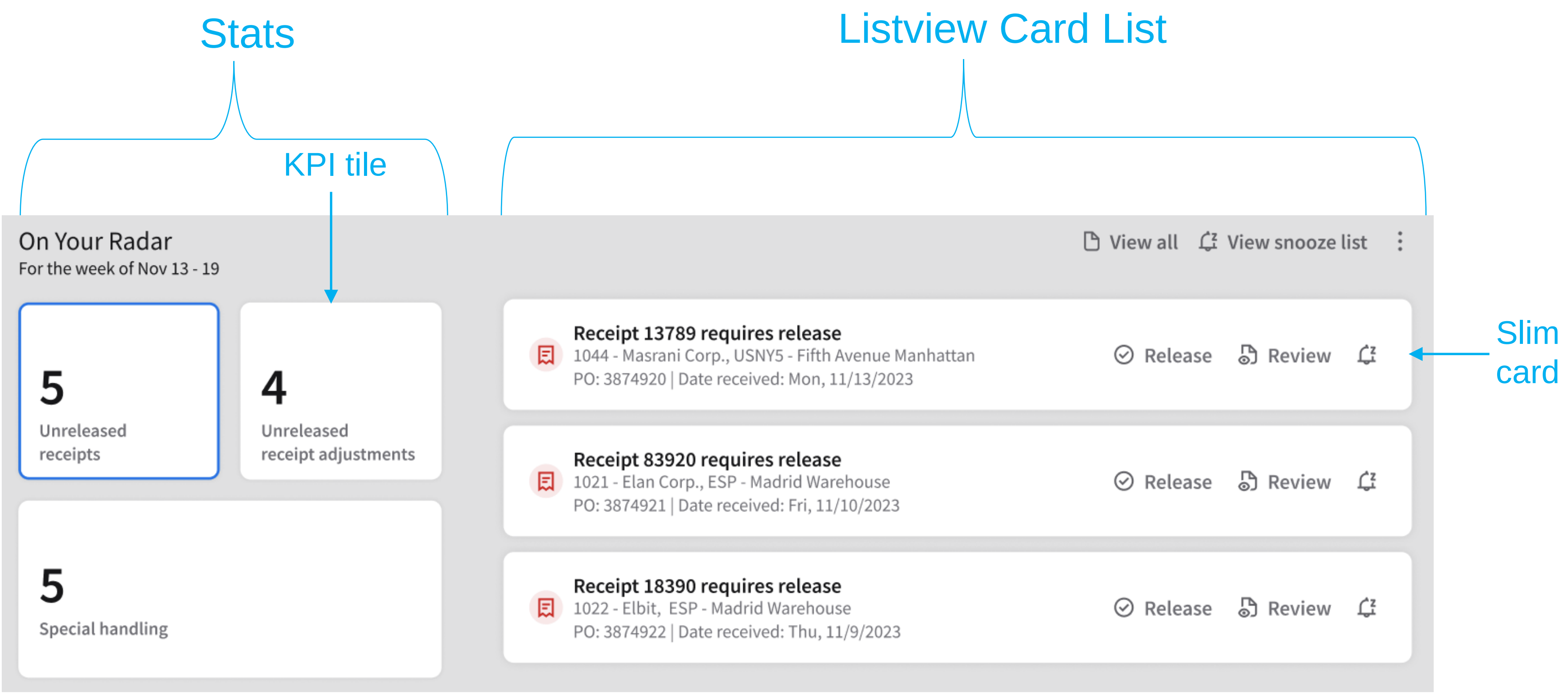
On Your Radar

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]().

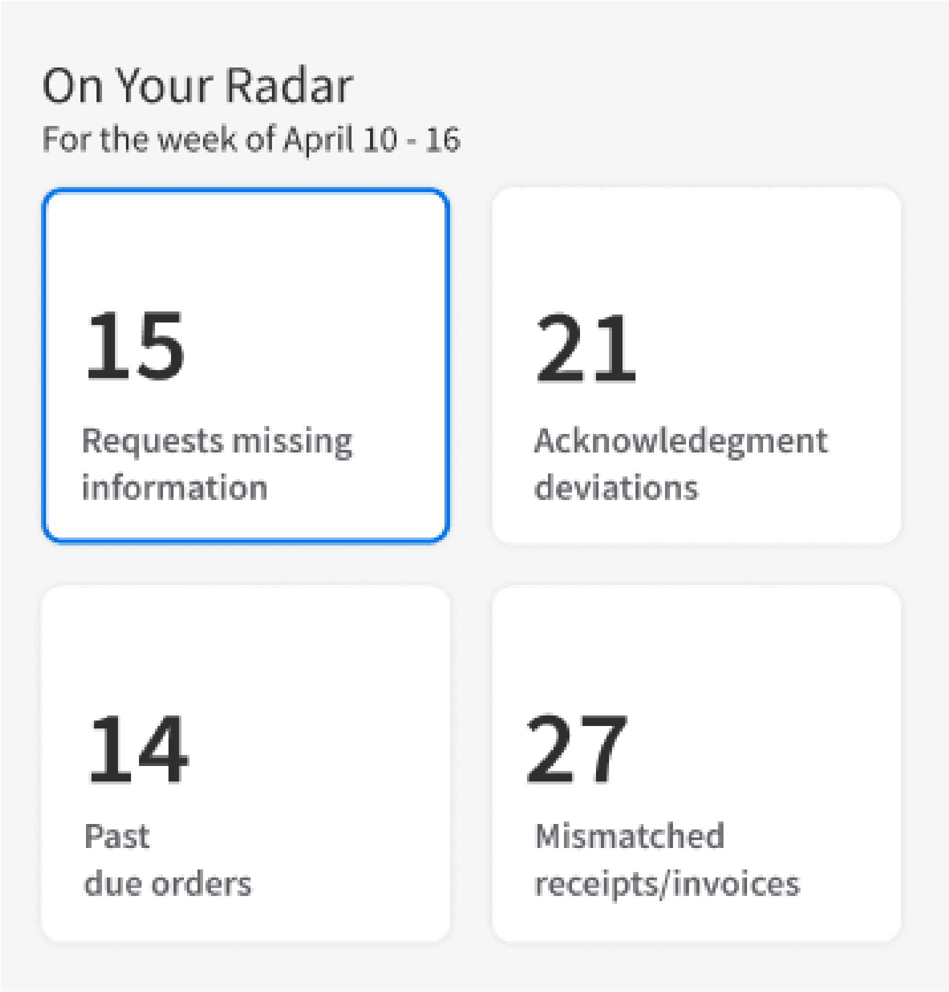
On Your Radar: KPIs

- 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:

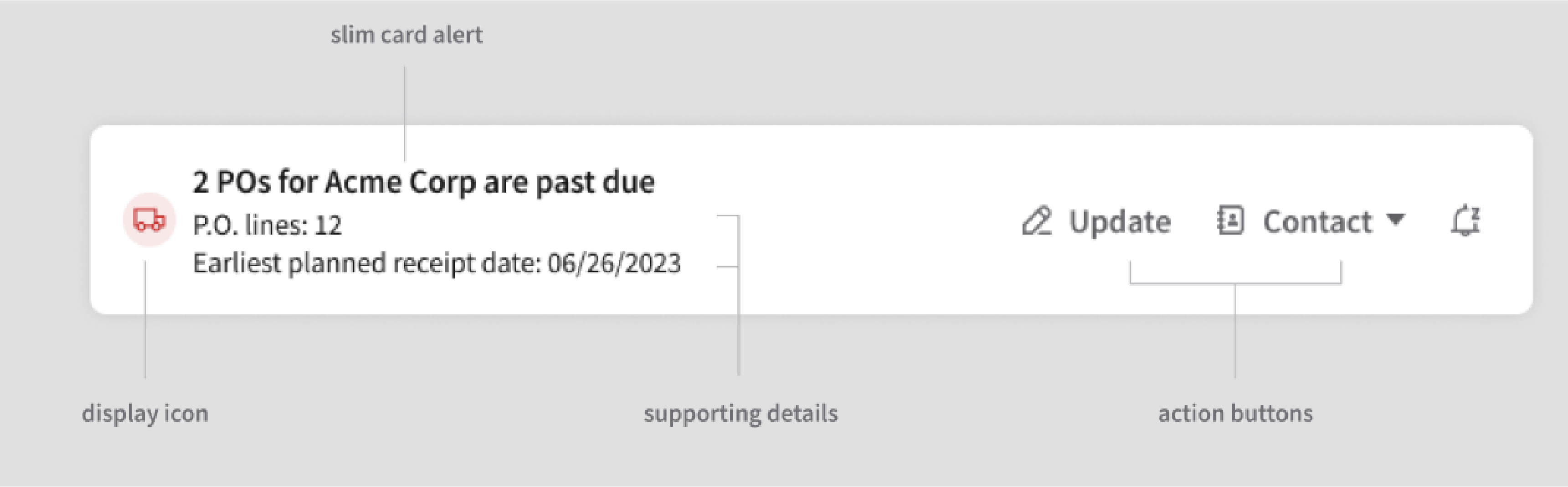
- ➢ 15 Requests missing information
- ➢ 14 Past due orders
- ➢ 27 Mismatched receipts/invoices



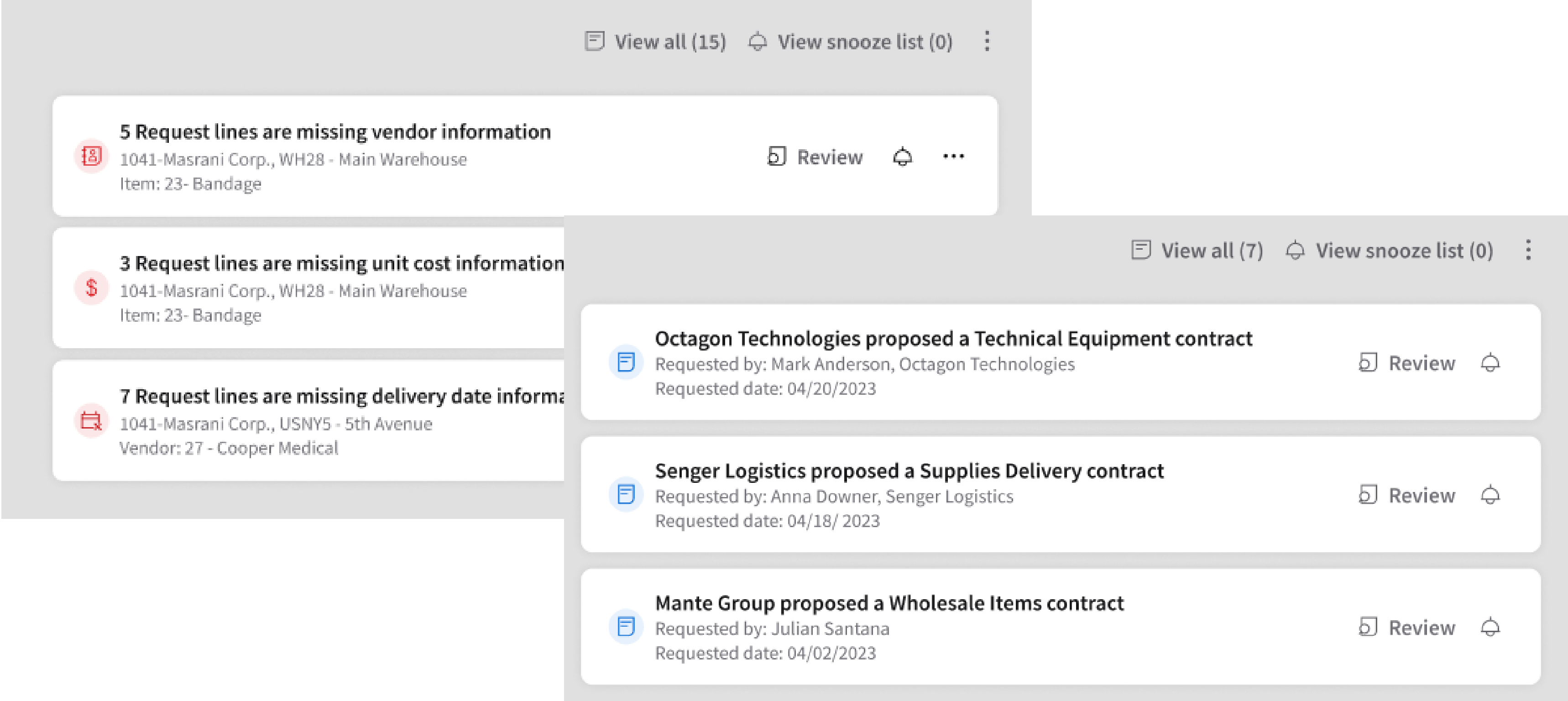
Read more guidelines for the On Your Radar widget.

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.)



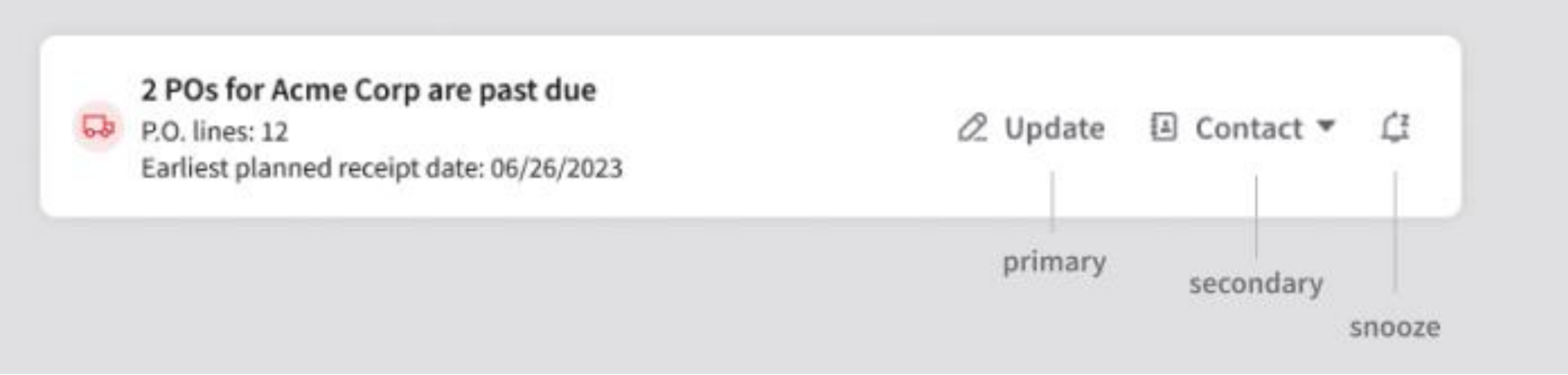
Examples:

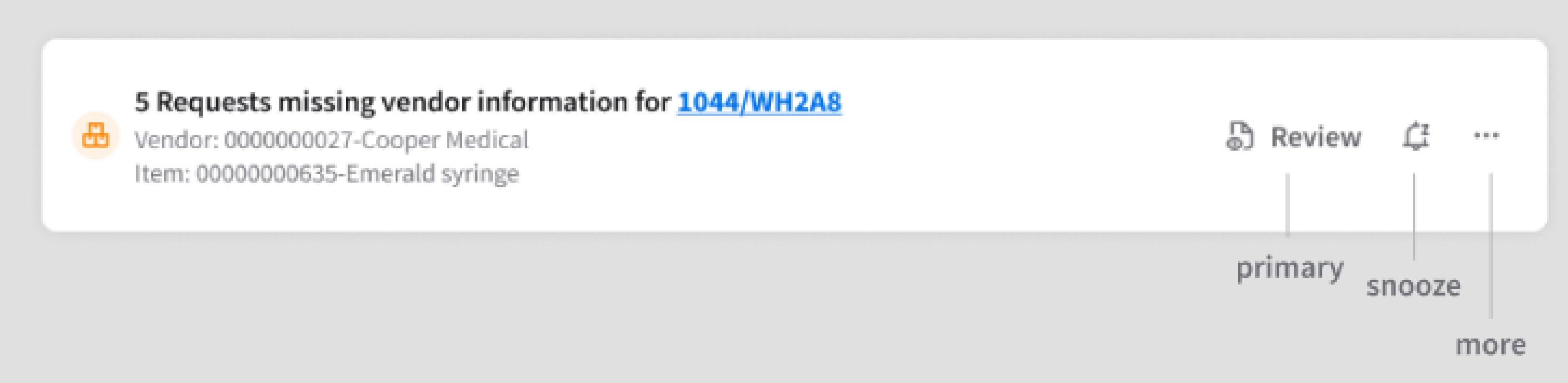


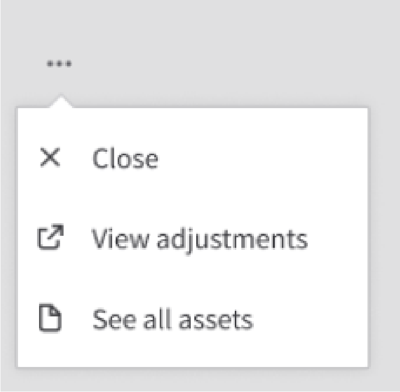
Read more guidelines for the On Your Radar widget.

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)

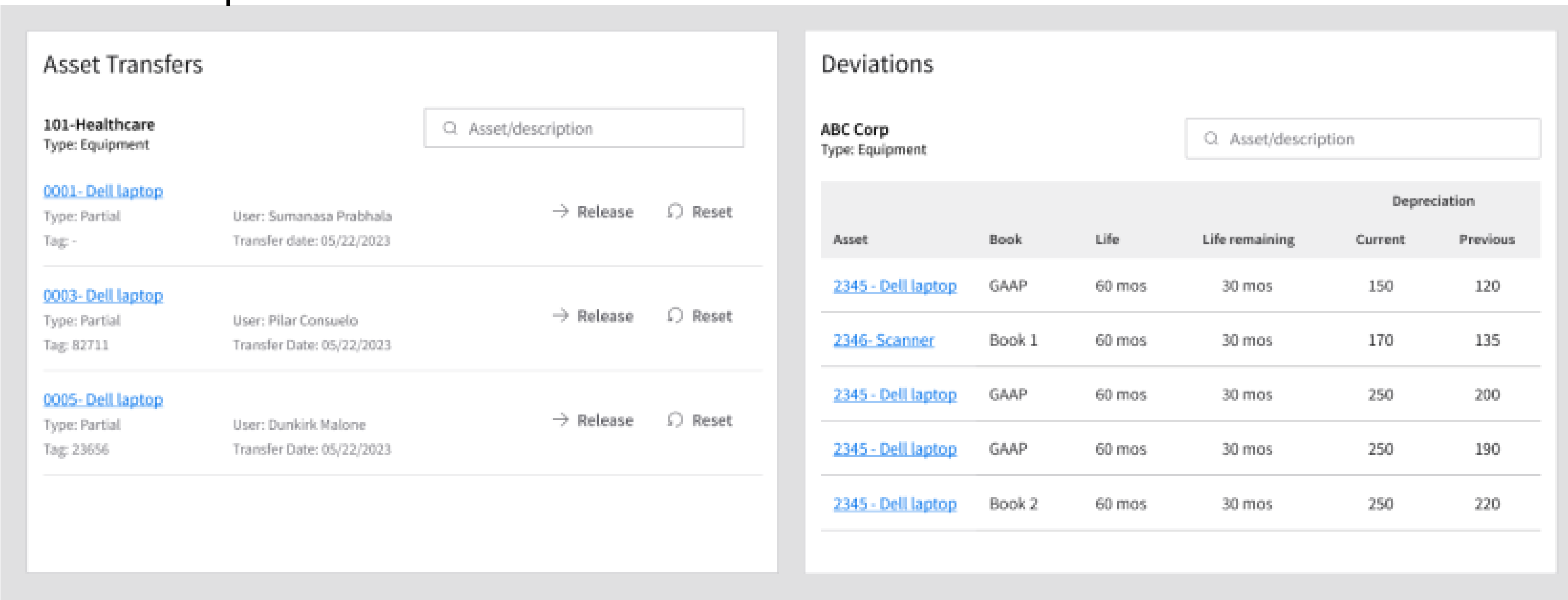
The decision to use a modal or a contextual action panel for your pop-up window depends on the action that the user needs to take.

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.

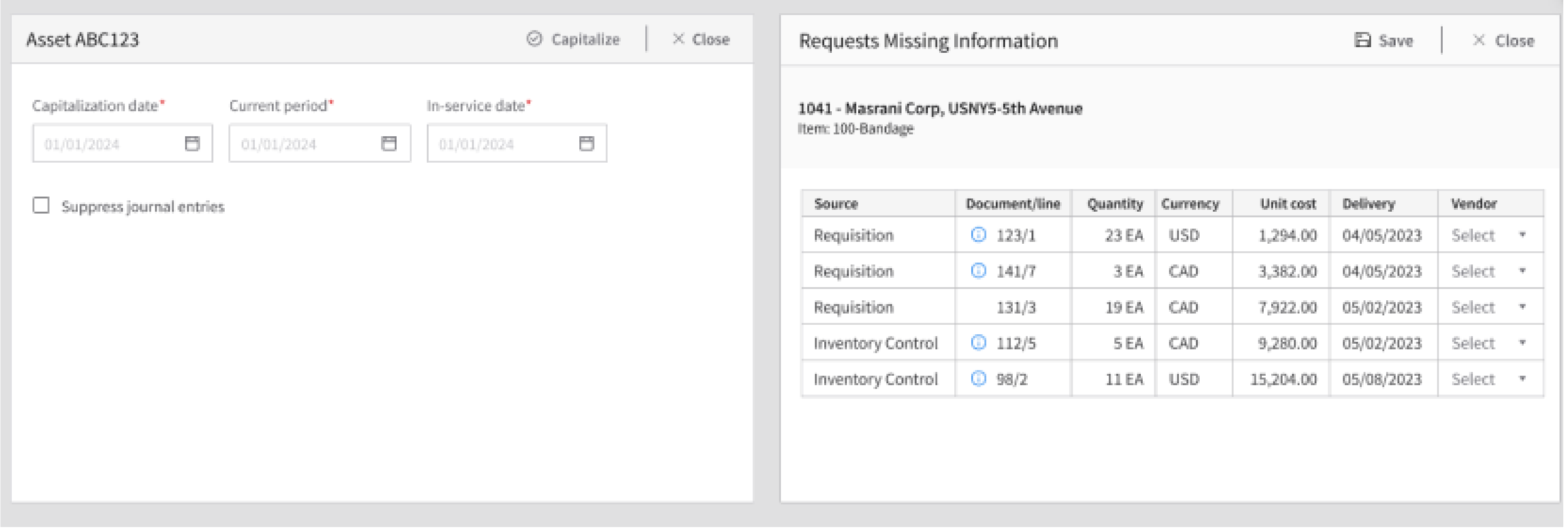
Use a **contextual action panel (CAP)** if you’re showing a form or a data grid with columns that need user input.

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

Modal examples

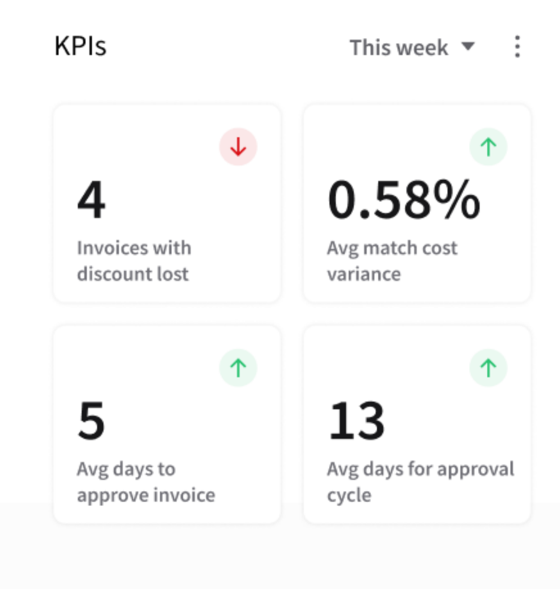


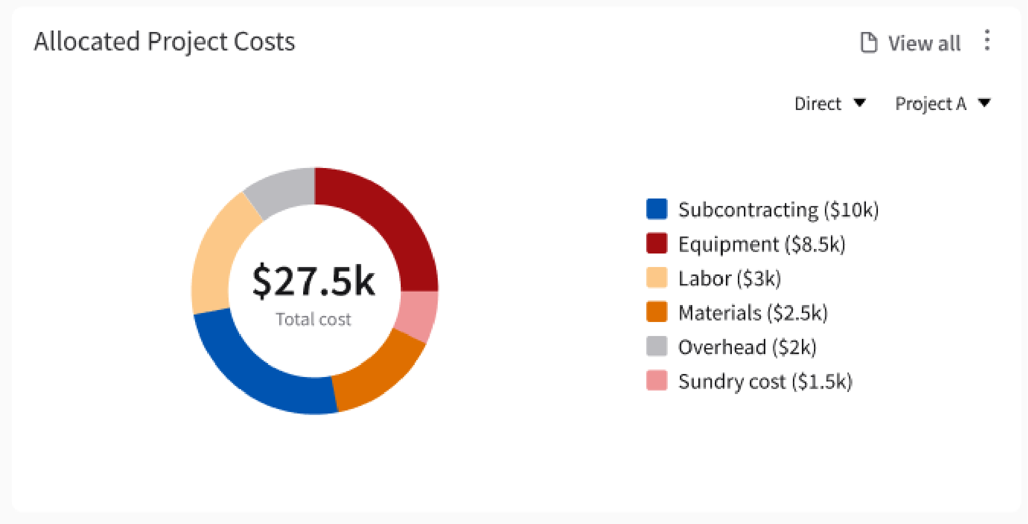
Contextual action panel examples

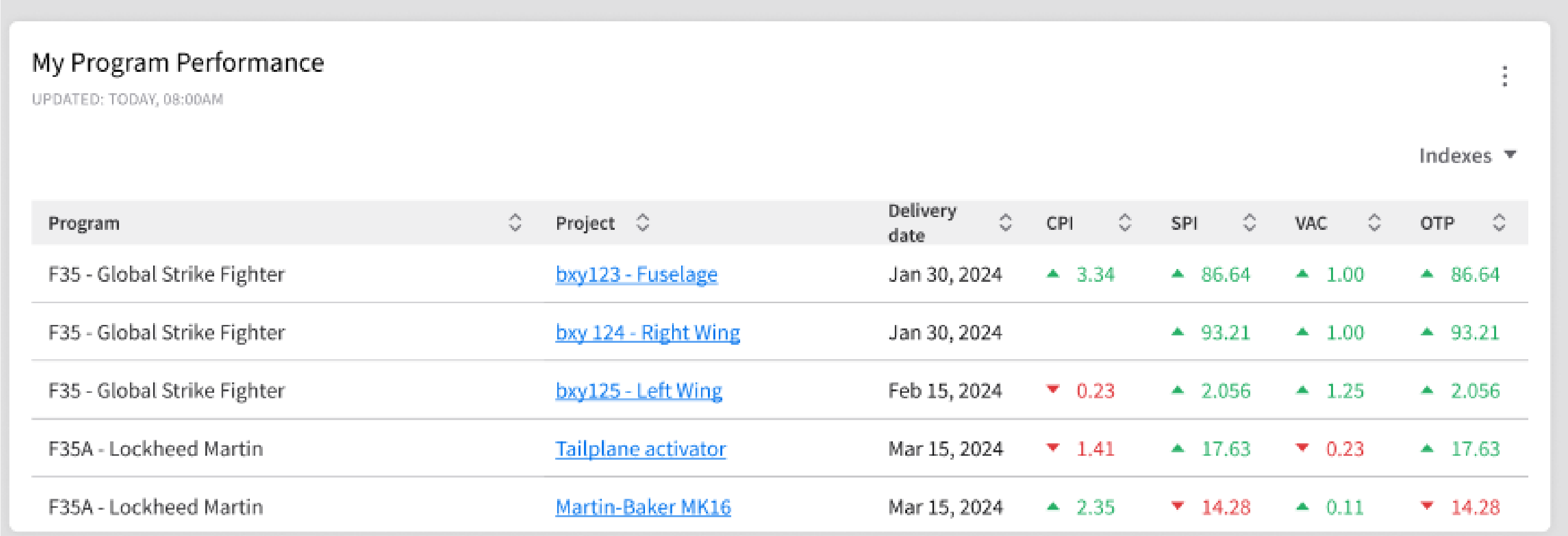


Metrics and Data Visualizations

- 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.






My Program Performance

UPDATED: TODAY, 08:00AM

Indexes

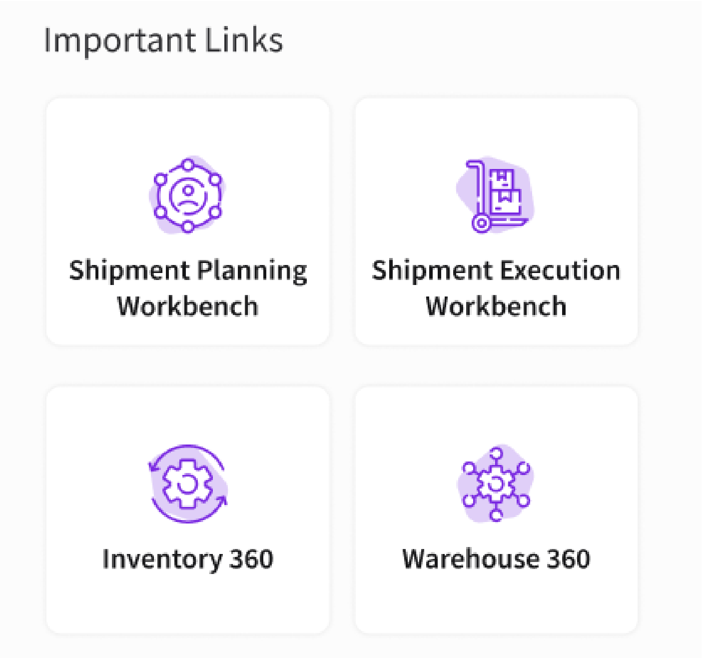
Program	Project	Delivery date	CPI	SPI	VAC	OTP
F35 - Global Strike Fighter	bxy123 - Fuselage	Jan 30, 2024	3.34	86.64	1.00	86.64
F35 - Global Strike Fighter	bxy 124 - Right Wing	Jan 30, 2024		93.21	1.00	93.21
F35 - Global Strike Fighter	bxy125 - Left Wing	Feb 15, 2024	0.23	2.056	1.25	2.056
F35A - Lockheed 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

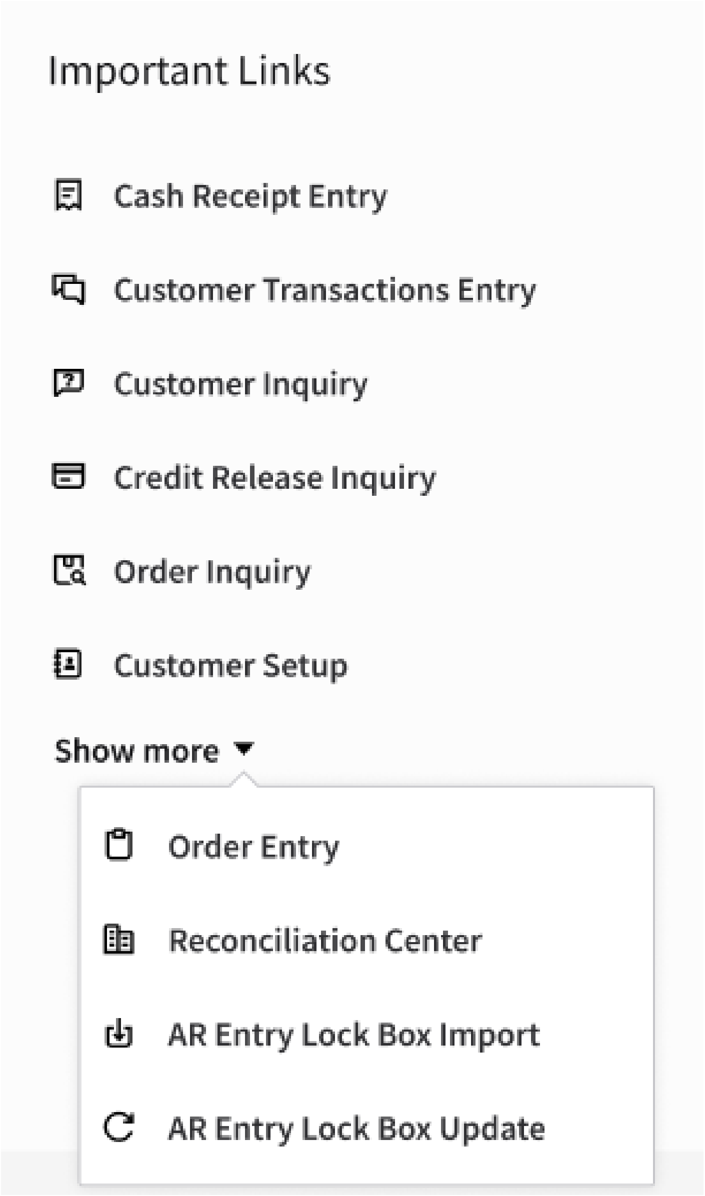
Read more about charts from the Infor Design System

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.

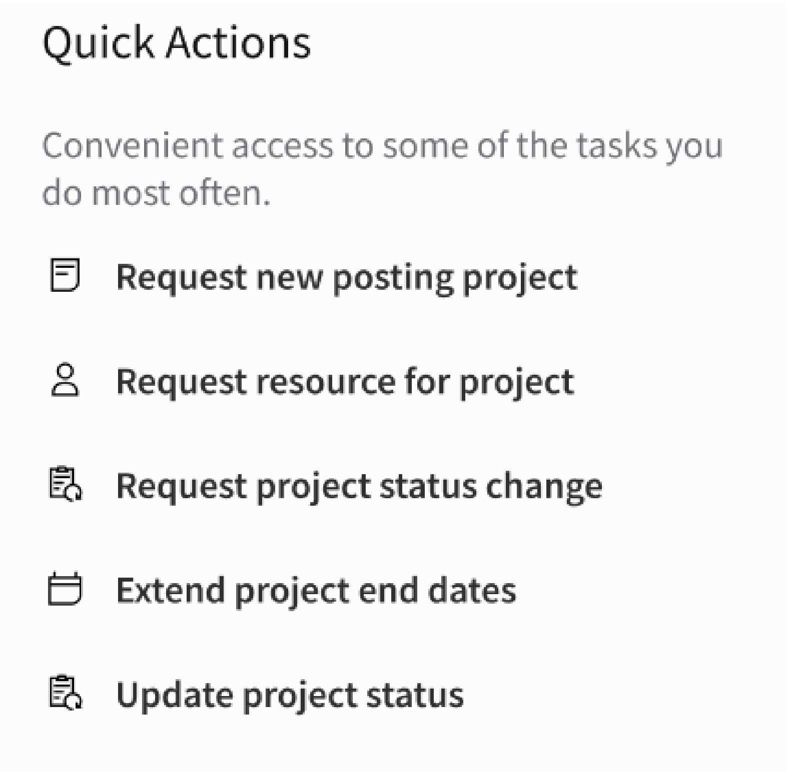
Review the guidelines for Important Links.
Refer to the UX Writing Guidelines for buttons and links.
System icons are available in the Design System icon library.

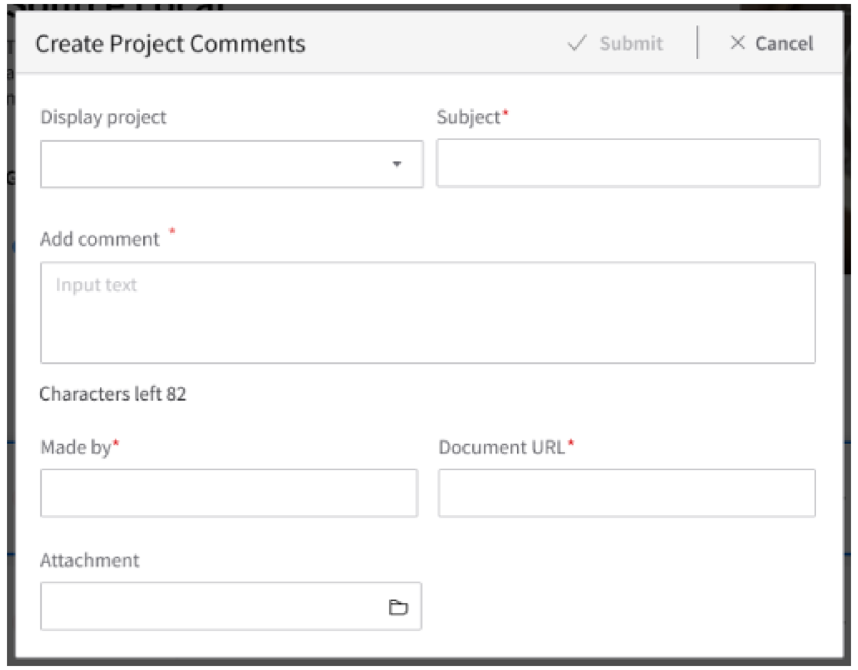
Quick Actions

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

Use	Don't Use
• 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.	• 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.





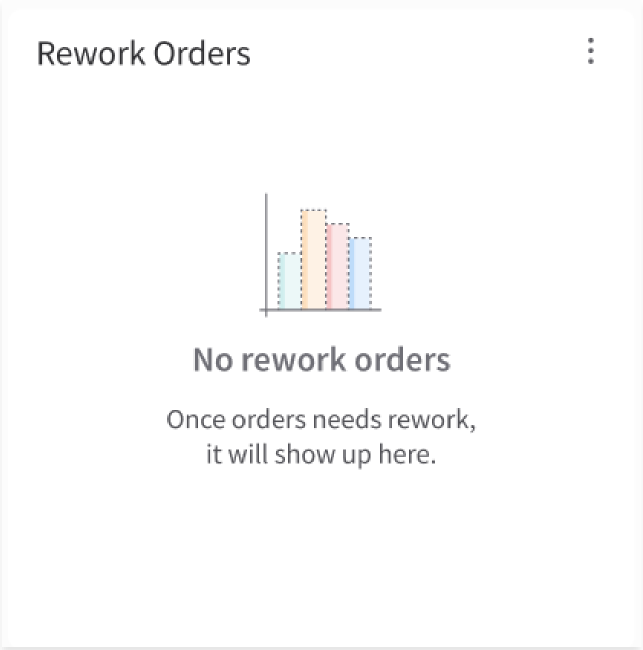
Writing Tips

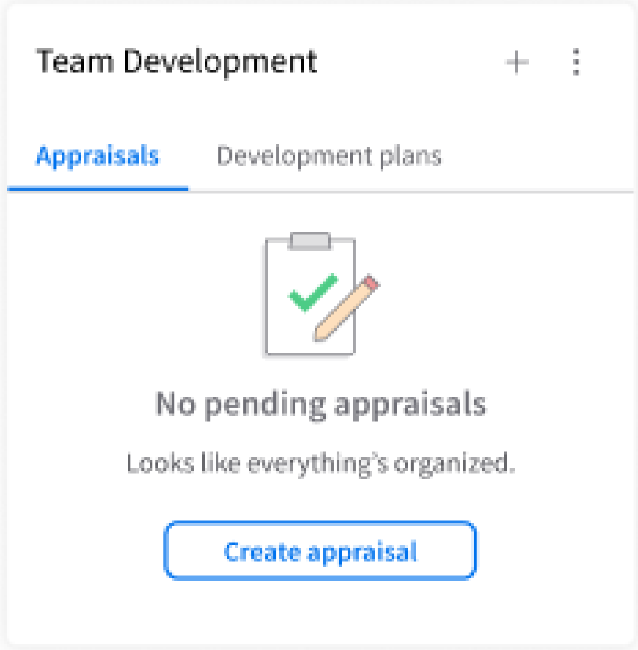
- Start with a verb (action word) and end with an item.
- Limit the link name to one line and follow sentence case (only first word has a capital).

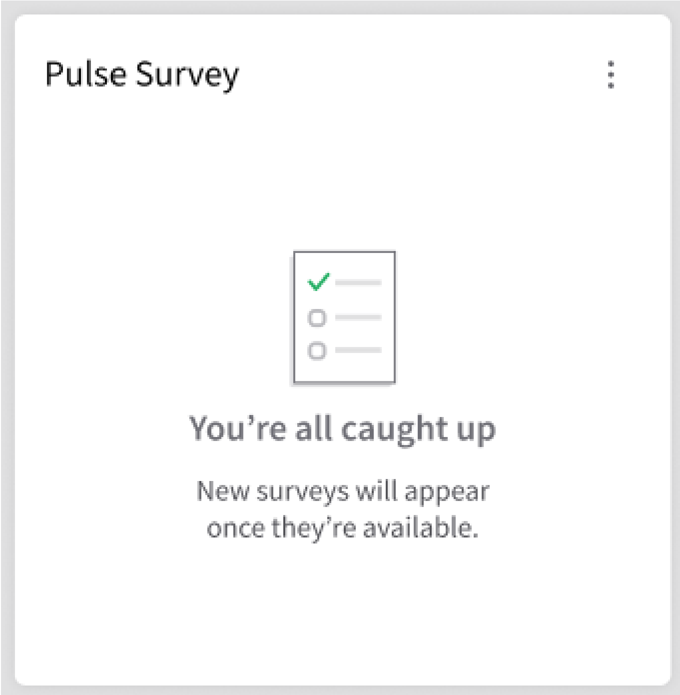
Review the guidelines for Quick Actions.
Refer to the UX Writing Guidelines for buttons and links.
System icons are available in the Design System icon library.

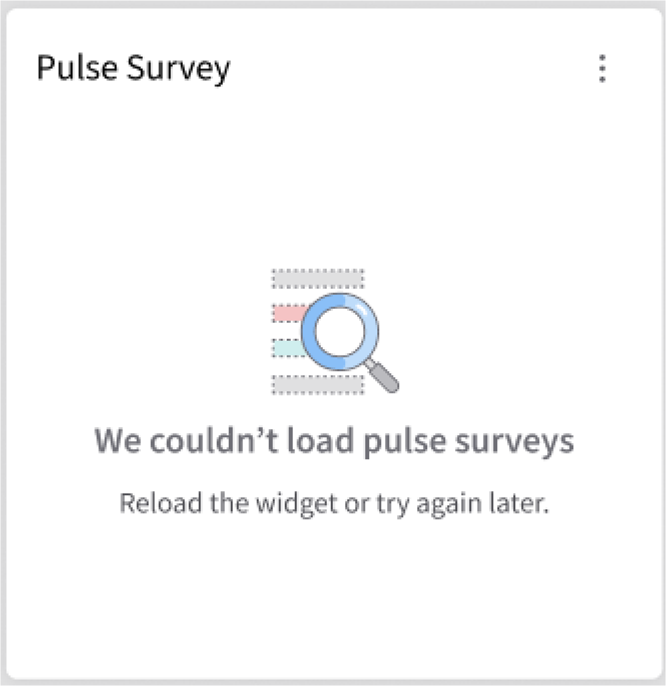
Empty States

- 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.





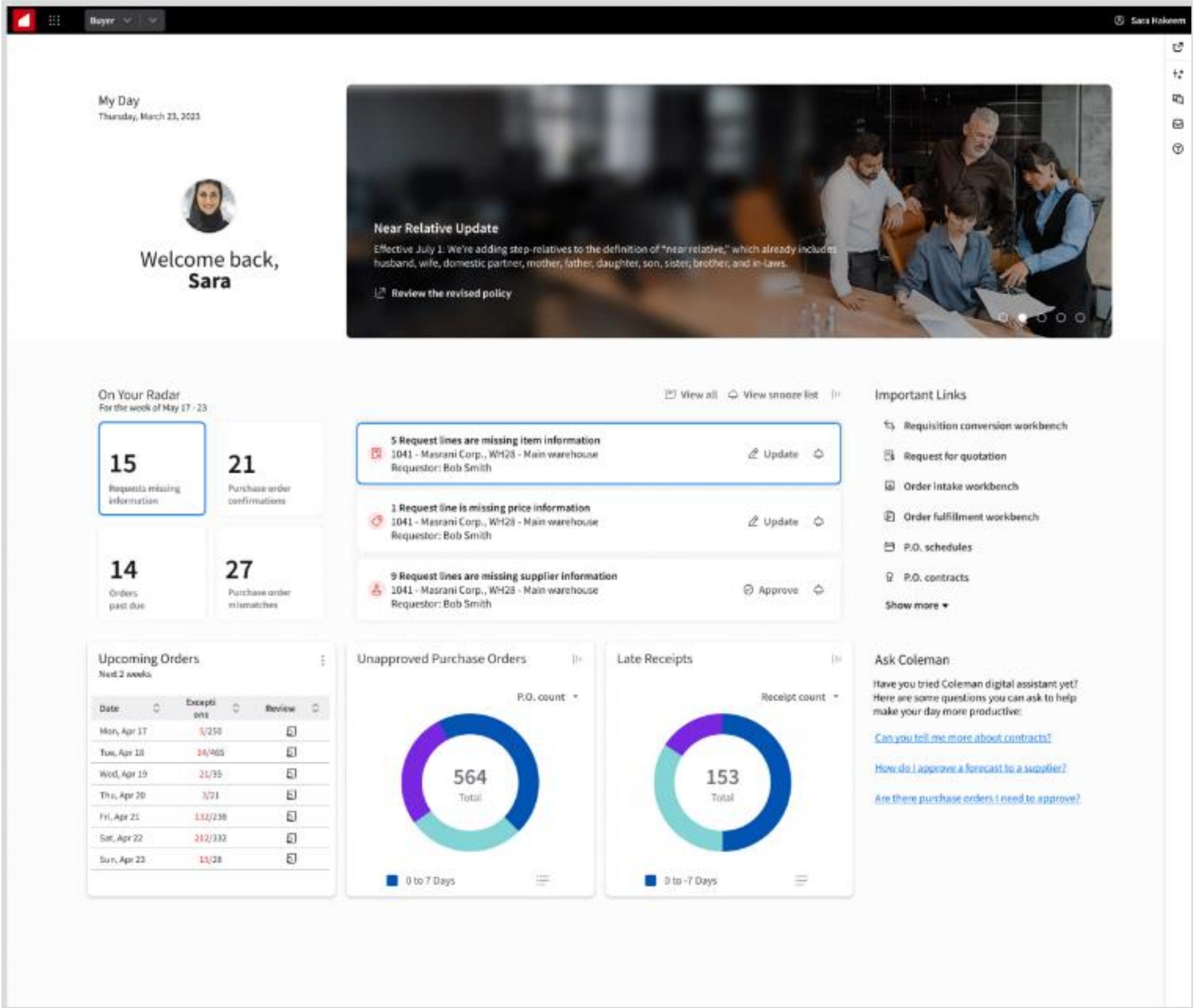


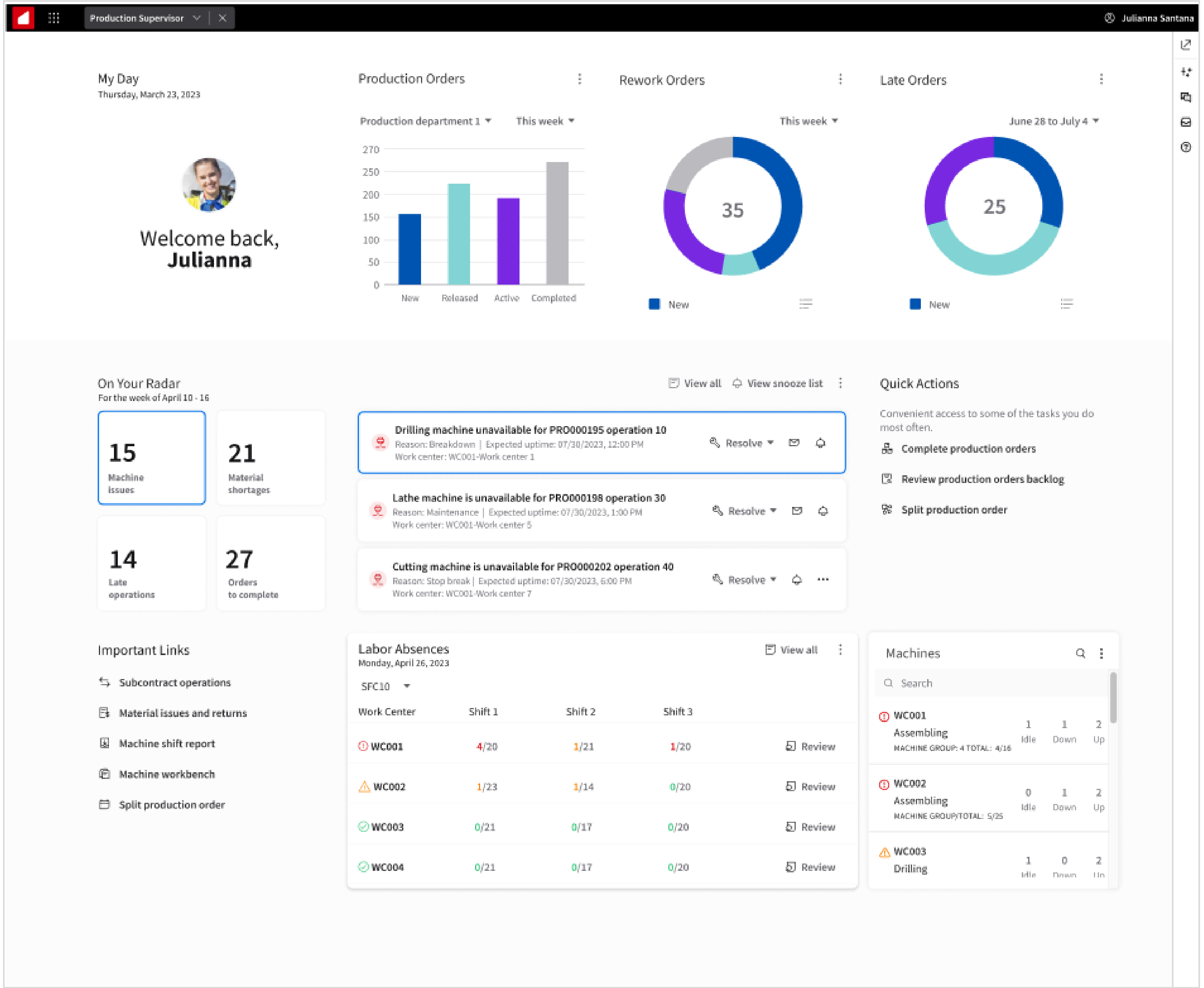


Refer to the [UX Writing Guidelines for empty states].
*Examples are [here].

Quiz time!

Putting it all together





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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

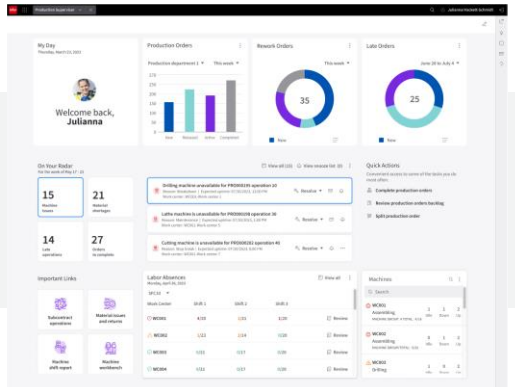
- Buyer
- Buyer (SMB)
- Production Supervisor
- Program Manager
- Payables Administrator
- Shipping Planner
- Project Accountant
- Fixed Asset Administrator
- Receivables Administrator
- Customer Service Representative (SMB)

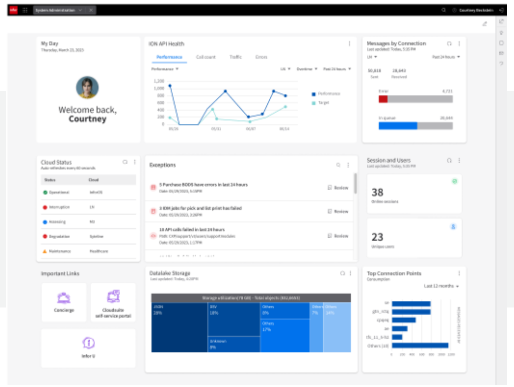
11 Service Industries

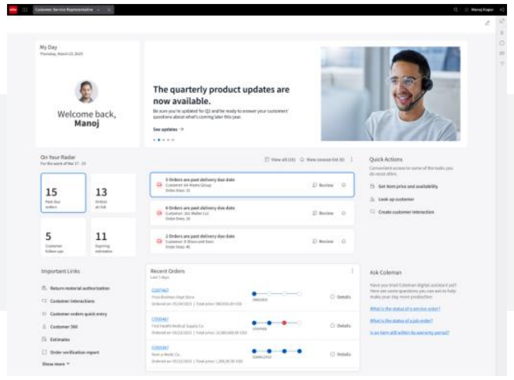
- Buyer
- Contract Manager
- Project Manager
- Asset Accountant
- Inventory Manager
- Purchasing Manager
- Purchasing Receiver Coordinator
- Supply Chain Director
- Payables Manager
- Principal Investigator
- Staff Accountant

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)







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[Refer to this archive of past standard RBWS created by Infor Design](#).

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?