



Rsam Platform

Design Recommendations for Rsam Home Pages

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About this Guide

Rsam Home Pages are highly configurable and come with endless design options from version 10 onwards. Administrators can add widgets to display information, configure Activity Centers to act as a central task location, set the desired landing pages, and much more. This guide provides recommendations to design useful and efficient home pages in Rsam.

This document does not provide detailed information on the steps to configure home pages. For detailed information, refer the *Rsam Online Help*.

Intended Audience

This document is intended for use by *Rsam Administrators* or those users responsible for configuring and maintaining Home Pages in Rsam.

Designing Home Pages

This section provides some guidance on designing home pages in Rsam version 10 as follows:

- [Designing Activity Centers](#)
- [Widget Display Options](#)
- [Data on Widgets](#)
- [Widget Arrangements](#)

Designing Activity Centers

Activity Centers should be used to design an easy experience for end-users having a limited number of tasks to complete. Ideally an end-user with only a few tasks will see only activity centers and will not have to navigate to other pages to complete those. Activity Centers can act as a central location to view information and complete tasks across same or different modules.

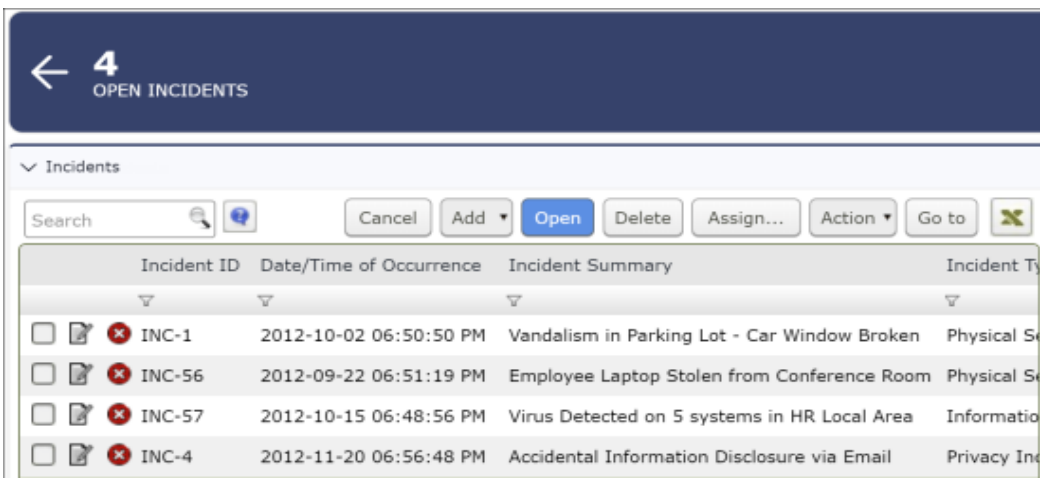
Task-Focused Activity Centers

End-users mostly use Rsam to enter data on an existing record or object. To make these tasks simple, it is recommended to design a basic activity center for each end-user tasks:

- Create a basic flat search that lists the items users needs to interact with (for example, Open Incidents)
- Design an activity center that uses the search to show a count and a provide a title such as Open Incidents



- To the activity center, associate a single Saved Search Results widget that shows this search data.



For an advanced interaction you can do the following:

- Set **Dynamic** coloring for the activity center. You can set it to display in a gray or light color when the count is 0 (no activities) and a brighter color when the count is more.

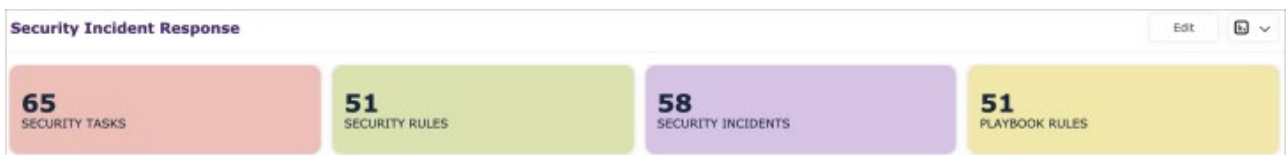


- Add a chart (using a different search with a grouping) below the saved search results widget.

These customizations make it easy for users to find and interact with their pending activities.

Usage of Colors

- Using different colors help segregate Activity Centers based on modules or sub categories within a module.
- Use the Dynamic Widget Style to define color gradients when you want widget colors to draw attention of users. For example, if an Activity Center widget has tasks requiring immediate action vs when it contains just informative content.



Naming, Placement and Grouping

- Activity Centers, which act as Task Centers are best placed at the top of a page from where users can easily navigate to tasks.
- Group related widgets into an Activity Center.
- Use containers to group Activity Centers.
- Provide easily comprehensible and distinguishable names to Activity Centers. Use Tooltip field to provide more information on the purpose of the Activity Center.

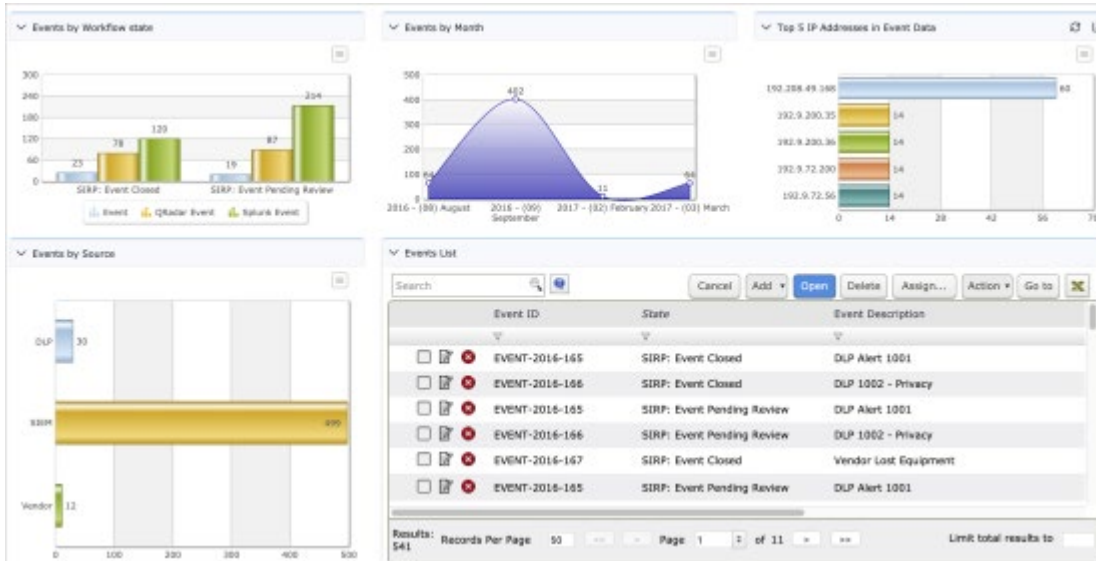
Widget Arrangements

Widgets arrangements can vary depending on use cases and type of data being displayed. Some best practices applicable for most cases are as follows:

- **Task-based widgets** - Some widgets are placed on the home page for end-users to complete pending tasks. Most often this will be a Records Category List or Saved Search Results widget. You can place these widgets at the top of the page to draw quick attention to tasks.
- **Multi-column layout** - Make use of the multi-column layout and place more widgets together on a row. However, placing more than 4 or 5 widgets on a page may give a cluttered appearance. Also, make sure that you view the arrangements in the lowest and highest screen resolutions for your end-users.

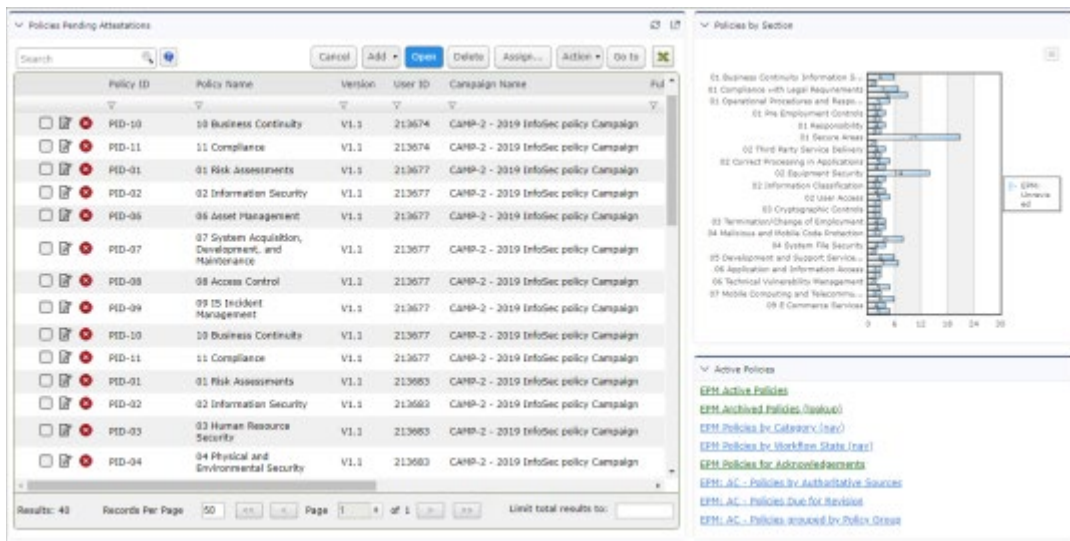
- Consistent number of widgets** - Maintain consistency in the number of widgets being added in each row or resize the widgets to maintain a uniform look.

If a widget has more data compared to rest of the widgets on the page, you can align the widget with more data to occupy 2 or more columns for better visibility of data. The following image shows an example of placing widgets across columns.



- Widget sizing** - Align the widgets to have the same height to eliminate unwanted spaces between widgets.

If a widget needs to span across 2 rows, align it to fit with the other widgets adjacent to it.



Widget Display Options

- Disable **Show Gridlines** option for widgets containing tabular or list data if the list is relatively small. However, if there are 8 or more items, you can enable gridlines to easily differentiate between rows and columns.
- Enable **Collapse on Load** option for those widgets containing more data that are accessed less often.
- You can use Cosmetic widgets to show separators or headings on pages to segregate widget groups.

Data on Widgets

- **Show Live Data** - For better performance when designing home pages, you can clear the **Show Data** check box. Clearing the selection ensures that data on widgets are not loaded while designing and you can design the page faster. Enabling Show Data option is useful in cases when you want to visualize the data while designing the page.
- **Setting Widget Priority** - When adding widgets, set the **Priority** for each widget by analysing the importance and amount of the widget data. Home pages load data on the page depending on the priority set for the widgets. You can set first priority for widgets that must be loaded first and have lesser amount of data.

Place widgets with more importance on the top of the page and set the first priority for these widgets so that users can view data as soon as the page start loading. Widgets with lesser priority can be placed towards the bottom of the page.