



USER INTERFACE DESIGN RECOMMENDATIONS

UPDATED OCTOBER 2013

TABLE OF CONTENTS

Introduction.....	3
Design Objectives	4
Put the End User in Control.....	4
Reduce the User’s Memory Load	6
Make the Interface Consistent.....	6
Design for Errors.....	7
Other Key Considerations	8
Use of Color	8
Use of Text.....	9
Iterative Screen Design	9
Activity Objects.....	9
Designing for Mobile Devices	10
Summary OF XMPro Design Principles	10
Examples of Well Designed XMPro Screens	11
Conclusion.....	14
References	14
Contact XMPro.....	15

INTRODUCTION

The objective of this document is to provide Configuration Consultants or Citizen Developers with User Interface Design Principles that will support them in delivering effective solutions.

As with all types of Design work, User Interface Design reflects a “personal touch”. If you have more than one Citizen Developer or Configuration Consultant working on the solution design, consistency is imperative. We recommend that you agree on a style guide with your end users and make that available to all Citizen Developers. Interface inconsistency and ineffective design can potential result in a significant cost due to lost in productivity and increased support cost. Even worse – the solution can be terminated, which from a software and solution supplier’s point of view needs to be prevented at all cost.

It is important to understand that end users often have different abilities and expectations than IT and configuration consultants. The UI design must always be approached from the end user’s perspective. You can be the best Designer in the world – if you’re client or the end user cannot associate with the interface or if it doesn’t work for them you could potentially end up with a very disgruntled end user. Prior to starting your configuration (building) process you need to understand your end users and what is important to them. This will help when you need to make design trade-offs, which does happen in most UI design interfaces.

This document addresses the key components of the “Look and Feel” of an XMPro solution including:

- Presentation.
- Interaction.
- Object Relationships.

The four main design objectives of any Activity / Screen or Form are:

- Consistency (don’t change the way you do things from screen to screen).
- Reduce the users’ memory load (make it easy for them).
- Place the users in control of the interface.
- Design for errors.

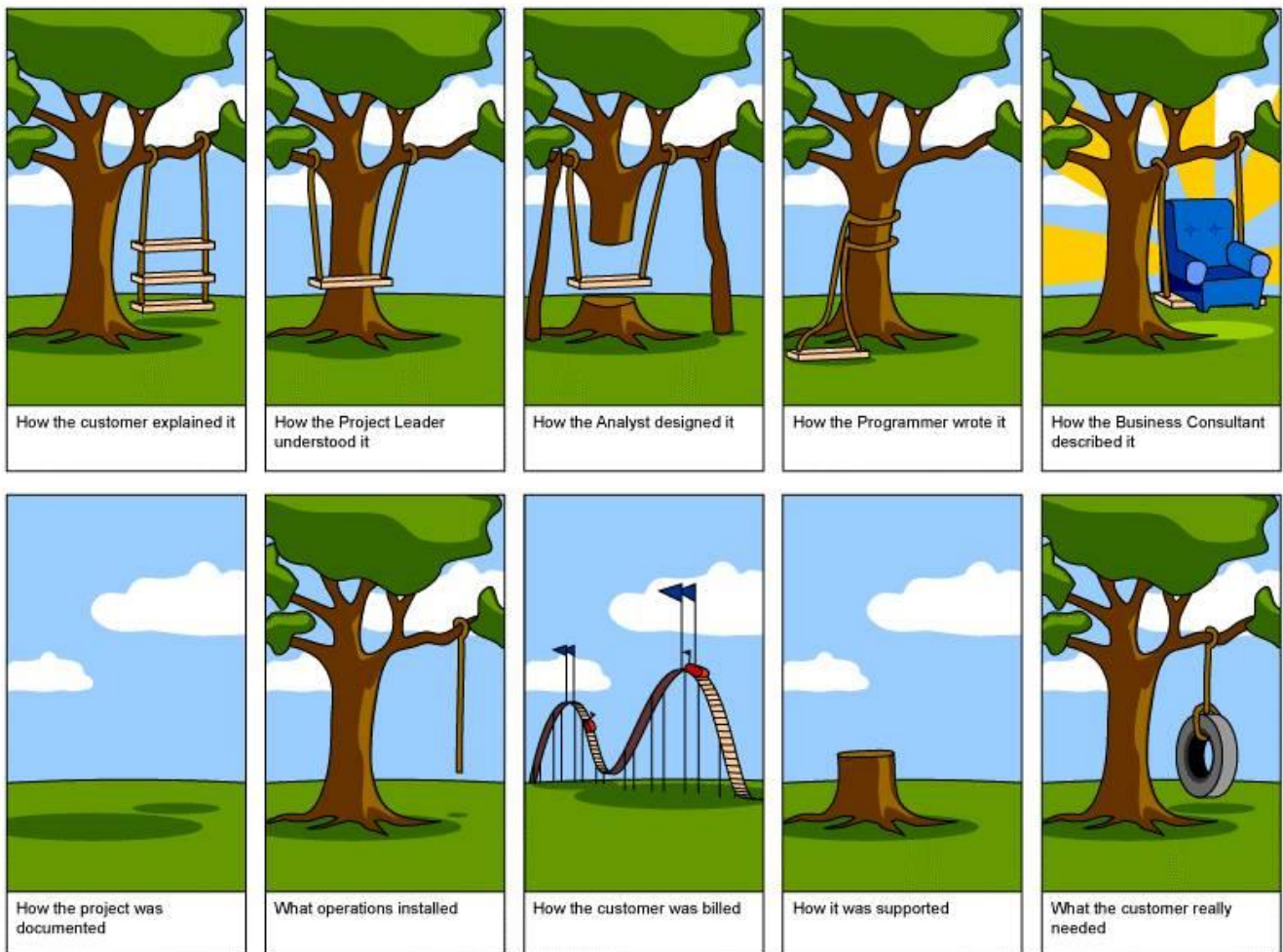


Figure 1: The Swing and the tyre (Credit: Michael Hillborne)

The End User Interface Design is probably one of the most important components of designing a solution (Refer to Figure 1 – System Design). The End User Interface is what the end user sees. You want to empower your users to do their jobs. If the screens are too busy, too colorful, too many screens to get the job done and “distract” rather than “inform” you have lost the effectiveness of your solution.

Figure 2: An example of a poorly organized screen.

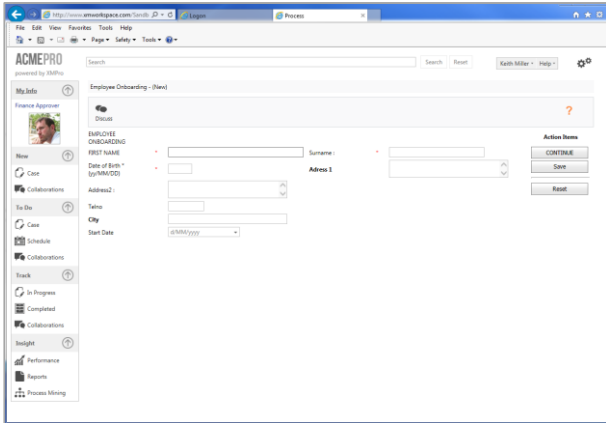
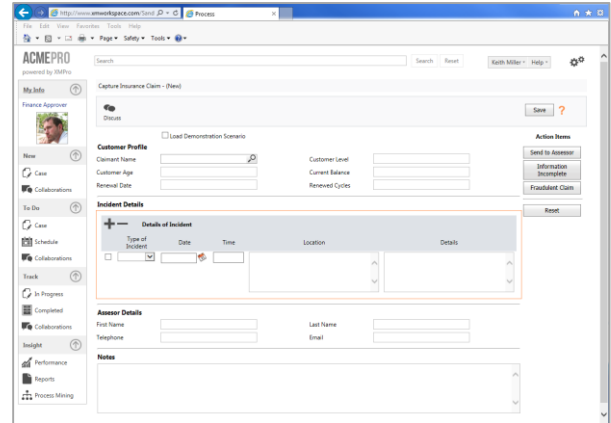


Figure 3: An example of a better organized screen.



There are various reasons why Figure 1 above has an ineffective User Interface and why Figure 2 has a better designed interface.

Note the differences:

- Grouping of information.
- Headers.
- Alignment.
- Tooltips.
- Command buttons.
- Mandatory fields.
- Use of Text (bold, capital letters).

The next section will focus on the areas that will improve your user interfaces.

DESIGN OBJECTIVES

PUT THE END USER IN CONTROL

There is this story about a wise architect that needed to design walkways between buildings. He did not assume that he knew how the users would really use walkways between buildings so he planted grass with posted signs “Please walk on the grass”. Worn paths appeared where people actually walked so he knew where to put the walkways.

Keyword:	How to achieve this in XMPro:
Accessible	Accommodate different skill levels. Design for the lowest level of skill not for the highest. Provide fast paths for experienced users. Use “tooltips” and input masks. The experienced user does not have to be “exposed” to all the detail the “unexperienced” user might need.
Forgiving	Prevent re-work or re-input of information by effective use of error messages and error handling. Provide reversible actions and detailed, sensible feedback / error messages. Use a command button to “undo” and clear a screen and an Update functions to rectify incorrect information previously saved.

Keyword:	How to achieve this in XMPro:
	Provide “acknowledgement” when an action has been performed. E.g. Record has been saved successfully.
Clear Navigation	<p>Ensure the flow between objects is logic and doesn’t jump around (achieved by index no of objects).</p> <p>Show the user where he / she is in the process (widget).</p> <p>Use sensible headers where possible (label objects are used).</p> <p>Group relevant fields (objects) together. Horizontal Lines (inline HTML – available as part of the FastFields functionality) may help to make the grouping of information more visual.</p>
Transparency	<p>Provide the user with the information they need to perform that specific step of their work. This can be achieved by using Widgets, Best Next Action, Discussions, and Process Goals.</p> <p>Do not display fields that are not required. Rather “hide” fields in the beginning and give users an option to display more information if required. In this way you do not clutter screens and annoy more experienced users but you do provide additional info to support new or less experienced users. The “Visible” property of the object can be set to True or False.</p>
Preferences	Allow the user to customize their interface. This can be achieved during the design phase as well as changing of themes in the Workspace and User Self- Management.
Different Modes	Users can access their XMPro solution via Web, Mobile, MS SharePoint, MS Outlook, Salesforce, and Custom UI. XMPro supports a “develop once, surface in multiple environments” approach. Remember to consider “real estate” constraints during the design phase if you are going to use the mobile interface.
Flexible	Consider “Mouse”, “Keyboard”, “Swipe and Tap” actions during design. The user should not be limited.
Interactive	<p>Make sure the descriptions on label objects and command buttons are sensible. The use of Discussions, Crowd Questions and Ad-hoc tasks improve interactivity between users and users and the solution.</p> <p>Provide feedback. Users should be informed about what is going on.</p>
Helpful	<p>Descriptive messages, text, tooltips, input masks and error messages.</p> <p>Do not use developer terms. Use a proper tone in messages – don’t blame users for errors.</p>
Interruptible	<p>Allow the users to change focus, that is to Save and Continue where they have left off. XMPro is not different from most other solutions – the user has to press a Save button prior to exiting the solution.</p> <p>Review Session Time-out defaults in the configuration file and make sure users are aware of this setting. Agree with users on a time which is acceptable to them but also won’t make their solution vulnerable to unauthorized access.</p> <p>Try not to force users to complete work in a predefined sequence. XMPro’s dynamic process architecture supports unstructured and structured work.</p> <p>Wizards is a good way of guiding a user and not forcing them through the steps in a task.</p>

REDUCE THE USER'S MEMORY LOAD

Keywords:	How to achieve this in XMPro:
Relieve short term memory	Don't force the user to remember or repeat what the solution can do for them. Drop down boxes, browse pages etc. gives the user the option to "select" a value and contribute to the accuracy of the input. Retrieve existing information at all times and don't duplicate input effort.
Rely on recognition and not recall	The use of radio buttons, check boxes, drop downs, browse pages, best next actions, widgets and process goals support recognition. Default values can also help.
Organize (Visual Clarity)	Organize relevant information together in groups on your screen. Another way of grouping information is by using object groups. Aligning rows and columns reduces the complexity of a screen. Divide them with headers and lines. Make sure your tabs work - within the group and then to next group of information. Refer to figure 2 and 3 in the Introduction.
Progressive Disclosure	Show only what the user needs to see at that point in time. If required "hide" information and give the user the option to "display" as required.
Visual Cues	Tooltips, display masks, dropdowns, browse pages, widgets etc. Use icons in the widget bar. Flow diagrams or procedural documents or help files can be linked in the widget bar,
Real-world metaphors	Do things in ways that are "familiar" to users. As soon as you use new things e.g. a different button for file attachments (e.g. not the frequently used paperclip) users need training and Change Management requirements come in to play. Consistency is yet again imperative.
Defaults, undo and redo	Provide default values for input fields where possible. The command buttons should provide the "Clear", "Undo" functions. Tick boxes to "copy" existing information to another field or group.
Shortcuts (frequency)	Copy existing information to a next group of fields e.g. physical to postal address. Instead of re-typing information provide drop downs or browse objects – the use of these objects will contribute to accuracy of input.
Object-action syntax (intuitive)	Allow the users to learn the relationship between objects and actions. Consistent implementation of objects and related actions is imperative. E.g. Use consistent descriptions for your "command buttons". If you use "Submit" vs. "Continue" – it doesn't matter what you use as long as the action is clear and you are consistent.

MAKE THE INTERFACE CONSISTENT

Keywords:	How to achieve this in XMPro:
Predictability	Encourage exploration and ensure that the solution behavior is predictable. Even though it is a business solution the interface should be "enticing" and fun-to-use. The use of widgets could be very enticing and visually pleasing while providing relevant information that makes the end user's work easier.

Keywords:	How to achieve this in XMPro:
Expectations	Keep interaction results the same. Consistency in interface behavior is very important.
Experience	<p>One of the most important aspects of an interface design is to maintain consistency throughout your solution. Users should be enabled to “learn” about a concept and “apply” it in a new part of the solution. There are three levels where consistency should be applied:</p> <ul style="list-style-type: none"> • Presentation (same logical, visual or physical presentation). • Behavior (the object should “work” the same way throughout the solution). • Interaction techniques (e.g. same Shortcut keys). <p>Try to make the length of input fields the same (right align where possible).</p> <p>Size Browse Pages properly (to prevent scrolling where it is not necessary).</p> <p>Do not use an AutoPostBack if it is not necessary. (This will refresh your screen and could potentially update other fields based on the line selected in the drop down object. If nothing needs to happen based on the selection set AutoPostBack to False.</p> <p>Sort information (e.g. alphabetically or favorite options) where possible. If you have a drop down of 30 meeting rooms and the user must find the correct one – it will help to sort them. This can be achieved by the “Items Attribute”. Alternatively for a lookup (where you are querying a database) use an order by in your select statement.</p>
Continuity	<p>Sustain the context of users’ tasks. Provide point of reference as they navigate through the solution. E.g. provide “breadcrumbs”, window titles, dynamic descriptions etc. can be of help.</p> <p>The user should not have to leave the window to find additional information to complete the activity.</p> <p>Tooltips, lookups, browse pages, drop down boxes, widgets and flow diagrams can provide information needed to complete a task.</p>
Attitude	<p>Provide aesthetic appeal and integrity.</p> <p>Be consistent in the use of :</p> <ul style="list-style-type: none"> • Colors. • Fonts. • Icons. • Window / form / screen layout. <p>The process design must allow the user “to get their job done”. A pretty interface doesn’t help if the solution lacks the required functionality.</p>

DESIGN FOR ERRORS

Keywords:	How to achieve this in XMPro:
Input errors	<p>Prevent input errors that can have an impact on the following aspects of the information captured:</p> <ul style="list-style-type: none"> • Accuracy. • Completeness.

Keywords:	How to achieve this in XMPro:
	<ul style="list-style-type: none"> • Validity. • Financial periods. <p>To contribute to the above mentioned bullet points use pre-captured master data “drop downs” or database tables where possible. We recommend a Master Data Maintenance process (assigned to the appropriate role) with authorization procedures if required.</p> <p>The user “selects” the correct information rather than having to “type” in information which could potentially result in errors.</p> <p>E.g. of objects include dropdown boxes, radio buttons, browse pages and date pickers.</p> <p>Don’t allow users to update fields where they are not supposed to (validity and accuracy). E.g. you can use the Label object to display information. Users will not be able to edit information displayed in a Label Object.</p>
Clear Error Messages	<p>Ensure that each potential error has a clear error message that make sense. Be specific.</p> <p>Don’t blame the user or imply that it was a user error. Try to substitute as follows:</p> <ul style="list-style-type: none"> • Error or failure with problem. • Failed to with unable to. • Illegal, invalid or bad with incorrect or not valid. • Abort or terminate with stop. • Fatal or catastrophic with serious. <p>If possible, propose a solution to fix the problem.</p>
Error Prevention	<p>Test for ALL potential errors a user might encounter. Even better than a good error message is error prevention.</p>

OTHER KEY CONSIDERATIONS

USE OF COLOR

You don’t need to be the provider of the rainbow after the storm. Minimize the use of color. Colors should be natural and not distracting.

Use color where it potentially highlights information and supports clarity. A good approach is to start with a greyscale and to add color as required. Many extreme colors will cause eye fatigue. A good principle is to use subdued colors close to each other on a color wheel.

XMPro’s skins provide different options so that the Citizen Developer can start with a few “canvas options”. Custom skins can be used and are defined on Activity level (Properties Tab, Behaviour, Stylesheet). CSS styles can be set on object level (field level) – in the Properties tab, Options, Style).

If you are associating colors to meaning no more than 7 to 9 colors should be used. Keep the following commonly associations of color in mind:

- Green – go, on, safe, clear.
- Red – stop, hot, fire, danger, on, emergency.
- Yellow – caution, slow, warning, warm.
- Blue – cold, off, calm.
- White – empty, closed.
- Black – full, open.

Blue is not a good color to use for text since blue is a hard color for the eye to focus on. Users also often associate blue with a link.

If you have a dark room, use dark colors for the majority of the screen area with light graphics and text. Similarly, with a bright room, use light backgrounds with black text. This method will lower eye strain by taking into account eye sensitivity to light.

USE OF TEXT

Select only two or max 3 font families throughout the solution. Use standard point sizes to display different types of information. Use a large point size for headers and a smaller size for labels.

Interestingly enough, users tend to identify words by their shapes; therefore words made up entirely of capitals do not vary in shape from word to word and thus take longer to identify.

Use ordinary, conversational terms focussed on user goals and not technology.

Be polite, supportive and encouraging.

Remember to check your spelling and grammar.

Be consistent in capitalization.

Don't put periods at the end of labels or main instructions.

Keep an eye open for mandatory field indications "*". The system automatically adds the "*" at the end of the label description.

ITERATIVE SCREEN DESIGN

Design the screen and use the Preview function to show users what they will see. These iterations help teach the users what is possible with XMPPro. When you show users what is possible, they can better communicate their requirements to you. Several iterative designs should be done even during the initial demonstration of the preliminary screens in order to show the users that changing screens is easy.

ACTIVITY OBJECTS

Ensure that you use the correct object. E.g. you will not use a Simple Text Box to input a Date.

Label every object or group of objects. Reconsider "disabled" or "invisible" objects.

The following list explains the use of the objects available (please refer to your training material or the Designer Help for more detail):

- Reference Label is displayed as a dynamic value on the activity screen. The user can't change this value.
- Simple Text Box is displayed as a standard Windows text box.
- Large Text Box is displayed as a comments box or multi-line text box on the activity screen.
- Drop Down allows the user to choose a value from a predefined list. It is displayed as a combo-box. The values for a drop down are static in the XMPPro Designer. This is a good control to use if you want to display "stagnant" information that is not sensitive. If the options are going to change frequently or if you are working with sensitive information this is not a good control to use.
- Browse Page allows you to display more than one field from a database in a separate browser window.
- Date Picker allows the user to choose a date from a Calendar drop down. It displays a drop down that displays a calendar when the user clicks on it. It is more flexible in terms of date formats than the ordinary date picker.
- Lookup allows the user to choose a value from a list. It is displayed as a combo-box. The values for a lookup are dynamically retrieved from a database.
- Chart displays as a chart in the XMPPro Workspace. You have a lot of control over the chart type, chart colors, the chart's axis, and other chart elements.
- Checkbox displays a standard Windows check box on the activity screen.
- Radio Button is displayed as a standard Windows radio or option button. It allows the user to choose one of more than one option.
- File Attachment allows the user to attach documents to the process. It is displayed as a text box with a Browse button next to it. If the user clicks on Browse, it allows the user to navigate his/her hard drive.
- Hyperlink provides a hyperlink on the activity screen. It is typically used as links to open reports, or links to related documents such as policy and procedure documents.
- Team Select allows the user to choose the role group to which a later activity must be routed. It is displayed as a combo box. For the object to work, you need to make sure that the items in the team select are exactly the same as existing role groups. Then you can use this object as the Creation Value when choosing Dynamic Group as the Creation Type.
- Command option object type is responsible for calling the next activity. All activities must have at least one command option.

Command buttons should be specific and consistent. The following recommendations may help:

- “Cancel” or “Return” should return the solution to its previous state without making changes.
- “Submit” to save and continue to the next step.
- “Save” to save information and continue the process (work) later.
- “Clear” to clear all input fields.

An explicit “Cancel” button is very important. The user needs a way out of the solutions without changing the current state.

DESIGNING FOR MOBILE DEVICES

XMPro’s principle of “Design once and surface in multiple end user interfaces” requires the Citizen Developer to consider Mobile device constraints (e.g. limited real estate) at the start of the design process. The constraints might influence the process design.

Simple principles include:

- Display limited content.
- Limit end user input required.
- Progressive or staged disclosure.

Users want power with simplicity. Progressive disclosure is one of the best ways to satisfy both of these conflicting requirements. Another approach often used in XMPro is Staged Disclosure (one step at a time).

Keep in mind that progressive disclosure and a staged approach could potentially be frustrating to users because they feel there are too many steps required to complete a task.

If mobile devices are going to be the primary interface it is a good idea to do the design from a mobile device point of view rather than from a Web interface point of view.

SUMMARY OF XMPro DESIGN PRINCIPLES

- Inform don’t distract.
- Minimize color and tone down (games apps are different).
- Layout – objects in the expected place, align, group, separate and balance whilst considering different interfaces.
- Simplicity – focus on what is likely (what users will do) and remove redundancy (reduce and hide where unlikely and eliminate what is impossible).
- Use safe, secure and probable default values.
- Make it work automatically.
- Effective communication.
- Use the cool features.
- Use the right objects.
- Design with controls in mind (data input controls need to ensure accuracy, completeness and validity).
- Display information graphically instead of textually (or both).
- Mobile devices need to be considered during design time.

EXAMPLES OF WELL DESIGNED XMPRO SCREENS

ACMEPRO

Tim Clark | Help

Invoice approval and matching for supplier: ACME Inc. for invoice: 536524 - (#181)

Ad Hoc Task
 Discuss
 Files
 History

?

Captured Details

Supplier	ACME Inc.	Invoice Date	July 18, 2013
Purchase Order Number	1892727	Invoice Number	536524
Cost Allocation	Inventory		
Total	\$46,124.00		
Tax	\$4,612.40		
Total (including Tax)	\$50,736.40	Approve Invoice	<input type="button" value="Submit"/>
			<input type="button" value="Reset"/>

Action Items

Invoice Lines

Drag a column header here to group by that column

Description	Qty	Unit *	Total *	Tax *	Inclusive
Frame Clips - S300SN23	120	\$10.00	\$1,200.00	10	N
Frame Bezel - S345SN95	120	\$17.70	\$2,124.00	10	N
Frame Stand and Hinge - H564SN87	50	\$856.00	\$42,800.00	10	N
Count=3		Sum=290		Sum=46124	

Purchase Order Lines

Drag a column header here to group by that column

Description	Qty	Unit *	Total *	Tax *	Inclusive
Frame Clips - S300SN23	120	\$10.00	\$1,200.00	10	N
Frame Bezel - S345SN95	120	\$17.70	\$2,124.00	10	N
Frame Stand and Hinge - H564SN87	50	\$856.00	\$42,800.00	10	N

Budget Performance

Legend: Budget (blue), Current Supplier Spend (red), Total Spend (green)

ACME INC. INVOICE

15000 First Freeway, Richardson, TX, 75081 (556) 555-5555

BILL TO: EXCOMM INC. 40010000 North Central Expressway Dallas, TX 75231	INVOICE NUMBER: 536524 INVOICE DATE: July 18, 2013 OUR ORDER NO.: 1705270 YOUR ORDER NO.: 1892727 TERMS: Net 30 SALES REP: Jamie Green SHIPPED VIA: Air F.O.B.: N/A
--	--

Sales Tax Rate:

QUANTITY	DESCRIPTION	UNIT PRICE	AMOUNT
120	Frame Clips - S300SN23	\$ 10.00	\$ 1,200.00
120	Frame Bezel - S345SN95	\$ 17.70	\$ 2,124.00
50	Frame Stand and Hinge - H564SN87	\$ 856.00	\$ 42,800.00

Figure 4: Example 1 – Note graphs, alignment (specifically numeric fields), grouping, headers and widgets.

Figure 5: Example 2 – Note graphs, widget bar and tabs.

ACMEPRO

Search

Search

Reset

Keith Miller ▾ Help ▾ ⚙

My Info ↑

Finance Approver

New ↑

Case

Collaborations

To Do ↑

Case

Schedule

Collaborations

Track ↑

In Progress

Completed

Collaborations

Insight ↑

Performance

Reports

Process Mining

Underwriting Review for Sanjeev - (#196)

Ad Hoc Task
Discuss
Files
History
Flood Map

?

Applicants Income and Expense

Income

Expense Breakdown

I. Type II. Property III. Borrower III. Co-Borrower IV. Employment V. Expenses / Income

I. Type of Mortgage and Terms of Loan

Agency Case Number Agency Number 100

Lender Case Number Lease Case 200

Mortgage Applied for

VA	False	FHA	False
Conventional	False	USDA/Rural	False
Other (Explain)	False	Other	

Housing Service

Amount Interest Rate 0.00

No of Months

Amortization Type

Fixed Rate	False	GPM	False
ARM	False	Type	
Other (Explain)	False	Other	

Action Items

Process Loan


Reset

Figure 6: Example 3 – Note Tabs and Excel integrated as part of the UI.

ACMEPRO
powered by XMPro

My Info ↑

Finance Approver



New ↑

- Case
- Collaborations

To Do ↑

- Case
- Schedule
- Collaborations

Track ↑

- In Progress
- Completed
- Collaborations

Insight ↑

- Performance
- Reports
- Process Mining

Search Search Reset Keith Miller ▾ Help ▾ ⚙️

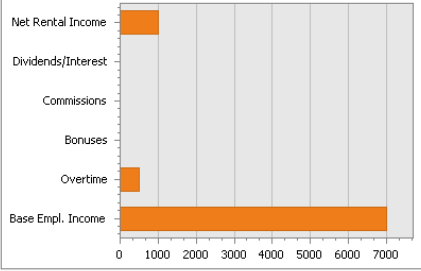
Underwriting Review for Sanjeev - (#196)

Ad Hoc Task Discuss Files History Flood Map

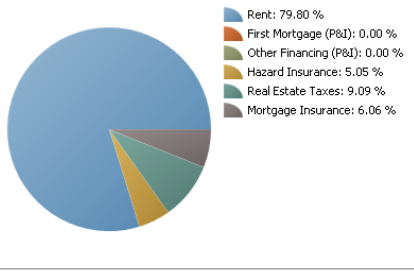
?

Applicants Income and Expense

Income



Expense Breakdown



I. Type II. Property III. Borrower III. Co-Borrower IV. Employment V. Expenses / Income

Date To: _____
 Monthly Income: _____
 Position/Title/Type of Business: _____
 Business Phone (incl. area code): _____

Residential Loan Applicationv2

Residential Loan Application

Property Address: _____
 Case Number: _____

Gross Monthly Income	MONTHLY INCOME AND COMBINED EXPENSE INFORMATION			Combined Monthly Housing Expense	Present	Proposed
	Borrower	Co-Borrower	Total			
Base Empl. Income	\$0.00			Rent	\$0.00	
Overtime	\$0.00			First Mortgage (P&I)	\$0.00	\$0.00
Bonuses	\$0.00			Other Financing (P&I)	\$0.00	\$0.00
Commissions	\$0.00			Hazard Insurance	\$0.00	\$0.00
Dividends/Interest	\$0.00			Real Estate Taxes	\$0.00	\$0.00
Net Rentals/Interest	\$0.00			Mortgage Insurance	\$0.00	\$0.00
Other (describe below)		\$0.00		Other	\$0.00	\$0.00
Total				Total		

Describe Other Income

Notice

Alimony, child support, or separate maintenance income need not be revealed if the Borrower (B) or Co-Borrower (C) does not choose to have it considered for repaying this loan.

B/C	Monthly Amount
	\$0.00
	\$0.00
	\$0.00
	\$0.00

IncomeExpense
AssetsLiabilities
RealEstateSchedule

Action Items

Process Loan

Reset

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Page | 13

CONCLUSION

It is important to remember that the solution and therefor XMPro will be judged on the effectiveness and positive adoption of the User Interface. The significance of the Citizen Developer's role cannot be underestimated or underemphasized in the successful design of the End User Interface.

In our experience XMPro End Users expect familiarity, consistency, immediate productivity and an enjoyable experience that performs targeted tasks well.







"Perfection is achieved, not when there is nothing more to add, but when there is nothing left to take away." —Antoine de Saint-Exupery

REFERENCES

The following are excellent references for additional guidelines:

1. [http://msdn.microsoft.com/en-us/library/windows/desktop/ff728831\(v=vs.85\).aspx](http://msdn.microsoft.com/en-us/library/windows/desktop/ff728831(v=vs.85).aspx)
2. http://en.wikipedia.org/wiki/Principles_of_user_interface_design
3. <http://bokardo.com/principles-of-user-interface-design/>
4. www.nngroup.com/articles/ten-usability-heuristics/

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<p><i>Community Forum</i></p>	<p>www.community.xmpro.com</p>	
<p><i>Online Technical Support</i></p>	<p>www.xmworkspace.com/support</p>	
<p><i>XMPro Partner Portal</i></p>	<p>www.partner.xmpro.com</p>	
<p><i>Social Media</i></p>		<p>www.facebook.com/xmpro</p>
		<p>http://www.linkedin.com/company/xmpro-inc</p>
		<p>www.twitter.com/#!/xmpro</p>
		<p>www.youtube.com/user/Xmprodbpm</p>
		<p>http://gplus.to/xmpro</p>

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