

Evolve UX Wireframes

# Form Controls & Form Validation

Version 0.01

Work-in-Progress

## Version History

Document Name	Author	Date Modified	Notes
Evolve UX Wireframes - Form Validation_v0.01	Yooch Wan	14 Oct 2013	Document Created. Initial version covers first drafts of: text fields, fields with dynamic filtering, tooltips, date fields and ranges, tabbing, toggle switches

## Purpose of Document

Document based on earlier documented design patterns from Blotter and Manual Ticket Entry UX requirements.

This will form the basis of all generic form workflow and form validation behaviours.

# Text Fields

Text goes here

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## Letters only

NAME

Jonathan1 Bloggs I

Invalid Entry - Only letters allowed

---

## Numbers only

Amount

100000000 I

Amount

100,00USD

Invalid Entry - Only numerical values allowed

---



Amount

100,000,000 I

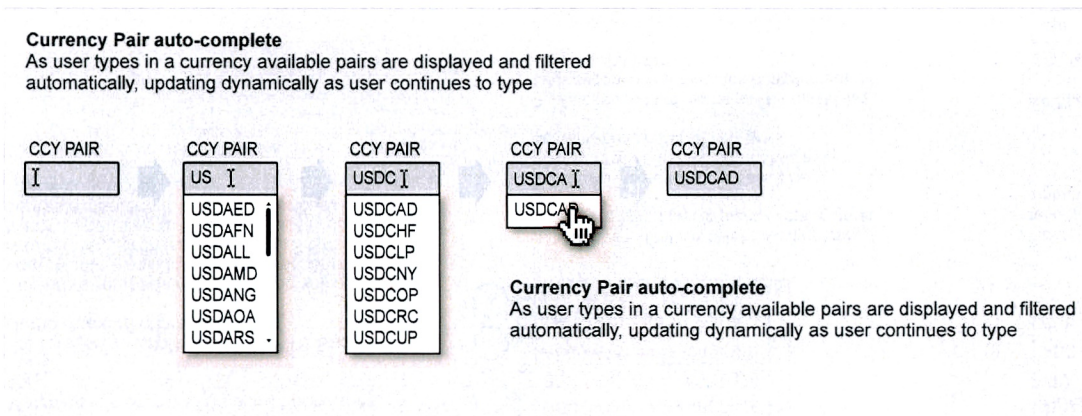
Numbers entered should be re-formatted to display the number with comma separators to aid readability upon on-blur (when the mouse or cursor leaves the input field).

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## Fields with Dynamic Filtering

Combo-boxes are employed for text fields that require inputs to match a pre-defined set of values. Combo-boxes allow the user to type in a value directly into the control or choose from a list by scrolling. As the user types, matching values are filtered automatically and displayed within the list, and is updated dynamically as the user continues to type. The user may use the mouse or cursor keys to select a value from the list at any time.

Currency Pair input into a combo-box



Further reading: [http://en.wikipedia.org/wiki/Combo\\_box](http://en.wikipedia.org/wiki/Combo_box)

# Fields with Dynamic Filtering (continued)

## Entering a Counterparty

Search strings typed into counterparty field are matched to display name and Treats code of counterparties that are defined in user's 'Your relationships'.

Results will only include counterparties for selected region [\(To be confirmed\)](#)

Matching is performed on word boundaries only.

For release 1, display name is PTS Short Name (max 15 characters)

For future releases, display name will be either Long Name (max 255 characters), Short Name (max 28 characters) or PTS Short Name depending on 'Display counterparty names as' setting in user preferences. [\(To be confirmed\)](#)

### Order of Matches

COUNTERPARTY

FID I

- 1 FIDELITY A - ABCDE123
- 2 FIDELITY B1 - ABCD124
- 3 ABC FIDELITY Z - ABCD125
- 4 BBC FIDELITY A - ABCD126
- 5 ABC WORK FID - ABCD127
- 6 ADF ACE FID - ADCD128
- 7 ADF ACE FID - FIDD128

1. Matches to first words of display name will be displayed first in alphanumeric order
2. Matches to second words will be displayed after first word matches in alphanumeric order of first word
3. Matches to third words will be displayed after second word matches in alphanumeric order of first word
4. If word and treats code matches are found only word word match rules apply

### Long Name Tooltip

COUNTERPARTY

FIDE1 I

- FIDELITY B2 - FIDE102
- FIDELITY A3 - FIDE113
- FIDELITY A3 INVESTMENTS LIMITED - FIDE113

Counterparty long name is displayed in tooltip on-hover after short delay

### Treats Code Matches

COUNTERPARTY

FIDE1 I


- FIDELITY B2 - FIDE102
- FIDELITY A3 - FIDE113
- FIDELITY A1 - FIDE123
- ABC FIDELITY Z - FIDE138
- ABC FIDELITY A - FIDE142
- ACE FIDELITY 1 - FIDE193

If only treats code matches are found results are ordered by treats code alphanumerically

### No Matches Found

COUNTERPARTY


asd

 No matching counterparties found

COUNTERPARTY

asd


Searching entire database...



COUNTERPARTY

asd

0 results found

 No matching counterparties found

### Search Strings with Spaces

COUNTERPARTY

FIDELITY B1 I

- FIDELITY B1 - ABCD123
- FIDELITY B123 - ABCD125

Search strings that include a space will only show exact matches

COUNTERPARTY

asd I

3 results found:

- ASDA GD - ASGDLTD
- ASHLAND CORP - ASDIUK
- ASPIRE INV - ASDELTD



# Date Fields

XXXXXX

## All Date Fields

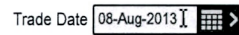
Dates can be manually entered using any of the following formats but re-displayed as DD-MMM-YYYY:

- 10-Sep-13
- 10-Sep-2013
- 10 Sep 13
- 10 Sep 2013
- 10 09 13
- 10/09/13
- 10/09/2013

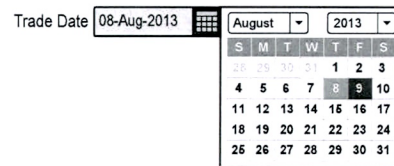


## Date Fields with Date Picker (Calendar Icon)

Date can be typed in:



Or selected from the calendar:



Calendar controls should be initialised with valid date rules, e.g. if dates in the past are not valid then disable those dates so that it is un-selectable.

## Date Validation

If a date is manually entered into a date field and the date is invalid, a red outline appears around the text field and upon on-focus or mouse-over, a tooltip appears over the text field with an error message

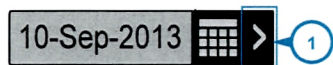


## Date Ranges

Some date controls allow the user to specify a date range.

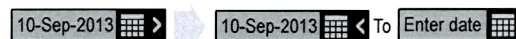
This is denoted by a right chevron at the end of a date control, which when clicked, will reveal an additional date field to input the end date.

### Date Range Controls



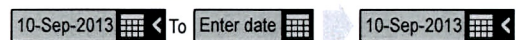
1. Range button

Date range controls can be revealed:



As fields are expanded when space on a line is filled elements wrap onto the next line when necessary - DISAGREE?

and hidden as required:



## Date Range Validation

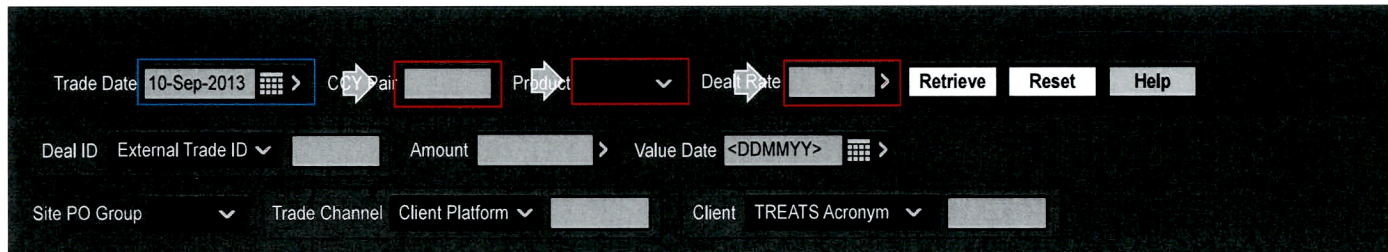
Calendar controls for end-dates should be initialised with valid date rules, e.g. do not allow date values before the start date value.

# Tabbing

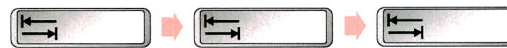
## Sub-heading

Tabbing allows the user to navigate between fields using the keyboard by pressing the [TAB] key to move to the next field or by pressing [SHIFT] + [TAB] to move to the previous field.

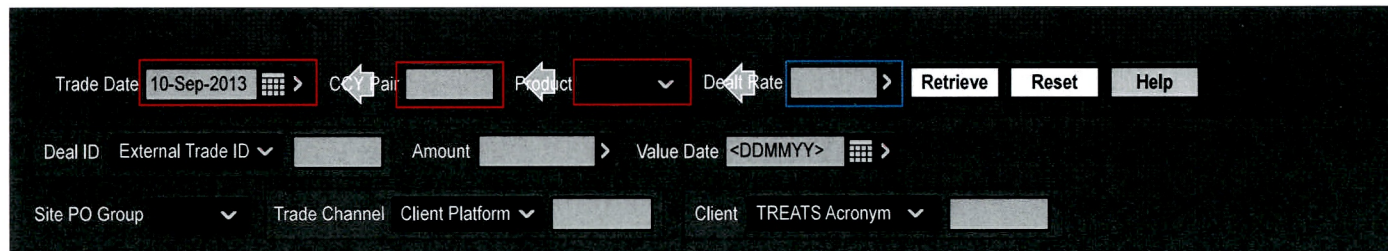
Tabbing to move to next field



A screenshot of a form with various input fields. Red boxes highlight the 'Trade Date' field (containing '10-Sep-2013'), the 'Currency Pair' field, the 'Product' dropdown, and the 'Deal Rate' field. White arrows point from the right side of the 'Trade Date' field to the 'Currency Pair' field, from the right side of 'Currency Pair' to 'Product', and from the right side of 'Product' to 'Deal Rate'. At the bottom right, there are three buttons: 'Retrieve', 'Reset', and 'Help'.



Shift-Tabbing to move to previous field



A screenshot of the same form as above. Red boxes highlight the 'Deal Rate' field, the 'Product' dropdown, the 'Currency Pair' field, and the 'Trade Date' field (containing '10-Sep-2013'). White arrows point from the left side of the 'Deal Rate' field to the right side of the 'Product' dropdown, from the left side of 'Product' to 'Currency Pair', and from the left side of 'Currency Pair' to 'Trade Date'. At the bottom right, there are three buttons: 'Retrieve', 'Reset', and 'Help'.



# Toggle Switches (Radio Buttons)

Sub-heading

Enter text here



1. Click All Regions Panic toggle to activate



2. Click again to de-activate



## Panic Individual Regions



1. Click a Region Panic toggle to activate for that region



# Form Submission

Prevent form submission by disabling submit button until mandatory fields have been populated and both mandatory and optional fields have been validated

Enter text here

Submit button is visible but disabled as required fields have not been populated

Field 1 (Required)	Field 2 (Optional)	Field 3 (Optional)		
<input type="text" value="Required Field"/>	<input type="text" value="Optional Field"/>	<input type="text" value="Required Field"/>	<input type="button" value="Submit"/>	<input type="button" value="Cancel"/>

Submit button is disabled as entry is required for one mandatory field (field 3)

Field 1 (Required)	Field 2 (Optional)	Field 3 (Required)		
<input type="text" value="Entered Text"/>	<input type="text" value="Entered Text"/>	<input type="text" value="Required Field"/>	<input type="button" value="Submit"/>	<input type="button" value="Cancel"/>

Submit button remains in a disabled state as mandatory field has an invalid value

Field 1 (Required)	Field 2 (Optional)	Field 3 (Required)		
<input type="text" value="Entered Text"/>	<input type="text" value="Entered Text"/>	<input type="text" value="ABCDEF12345678"/>	<input type="button" value="Submit"/>	<input type="button" value="Cancel"/>

**Invalid Entry - Unknown ID**

Although Field 2 is optional, any values entered are still validated. Submit button remains disabled until all populated fields are checked for valid values.

Field 1 (Required)	Field 2 (Optional)	Field 3 (required)		
<input type="text" value="Entered Text"/>	<input type="text" value="31 Feb 2013"/>	<input type="text" value="Invalid Date"/>	<input type="button" value="Submit"/>	<input type="button" value="Cancel"/>

**Invalid Date**

Once all mandatory fields have been populated with entries and validated, the submit button is enabled

Field 1 (Required)	Field 2 (Optional)	Field 3 (required)		
<input type="text" value="Entered Text"/>	<input type="text" value="Optional Field"/>	<input type="text" value="Entered text"/>	<input type="button" value="Submit"/>	<input type="button" value="Cancel"/>

# Heading

Sub-Heading

Enter text here

# Form Layouts

Sub-Heading

Enter text here

including section about overflow of form elements and wrapping to next line.