

# Interaction Design Checklist

The list below contains some general recommendations and questions you can ask to come up with the rules that work for your specific application. Feel free to share this document but please link back to <http://www.cindyalvarez.com>.

## First User Experience

- *How does our application/this feature/this page differ the very first time a user sees it vs. after they've been successfully using it for awhile?*
- Provide additional help, examples, or previews on a page or feature the very first time a user sees it.
- Explain any jargon or acronyms

## Error Messages

- Error messages must give the user some way to resolve the problem
- Focus on explaining “how to fix this” vs. “what went wrong”
- *Is there anything you need to reassure the user about? (i.e. make it clear that their data was/was not saved, make it clear that their credit card was not double-charged)*
- *Was there any way to prevent having to show an error message? (i.e. by using AJAX validation, or hiding irrelevant options from the user)*

## Confirmations

- Whenever the user initiated an action, confirm that the application actually did do what they requested (saved their work, updated their code, etc.)
- *Is there a “next logical step” that the user should take? How can we prompt them to continue?*

## Forms

- *What do we use forms for? Are we being consistent in when and how we use them? (e.g. many sites use information-gathering forms (vertically-stacked) and filter/sorting forms (horizontally-aligned))*
- *When should we use inline validation and how should we display errors?*
- *If a form submission fails, what information should we save?*
- Do not default to a specific value if it might be wrong for some users (i.e. allowing a state drop-down to default to the first value, “Alaska”)

## Optional/Advanced View

- If a feature or piece of information going to be used by 80% of users, 80% of the time, then it should always be displayed. If not, consider hiding it behind a “more options” link.
- *Is this feature or piece of information only relevant to certain users?*

## “Money-related stuff”

- *Are we being absolutely clear about the financial impact of the user taking this action?*
- *Are we providing a clear confirmation every time we make a change that will affect the user's payment method or amount?*
- *Have we had a neutral third-party take a look at this text/feature to make sure it isn't*

*inadvertently intimidating?*

### **No Data / Lots of Data**

- *How will this page/feature look when there is no data yet?*
- When there is no data or content on a page, provide a way for the user to get some (i.e. “You have no search results. Search again.” or “You do not have any friends yet. Find a friend.” or “You haven’t uploaded any photos yet. Upload some now.”)
- Use consistent standards for when to paginate
- When there is “lots” of data or content, provide at least one way for users to narrow it down (search, filtering, pagination, CSV export, etc.)
- *How will users be using this data / content? (Understanding how they use it will help you provide the most usable way to get to a specific piece of content.)*
- *Will this content be a static, consistent size or will it vary by user?*

### **Action and Navigation**

- *How do we differentiate between a “dominant” action and a “non-dominant” action? (i.e. Edit Survey vs. Back to Dashboard)*
- *From this page, what areas will users typically need quick access to? Have we provided clear navigation to each of those areas?*
- For any action, it must be unambiguous what that action will do. (For example, if you have two separate “Edit” buttons on the same page, it may be unclear which section the user is editing.)

### **What’s Next**

- Do not “dead-end” the user on a page. There must always be some cue as to what action they should take next or what additional activities they may do.

### **Other Things To Consider:**

- *When should we use inline editing vs. “flyovers” vs. taking the user to a new page?*
- *What terms will we use for common actions? (best to pick only ONE for concepts like these):*
  - *Edit/Update/Change*
  - *Delete/Remove*
  - *Undo/Cancel*
  - *Create/Add*
- *For user-editable data, will we enforce character limits?*
- *How will the size/length of this page change based on user-specific characteristics or data?*
- *What devices are we designing for? (mobile? iPad?) Will the user’s behavior change based on what device they’re using? (i.e. iPhone apps are often a streamlined version of the ‘normal’ app)*
- *Is our application asynchronous? If there are delays, how will we communicate those and ensure that the user returns?*

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