User Assistance

Overlays
(Lightbox, Modal Window)

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Problem

The user needs to more information than is provided on the page, but the design intention is to keep the user on the page.

The information that needs to be provided to the user cannot be created in context (due to size constraints and/or information flow), within the current page, and you need to direct their attention to this information.

Use When

- You want to provide the user with more information, but do not want them to leave the page that they are on.

- You want to provide detailed instructions or reveal more information about a product or material.

- You need to obtain input from the user regarding the particular area or segment the user is currently interacting with.

- You want to invite the user to provide details or more information (i.e. a survey/questionnaire – or setting their preferences, or view their cart).

- You want to introduce a new feature (or a major change in a current feature) on the site or application.

ThermoFisher
SCIENTIFIC

- You want to indicate to the user the progress of an order – or on the delivery of a product.

- You want to indicate to the user the progress the system is making on processing their request.

- You need to get critical confirmation for a selected action (such as deleting their profile – do they want to continue, etc.)

Solution

Display a panel front and center that requires people to focus and take action on before continuing.
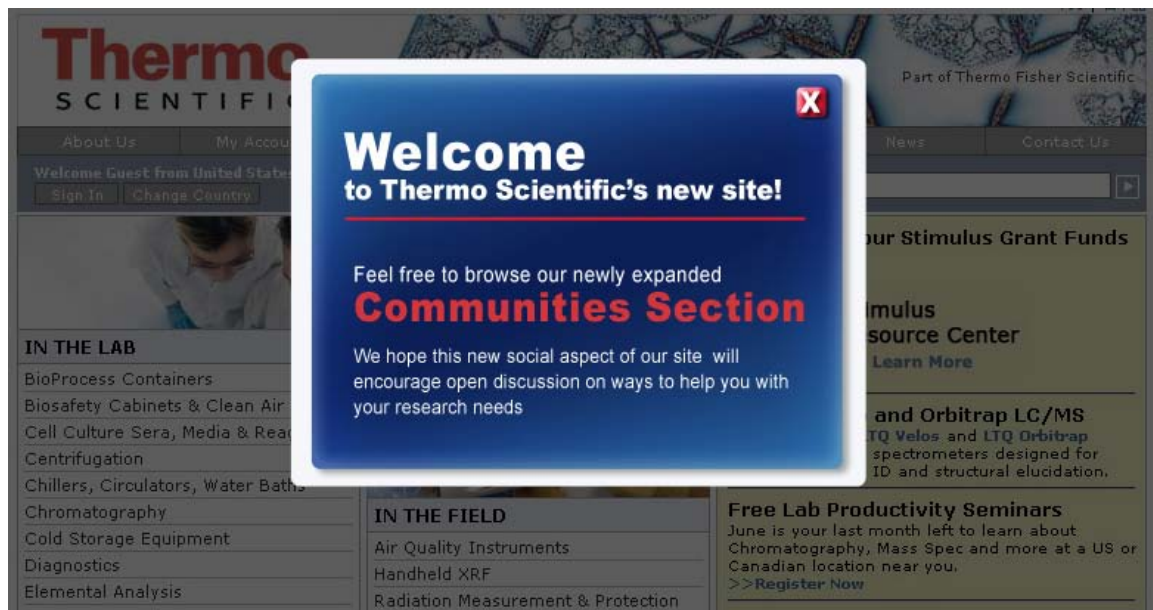
How

Create a modal window: Instead of sending the user to a new page, display a mini-page in a lightweight (pop up) layer over the page. Since these types of panels are typically part of some larger flow, you should place them in the natural flow – or near the element of it's focus.

> For example, if people are filling out a long form that contains some control that triggers the panel, it's best to display the panel near (or over) that control because that is where they are focusing at that time. The key is to minimize the user's effort on refocusing.

- Once the overlay appears, interaction is only available to the user in the overlay. The background page is not available until they perform an action – or close out of the modal window. Because of this: ***Provide the user with an opportunity to cancel the request – or close the window.***

- o **Note:** *this is different than a detail overlay, which allows the user interact with the background page.*

- Give the user a clear message that they need to perform an action in the window before they can revert to the main – or background page.

- Dim the background page so that the overlay is clearly the focus of the user's attention. This is commonly referred to as a "lightbox" effect.

- **Always** use a lightweight overlay instead of the javascript alert mechanisms built into the browser for confirmations:

  - o The browser's alert mechanisms do not present themselves consistently across different operating systems.

  - o There is no way to control the look and feel of browsers alert pop up. Lightweight overlays allow you to integrate the design with your web interface.

Do NOT:

Create a browser pop up Older style browser pop ups are undesirable because:

1. Browser pop up windows display a new browser window; these take time and a sizeable chunk of system resources to create.

2. Browser pop ups display the browser's interface controls (url bar), which makes them visually unappealing.

3. They are much harder to control (placement, size, etc.)

Don't use an overlay when an in-page interaction would be more appropriate. For instance, avoid abuse of confirmation dialogs (e.g., "Are you sure you want to do X?") if you can—use an **Undo** or an input message where it is more appropriate.

Rationale

Because the overlay is a lightweight pop up, the confirmation can be displayed more rapidly and the application has complete control over its look and placement.

The purpose of a modal panel is to try to capture user's attention: to get them to focus on the content in the panel - and then to force them to take some kind of action.

You should use modal panels sparingly because they might disrupt the flow and demand more from the user (requiring their attention and action). Many applications have abused them in the past, especially as regards confirmation dialogs.
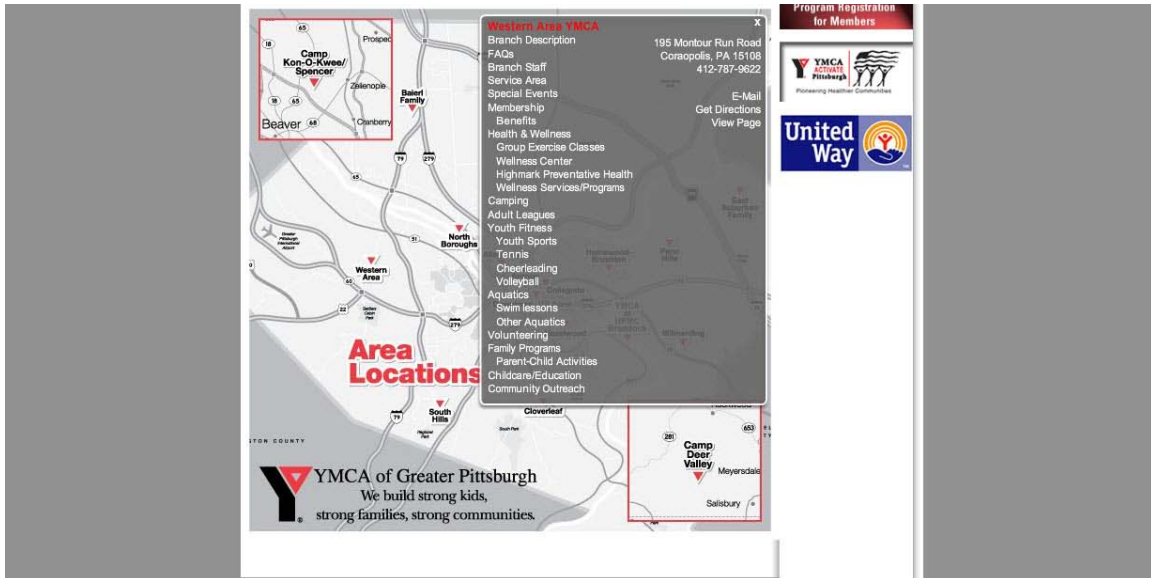
Examples

The pottery barn uses a modal overlay to display the user's shopping cart:
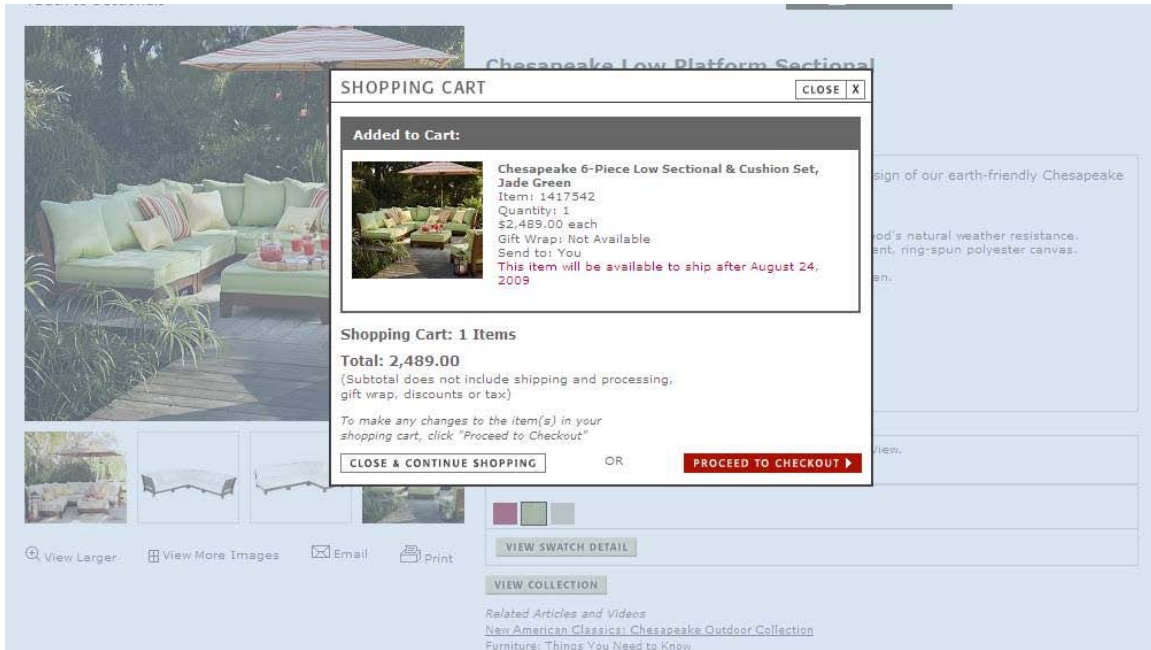
YMCA of Greater Pittsburgh:

When the user clicks on the location on the map, an overlay appears giving more details about the facility, such as classes available, the mailing information, etc.

AutoZone forces the user to put in their zip code to see if particular parts/inventory are available in a store located near them:
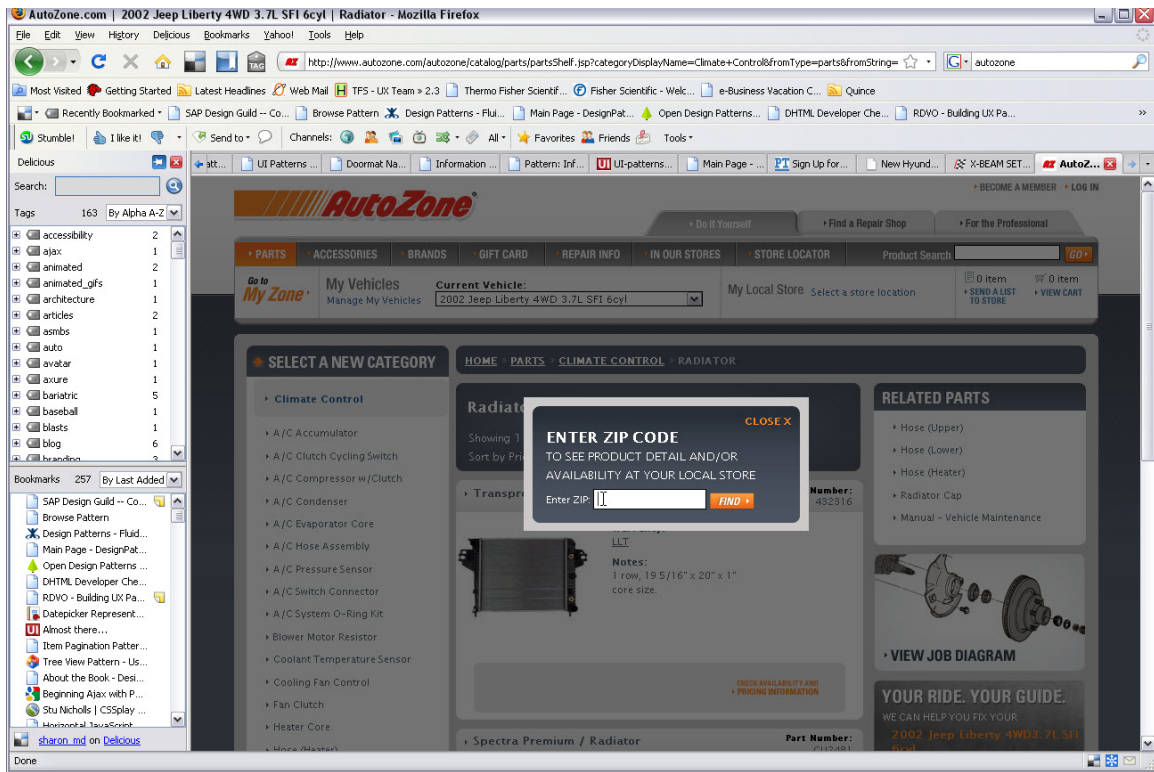
Munchkin provides a lit of their products with titles. When clicked on, a larger image appears with more details about the product. Instead of dimming the background, they use one of their bright corporate colors as the background – which works well for them because it is consistent with the overall branding of their site.

Target.com uses an overlay to give the user more information about a product. Note that they did not dim the background layer. This indicates to the user that they can click on the background layer and the overlay closes.

Resources

Designing Web Interfaces, by Bill Scott & Theresa Neil, O'Reilly Press, Copyright 2009, pp 105-119.