

Item setup: Wireframe excerpt

This is an excerpt of selected wireframe pages from a huge B2B project for a major retailer who asked not to be identified here. So I've changed their name to "Ipsum."

The retailer's website carries a wide variety of products, supplied by thousands of vendors ranging from Fortune 500 enterprises to mom-and-pop boutiques. This portal is the means by which all of those vendors set up their items to be included on the site. Such work would be done only on the desktop, not on mobile devices.

The retailer needs certain information about each product, which differs dramatically depending on whether the product is a sofa or earrings or ice cream or a lawnmower. Enterprises will just upload XML, but smaller vendors and all new vendors need templates with the fields appropriate to their product type(s).

This excerpt addresses mainly how vendors get and manage their templates and upload their data.

--John Boykin

Portal landing page

LOGO

Website Item Management

[Search](#) [Help](#) [Logoff](#)

Administration

Set up new items

Manage current items

Reference

Reports

Dashboard

To-Do List

- [Update item information \(26\)](#)
- [Provide missing information \(741\)](#)
- [Review items that expire soon \(94\)](#)
- [Download updated templates \(4\)](#)
- [Resume incomplete setups \(3\)](#)
- [Other lorem ipsum dolor sic](#)
- [That nunc pumpulus](#)
- [This rumpulum et](#)

Messages from Ipsum

REPORTS READY

- Feb 23 [Upload response: Winter Line](#)
- Feb 17 [Data quality analysis: Winter Line](#)
- Feb 12 [Report nunc pumpulus](#)
- Jan 28 [Message rumpulum et](#)

NEWS & NOTICES

- Jan 21 [Major change in Lorem Ipsum](#)
- Jan 14 [New categories in Toys](#)
- Jan 7 [Announcement nunc pumpulus](#)
- Jan 1 [Message rumpulum et](#)







GROUP HEADING

- Feb 17 [Lorem Ipsum nunc pumpulus](#)
- Feb 12 [Information rumpulum et sic biscus](#)

[My message preferences](#)

Updated templates

Please download these updated versions of templates you use.

-  Template name lorem ipsum dolor
-  Template name lorem ipsum dolor sic
-  Template name lorem ipsum dolor sic nunc
-  Template name lorem ipsum rapsidus
-  Template name lorem ipsum rumpdedum
-  Template name lorem ipsum dolor sic nunc

Download templates selected

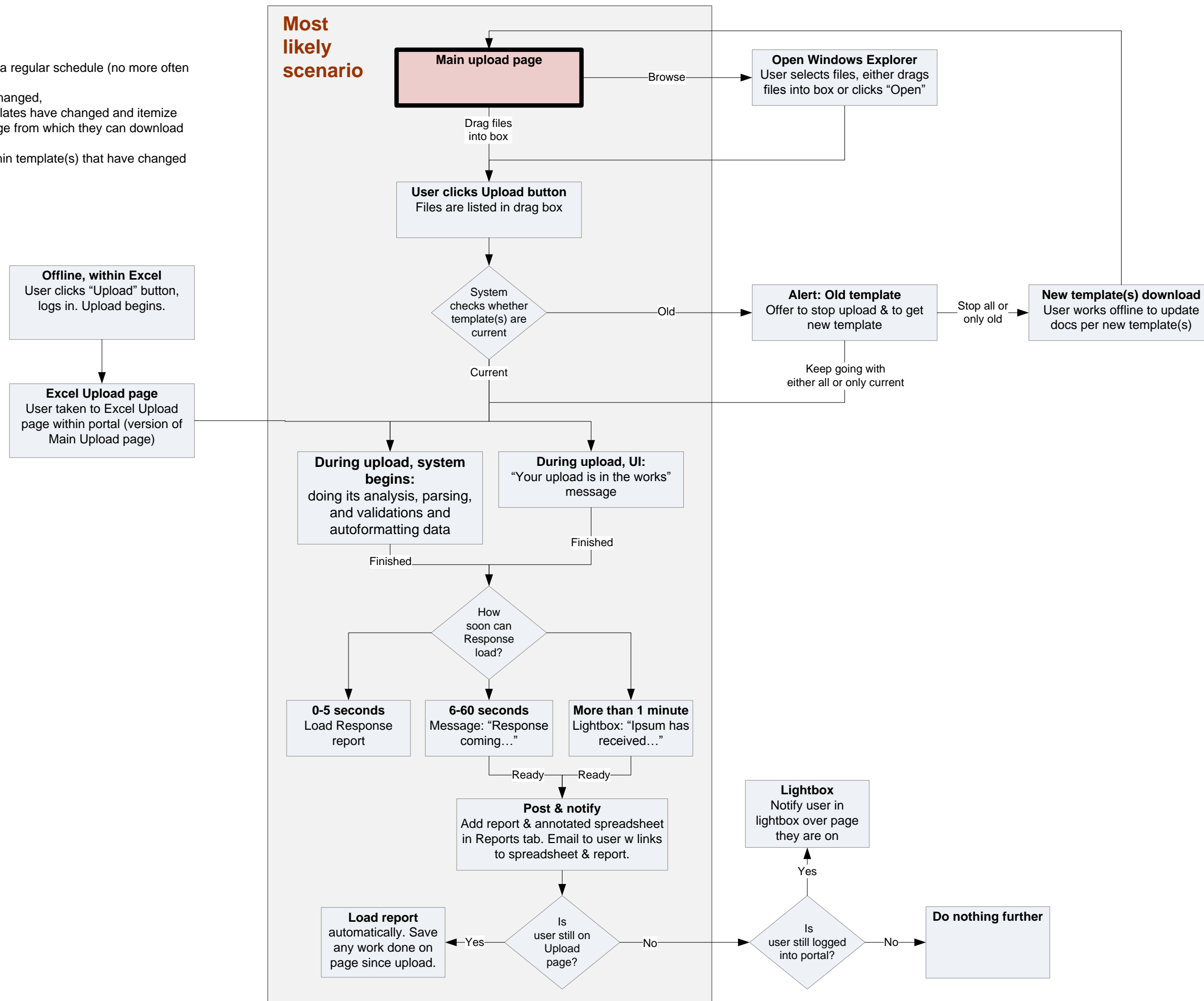
Search
Help
Logoff

Bulk upload flow

We should release template updates on a regular schedule (no more often than quarterly).

If 1+ templates used by this user have changed,

- Notify each user which of their templates have changed and itemize the changes, along with a link to page from which they can download their updated template(s)
- Offer download of all their items within template(s) that have changed



Main upload page

Administration **Set up new items** Manage current items Reference Reports

Upload existing file(s)

Identify Excel spreadsheets or XML files you want to upload by either dragging them into the box below or [browsing for them](#).

Tips

Drag files here

OR

click "Browse for file(s)" above

Give this upload a nickname to make it easy to recognize in later reports (optional):

RELATED LINKS

- [Browse for file\(s\)](#)
- [Instructions](#)
- [Get latest template\(s\)](#)
- [View content requirements](#)
- [Set up 1 item at a time online](#)
- [Auto-upload XML](#)

Page Intro:

This is the page most vendors will use most of the time to set up items, by uploading one or more Excel spreadsheets and other documents. The user does not have to specify what they are uploading. The system automatically figures out what the documents are, what to do with them, and how they relate to one another.

1. Link: Browse for file(s)

Effect: Superimposes the user's own Windows Explorer or Mac equivalent over this parent page. See later page of this document.

2. Link: ... latest template(s)

This contingent link appears only if there are 1+ updates to this user's templates that this user has not yet downloaded.

Effect: Loads the page that smartly lists templates for this user's categories have changed since the last time this user either downloaded this templates or uploaded items.

3. Link: View content requirements

Effect: Superimpose lightbox over this page, displaying content requirements from the reference documentation.

4. Link: Set up 1 item

This link is offered as a convenience for users who may have gotten to this page by mistake.

Effect: Load page XYZ: "Set up 1 item at a time online."

5. Link: Auto-upload XML

Effect: Load Auto-upload XML page.

6. "Drag files" box

Concise instructions appear inside the box; they disappear when 1+ file listings appear in the box. If the user

- drags one or more file listings from their Windows Explorer (or Mac equivalent) into this box, or
- has clicked the "Browse for file(s)" link, selected 1+ files in their Windows Explorer (or Mac equivalent), and clicked Open, return focus to this page, display a simple animation representing those files flying into the drag box, then display the list of files in this box as shown in the following pages of this document. Stretch the size of the box vertically as needed to fully display up to 20 listings.

7. Naming this upload

Giving this upload a nickname is completely optional. If the user:

- gives this batch a name, that name sticks with the batch and with each item in it
- gives this batch the same name they used before, an error message is revealed (without reloading the page) asking them to give this batch a unique new name

8. Buttons: Start upload now & Save to resume later

Both of these buttons are grayed out until at least one file is listed in the drag box (either by dragging them in or browsing for them). At that point, both come alive.

9. Button: Start upload now

Effect: System starts the upload and does its checks, analysis, parsing, and messaging as shown in the flow diagram earlier in this doc. It should start that immediately, rather than waiting until the upload is complete to start.

10. Button: Schedule later upload

Effect: Reveals scheduling widget. See later page in this doc.

11. Button: Save to resume later

Effect: System saves the list of files that the user dragged into the Drag files box, presents a message saying that it has done so, and populates them in the box next time this page loads at any point in the future. User does NOT need to go through any Save procedure or give the collection a name.

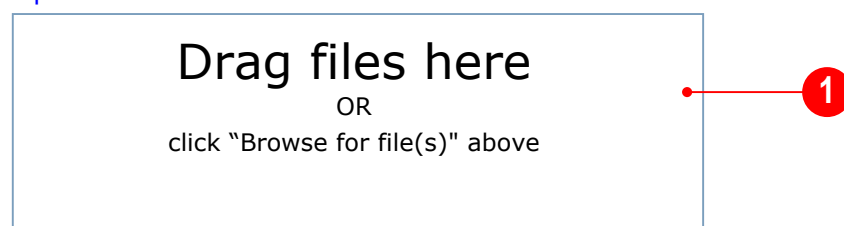
12. Link: Instructions

Effect: Superimpose lightbox containing instructions pertinent to this page.

Drag box

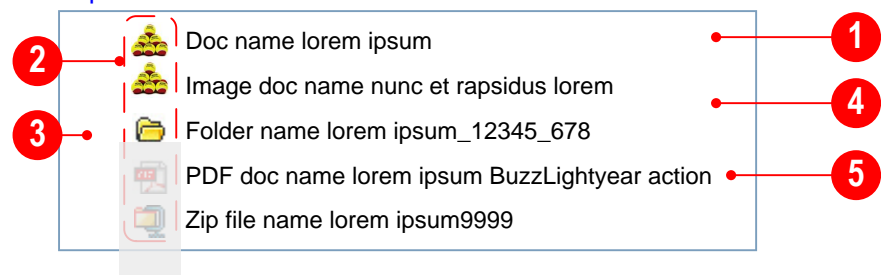
State 1

Tips



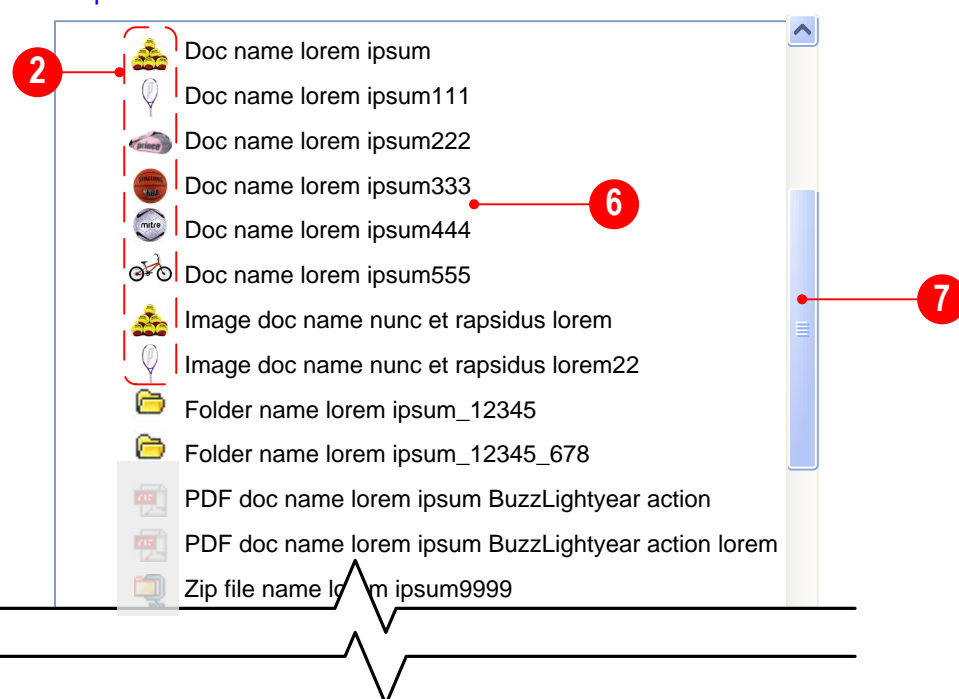
State 2a: Files listed

Tips



State 2b: Files listed—21+ files in list

Tips



Page Intro:

This describes some of the behavior of the Drag files box.


During the time between the user's drag action and the system's listing of files in drag box, display a simple animation representing files being moved into the box.

1. Instructions inside Drag files box

These concise instructions appear inside the Drag files box in the default state, 1. As soon as 1+ files are dragged into the box, the instructions disappear and/or replaced by the listing of files.

2. Icons for file types

Each listing is preceded by either a specific thumbnail or an icon representing its file type:

- File (whether spreadsheet or XML or anything other than the following). For Excel spreadsheets and XML, show a thumbnail of the photo representing each template. Otherwise generic icon: 
- Image (use thumbnail of the image itself)
- Folder
- PDF
- Zip

3. Space to left

Note the blank space to the left side of the drag box. It will be filled in with icons as the upload progresses.

4. Dragging repeatedly

User may go through the motions of dragging files into the box multiple times. For example, they might drag in six files, then drag in three more files, then drag in five more files, for a total of 14 files.

The drag box does not accept any new additions once the "Start upload now" button has been clicked.

5. Removing specific files from the list

User may drag any 1+ file(s) out of the box, either

- one at a time
- Shift-clicking to select multiple consecutive files, or
- Control-clicking to select multiple non-consecutive files

Any file dragged out of the box will not be uploaded. This will enable the user to correct errors and change their mind.

6. Sequence in listing

Files are grouped by file type in this sequence:

- File (whether spreadsheet or XML or anything other than the following)
- Image
- Folder
- PDF
- Zip
- then listed in alphabetical order within file type. The sequence of listings is refreshed if (and each time) the user drags more files into the box.

No given file is ever listed more than once, even if it is dragged in more than one time.

If possible, insert a horizontal line between each grouping.

7. Scrollbar






Stretch the vertical height of the Drag files box to accommodate the number of files dragged into it, up to a maximum of 20. For 21+ listings, add a scrollbar so the box scrolls.

The box should also automatically stretch horizontally to accommodate any long file listings. If any listings are too long to fit inside the box within our overall page width (1000 pixels), add a horizontal scroll box.

Upload doc (p. 3 of 5): Progress indications


Reminder of State 2, for comparison

Tips

	Doc name lorem ipsum
	Image doc name nunc et rapsidus lorem
	Folder name lorem ipsum_12345_678
	PDF doc name lorem ipsum BuzzLightyear action
	Zip file name lorem ipsum9999

State 3: Progress indications

1 Your upload is in the works

2  2 of 5 files uploaded **Reference number:** 98765









3 We will notify you when the response report is ready

5 **Stop upload**

6 Leaving this page will not stop your upload

7 [When to expect response](#)
[When will items be up on site?](#)


4

		Doc name lorem ipsum
		Image doc name nunc et rapsidus lorem
		Folder name lorem ipsum_12345_678
		PDF doc name lorem ipsum BuzzLightyear action
		Zip file name lorem ipsum9999

State 3a (out-of-date template detected)

Your upload is in the works

8 **One or more templates you are using is out of date.** [Details](#) **9**









 2 of 5 files uploaded **Reference number:** 98765

We will notify you when the response report is ready

Stop upload

Leaving this page will not stop your upload

[When to expect response](#)
[When will items be up on site?](#)

		Doc name lorem ipsum
		Image doc name nunc et rapsidus lorem
		Folder name lorem ipsum_12345_678
		PDF doc name lorem ipsum BuzzLightyear action
		Zip file name lorem ipsum9999

Page Intro:

This is what happens once an upload begins.

1. Reveal new material above drag box

As soon as the user clicks "Start upload now,"

- The instruction "Drag file(s) into this box (tips):" above the drag box disappears and is replaced by the messaging and progress bar shown here
- The drag box is bumped down a little to make room

The drag box does not accept any new additions once the "Start upload now" button has been clicked.

2. Graphic progress bar

Show progress of upload, with the bar extending rightward as each additional file is uploaded.

3. Number of files

As the upload progresses, show a running count of the number of files that have been uploaded in the form: "[number uploaded so far] of [total number to be uploaded] files uploaded"

4. Success indicators

As each file is finished uploading, display one at a time either

- a success icon to indicate that the upload of that specific file is complete and successful, or
- a failure icon indicating that the upload of that specific file was unsuccessful for some reason. If the user clicks or mouses over the failure icon for 0.5 second, display a tool tip explaining what the problem was and what the user can/should do about it.

Files should be uploaded in the same sequence they are listed here.

5. Reference number

Insert job number we have assigned to this upload.

6. When upload finishes

What happens as soon as the upload is complete depends on how long the Response report will take to generate and load. Either:

- 0-5 seconds: Automatically load the Response report as a new parent page
- 6-60 seconds: Without reloading the page, replace the material shown inside this red dashed box with the "Response coming..." material (State 4) in this same location
- >60 seconds: Load the "Ipsium has received your upload..." lightbox superimposed over this page (shown on a later page of this document)

7. Button: Stop upload

Effect: Stop the upload and present a dialog box offering the following options:

- Discard all files uploaded so far
- Keep all files uploaded so far
- Resume upload

Do whichever action customer selects in that dialog box.

8. Contingent element: Notice of out-of-date template

As soon as the system detects that one of the spreadsheets being uploaded is out of date, display this message.

9. Link: Details

[TBD: Depends on whether we can list all out-of-date templates being uploaded while the upload is still proceeding]

Upload doc (p. xx of xx): Progress indications

State 4: upload complete, report due within 60 seconds

1 Upload complete
2 Response coming within 1 minute
3 When will items be up on site?

- Doc name lorem ipsum
- Image doc name nunc et rapsidus lorem
- Folder name lorem ipsum_12345_678
- PDF doc name lorem ipsum BuzzLightyear action
- Zip file name lorem ipsum9999

State 3 (for comparison only)

Your upload is in the works

2 of 5 files uploaded **Reference number:** 98765 **Stop upload**

We will notify you when the response report is ready

[When to expect response](#) Leaving this page will not stop your upload

[When will items be up on site?](#)

- Doc name lorem ipsum
- Image doc name nunc et rapsidus lorem
- Folder name lorem ipsum_12345_678
- PDF doc name lorem ipsum BuzzLightyear action
- Zip file name lorem ipsum9999

Page Intro:

This is what happens once an upload begins.

Annotations

1. New messaging

As soon as the upload is complete, replace the State 3 messaging (“Your upload is in the works” message, progress bar, number of files, and reference number) with this new messaging. Put a colored background behind it to call attention to it.

2. Different progress indicator

Display a graphic progress indicator representing progress in building the Response report. It should look very different from the earlier upload progress bar, to highlight that it is different.

3. Remove obsolete elements

Remove the elements that no longer apply once the upload is complete:

- the “Stop upload” button,
- the “Leaving this page...” message
- the “When to expect a response” link.

Leave the other link (“When will items...”) exactly where it was (i.e., it should not jump around just because of their elements have disappeared).

Response report on bulk uploads (p. 1 of XX)

Administration

Set up new items

Manage current items

Reference

Reports

This Response Report created Aug 21, 9:27 AM Pacific

Ipsum's response to your upload "Fall collection"

[Download my spreadsheets with Ipsum's annotations](#) [Review prior setups](#)

Overview

Reference number we assigned to job: 1234567890

Files successfully received: [27 spreadsheets](#)

Files rejected: We were unable to accept these files:

Filename lorem ipsum dolor 1234	Corrupted
Filename lorem ipsum dolor 1233	Corrupted
Filename lorem ipsum dolor 1232	Corrupted
Filename lorem ipsum dolor 1231	Missing filename extension
Filename lorem ipsum dolor 1230	Unacceptable type of file

Out-of-date templates used: [4 Details](#)

Total items included: 99,999

Items with errors: 99,999

Attributes with errors: 99,999

Uploaded by: Margaret Rasmussen

Date & time of upload: Aug 21, 8:27 AM Pacific

Status of items in this upload

Total number of items uploaded:	99,999	<div style="width: 100%; height: 15px; background-color: #a0c0ff;"></div>
Items complete & site-ready:	99,999	<div style="width: 100%; height: 15px; background-color: #a0d0a0;"></div>
Items needing your attention:	99,999	<div style="width: 10%; height: 15px; background-color: #c06060;"></div>
Items Ipsum needs to finish working with:	99,999	<div style="width: 20%; height: 15px; background-color: #d0d0d0;"></div>

This is the first of several wireframes showing components of the Response report that the system generates following an upload. Depending on the size of the upload, this report may take anywhere from a few seconds to several hours to generate. As soon as the report has been generated,

- The system sends either an e-mail or text message (depending on this user's preference on record) to the user notifying them the report is ready and including the reference number and a link to it [ALSO SEND REPORT AS ATTACHMENT???
- The report is placed in the Reports section of the Administration tab
- A top priority message is sent to the user's portal inbox and listed on the portal's landing page
- The report loads automatically If and only if
 - The user is still logged onto the portal and
 - The user is still on the Upload page and has done no further work on it

1. Creation time

Show the date and time that the system finished generating this Detail response report. Show the time in terms of the user's own local time zone and say what that time zone is (e.g., Pacific, Mountain, etc.)

2. Name of upload

If the user gave this upload a nickname, display that name inside quotation marks as the last part of the page title. If they did not give it a name, instead show the date and time the upload began.

2. Name of person & upload time

Show the name of the person who did the upload, followed by the date and time the upload began. Show the time in terms of the user's own local time zone and say what that time zone is (e.g., Pacific, Mountain, etc.)

3. Link: Review prior setups

Effect: Load report listing all setups within past 30 days (with widget to change timeframe).

6. Page tabs

Because some parts of this report may be quite long, we break the report up into a number of separate tabs.

7. Reference number

Insert the reference number that system assigned to this upload.

8. File count

Specify whether the file(s) are "Spreadsheets" or "XML files." The number is a link. Clicking it brings up a lightbox overlaying this page and listing the files.

9. Contingent element: Out-of-date templates

If any of the templates used in the upload are out of date, show the quantity of out-of-date templates, followed by "Details" link. Clicking the link brings up a lightbox overlaying this page and listing the templates that are out of date and offering a button to download them.

If there were no out-of-date templates, then omit this material from both columns.

10. Contingent element: Problematic files

If there was 1+ files that we were unable to receive, show the quantity of problematic files and the nature of the problem (e.g., "corrupt, rejected"; other kinds of problems TBD), followed by advice TBD on what to do to solve the problem. The wording reporting the problem is a link; clicking it brings up a lightbox overlaying this page and listing the files that were problematic, grouped by problem type, with a prominent subhead for each problem type.

If there were no problematic files, then omit this material from both columns.

11. Contingent element: Name upload

If the user did not give this upload a nickname earlier, add a field label in the left column and a text entry box and Submit button to its right. If the user enters a name in the box and clicks Submit, add that name to the page title and remove this contingent material without reloading the entire page.

My current templates tab

All your templates, State 1: Default if 1-20 templates (note similarity to State 3)

- Administration
- Set up new items
- Manage current items
- Reference
- Reports

Templates for setting up items

Different item setup templates apply to different kinds of products. [Browse all templates Ipsum.com uses.](#)

My current templates






Find templates

Complete list of your templates

Here is the template information we currently have on file for you, based on your authorizations. If you feel this information is not correct or if you want to update your authorizations, [contact Lorem Ipsum Office.](#)

Display options ▾ Sort options ▾















UPDATED TEMPLATES YOU NEED TO DOWNLOAD

- | | |
|--|---|
|  <input checked="" type="checkbox"/> Template name lorem ipsum dolor |  <input checked="" type="checkbox"/> Template name lorem ipsum rumpdedum |
|  <input checked="" type="checkbox"/> Template name lorem ipsum dolor sic |  <input checked="" type="checkbox"/> Template name lorem ipsum dolor sic nunc |
|  <input checked="" type="checkbox"/> Template name lorem ipsum dolor sic nunc | |

Download with my items filled in Download as blank spreadsheet(s)
















Download selected templates

THE REST OF YOUR CURRENT TEMPLATES







- | | |
|--|--|
|  Template name lorem ipsum dolor |  Template name lorem ipsum dolor sic nunc |
|  Template name lorem ipsum dolor sic |  Template name lorem ipsum rapsidus |
|  Template name lorem ipsum dolor sic nunc |  Template name lorem ipsum rumpdedum |
|  Template name lorem ipsum rapsidus |  Template name lorem ipsum dolor sic nunc |
|  Template name lorem ipsum rumpdedum |  Template name lorem ipsum dolor |
|  Template name lorem ipsum dolor sic nunc |  Template name lorem ipsum rapsidus |
|  Template name lorem ipsum rapsidus |  Template name lorem ipsum dolor sic |

Rollover states













Mouse hover over listing 0.5+ second: Normal listing

 Template name lorem ipsum dolor	 Template name lorem ipsum dolor sic nunc
 Template name lorem ipsum dolor sic	 Template name lorem ipsum rapsidus
 Template name lorem ipsum dolor sic nunc	 Template name lorem ipsum rumpdedum
  Template name lorem ipsum rapsidus Create nickname	 Template name lorem ipsum dolor sic nunc
 Template name lorem ipsum rumpdedum	 Template name lorem ipsum dolor
 Template name lorem ipsum dolor sic nunc	 Template name lorem ipsum rapsidus
 Template name lorem ipsum rapsidus	 Template name lorem ipsum dolor sic





Mouse hover over listing 0.5+ second: Updated template listing

 <input checked="" type="checkbox"/> Template name lorem ipsum dolor	 <input checked="" type="checkbox"/> Template name lorem ipsum rumpdedum
  <input checked="" type="checkbox"/> Template name lorem ipsum dolor sic Updated Jan 1 List changes Create nickname	 <input checked="" type="checkbox"/> Template name lorem ipsum dolor sic nunc
 Photo	
<input checked="" type="radio"/> Download with my items filled in	<input type="radio"/> Download as blank spreadsheet(s)
Download selected templates	

Magnifying glass icon clicked: Normal listing (left column)

 Template name lorem ipsum dolor	 Template name lorem ipsum dolor sic nunc
 Template name lorem ipsum dolor sic	 Template name lorem ipsum rapsidus
 Template name lorem ipsum dolor sic nunc	 Template name lorem ipsum rumpdedum
  Template name lorem ipsum rapsidus Create nickname	
 Template name lorem ipsum rumpdedum	
 Template name lorem ipsum dolor sic nunc	
 Template name lorem ipsum rapsidus	

Magnifying glass icon clicked: Updated template listing, already nicknamed (right column)

 <input checked="" type="checkbox"/> Template name lorem ipsum dolor	 <input checked="" type="checkbox"/> Template name lorem ipsum rumpdedum
  <input checked="" type="checkbox"/> Template name lorem	 <input checked="" type="checkbox"/> Template name lorem ipsum dolor sic nunc Updated Jan 1 List changes Change nickname
 No Photo	
<input checked="" type="radio"/> Download with my items filled in	<input type="radio"/> Download as blank spreadsheet(s)
Download selected templates	

My current templates tab (p. XX of XX)

All your templates, State 2 (default if 21+ templates)

Administration | Set up new items | Manage current items | Reference | Reports

Templates for setting up items






Different item setup templates apply to different kinds of products. [Browse all templates Ipsum.com uses.](#)

My current templates | Find templates

Complete list of your templates

Here is the template information we currently have on file for you, based on your authorizations. If you feel this information is not correct or if you want to update your authorizations, [contact Lorem Ipsum Office.](#)

[Display options ▶](#) [Sort options ▶](#)

▶ Apparel	
▶ Electronics	
▶ Sports & Fitness	
▶ Toys	
▶ Video games	
▼ Updated templates you need to download	
 <input checked="" type="checkbox"/> Template name lorem ipsum dolor	 <input checked="" type="checkbox"/> Template name lorem ipsum rumpdedum
 <input checked="" type="checkbox"/> Template name lorem ipsum dolor sic	 <input checked="" type="checkbox"/> Template name lorem ipsum dolor sic nunc
 <input checked="" type="checkbox"/> Template name lorem ipsum dolor sic nunc	

Download with my items filled in Download as blank spreadsheet(s)

[Download selected templates](#)

▶ All your templates in all your categories

Find templates: Results if user entered multiple identifiers


My current templates
Find templates

Find templates for new item(s)


SEARCH RESULTS [Start over](#) 1

2 3 Templates appropriate to your search already been downloaded by you.
1 of those templates has since been updated. Please get the updated version.

3 4 Items we were unable to find a template for. [List those items](#)




Template name lorem ipsum
for items comparable to UPC 1234567890987 5



Template name lorem ipsum bunculum
for items comparable to UPC

1234567890122	1234567890155	1234567890188	1234567890211
1234567890133	1234567890166	1234567890199	1234567890222
1234567890144	1234567890177	1234567890200	1234567890233



Template name lorem ipsum rompilius eptibar
for items comparable to UPC


1234567890987	1234567890989	1234567890991	1234567890993
1234567890988	1234567890990	1234567890992	

No Photo

Generic template 7

We were unable to match the following items to any template. Please use this generic template for them, or try searching again.

9876543210987	Boeing 787 aircraft
9876543210988	Atlantic Ocean




Template name lorem ipsum dolor sic
for items comparable to UPC 1234567890123 1234567890988 1234567890999

You have already downloaded this template, but you need the updated version

No Photo

Template name lorem ipsum dolor
for items comparable to Sony model 890155

You have already downloaded this template



Template name lorem ipsum rapsidus nunc
for items comparable to Schwinn Roadster Trike

You have already downloaded this template

Download selected templates 9

Cancel 10

Page Intro:

This shows the results if the user enters multiple identifiers or search terms in the large search box in the "Find templates" tab's default state. All results are templates. There is a reasonable likelihood that

- one template will apply to 2+ items the user searched by
- the user may have already downloaded 1+ of the templates in these search results

This mockup assumes both of those have happened.

Annotations:

1. Link: Start over

Effect: Reset "Find templates" tab to its default state (same effect as Cancel button below)

2. Redundancy statement(s)

If the user has already downloaded 1+ of the templates in these search results, include statement(s) to that effect at the top of the search results, as shown.

- The first statement shown here appears only if 1+ of the templates has NOT been updated since the user downloaded it.
- The second statement shown here appears only if 1+ of the templates HAS been updated since then. Each statement begins with the number of templates it applies to.

3. Null results statement

This statement appears only if we are unable to find any template for 1+ items. Clicking "List those items" link brings up a box listing all of the user's search entries that we were unable to associate with any template. The user should be able to copy those listings.

4. Checkboxes

Each template that this user has NOT already downloaded is pre-checked by default.

5. List item(s) the user searched by

Always repeat whatever the user searched by that yielded a particular template as a result, whether they searched by UPC, a brand and model number, a product name, or anything else or any combination. If a single template applies to multiple items, list all of those items by the user's search entries.

6. Sequence of results

Templates new to this user

Generic template if we failed to find the template to match 1+ of the items the user searched by

Templates this user has already downloaded, but that have since been updated

Templates this user has already downloaded that have NOT since been updated

7. Generic template

Include this listing only if we failed to find any template for 1+ items the user searched by. List those items. The checkbox is preselected by default.

8. Templates the user has already downloaded

List those redundant templates at the end of the list, separated from the rest by a simple graphic element such as a horizontal line

- Each redundant listing includes a statement about the redundancy
- Leave its checkbox unchecked by default
- If a redundant template has been updated since the user downloaded it,
 - list it first among the redundant templates
 - expand the redundancy statement to note that the user needs the updated version
 - pre-check its checkbox

9. Button: Download selected templates

Effect: Download templates whose checkboxes are checked. Show progress indicator has download proceeds. When download is finished, reset page to "Find templates" tab's default state.

10. Button: Cancel

Effect: Reset "Find templates" tab to its default state (same effect as "Start over" link above).

Shuffler

Introduction

A shuffler is an extraordinarily powerful widget for slicing through a large taxonomy efficiently. We will use a shuffler in several different contexts, such as:

- Browsing for items
- Browsing for categories

One example of a shuffler is BF Goodrich's tire finder at <http://www.bfgoodrichtires.com/bfgapp/index.jsp>

Terminology

Whereas in other contexts Wal-Mart uses terms such as

- Segment, Family, Class, Brick, and Finer Categorization; or
- Department, Category, Sub-category, and Product

to designate the various taxonomic levels, the shuffler just refers to them as "level 1," "level 2," etc., followed by the maximum number of levels to this particular user is authorized for, such as "level 1 of 4," "level 2 of 3," and so on. This approach enables users to do their work regardless of whether they know the terminology or whether our taxonomy/terminology change in the future.

This numbering of levels is not absolute, but relative according to

- this particular user's authorization and
- how many choices are available to this user at their highest authorized level

See note below.

Spatial arrangement

In some cases, the dropboxes may be arranged horizontally; in other cases they may be arranged vertically. But they work exactly the same either way.

Functionality

The widget works the same in each context. Currently we offer 5 levels of taxonomy. The shuffler works the same regardless of how many levels are offered.

- At first, the user is offered only one dropdown (State 1)
- As soon as the user makes a selection in the first dropdown, the second dropdown is added, offering only children of the selection made in the preceding dropdown (State 2).
- This pattern continues through all subsequent dropdowns, with each including only children of the category selection made in the preceding dropdown (States 3-6).
- The action button appears only once the user has made a selection at the lowest level (State 6). The wording of the action button may vary from one context to another.
- Unless otherwise noted, at each level, the dropdown defaults to "Select level [X] of [Y]," where X is the number of the current level, and Y is the total number of levels available to this user. For example, in some contexts the default might be "All."
- At each level, the dropdown offers only categories in which this specific user is authorized to set up or edit items. So the set of listings offered will vary from vendor to vendor, and from person to person within a given vendor.

Conceivably, the same person could have different authorizations for setting up versus editing, in which case that person might be offered a different set of options in a setup context than they would be offered in an editing context.

Functionality (cont.)

- The number of dropdowns (i.e., taxonomical levels) offered for this particular user depends on their authorization. So one user might be offered 5 dropdowns, while another user might be offered only 2 or 3 dropdowns.
- In some cases, a given user may be authorized to work only within level 5. In that case, a shuffler would serve no purpose, so it would not be offered. Instead, we would offer
 - **2+ nodes:** a list of the nodes that this user is authorized to work with, with each listing preceded by either of checkbox or radio button, as appropriate to the context.
 - **only 1 node:** an uneditable statement of that one node's name. There is no choice for the user to make.
- In some cases the listings offered at each level may be limited somewhat differently, such as showing only categories in which this user's company has set up items previously. Limitations by authorization would still apply as a further narrowing of that subset.
- The number of listings in any given dropdown will vary. Some cases, the number may be quite large. Let each dropdown be as tall as it needs to be, up to full height of the user's monitor, rather than arbitrarily limiting it to a handful of listings being visible at a time.
- All of this happens without reloading pages.
- "How to make multiple selections" link appears only with final dropdown. When clicked, it reveals ToolTip appears:

Multiple selections (this dropdown only):

Shift-click to select multiple consecutive listings.

Control-click to select/unselect non-consecutive listings.

States

State 1	Select level 1 of 5				
State 2	Toys	Select level 2 of 5			
State 3	Toys	Boys Toys and Music	Select level 3 of 5		
State 4	Toys	Boys Toys and Music	Vehicles	Select level 4 of 5	
State 5	Toys	Boys Toys and Music	Vehicles	Play vehicles	Select level 5 of 5
State 6	Toys	Boys Toys and Music	Vehicles	Play vehicles	Toy Vehicles – Non-Ride Other

[How to make multiple selections](#)

Continue

NOTE: Numbering of levels is not absolute, but relative. If, for example, this were the highest level at which selections are available to this particular user, then the first 2 dropdowns would not appear and this one would be called "level 1 of 3."

Vertical arrangement

Toys

Boys Toys and Music

Vehicles

Play vehicles

[How to make multiple selections](#)

Toy Vehicles – Non-Ride Other

Continue

Find templates: Results

1 result

Administration
Set up new items
Manage current items
Reference
Reports

Templates for setting up items

Different item setup templates apply to different kinds of products. You may browse the list of [all templates Ipsum.com uses](#).

My current templates
Find templates

Find templates for new item(s)

Work your way down through product categories one step at a time to find the template you need. At the lowest level of organization only, you may select multiple listings.

[How to make multiple selections](#)

Continue

Use this template

Toy Vehicles – Non-Ride Other

Download as Excel

Download as XSD

Multiple results

[How to make multiple selections](#)

Continue

Use these templates

- Toy Vehicles – Non-Ride Other
- Racetracks & Playsets
- Trains & Train Sets

Download as Excel

Download as XSD

Multiple-selection instructions

Multiple selections (this dropbox only):
 Shift-click to select multiple consecutive listings.
 Control-click to select/unselect non-consecutive listings.

[How to make multiple selections](#)