# Visual Layout

Overview

This document focuses on the visual experience of the staff interface. Some overarching themes addressed are maximizing the usage of the screen and reducing the need for scrolling and clicking both within the conventional computer monitor and via mobile phone. This section identifies visual accessibility issues with the current interface and recommends adjustments that can better facilitate the use of the staff interface. While partnering with a professional design firm would be optimal for ensuring usability and accessibility standards, the following are recommendations on what the SIEWG Visual Interface group would like to see in the program from a visual perspective.

Accessibility

All aspects of the staff interface should comply to WCAG 2.0 Level AA standards for default color contrast and alt-text for all images. https://archivesspace.atlassian.net/browse/AR-968 As the screenshot demonstrates, it currently can be improved. These results can easily be reproduced by copying the webpage into http://wave.webaim.org/ or applying the WAVE plug-in

for Chrome internet browsers.
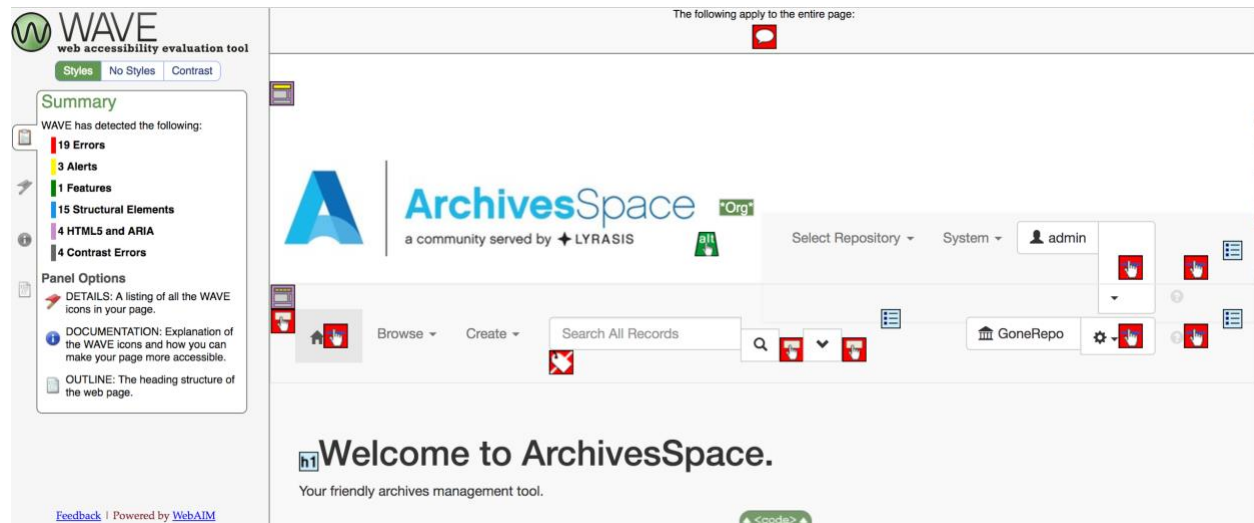
As the Contrast checker concluded, the darker grey letters on a lighter gray background doesn't pass color contrast accessibility standards. Other error notices include icons and links that aren't described.
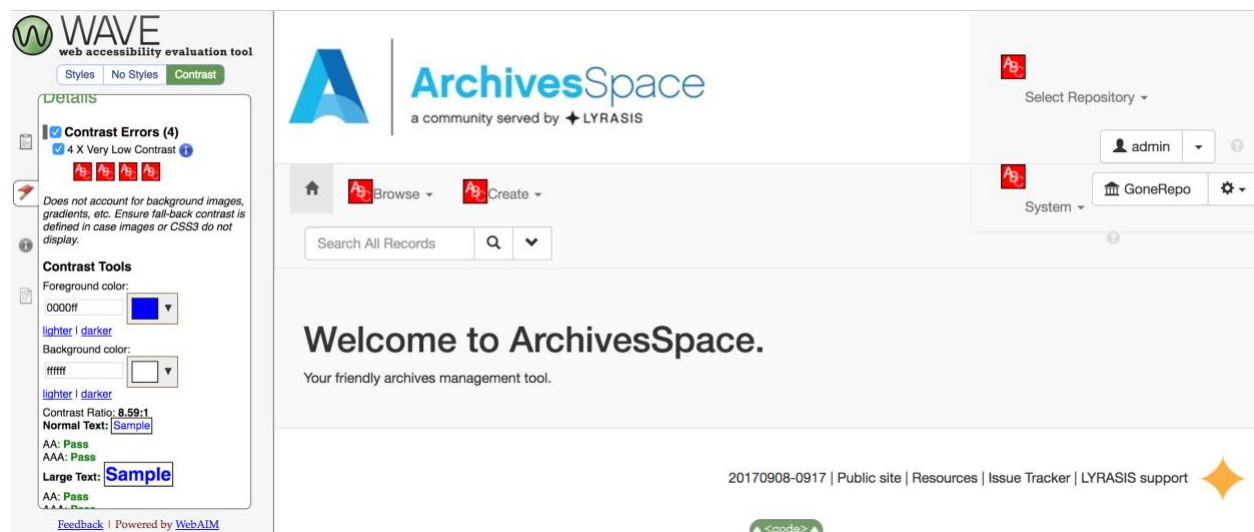
The interface should be completely tabbable and operable by keyboard commands. Nothing should have only one way to accomplish a task and especially nothing should rely solely on finding and clicking or dragging via the mouse.

Even though screen magnifier and screen reader software usually have capabilities to increase the text size and contrast, having the ability within the program to increase the font size would be a great plus, especially with browsers and computer operating systems which might not offer this capability. It also would be worth testing the interface well with common screen readers/magnifiers such as JAWS, Kurzweil, VoiceOver, and ZoomText.

In the current staff interface, having a (basically) continuous scroll in the middle of the window for the resource tree is not compatible for screen readers, which, without a keyboard command to skip in and out of the area, are stuck in a nearly endless scroll. For this reason, among others, it is recommended to move that scrolling tree view to one side. Pop-up windows, such

as for Rapid Data Entry and Top Containers, is also problematic for accessibility, as is the light shading of the required area to click and drag for Reorder Mode:
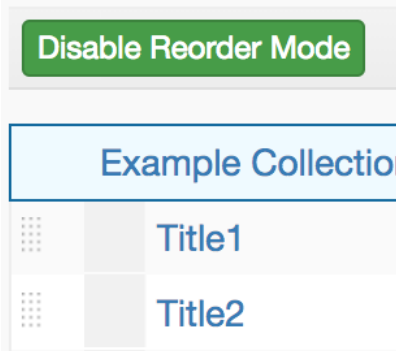
The textured area has too little visual contrast, and the function is dependent on visually clicking and dragging. There should also be corresponding keyboard commands for the Reorder Mode. Labels which disappear or appear only when hovered over by a mouse are also not accessible. Example: View of Top Containers if the mouse isn't hovering over the area

Desired view: the labels are always visible but also have a stronger visual contrast (not grey on white)

Staff Login

The staff sign in should be in a more central and obvious place, ideally front and center, or at least with a more visibly prominent top right hand box. Both alternatives are mocked up below, with the center-oriented exposed username and password field preferred (although deferred to best practices for internet security. As mocked up, the staff login should also have a "forgot password" function for users to independently reset their password without additional staff intervention.
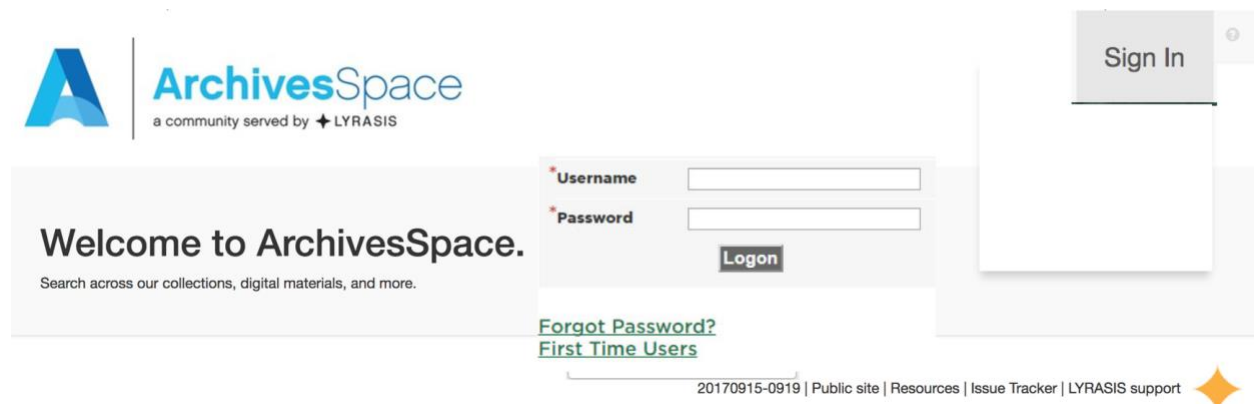
An additional recommendation is to link to the staff login via the public interface, in addition to the earlier freestanding login page as pictured below.
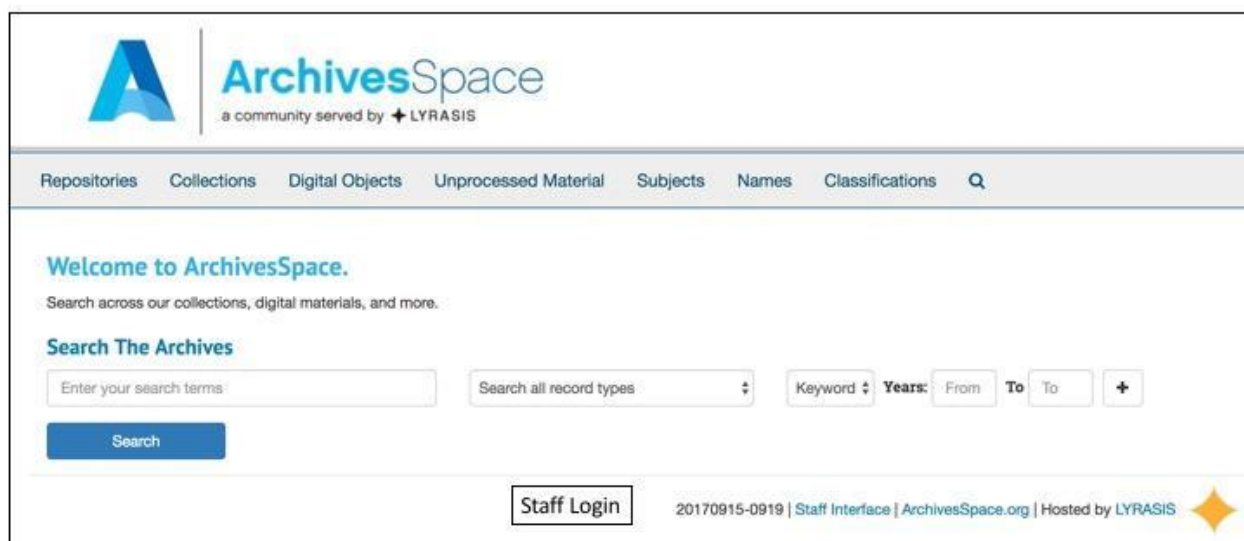
Functionality of Logged in Staff in PUI

It is currently possible for logged in staff to transition from the Public Interface to the staff interface when the "Collection Organization" and "Container Inventory" views are selected. This is helpful for editing the resource. Below are additional proposed functions for logged in staff in the Public Interface to address the needs of reference staff and people who are specifically using the program to retrieve materials.

Issue: There needs to be an easier way for reference staff to identify Top Containers which contain restricted files. There also needs to be an easier way for staff retrieving materials to view location information.

Proposed solution: Option 1: The container inventory tab would have a "Contains restricted material" marking for Top Containers which have component(s) with active restrictions. An additional Staff Information tab or extra fields appearing under the "Collection Overview" tab would have location information, repository processing note, Top Container Profile, and other unpublished components readily available once a staff logs in via the public interface.
Option 2: "Contains restricted material" marking for Top Containers and location information is combined on the container inventory tab.

Option 1: Container Inventory View

Robert Coles papers

Collection   Identifier: MSS 323 large

Michigan State University Libraries Special Collections | Robert Coles papers

| Collection Overview | Collection Organization | Container Inventory | Staff Information |

Box 1   Contains Restricted material
Container
Found in: Michigan State University Libraries Special Collections

Box 2
Container
Found in: Michigan State University Libraries Special Collections

Staff Information view:

Robert Coles papers

Collection   Identifier: MSS 323 large

Michigan State University Libraries Special Collections | Robert Coles papers

(Staff Info Selected)

| Collection Overview | Collection Organization | Container Inventory | Staff Information |

Storage Locations:

Content	Location	Range	Section	Shelf	Extent
01-14	AS2: 201 ARC (Second Floor Stacks)	7	2	1	4.60 Cubic Feet
15-28	AS2: 201 ARC (Second Floor Stacks)	7	2	2	4.60 Cubic Feet
29-42	AS2: 201 ARC (Second Floor Stacks)	7	2	3	4.60 Cubic Feet
43-46	AS2: 201 ARC (Second Floor Stacks)	7	2	4	2.00 Cubic Feet

Repository Processing note:

Restrictions:

(Location view for Top Containers similar to Archon)

Option 2:

Having the ability to ArchivesSpace members to test either option and provide additional feedback would be preferable.

Customization and repository-specific branding

It should be possible to do basic edits to the public and staff interfaces from the staff interface at the Repository Manager level of permissions. This should include:

- Uploading a png or jpeg logo of the individual repositories for the public and staff interfaces and PDF export of finding aids
- Suppressing unused components of the PUI (i.e. removing "Unprocessed Materials" from the ribbon or suppressing the "limit search options to digital objects" drop-down menu.)
- If the original Cherry Hill functionality for the PUI of pinning selected or newly-published collections or digital objects to the front page of the PUI , this could be easily customized via the staff interface.
- Edit the default welcome language and default color scheme through the staff interface.

[Depending on the day, sometimes it doesn't feel so friendly!]

Designing for the "F"

A fairly widely accepted User Experience idea is that users tend to look at pages in an "F" pattern, skimming from the top from left to right, down the left column, and then to main content extending into the center region. This approach is also mirrored by screen readers, although specific coding can help direct the screen reader order. With the current staff interface dividing areas of attention across the screen (login area top right, menus on the middle left and right sides, data entry and edit at the bottom), it may not utilize the intuitive expectations of users. It is highly recommended that gathering professional design input as well as conducting a heat map usability study be part of this process. Below are some of many possible approaches to reevaluating the layout of the staff interface. Suggestions and alternate versions are welcome! Additional comments about the below suggested mockup:

- The ArchivesSpace/Institutional logo is moved out of the prime screen real estate, to the top right corner. This is an optional change and the original orientation of the icon in the top left corner may not be a problem for most users.
- The down-arrows are generally problematic for accessibility because they often are not described with alt-text per accessibility standards. We propose the functionality of the down-arrow should be integrated into the entire button. The user should be able to open the "admin" menu by clicking anywhere on the "admin" button. In this mockup, the menu would fly out to the right side.
- The named repository (to clearly indicate which repository the user is logged into) should come next. By clicking on the repository button, it should trigger the "Select/Change Repository" function.
- Next should be a menu tentatively titled System Settings, which combines the functions of the Cog and Systems. For more information, please view the Organization of Menus page.


Experimenting with Page Layout

The current page layout can be assessed for efficient screen usage, accessibility, and usability. Consulting with a professional design company would be best to ensure a

solution that adequately and attractively addresses usability and accessibility standards. This Working Group can be helpful for gathering the ideas of archivists on what they need from a program and how they expect to use it, but these design considerations may be one of the greatest examples of the need to also get professional input.
Current view:
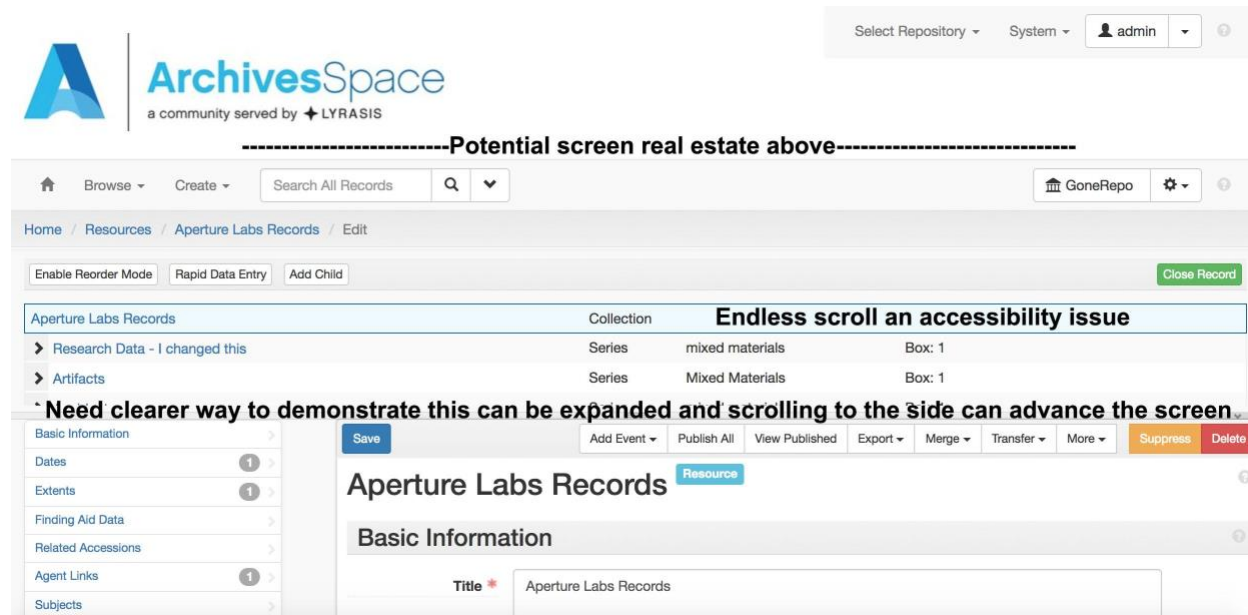
- Needs scroll bars for both vertical and horizontal movement of the Resource tree and a more clear way to scroll down the screen. New users often are confused because they don't know where to scroll to advance the Resource tree vs. advance the screen to view/edit information.
- Needs an accessible way to navigate to, and out of, the Resource tree via keyboard shortcut
- Ideally should have a layout which reduces the current amount of scrolling and clicking.
- In the Hierarchy Pane for the Resource components add Expand all/Close all toggle. See the Browsing and Customization page for additional information;

Layout for Editing Resource Record

Issue: Continuous scroll in the center of the screen isn't good for accessibility and the bulk of staff attention is in the record which is nearly off the screen, requiring lots of scrolling up and down.
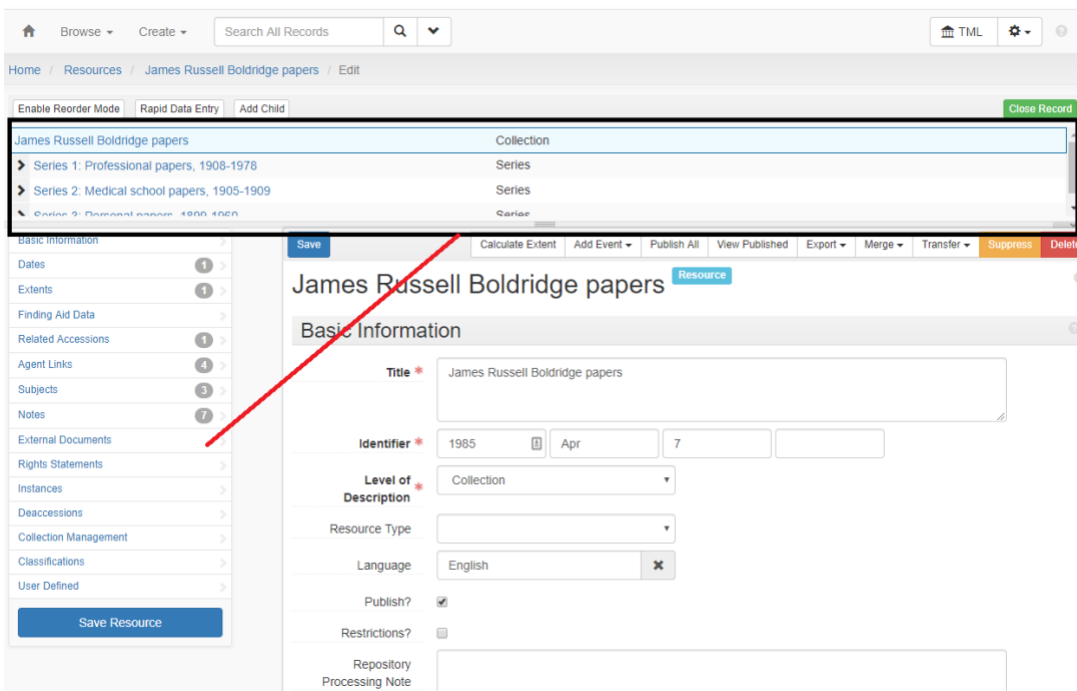Current view:
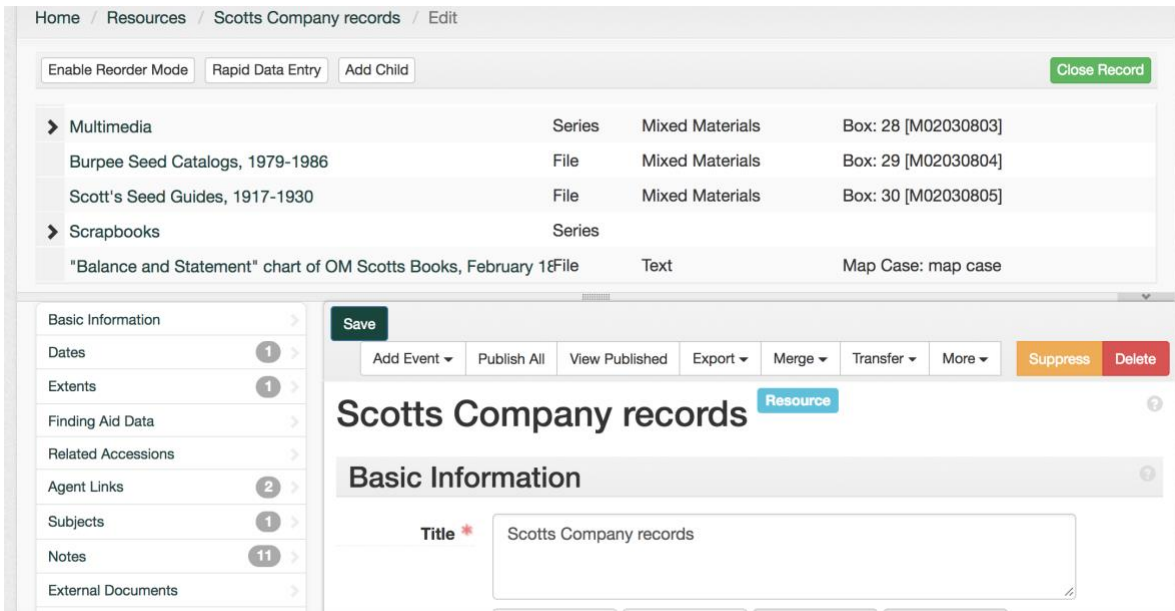
Option 1 is to "freeze" the pane with the components to always be visible at the top while scrolling through the body of the record, similar to freezing the top row of a spreadsheet so that the headers are visible when scrolling.

Pro: Users can always have a view of the record in its hierarchical context

Con: It doesn't address the accessibility issue.

Option 2 moves the navigation bar to either the right or left side like the PUI.

Pro: It frees up the upper area of the screen, which otherwise is underutilized.

Con: It limits even more the view of the instance information, which could be addressed by hovering the mouse over the line, but that is probably also an accessibility issue. It also replaces the outline for individual records. To address this, the Edit View of the archival object

could be initially collapsed to show only fields that have content and otherwise the user can expand additional fields as needed.

Option 3 is to have both the resource tree and individual archival object outline as boxes on one of the sides. To better visually distinguish restricted and suppressed records, we propose adding a tag with text and a corresponding color to the archival object as "Suppressed/Sup." in light blue (as it is currently in some views), "Restricted/Rest." in red, and an additional designator (to be determined - seeking ideas) on unpublished materials. This proposal comes with a recommendation to consult with a professional who specializes in accessibility, to ensure that any decisions on these indicators are accessible for people who may be colorblind or use a high contrast screen viewer. (As an archivist, I want unpublished archival objects to be distinguishable in the navigation tree AR-1513)

Resource tree view
------------ 	
  [sup]----------
  [rest]-----------
------------ 	
	Edit pane (automatically in edit mode with keyboard commands or a button nearby to save the object. By placing the cursor in a field, it should be easy to update records, including creating Top Containers)

Selected Archival Object outline view (expandable easily by keystrokes or shortcuts such as L for location)	

Pros: Ideally, these windows could fully configurable by the individual user, to determine the order and dimensions of each column to be dragged by the user. The selected archival object outline would only display fields containing data with a little down-facing arrow at the bottom to

indicate it is partially collapsed. Click on that and it fully expands to show all fields, with and without data.

Con: Having multiple boxes of data across the screen horizontally isn't mobile friendly (a user would need to be scrolling both up and down and right and left), and may have accessibility issues both from the extended scrolling areas and navigating around the boxes.

Final thoughts: With any potentially dramatic changes to the visual layout, it would be helpful to have a toggle to switch to the older version, if a user prefers the existing set up. Any drastic changes to the visual layout should be present to the ArchivesSpace membership for broad usability testing and feedback.

Locations and Instances

As an archivist, I would like to see location information more prominently in the staff view of resources and accessions AR-927

Recommendation:

Make the default visible fields for the Resource tree customizable by Repository (editable for individual accounts by archivist-level permissions) within the System Settings menu. University of Denver currently has a plugin to enable this function that may be helpful to reference this code on Github at https://github.com/duspeccoll/tree_component_id. The default Resource Tree view should remove the Material Type field (although keep it within the data entry/editing view) and add a field for locations. Also, it would be great to add a field in the Instance module to view locations. Some suggestions include adding the location to the Top_Container display string or having it autopopulate a field immediately below it (see mockup). Additionally mockups and polling of the ArchivesSpace community may be necessary, especially when displaying Instances with multiple locations. Locations should also be available in the "View mode," similar to Subject and Agents and their authority ID.

Issue: When viewing the Resource Tree in a condensed screen view/mobile device, it currently collapses somewhat but isn't currently possible to scroll horizontally (see screenshot below). Thus, the only possible way to view the folder information is to open each individual record.

Recommendation: It should be possible to scroll laterally, and in cases of a condensed view, it should favor the title and box-folder information (collapsing over the hierarchy and Material Type data columns).

Visual Layout of Notes

Current view of new, not-yet-saved notes have a duplicate Note Type field.
Issues:

- It's unclear which field should be changed in case the user wants to change the Note Type after it's initially created and is visually distracting.
- If the Note Type is changed after data is added, it automatically deletes all of the data. (Oh no!)

Current view of opening a saved note:


Proposed changes and mockup:
- Although for clarity it would be preferable to have a single publish button, for now, publish buttons for both the note and the sub note(s) remain in the below mockup. If the multiple publish notes are retained, if the top level button is published, it automatically publishes the subordinate note, <u>unless</u> the sub note publish box is explicitly <u>un</u>checked, as shown in the highlighted text, in the mock up below.

- For further discussion is possibility to change the term "Publish" to "Public," or "Internal Only." For additional details, see the [Browsing, Functionality, and Terminology document](#).
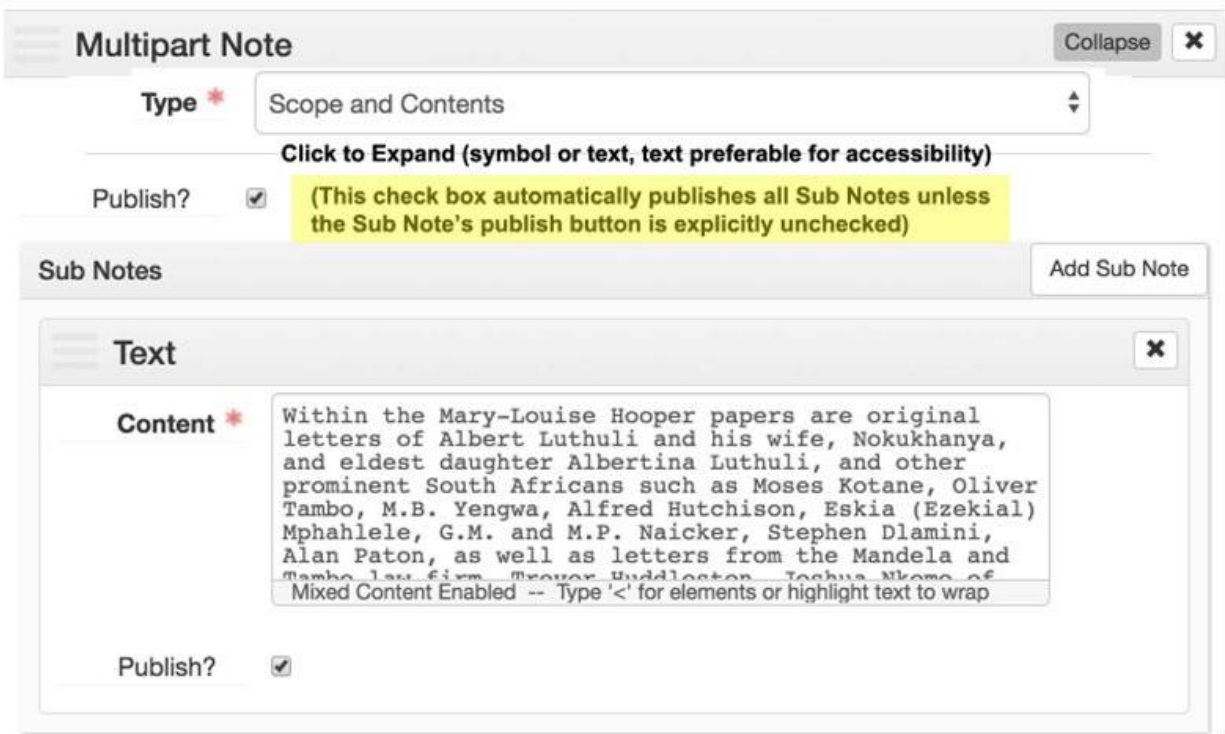
Confirmation of actions

Transferring records should have a visual confirmation once the button is clicked. Currently, the grey button is unresponsive. Ideally, Transfer should be green (for "go") and perhaps lighten or darken in color and the text should read "transferring." If the action requires a partial reindex of the database (such as merging controlled values or deleting templates for RDE), there should be text indicating that the results of the action may take a few minutes to show up.
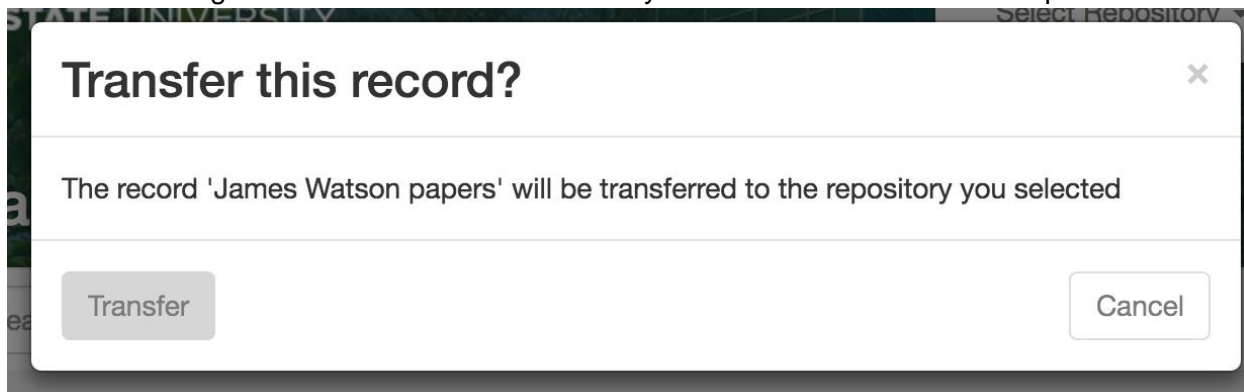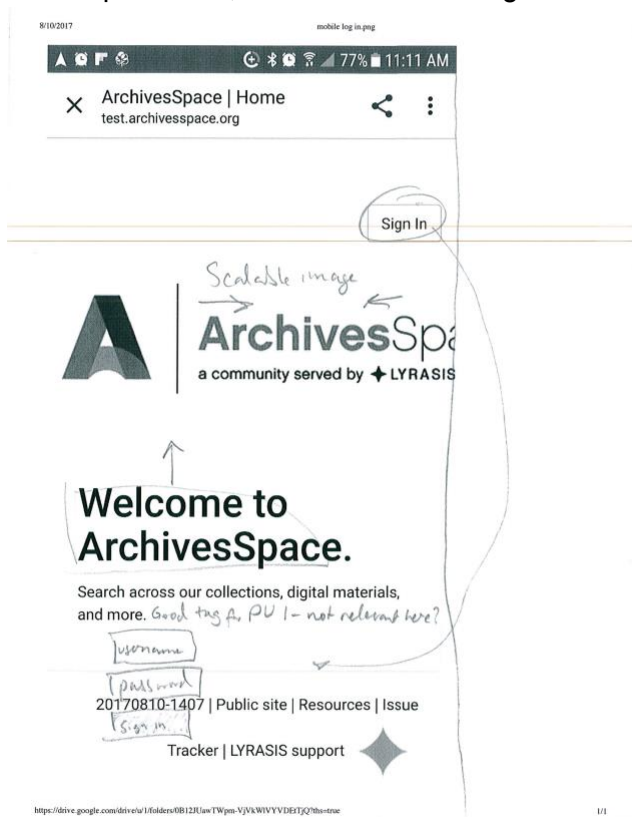
Mobile Interface

As an end user and archivist, I want to be able to easily login on mobile devices AR-1287

Designing for the mobile interface may help accessibility in general. It would be great to link to mobile/simplified interface for accessibility through the regular staff interface.

Below are some suggestions for the layout and organization of the mobile interface.
- The top header icon should be scalable to accommodate the mobile view in a polished way.
- The sign in should be immediately below and much more prominent (see earlier loggin suggestions). Ideally, for accessibility it should have a hidden prompt to jump to this field. Also for accessibility, ideally the fields should be open for the username, password, and tab-able to navigate to the "Enter" button.

Once logged in:
- Scalable header icon
- Have all elements currently nested in the 3-line box across as a ribbon
- Where is the "My Account" menus?

ArchivesSpace | Home
test.archivesspace.org
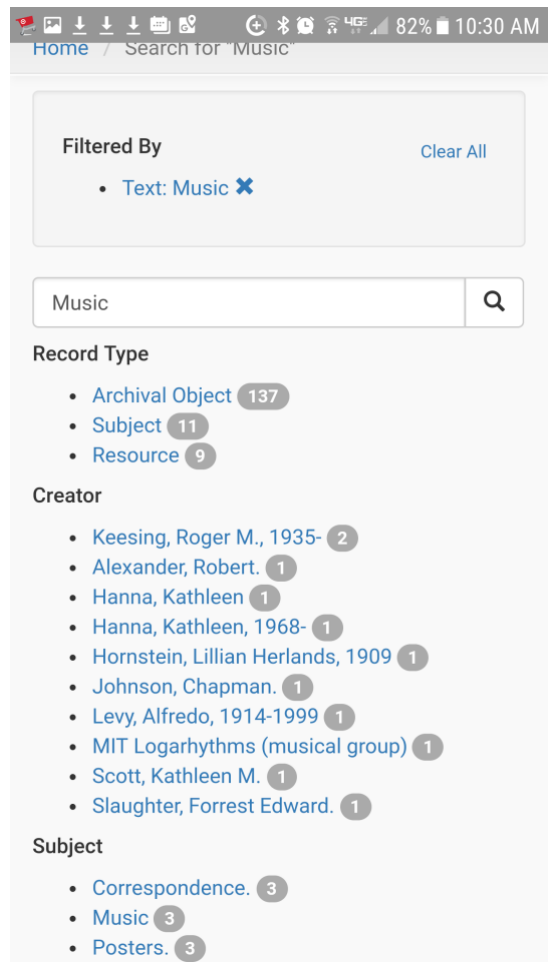
The mobile interface needs to align the boxes.

Collapse the Record Type, Creators, and Subjects as the default view (especially if they are very long. This is helpful not only to reduce scrolling but also for accessibility since screen readers read out the entire lists.

Home / Search for "Music"

Filtered By   Clear All

- Text: Music ✖

Music   🔍

Record Type

- Archival Object 137
- Subject 11
- Resource 9

Creator

- Keesing, Roger M., 1935- 2
- Alexander, Robert. 1
- Hanna, Kathleen 1
- Hanna, Kathleen, 1968- 1
- Hornstein, Lillian Herlands, 1909 1
- Johnson, Chapman. 1
- Levy, Alfredo, 1914-1999 1
- MIT Logarhythms (musical group) 1
- Scott, Kathleen M. 1
- Slaughter, Forrest Edward. 1

Subject

- Correspondence. 3
- Music 3
- Posters. 3

Move the edit button for the search results to the left side. In fact, this might be a positive in general for the regular view of the staff interface also.

It's not clear what the current radio buttons by each line are useful for besides bulk deleting or deriving CSV files, so this change, in general may be more helpful. If the radio buttons are still desirable, having the buttons be in a row may be easier for thumbs. Also, other preferences for greater context of search results would be great such as possibly a Keyword in Context preview.

Edit

View
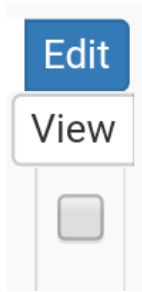
Also, since the mobile interface could potentially be useful for staff and students who need to access the location information of materials in the stacks, location information should be easily visible.