

Action Menu Redesign: Guideline + Competitive Ana...

Mural:

<https://app.mural.co/t/endorexperience5083/m/endorexperience5083/1587481931628/01750b8afaed3aa66240dedec8afea799d40f56>

As-is Mural

<https://app.mural.co/t/endorexperience5083/m/endorexperience5083/1590691974347/0ba061a547bb33967d70d24fb3357253fe061e7b>

Guideline draft: <https://ibm.ent.box.com/notes/677091950986>

Crystelle's Mural EDITS:

<https://app.mural.co/t/endorexperience5083/m/endorexperience5083/1592237034112/bc790829288dd3cecb54bf24854da2e324576a1b>

Invision final design (released for CA 11.2 - partial)

<https://ibm.invisionapp.com/share/8HOOL3NNCTR#/screens>

If the icon is useful for the user (present in the toolbar) place in context menu (i.e Report

GUIDELINE DRAFT

1. Develop consistent groupings
 - a. For example: If actions are shared across various action menus, keep it consistent
2. Check if you can reduce any unnecessary action
3. Place delete at bottom
4. Some groupings may be arbitrary

Action Menus

Introduction:

Action Menus are a small subset of relevant actions for users so they can find exactly what they need for the task at hand

Purpose

- To provide users with the most important commands and relevant tools they need to complete tasks easily within their given action
- To reduce interaction cost and cognitive load as users don't have to parse through long lists of main-menu items

Placement:

Menus appear in front of all other permanent UI elements.

Best Practices

Place the most frequently used items at the top of the menu

Only include a focused set of actions and common options related to the task at hand. Items inside of action menus should directly relate to the tasks the user needs to complete or the element in the interface that's selected or clicked.

Action menus are not toolbars

Features available in the toolbar should ideally not be available in the action menu, except for special cases (e.g. clipboard functions).

Always have an alternate way of doing things

Commands in action menus should also be available elsewhere to perform the same tasks as well

Include visual elements in the UI to indicate that an action menu is available.

Common visual signifiers for action menus include vertical or horizontal ellipsis (3 dots) and down-pointing arrows (chevron/caret). Advanced users may understand that right-clicking, control-clicking, swiping, or long-pressing will reveal a contextual menu, but not all users will know this.

**CA has ellipses*

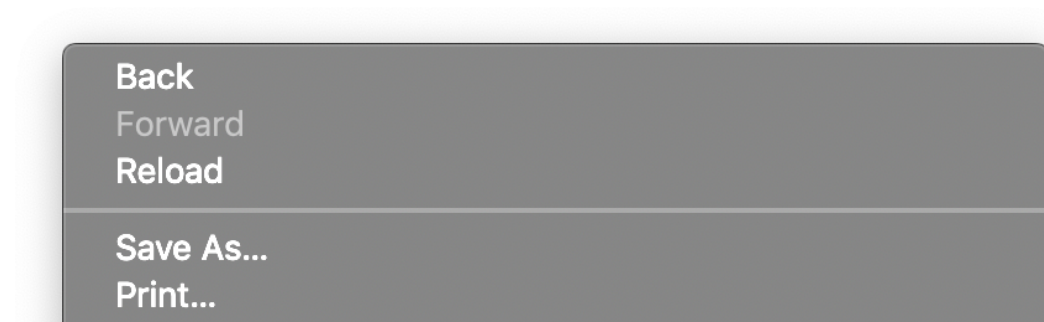
Keep it consistent across the product

Adopt action menus consistently. If you provide context menus for items in some places but not in others, people won't know where they can use the feature and may think there's a problem with your app.

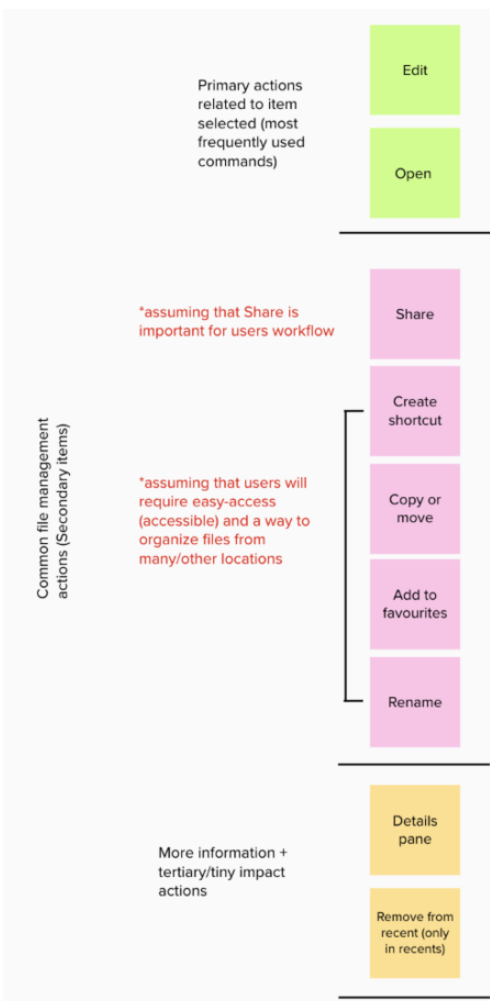
Disable items that aren't relevant to the user's action.

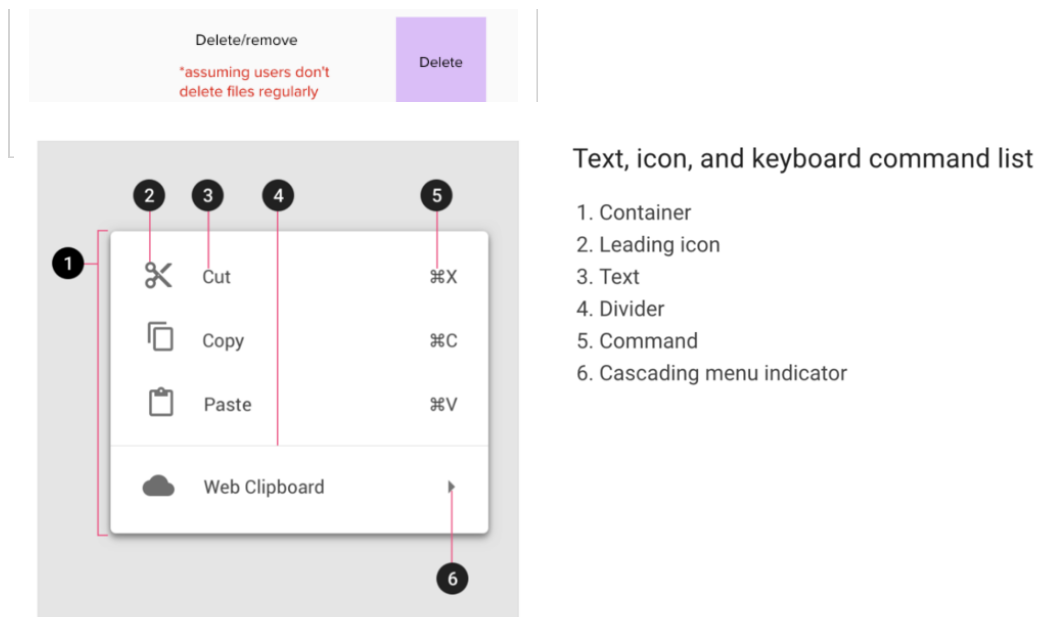
Rather than hiding irrelevant actions, disable them so that users won't have to try to find where menu items disappeared, nor will they have to determine how to get the system back in the proper action to reveal a specific command. Also, make sure that you include all options (instead of just one) in a family of related commands. For example, if there is a *Back*, there should also be a *Forward*. If there's a *Cut*, there should also be *Copy* and *Paste*.

Example: Forward action

**Information Architecture Hierarchy****General Rule**

Example: File management use cases (our use-case)	General Use Cases (for in-product uses)
<p>Order of Hierarchy</p> <ul style="list-style-type: none"> • Primary (most frequently used commands) <ul style="list-style-type: none"> ◦ <i>Run, Edit, Open, Open with,</i> • Common file management actions <ul style="list-style-type: none"> ◦ prioritized in most commonly used actions for user types ◦ <i>Rename, Duplicate, Move, Share</i> • More information actions + low impact actions <ul style="list-style-type: none"> ◦ tertiary actions ◦ <i>View details</i> • High impact actions <ul style="list-style-type: none"> ◦ <i>Delete/Remove</i> <p><i>*Importance and frequently commands always trumps hierarchy (which includes delete command)</i></p>	<p>Order of Hierarchy</p> <ul style="list-style-type: none"> • Primary (most frequently used commands) <p>Common actions</p> <ul style="list-style-type: none"> ◦ prioritized in most commonly used actions for user types <p>More information actions + low impact actions</p> <ul style="list-style-type: none"> ◦ tertiary actions <p>High impact actions</p> <p><i>*Importance and frequently commands always trumps hierarchy (which includes delete command)</i></p> <p>Order of Hierarchy:</p> <ul style="list-style-type: none"> ◦ Primary (most frequently used commands) ◦ Open/run/play/print ◦ transfer commands ◦ cut copy paste ◦ object settings ◦ object commands ◦ delete rename properties ◦ program technical actions (meant for more expert users)





Text, icon, and keyboard command list

1. Container
2. Leading icon
3. Text
4. Divider
5. Command
6. Cascading menu indicator

Icons (2)

Use icons for actions that map to items in the toolbar or most important actions

Show keyboard shortcuts in action menus (5)

To help users save time and learn keyboard shortcuts, include them in action menus. Seeing these shortcuts repeatedly will help users memorize task-specific commands and become efficient.

Separators (4)

Separate groups with lines

Use separators to group related menu items. Creating visual groupings can help people scan a menu more quickly. For example, you might use a separator to group actions related to editing the item and another to group actions related to sharing the item. Typically, you don't want more than three groups in an action menu.

Number of items

Keep it simple. Ask yourself if you can **identify a small set of options** or tools that are related to a particular task, selected element, or app screen

Do not put more than 10 items within the default level of a menu added by not more than 5 context sensitive items after right clicking an element. Add separators between logical groups within a menu. Organize the menu items into groups of seven or fewer strongly related items.

Delete

It lives at the bottom since it is a highly impactful action. The hover state should be red like:

<https://www.carbondesignsystem.com/components/overflow-menu/usage/#formatting>

Submenus (Cascading menus)

Limit the use of submenus within action menus

Use submenus to manage complexity. A submenu is a action menu item that reveals a secondary menu of logically related commands. Give submenus intuitive titles that describe their contents so people can predict the submenu's commands without revealing them. Concise, action-oriented titles also let people skip over submenus they don't need in their current context.

Keep submenus to one level

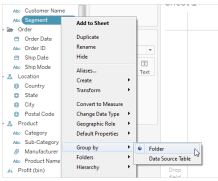
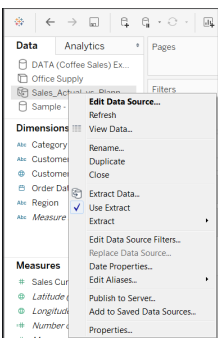
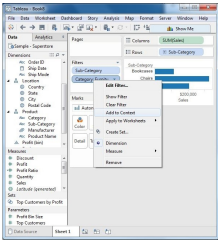
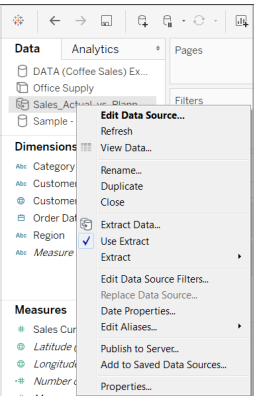
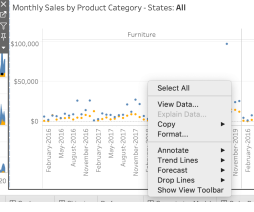
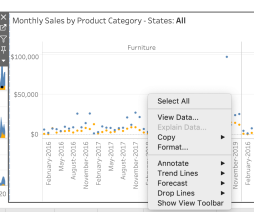
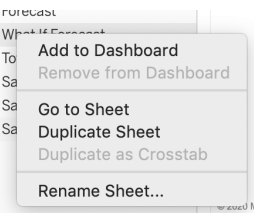
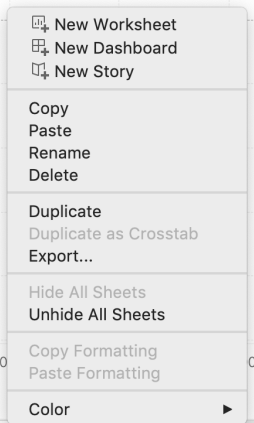

Although submenus can shorten an action menu and clarify the commands that people can perform, more than one level of submenu complicates the experience and can be difficult for people to navigate.

Other important notes for effective Action Menu

- For browser-based programs, task pane menus are a more common solution for action commands. Currently, users expect action menus in browser-based programs to be generic and unhelpful.
- Use when there is a small set of commands / options that can apply to the selected area
- Most frequently used items go at the top
- Use icons for only most important actions
- Separate groups with lines
- Avoid Submenus if possible, when using keep to one level
- Commands in action menus should also be available else where to perform the same tasks as well
- Order of hierarchy should be
 - Primary (most frequently used commands)
 - Open/run/play/print
 - transfer commands
 - cut copy paste
 - object settings
 - object commands
 - delete rename properties
- Disable action menu items that are not currently applicable vs hiding them altogether
- Use short commands (show them in the action menu if there are any)
 - Assign shortcut keys to most frequently used items
- Caret or 3 dots / or chevron helps show there is a menu available - some visual aid to show menu is available helps vs right click action. Try to see if action menu can be triggered in ways without right click - as user won't know if it's available
- For browser-based programs, task pane menus are a more common solution for action commands. Currently, users expect context menus in browser-based programs to be generic and unhelpful.
- **For hidden action menus, (1) include tips to create awareness and (2) allow users to perform the same actions another way.**Avoid providing a context menu and an edit menu for the same item. It can be confusing to people and hard for the system to detect intent when both features are enabled for the same item.
- Submenus triggered from action menus can easily disappear if the cursor moves away from the primary list item or if the user accidentally clicks outside of the contextual menu. If a submenu is needed, make sure that none of its options open yet another level of submenus and don't overload it with obscure commands to the point that it becomes cluttered, confusing, and difficult to use
- Include a glyph with each command in an action menu. A glyph reinforces the meaning of a command, helping people instantly understand its function. If your action menu includes a submenu, you don't need a glyph for it because it automatically displays a system-provided chevron symbol that indicates the presence of additional commands.

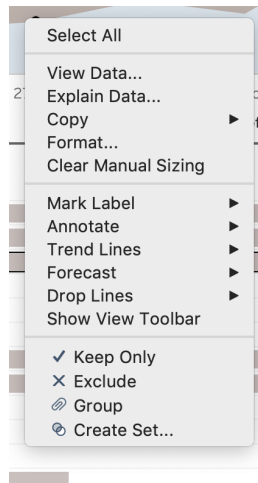
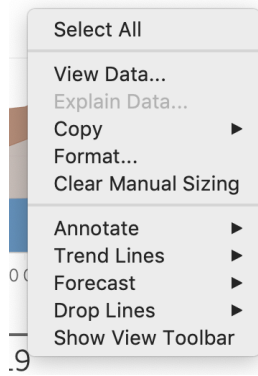
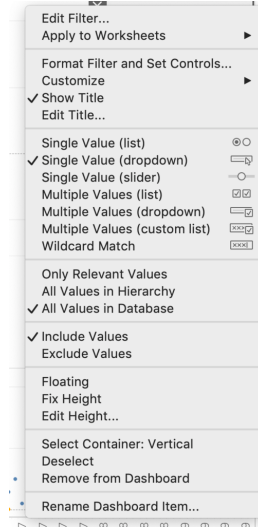
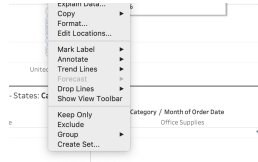
ARCHIVES/REFERENCES


Research

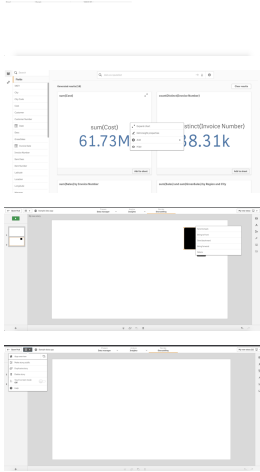
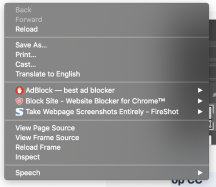
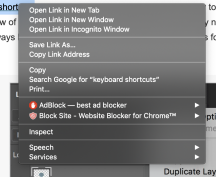
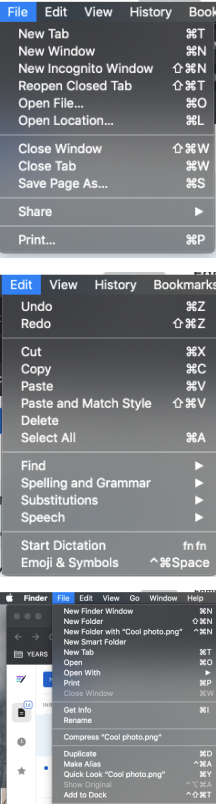
Screenshot + Link	Google Images	Application	Notes
<p>Tableau</p>	<p>Google:</p>  <p>https://help.tableau.com/current/pro/desktop/en-us/img/underlyingdata_1.png</p>   <p>https://lh4.ggpht.com/-85cJY-hm2Vk/T9DMgYJGRLI/AAAAAAAZUA/vMD4QDhAYHK/image_thumb27.png?imgmax=800</p> <p>https://help.tableau.com/current/pro/desktop/en-us/img/table_calc_filter_applytototals2.png</p> <p>https://help.tableau.com/current/pro/desktop/en-us/img/access_selectfiltertype.png</p> <p>https://cdn.educba.com/academy/wp-</p>	<p>App:</p>      	<p>Group 1:</p>

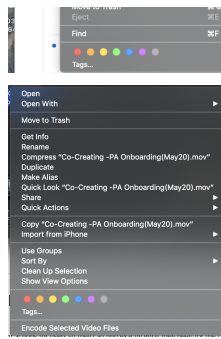
<content/uploads/2019/10/dash-7.png>

https://mdl.library.utoronto.ca/sites/default/files/pictures/Tableau_6b.png



PowerBi			
Micro-strategy			
QlikView			Couldn't identify a clear

			<p>pattern but secondary actions always located at the bottom (Help, Hide, Delete)</p>
<p>Looker</p>	<p>Not available</p>	<p>Not available</p>	
<p>Google (Guidelines)</p>	<p>Google Chrome (right click on webpage)</p>  <p>Google chrome (right click on hyperlink text)</p> 		
<p>Apple (HCI Guidelines) https://developer.apple.com/design/human-interface-guidelines/macos/menus/contextual-menus/</p>			<p>Adopt context menus consistently. If you provide context menus for items in some places but not in others, people won't know where they can use the feature and may think there's a problem with your app. Include only the most commonly used commands that apply to the item. For example, in the context menu for a Mail message, it makes sense to include commands for replying and moving the message, but it doesn't make sense to include formatting or mailbox commands. Listing too many commands can</p>



overwhelm people.

Include a glyph with each command in a context menu. A glyph reinforces the meaning of a command, helping people instantly understand its function. If your context menu includes a submenu, you don't need a glyph for it because it automatically displays a system-provided chevron symbol that indicates the presence of additional commands.

Use submenus to manage complexity. A submenu is a context menu item that reveals a secondary menu of logically related commands. Give submenus intuitive titles that describe their contents so people can predict the submenu's commands without revealing them. Concise, action-oriented titles also let people skip over submenus they don't need in their current context.

Keep submenus to one level. Although submenus can shorten a context menu and clarify the commands that people can perform, more than one level of submenu complicates the experience and can be difficult for people to navigate.

Place the most frequently used items at the top of the menu. When people open a context menu, their focus is on the top area of that menu. Placing the

			<p>most common items at the top of the menu helps people find the item they're looking for.</p> <p>Use separators to group related menu items. Creating visual groupings can help people scan a menu more quickly. For example, you might use a separator to group actions related to editing the item and another to group actions related to sharing the item. Typically, you don't want more than three groups in a context menu.</p> <p>Avoid providing a context menu and an edit menu for the same item. It can be confusing to people and hard for the system to detect intent when both features are enabled for the same item. For additional guidance, see Edit Menus.</p> <p>Avoid providing an action button that opens the item preview. People can tap to open the item they're previewing, so there's typically no need to provide an explicit Open button.</p>
<p>Eclipse (HCI Guidelines) https://wiki.eclipse.org/User_Interface_Guidelines#Context_Menus_2</p>			
<p>https://www.nngroup.com/articles/contextual-menus/</p>		<p>Notebook: https://media.nngroup.com/media/editor/2019/02/14/contextual-menu-in-one-note.jpg Actions such as Paste and Insert Link made sense to</p>	<p>Context Menus:</p> <ul style="list-style-type: none"> • Offers a small subset of relevant actions for users so they can find exactly what they need for the task at hand

insert link made sense to include here, but global actions such as Save or Print did not make sense to include as those commands are related to the entire Notebook, rather than the selected note.

*shortcuts are next to options

<https://media.nngroup.com/media/editor/2019/02/14/google-photos-contextual-menu.png>

*google uses horizontal eclipses to show relevant information

<https://media.nngroup.com/media/editor/2019/02/14/google-sheets-contextual-menu.jpg>

*Google (excel), submenus were hard to reach and decipher

<https://media.nngroup.com/media/editor/2019/02/14/youtube-contextual-menu.png>

* The menu options were presented in order of importance and, if users decided to take no action, they were able to easily Cancel the task, thus hiding the contextual menu without any change to their view.

<https://media.nngroup.com/media/editor/2019/02/14/powerpoint-contextual-menu.png>

*Shortcuts

task at hand

- Why? Bc it reduces interaction cost and cognitive load as users don't have to parse through long lists of main-menu items

Tips for effective context menus:

1. ask yourself if you can **identify a small set of options** or tools that are related to a particular task, selected element, or app screen
 2. **Only include a focused set of actions and common options related to the task at hand.** Items inside of contextual menus should directly relate to the tasks the user needs to complete or the element in the interface that's selected or clicked.
 3. **Include visual elements in the UI to indicate that a contextual menu is available.** Advanced users may understand that right-clicking, control-clicking, swiping, or long-pressing will reveal a contextual menu, but not all users will know this. Common visual signifiers for contextual menus include vertical or horizontal ellipsis and down-pointing arrows.
- **For hidden contextual menus, (1) include tips to create awareness and (2) allow users to**

			<p>perform the same actions another way.</p> <ul style="list-style-type: none"> • Limit the use of submenus within contextual menus. Submenus triggered from contextual menus can easily disappear if the cursor moves away from the primary list item or if the user accidentally clicks outside of the contextual menu. If a submenu is needed, make sure that none of its options open yet another level of submenus and don't overload it with obscure commands to the point that it becomes cluttered, confusing, and difficult to use. • Show keyboard shortcuts in contextual menus. To help users save time and learn keyboard shortcuts, include them in contextual menus. Seeing these shortcuts repeatedly will help users memorize task-specific commands and become efficient.
<p>Context Menus - Microsoft https://docs.microsoft.com/en-us/windows/win32/uxguide/cmd-menus</p>			<p>Here are some guidelines for context menus:</p> <ul style="list-style-type: none"> • Identify various types of objects or task scenarios in your application and create context menus that reflect the most likely choices. Context menus generally contain a limited number of commands. Lengthy context menus

			<p>Context menus require more wrist movement to navigate and are harder to scan.</p> <ul style="list-style-type: none">• If possible, avoid using submenus, especially multiple levels of submenus.
Google Sheets			<p>Groupings: (context menu on cell)</p> <ul style="list-style-type: none">• Cut/copy/paste• Object commands (insert)• Secondary object commands (delete)• Tertiary object commands (insert link)• User options (comment, notes)• Programming options - data validation / conditional formatting <p>(drop down on sheet)</p> <ul style="list-style-type: none">• Arrow to show menu exists, triggered by caret• Delete, duplicate, copy to/rename, change colour,