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# Creating Order Out of Chaos

## Writing and Maintaining Web Design Standards

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# Overview

- Introductions
- Why use design standards
- What to include
- Design standards in the real world
- Resources



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# Introduction

- About me
- About the BC Securities Commission
- About our websites



# About the BCSC

- Provincial agency charged with regulating capital markets in BC and empowering investors to make informed investment decisions
- Substantial resources put into websites
  - Large team
  - Sophisticated technical infrastructure
  - Project focused



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# About our websites

- Three distinct websites
  - Very different purposes
  - Distinct looks
  - Shared tools and resources



# Corporate website

The screenshot displays the British Columbia Securities Commission (BCSC) website. The header includes the BCSC logo and navigation links: HOME, Q&As, RELATED LINKS, CAREERS, and CONTACT US. A search bar is located at the top right, with a 'JUMP TO:' dropdown menu and a 'GO' button. The main content area is divided into several sections:

- TOOLS & RESOURCES:** Includes links for POLICIES & INSTRUMENTS, WEEKLY REPORTS, FEES, CHECK REGISTRATION, FORMS, and DECISIONS & ORDERS.
- FILING SYSTEMS:** Includes links for BCSC E-SERVICES, SEDAR, NRD, and SEDI.
- HOT TOPICS:** Lists items such as '31-103 Registration Requirements and Exemptions', 'Pre-filing review for mining issuers', and '2009 CSA Investor Index'.
- FOR COMPANIES:** Includes 'Continuous disclosure filing calendar' and 'SEDAR regulatory fee guide'.
- FOR REGISTRANTS:** Includes '2009 Examinations Report Card' and 'Adoption of passport for registrants'.
- NEWS HEADLINES:** Features several news items, including 'BCSC Executive Director's Bulletin: Securities regulator issues temporary order against Sung Wan (Sean) Kim, October 21, 2009', 'Canadian securities regulators prepare for changes to investment fund disclosure resulting from International Financial Reporting Standards [CSA], October 16, 2009', 'Media Invited: Experts in Vancouver to discuss credit market crisis and its fallout, October 15, 2009', and 'Canadian families learn how to "Make it Count" [CSA], October 14, 2009'.

The left sidebar contains navigation links: SECURITIES LAW & POLICY, FOR COMPANIES, FOR REGISTRANTS, FOR INVESTORS, NEWS & PUBLICATIONS, ENFORCEMENT, and ABOUT THE COMMISSION. Below these are logos for InvestRIGHT Investor Education and PLANNING 10 Finances. The bottom of the page shows a taskbar with the Internet Explorer browser icon and a 100% zoom level.

www.bcsc.bc.ca

# Investor education website

BC Securities Commission Investor Education

Home Know yourself Know your advisor Know your investment Avoid scams  
Get Ready to Retire Report scams & complaints Programs Subscribe Q & A

**investRIGHT**

**Now on InvestRight**

**Protect your money**  
Free online tool helps you:  
- Understand investment fraud tactics  
- Recognize the signs of fraud  
- Know what to do if fraud finds you  
*Launch tool now*

**Invest wisely**

- Work with your advisor
- Protect your money
- Learn investing basics
- Do background checks
- Understand private companies
- Report suspected scams

**Scams in the news**

- Proposed law would automatically jail fraudsters  
The Financial Post  
October 19, 2009
- Many people don't know where their money is invested  
The Vancouver Sun  
October 16, 2009
- Link to an article on the CBC News website  
CBC News  
October 16, 2009

**Investment products**

- Mutual funds
- Principal protected notes
- FOREX
- More...

**Feedback**

- What do you think of the InvestRight site?

**Protect Yourself**  
Tools that can help

- Advisor registration
- Disciplined persons list
- Cease trade orders
- Investment caution list
- Investor alerts & watches
- SpamWatch

**Stay Informed**

- Investor Alert: Securities regulator investigating Suna Wan Kim  
October 13, 2009
- Research: Canadians still not putting investing knowledge into practice, national study reveals  
October 5, 2009
- Investor Alert: Manitoba Securities Commission and BC Securities Commission uncover "re-victimization" scheme  
September 24, 2009

**RED-FLAGS**  
Protect your investments  
Spot the Red Flags

Internet 100%

www.investright.org

# Intranet

The screenshot shows the BCSC StaffWeb intranet homepage. At the top, there is a navigation bar with buttons for StaffWeb Home, People, Initiatives, Forms, Links, Q&A, and E-Services. Below this is the BCSC logo and the text "BRITISH COLUMBIA SECURITIES COMMISSION". A search bar is located on the right side of the header. The main content area is divided into several sections: "BCSC News" with a list of updates and a list of staff names; "Today in the News" with a list of news items; "Find it fast..." with a search box and a list of quick links; and "FYI" with a list of resources. A large "StaffWeb" watermark is overlaid on the bottom left of the page.

**BCSC** BRITISH COLUMBIA SECURITIES COMMISSION

Advanced Search

StaffWeb Jump to: Divisions... Search:  GO Public Website Site Map

**BCSC News** [New item](#) | [Search](#)

UPDATED: Annual 2009 Craft Fair & Bake Sale  
You might see slow performance during 12:00- 1:00 today  
New Green Books on their way  
UPDATED: Employment opportunity - Senior Executive Secretary  
Junior Achievement comes to BCSC - Come and hear what they are all about  
UPDATED: PECSF Campaign Alert: Shandie's back and she's coming your way!  
Introducing Carrie Stevenson  
UPDATED: Cadillac Fairview contractors on-site on Fri. Oct23rd: Indoor Air Quality Testing & Light Level Monitoring  
Marty Nicholls  
Advisory Committee Appointed  
Harvest time 50-50. Help make this the biggest \$50-\$50 of the year!  
UPDATED: Bulletin #2 - New Email System

Kusumoto, Noriko  
Adams, Connie  
Petrie, Carolyn  
Martin, Louise  
Rutherglen, Anne  
Ougden, Beverley  
Grant, Peter  
Patterson, Brenda  
Abrams, Robert  
Leong, Brenda  
Brown, Brenda-Lea  
Davis, John  
[more...](#)

**Find it fast...**

[Ask about the Canadian Regulator](#)

[Department phone list](#)  
[Timesheets](#)  
[Emerging Retail Investment Trends Wiki](#)  
[Watchdog](#)  
[Securities Act Amendments \(updated\)](#)  
[Plain Language](#)  
[In an Emergency...](#)

**Today in the News** [Log into Infomart](#)

**Thursday, October 22**

[Baines - Calgary promoter raised millions for mining project with questionable future - Vancouver Sun](#)  
[Dealer banned by BCSC - Vancouver Sun](#)  
[Learning to love the idea of national securities regulator - Globe and Mail](#)  
[Time for national securities body - Toronto Star](#)  
[Bounty put on suspected Russian crime boss \[YBM Magnex\] - Montreal Gazette](#)  
[CFA charterholders' want more understanding of IFRS - Canada Newswire](#)  
[Webcast will help identify strategic opportunities in transition to IFRS - Canada Newswire](#)  
[Sharp pay cuts for top executives at big bailout companies - Canadian Press](#)  
[SEC In Canada: will disclosure for 'dark pool' trading systems - Canadian Press](#)  
[Financials Paper: Analysts 'Uncover' Up 'Dark Pools' - Wall Street Journal](#)  
[Reforms offer tool against market abuse \[Derivatives\] - Financial Times](#)  
[Galleon Sinks, Informant Surfaces - Wall Street Journal](#)

**FYI**

[StaffWeb Resources](#)  
[Interactive DM Manual](#)  
[DM Resources](#)  
[Software Training](#)

**StaffWeb**

# Why use design standards

- Set expectations
- Maintain consistency
- Prioritize usability
- Reduce effort
- Record rationale



# Using standards to set expectations

- Direction for
  - New staff
  - External contractors
  - Business owners
- Testing
  - Make sure supported browsers are appropriately tested in development

# Using standards to maintain consistency

- Create a common language
  - Developers, designers, business owners all on the same page
- Principles stay the same over time



# Using standards to prioritize usability

- Research best practices and use as a base for standards
- Prevent rogue developers
- Encourage business owners to focus on what they need the application to do... not design



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# Using standards to reduce effort

- Make decisions once
- Reduce conflict and arguments
- Provide staff with a reliable resource
- Speed up design process
- Streamline design and usability reviews



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# Using standards to record rationale

- Stop re-inventing the wheel
  - Determine how to display a certain kind of information or create functionality, indicate why in the standards, and revisit as necessary



# What to include

- Technology standards
- Styles
- Conventions
  - Formatting
  - Language
  - Navigation
- Interactivity guidelines
- Marketing/branding guidelines



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# Technology standards

- Use web analytics as your baseline if possible
- Browsers
  - Mobile?
- Monitor sizes
  - Hand-held?



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# Technology standards

- May be different for different sites or even different sections
  - Corporate site
    - 75% IE → Mostly IE 7, but substantial IE 6
  - InvestRight
    - 55% IE → Mostly IE 7, but also some IE 8
    - 20% Firefox, Opera, Chrome, other Mozilla
    - 5% Safari... but they're very vocal!



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# Styles

- Fonts
  - Paragraph/body, headings, lists
- Colours
  - Hex values, RGB/CMYK for graphics
- Buttons
  - Disabled state
- Graphics
  - Size, resolution



# Styles

Default	
Padding	4px top & bottom
Font	11px Verdana, Arial, sans-serif #003399 (dark blue) First letter of first word capitalized – all others lowercase
Background	#dbe2f1 (light blue)
Border	1px
Active	
Font	#ffffff (white)
Background	#003399 (dark blue)
Disabled	
Font	#666666
Background	#dbe2f1



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# Conventions – Formatting

- Tables
  - Row shading
  - Borders
- Page length
- External links
- Top links




# Conventions – Formatting

## ■ Top links example

Use green icon and “top” text in all caps. Link both icon and text to bookmark. Align left above heading and below text wherever possible.

### Securities Amendment Act, 2006

- [Bill 20, Securities Amendment Act, 2006](#)   
Received Royal Assent May 18, 2006

Part 19.1 -- Interjurisdictional Cooperation details  
Columbia Securities Commission in terms of the F

▲ [TOP](#)

### Phase One Passport Publications

- [BCN 2008/06 Notice of Adoption of Multilateral Instr and related companion policy, and related consequ adoption of National Instrument 52-110 Audit Com](#)



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Investor Education

# Conventions – Language

- Capitalization
- Spelling
- Date formats
  
- Plain language guide
  - [www.bcsc.bc.ca/who.asp?id=1370](http://www.bcsc.bc.ca/who.asp?id=1370)



# Conventions – Language

- Date format example

Display the date format to the right of the calendar control and in brackets (yyyy-mm-dd) so it is clear how to enter the date. If you cannot display it to the right, then display it beneath the date box.

Filing schedule  
Date from:   to:    
yyyy-mm-dd                      yyyy-mm-dd



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# Conventions – Language

## ■ Commonly use terms example

Term	Description
CAD	Expresses Canadian dollars in conjunction with a dollar sign (e.g. CAD \$500.00)
email	Avoid as a verb “email the file”; instead use “send”.
e-services	Hyphenate the term when referring to BCSC public web applications.
Party ID	Always capitalize “ID”
log on	Use log on to refer to connecting to a network (e.g. Reconnect when you log on to the network.).
logon (adj)	Use logon only as an adjective, as in “logon password,” not as a noun (e.g. Some networks support this logon feature.).
log off	Use log off to refer to disconnecting from a network (e.g. Remember to log off the network.).



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# Conventions – Navigation

- Breadcrumbs
- Menus
  - Label length
  - Sub-menus
  - Parts of speech
- Section depth

# Conventions – Navigation

## ■ Breadcrumbs example

All pages must contain breadcrumbs to allow users to easily navigate within sections and understand their location within the overall site navigation. Breadcrumbs must be linked to the main page for the section indicated and sections should be separated with > or /.

Breadcrumbs should not be used as main navigation. If pages are sequential or inter-related they should use sub-navigation, tabs, or steps as well as next and previous buttons.

### Know your investment

[investing basics](#) [background checks](#) [alerts & watches](#) [annual reports](#) [investing in mining](#)  
[investment products](#) [library resources](#) [mutual funds](#) [research old securities](#) [start-up companies](#)

[home](#) / [know your investment](#) / [mutual funds](#)

### What are the risks?



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# Conventions – Navigation

## ■ Menu example

Search hearing files  
Create file  
View hearing schedule  
View reports  
Maintain CHT

The public website and StaffWeb use left-hand navigation. InvestRight uses top navigation.

In all instances, the most frequently used items should be listed at the top. Use a verb + noun format whenever possible (e.g. Search hearing files) whenever possible.



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# Interactivity guidelines – forms

- Validation
- Auto-fill
- Required fields
- When to use
  - Drop-down menus
  - Radio buttons
  - Multi-select



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# Interactivity guidelines – Search

- Limiters
- Results
  - Sorting
  - Paging
- Search tips



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# Interactivity guidelines – Search

## ■ Search buttons examples

- Provide the option to clear all criteria.
- Left align **Search** button with field labels when fields are displayed vertically.

Find report(s) using the following search criteria:

Issuer name:

Exemption relied on:

Distribution date from:  to:

- Position the **Search** button to the right of the search box when search fields are display vertically.

- Hitting return/enter should activate search. Do not require users to mouse click on the **Search** button.



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# Design standards in the real world

- Time constraints
- Proscriptive vs. principles-based
- Use with third party applications
- Retroactive application
- Dealing with novel use



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# Tips

- Get buy-in
  - IT staff
  - Content creators
  - Business owners
- Create a small committee
- Index and cross-reference if you can
  - Point of need reference



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# Resources

- Smashing Magazine
  - [www.smashingmagazine.com/](http://www.smashingmagazine.com/)
- Web Style Guide
  - <http://webstyleguide.com/>
- Australian Government Web Publishing Guide
  - <http://webpublishing.agimo.gov.au/>
- *A Pattern Language for Web Usability*
  - Ian Graham; Addison-Wesley Professional (2003)



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