

The MyMacys.net Portal Style Guide

SCREEN CAPTURES OF ONLINE VERSION



Nick Zedlar, UX Designer
Enterprise Portal Team
March, 2010 - present



ENTERPRISE PORTAL TEAM

The MyMacys Portal Style and Standards Guide

Enterprise Portal Team (EPT)



About Us

The Enterprise Portal Team (EPT) is responsible for the daily support of the MyMacy's intranet and MacysPartners.com extranet portals. Both run on Microsoft SharePoint. The EPT specializes in building enterprise applications that enhance productivity and streamline business processes. This is possible through three areas of expertise:

- Infrastructure
- Development
- Support

The EPT partners with organizations across Macy's and Bloomingdale's to leverage SharePoint's capabilities as a development platform, content management system, social network and collaboration medium. This includes a wide range of services from custom development and SharePoint administration to user experience and training.

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Welcome to the My Macy's Portal Style Guide.

This site provides standards documentation, assistance, tips and assets for page-publishers and site admins on the MyMacy's portal.

Use the **current navigation** at left to navigate the Guide's articles. Pages on this site are article pages, which allow users to post comments and to rate what they read.

The "Introduction" section provides background information on the **audience and purpose** of the guide, an **overview** of the Portal and its **history**, and notes on the **standards policy**.

There are a number of exciting new features in SharePoint 2013 to learn about. Read the "Working with Sharepoint" section to familiarize yourself with how to work behind the scenes to get your pages looking and working the way you envision. Articles cover topics regarding masterpages, **pages and page layouts**, **web parts** and **zones**.

Additionally, the user interface of the Portal has changed dramatically. Read the "C-Clamp" and "Enterprise Web Parts" sections to get a handle on navigation and new ways to organize and serve up content with accordions, **sliders**, **tabs** and **tiles**.

The "Styles and Branding" and "User Experience" sections delve into issues of branding, **usability and best practices** and rules specific to **animation**, **colors**, **fonts**, **hyperlinks**, **images** and more.

The business unit responsible for this guide and related content is the **Enterprise Portal Team (EPT)**. If you wish to contact the EPT or submit, update or edit work requests, please visit <http://mymacys.net/sites/EPT/>.

You can also follow the **Macy's UX Community blog**.



ENTERPRISE PORTAL TEAM

Standards and advice regarding images, copy, multimedia and documents published on the MyMacy's portal.

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Audience and Purpose

Audience

Whether you're a content owner or a contributor, a gatekeeper or a developer, this guide exists for you. Anyone who builds, maintains, publishes, disseminates or consumes content or code on our corporate intranet is part of a greater community of users working toward the common goal of furthering Macy's business success.

That success is in large part dependent upon how efficiently we accomplish online tasks, be they sharing information or using applications. In turn, that efficiency is dependent upon how the Portal is organized and presented and how easy or difficult it is to navigate.

Purpose

With certain style standards in place, users can come to rely on the Portal as a unified whole. Hyperlinks, buttons, form elements and all aspects of the basic user interface should look and act the same. No one should have to guess whether something is clickable or not or how they get back to their FOB landing page, for instance. Font, list, image, tile, slider and multimedia attributes are common in all like situations across the Portal.

Let me elaborate with an allegory.

Imagine if no common conventions existed for how automobile controls are arranged. If there were pedals for gas and brake in one type of car and hand levers in another, things would be very confusing. One would probably spend a lot of time trying to figure out a joystick control versus a steering wheel, or distinguishing a windshield wiper switch from a radio volume knob. Design consistency allows a person to jump right in and do what they have to do without an aggravating learning curve—or, worse yet, the inability to do anything at all.

So, over time the automobile industry as a whole formally or informally began designing and producing vehicles with controls, for the most part, in the same general locations that look and work in generally the same way. The same goes for a wide range of products and services, from trousers to container ships.

*Interestingly, the same phenomenon occurs in nature. Completely different species through natural selection end up looking and acting in remarkably similar ways. They even occupy the same ecological niches, having independently acquired the same optimal design. The process is called **convergent evolution**.*

Anyway, in a real sense, knowledge about how to interact with an object—be it an industrial lathe or a soda pop can—defines the quality of the experience. Design consistency is a vital factor in determining a positive outcome.

Generally speaking, in any interaction, consistency is the key to keeping productivity high and guesswork low. To the end of propagating consistency, this series of articles represents the formally codified user interface guidelines for publishing content and applications on the My Macy's Portal.

Unless otherwise advised, this guide represents the final authority on everything from general guidelines and best practices to specific, appropriate tile use and list formatting.



An explanation of the rationale and intended audience for the MyMacy's Portal Style Guide.

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★★★★★ | 2

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What Is the Portal?

The My Macy's Portal is an intranet portal administered by the [Enterprise Portal Team \(EPT\)](#). The term "enterprise portal" is also used interchangeably. Wikipedia defines it as:

[T]he gateway that unifies access to all enterprise information and applications on an intranet. It is a tool that helps a company manage its data, applications, and information more easily, and through personalized views. [...] [I]ntranet portals provide value-added capabilities such as managing workflows, increasing collaboration between work groups, and allowing content creators to self-publish their information.

Basically, it's a one-stop for users across a company to find, store, process and share information, communicate by various means, and use programs and tools to accomplish tasks.

SharePoint

Wikipedia describes SharePoint as:

[...] a multi-purpose platform [that] allows for managing and provisioning of intranet portals, extranets and websites, document management and file management, collaboration spaces, social networking tools, enterprise search, business intelligence tooling, process/information integration, and third-party developed solutions.

In other words—to grossly oversimplify things to make a point—SharePoint is in some ways similar to Facebook (I know, bear with me here). It offers a central, collaborative, secure location to place shared multimedia content that can be targeted to certain audiences.



Multifaceted SharePoint.

People collaborate in a structured environment with a common interface. When they interact with each other, they do so through a system with established presentation rules and information architecture. One clicks on a certain link in a certain place to view picture galleries. One clicks on a certain link to post to someone's public forum (their "Wall" in Facebook speak) and in another place to real-time chat with them or send a private message.

All this interaction is stored and presented according to predetermined procedures and style standards. The experience is consistent for everyone. No one has to worry about the logistics of resizing images or the mechanics of formatting text for a particular portion of the Facebook experience. It does it "automagically," which is intuitive and largely worry-free.

In addition to fancy things like workflows, versioning and file management, SharePoint can be thought of as a business-class, enterprise-wide Facebook on steroids, designed for lots of users with lots of various types of data to securely store, modify, collaborate on, integrate, version-control and distribute.

Image adapted from Perficient Presentation "[SharePoint User Best Practices](#)."



An brief overview of what a portal is and how it relates to Microsoft's SharePoint platform.

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☆☆☆☆ | 0

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My Macy's - SharePoint 2007 Version



First-generation MyMacy's Portal in SharePoint 2007.

The Portal's origins date back to mid-May 2008. After consolidation of the Federated patchwork under the "My Macy's" initiative, over a dozen disparate corporate intranets became one entity with the launch of the My Macy's portal.

The new My Macy's Portal was built upon the shoulders of a Microsoft product called SharePoint 2007, which surpassed IBM WebSphere as the dominant enterprise portal solution player. This was in and of itself quite an accomplishment, particularly since it had to happen in the short span of a few months.

However, there were consequences to this rapid deployment that continue to impact the present, even after two major SharePoint upgrades.

My Macy's - SharePoint 2010 Version



Second-generation MyMacy's Portal in SharePoint 2010.

In late summer 2011 the Enterprise Portal Team (EPT) launched the newest version of SharePoint 2010 ("SP2010" for short). It promised many improvements over its predecessor. For one thing, it introduced the familiar Ribbon from the Microsoft Office suite of products, necessitating a totally new and larger Header design. Search was touted as more robust. New social computing features were included. Overall, it proved a welcome change, a noticeably more mature version of its rather touchy and clunky predecessor.

Macy's Inc. rightly recognized the wisdom in the move toward enterprise portal technology. Ever more companies are recognizing its benefits, and as a result the industry is growing at an astounding rate. Annual licensing revenues for SP2010 well surpassed the \$2 billion mark for Microsoft. Globally speaking, all SharePoint-related commerce may account for \$14 billion a year. Obviously, it's big business.



A short account of how Macy's adopted SharePoint, showing some examples of the portal home page through its incarnations since SharePoint 2007.

Rating

★★★★★ | 2

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More importantly, it can't be dismissed as a transient tech fad. With market demand and its revenues expanding, Microsoft will continue to develop and support SharePoint well into the foreseeable future. This means that features will continue to improve, multi-device support will grow, and the My Macy's portal will remain the centerpiece of information exchange and collaboration at Macy's for a long time to come.

My Macy's - SharePoint 2013 Version



Third generation MyMacy's Portal in SharePoint 2013.

After a successful pilot migration for Stores, migration en masse to SharePoint 2013 commenced in spring 2014. Transition for all business units across the enterprise completed in mid-August, 2014.

Other UX articles cover in detail the new features of SharePoint 2013. It is in most ways a vast improvement over SharePoint 2010. Some of the enhancements are as follows:

- Completely redesigned user interface
- Better mobile and browser support
- File sharing via OneDrive Pro (formerly SkyDrive Pro)
- Improved Search that uses Bing technology
- Expanded social features
- Boosted performance
- Easier drag-and-drop functionality
- Enhanced business connectivity
- Enterprise web parts, such as tiles, sliders, tabs and accordions
- Planned information architecture
- More varied, fluid and useful page layouts
- More screen space above the fold for page content
- Better accountability and governance mechanisms

My Macy's - SharePoint 2013 Version



Fourth generation MyMacy's Portal in SharePoint 2013.

In spring 2016, a more traditional flat design of the Portal was undertaken in response to usability research results. This interim version was intended to serve as a bridge to 2016.

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Overview

Every reasonable effort has been made to exceed expectations and requirements regarding the My Macy's Portal and cross-browser compatibility. The Portal looks and acts quite well in most Mozilla-based browsers, such as Opera, Firefox and Chrome, though it's optimized for Microsoft's Internet Explorer. After all, SharePoint is a Microsoft product.

For detailed information on browser and browser feature compatibility, see Microsoft's TechNet article [Plan browser support in SharePoint 2013](#).

Internet Explorer (IE)

Macy's will transition companywide to IE11 by September 2014.

That said, here's a little background on IE. IE8 was Macy's official target browser starting in March 2012. IE7, its predecessor, had some serious stability and performance issues. IE8 fixed many of them.

With each SharePoint upgrade/migration, the Portal is redesigned to leverage new and improved functionality in each IE iteration. For content migrated directly over from previous versions of SharePoint, some appearance and functionality issues may be evident. Styles may render differently, and some aspects of the interface may act differently or not at all.

The [Enterprise Portal Team \(EPT\)](#) will not support old pages that use deprecated styles, layouts, technology or templates, nor will it support the appearance or functionality of any content, old or new, in IE8 or lower.

Recreate your content within the new SharePoint environment for best results, full support and all the benefits of SharePoint search improvements, social features, security enhancements and other capabilities.

Note that some SharePoint features work only in IE browsers. For example, if you want to drag-and-drop Web Parts while editing a page or need the get the full horsepower out of the Ribbon, you must use Internet Explorer.

To determine your Internet Explorer browser version, either:

- use the **ALT+X** keyboard shortcut,
- choose **Help** from the menu bar, or
- click on the **Tools gear icon** in the upper right of the browser (not to be confused with the gray SharePoint Settings gear below and to the left of it).

Then select **About Internet Explorer**. A pop-up like the one below will tell you what version you have installed.



In IE, hit the **F12** key. This brings up the developer tools pane at the bottom of the browser window. Click **Browser Mode: IE9**. Make sure it reads **Browser Mode: IE9** and **Document Mode: IE9 Standards**. Test all your pages in this mode for best results.



Not all browsers are created equal. This article explores what browsers are supported, what some of their major performance and functionality differences are, and provides tips for maximizing your SharePoint experience through smart browser choice.

Rating

☆☆☆☆ | 0

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Google Chrome

Google Chrome is not officially supported. It does have some benefits, however, even in the face of Microsoft's attempts to close the standards compliancy and general usability of IE in recent times.

I am not officially endorsing Chrome or suggesting that you install it. I merely mention it, because it has historically been more stable and standards-compliant than IE. It uses fewer system resources and pages tend to load significantly more quickly. It's also rather crash-resistant.

Most significantly, there are some situations in which IE simply won't work or is so unbearably slow that Chrome is a real life-saving option to getting your work done. This is particularly true on less-capable systems with little or anemic RAM and/or puny processors. It can make a huge difference on Jurassic hardware or perhaps in bandwidth-challenged situations. Anecdotally, this may also be the case with mobile devices, though we don't have hard evidence at present to what extent.

There are some limitations for administrators. As mentioned earlier, Chrome does not support the dragging and dropping of web parts in edit mode. Also, if you're in a document library and click a document, Chrome asks for a "Save to..." location. If you choose "Edit in Microsoft Word" you get an "'Edit Document' requires a Windows SharePoint Services-compatible application and Microsoft Internet Explorer 6.0 or greater" error message. If you want to be able to click and start editing a document from SharePoint, use IE.

You may also try the Chrome **"IE Tab" plugin**. This has not been extensively tested by the Portal Team, but it has proven to emulate IE quite well in initial functionality tests. Use at your own risk.

There are undoubtedly other limitations and problems with using Chrome not mentioned here. Plus, Chrome is not supported in any way by Macy's—including the **Enterprise Portal Team (EPT)**—so if something goes wrong with it or you're having difficulties, there's no one to turn to in the company for assistance. You may also be violating a number of corporate policies against installing third-party software and using company assets in an unauthorized manner.

Monitus es. You have been warned.

Applications that run on the Portal are not guaranteed to work with Chrome, so your mileage will vary. Remember, though, I'm talking about theoretically, hypothetically using Google Chrome. Test your pages in IE9 at the **proper resolution** to make sure they look and perform the way you expect.

Safari

As information becomes available, it will be added here.

Comment on this article:

« Previous | Next »

There are no notes posted yet. You can use notes to comment on a page, document, or external site. When you create notes they will appear here and under your profile for easy retrieval. Other people can also view the notes you post.

Right click or drag and drop this link to your browser's favorites or bookmarks toolbar to use notes to comment on external sites.

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Desktop Viewport Size

Your content must fit within a 1,024-pixel-wide browser window. That means no spillover off the right edge that creates a horizontal scroll bar. That is expressly forbidden.



If you see a horizontal scrollbar, you are required to get rid of it.

Read up on [Scrolling and the Fold](#) for more information on what these dimensions mean for how your pages will display and what the implications are for scrolling and content hidden wholly or partially from the user's view. It's a critical consideration that should drive [page layout](#), [zones](#) and [web parts](#), such as [tiles](#) vs. bulleted lists or [accordion](#) vs. [tabs](#).

Test Your Page

To test your page, in IE hit the **F12** key. This brings up the developer tools pane at the bottom of the browser window. Click **Browser Mode: IE9**. Make sure it reads **Browser Mode: IE9** and **Document Mode: IE9 Standards**. As shown below, from the **Tools** menu, select **Resize**, then **1024x768**.

Tools	Validate	Browser Mode: IE9 Compat View	Document Mode: IE9 standards
Resize			800x600 Ctrl+ Shift+1
Change user agent string			1024x768 Ctrl+ Shift+2
Clear entries on navigate			1280x768 Ctrl+ Shift+3
Show ruler	Ctrl+L		1280x1024 Ctrl+ Shift+4
Show color picker	Ctrl+K		Custom...
Outline Elements...	Ctrl+O		

If you see a horizontal scrollbar in the resized window, **your content is too wide and you must take steps to eliminate the scrollbar.** How?

- If you don't absolutely require left in-page navigation, you can reclaim horizontal space by [choosing a different page layout](#).
- Try rearranging and/or resizing your web parts. Give wide ones more space on the page by giving them the full page width or removing content from adjacent zones so they have some breathing room.
- If you have web parts with sixteen columns of data that won't wrap, remove columns from the display or choose a different way to present the data.
- Simplify. Not everything needs to list-driven. For example, a list of five people's contact information can just as easily be a bulleted list in a content editor web part that can wrap as required. They can take up remarkably little space, giving you more freedom to do things with other web parts.
- Remove or resize [graphics](#) or other elements that are too wide.



All page content must horizontally fit within the minimum desktop screen resolution. Mobile devices have their own requirements. Learn about these and delve into topics about how to construct pages the right way for differing resolutions.

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☆☆☆☆ | 0

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Mobile Devices

SharePoint 2013 introduces a number of exciting possibilities for delivering content appropriately to different devices with varied operating systems, browsers, screen sizes, interface methods (touch versus keyboard/mouse, for example) and hardware capabilities.



Same content, different hardware, browsers and operating systems.



Information on how the Portal displays and functions in non-desktop environments, and what the design implications are.

Rating
★★★★★ | 1

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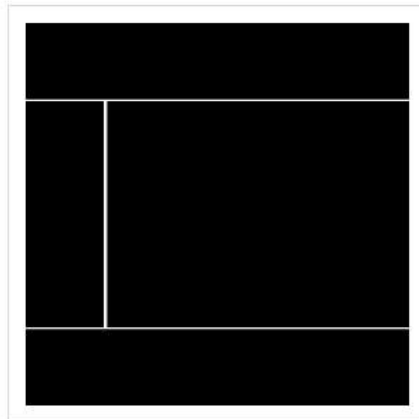
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Page Sections



Several distinct areas with different functions comprise pages.

A typical Portal page is comprised of the following sections:

- [header](#)
- [body and current navigation](#)
- [footer](#)

Jargon Tip: If you ever hear the term "C-clamp" used by the Portal team, it refers to the header, LNP and footer as a whole, because it looks like a "C."



An overview of the component pieces of a typical MyMacy's portal page.

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☆☆☆☆☆ | 0

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Header



The header is at the top of the page.

The *header* is the bar across the top of the page that provides main navigation tabs with cascading menus, the enterprise search field, and various links; it also houses the Ribbon and Site Actions bar for users with appropriate permissions.

The header scrolls with the page, but is omnipresent throughout most of the Portal (there are some exceptions). In some places, functionality may differ.



A description of the header as part of the C-clamp overview.

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★ ★ ★ ☆ ☆ | 2

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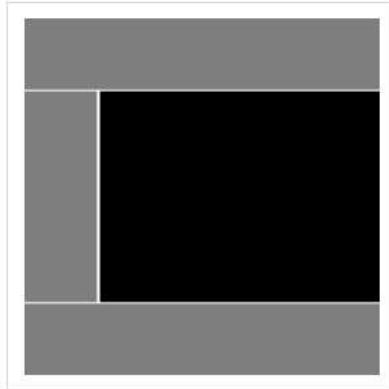
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Body and Current Nav

Page Body



The main content of a page appears in the body.

The *body* is the primary content area of the page. It is sandwiched between the header and footer and sits to the right of the local navigation area, if it's present.

This is where **page layouts** come into play. Content in the body area occupies discrete "containers" called web parts. There are various types of web parts and their appearance is customizable through chrome settings. "Chrome" is the SharePoint term for the gray-outlined boxes with titles, where different types of content are placed.

Think of dealing with SharePoint page layouts as kind of like developing land. Imagine that you have a piece of virgin land — in this case, the SharePoint page — that you want to build on. It's nice to look at, but useless until you subdivide it into parcels.

To do that, you start with choosing a template — called a page layout — to divide your tract of land into smaller properties. This makes it easier to figure out what kind of content you want on the page, where it's located relative to other pieces of content, and how it will look and act.

Page layouts are composed of versatile **zones** in different configurations. In the real world, if you wanted to build single-family detached homes on one part of the land, plus a strip mall and apartment blocks elsewhere, you would divide up the land appropriately. Likewise, Zones dictate where you can place your "structures," called "**web parts**" in SharePoint.

Web parts contain your content, such that you can think of them as rooms with all the stuff you choose to furnish them with. The parallel goes something like this:

- Geographic Area > Piece of Land > Parcels > Buildings > Structural Pieces (Wings, Floors, Rooms, etc.)
- SharePoint 2010 Site Collection > Layout (Page "Template") > Zones > Web Parts > Content (Images, Text, Multimedia, Lists, Announcements, etc.)

Just as in parceling a subdivision, the sizes, shapes and types of structures you plan to place there largely dictate how much space you must allocate to them and the sequence you'll place them in.



A description of the page body and current navigation (the left navigation) as part of the C-clamp overview.

Rating
☆☆☆☆ | 0

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Current Navigation

The *current navigation* area, also known as the *left navigation pane*, contains "local" site navigation text links that go three levels deep off the site root (not the Portal root). These links are configurable at the discretion of the site administrator.

The current navigation area is sandwiched between the header and footer and sits to the left of the page body. It is not always present. Its appearance and content are at the discretion of the admin in charge of a given site. It is not required and is not always appropriate.

Its utility comes into play for sites or site collections with deeply nested content. Otherwise, it takes up valuable space best used in other ways. Only one **layout** supports the current navigation area. It cannot be added to landing or home page layouts.

Expand/collapse capability as well as "docking" will likely be added in the future.



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Reference Information

SharePoint Developer Resources (MSDN)
<http://msdn.microsoft.com/en-US/office/dn448478>

SharePoint IT Pro Resources (TechNet)
<http://technet.microsoft.com/en-us/sharepoint>

Free Online Learning Resources

Basic SharePoint Use Case Information (End User-ready Content)*
<http://www.discoversharepoint.com/>
 * SharePoint app based on the cloud model; try it: <http://aka.ms/dspapp>

SharePoint 2013 Development Training (MSDN)
<http://msdn.microsoft.com/en-US/office/dn448488>

SharePoint 2013 IT Pro Training (TechNet)
<http://technet.microsoft.com/en-US/sharepoint/fp123606>

SharePoint 2013 IT Pro and Developer (Microsoft Virtual Academy)
<http://www.microsoftvirtualacademy.com/product-training/sharepoint>

2014 SharePoint Conference Resources
<http://channel9.msdn.com/Events/SharePoint-Conference/2014/>



A collection of links to SharePoint-related resources on the web.

Rating
 ☆☆☆☆ | 0

Last Modified
 7/23/2014 2:48 PM

Modified By

[Nick Zedlar](#)

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Navigation Links Area

The Markup

For your navigation in the mega-dropdown menu, you don't need to worry about styles, as they'll be automatically applied if you follow the formatting below. If you don't know HTML, don't panic. There are only four tags to learn:

```
<h3></h3> = header level 3  
<a href=""></a> = anchor (hyperlink)  
<ul></ul> = unordered list  
<li></li> = list item
```

Tip: Remember, you must always close an open tag.

```
<h3><a href="">Put Your Subtitles in H3 Tags</a></h3>  
<ul>  
  <li><a href="">Put links in Link Item Tags</a></li>  
  <li><a href="">Put links in Link Item Tags</a></li>  
</ul>  
  
<h3>Put Your Subtitles in H3 Tags</h3>  
<ul>  
  <li><a href="">Put links in Link Item Tags</a></li>  
  <li><a href="">Put links in Link Item Tags</a></li>  
</ul>
```

Tip: Your headers do not necessarily need to be hyperlinked. They can just be categories for the links below them.

Default Subnavigation

The default subnavigation for your business unit is "Welcome." This is what all users will see first, so consider this the "landing page" of your navigation. If you can fit all of your major links in "Welcome," then use it instead of creating another subnavigation item.

Recommended Subtitle Headers

Use subtitle Header tags to logically divide your links into logical groupings.

- **Announcements** - Important information local to the business unit, usually of an urgent nature.
- **Applications** - Programs with self-contained functionalities that extend or augment SharePoint's capabilities.
- **Calendars** - Release dates, deadlines, birthdays, PTO and vacation tracking, meeting schedules
- **Community** - Structured shared resources for internal use, such as blogs, articles, wikis, MySite pages, categorized discussions, badges and recognition.
- **Dashboards** - Scorecard groups and report views with analytic charts and grids that report status and drive action.
- **Departments** - Business units, task groups, directories, management teams, org charts
- **FAQs** - A list of frequently asked questions and their answers.
- **News** - Press releases, important information across business units
- **Projects** - Planned activities and objectives
- **Reports** - Aggregate data organized for analytical purposes.
- **Scorecards** - Reports that display key performance indicators (KPIs) along with performance targets for each.
- **Tools** - Similar to Applications, but features functionality of a limited, usually SharePoint-integrated, scope.
- **Training** - Structured educational resources, including multimedia assets, for internal or external users.



An explanation of how to use and configure the "Navigate" mega-dropdown navigation in the header.

Rating
☆☆☆☆☆ | 0

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Concept and Content

The "gray tabs" are enterprise mega-dropdown navigation menus grouped by *category*, **not** business function as the in the **Navigate tab**. This means that five categorical areas – One Macy's, News, Life & Career, Centers and Initiatives – provide rapid vectors to frequently accessed content common to all MyMacy's portal users.

- **One Macy's:** This category is a general overview of Macy's Inc., it's philosophy, business news, press releases, management and so forth.
- **News:** This category covers newsworthy information specific to Macy's, excluding Bloomingdale's. Included are links to media, corporate communications content, and company-sponsored charitable causes and events.
- **Life & Career:** This category will likely be renamed **Insite** in the near future. It provides links mostly to HR resources, such as training, community initiatives, payroll and benefits information, and travel.
- **Centers:** Consider this category as having its own self-evident sub-categories: Applications, Career, Policy, Talent and Travel.
- **Initiatives:** Company initiatives, such as MOM, are highlighted here.

Standards

As with the Navigate mega-dropdown menu, **the gray tabs require EPT pre-publish approval.**

Edits to a navigation page will kick off the approval workflow. Failure to adhere to standards will result in a rejection that starts the workflow over again. It will oscillate between submission and rejection until the EPT deems it ready to go into production. Here are some tips to



An explanation of how to use and configure the five "gray tab" navigation mega-dropdown menus in the header.

Rating
★★★★☆ | 1

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Page Layouts

At present, there are four official MyMacy's page layouts. There are pros and cons to each. The type of content, how you wish it to appear will dictate the best choice(s).

Macy's Standard Page



Stop

This general-purpose layout efficiently uses the entire horizontal page area. It is the **only** page layout with left in-page navigation. Recommended for most pages—other than home and landing pages—in sites with deeply nested content. It's a good choice for pages with wide content with little or no wrapping, such as big tables or large images.

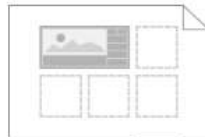
Macy's Standard Page - No Left Nav



Stop

This general-purpose layout efficiently uses the entire horizontal page area. It does **not** have left in-page navigation. Recommended for most pages—other than home and landing pages—where left navigation is not desired. It's a good choice for pages with wide content with little or no wrapping, such as big tables or large images.

Macy's Landing Page - Fixed Width



Stop

This layout is designed specifically for landing pages and is optimized for tile use. It features a 3x3 zone configuration of fixed width that is centered on the page. It includes an obligatory content slider linked to corporate content. Local slides can be optionally added to this slider. This layout **does not** have left in-page navigation. This layout is required for landing pages.

Warning: content that exceeds the fixed width will be cut off.

Macy's Home Page - Fixed Width



Stop



An overview of the different page layouts, their pros and cons, and recommended uses.

Rating
★★★★★ | 1

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Web Parts

Enterprise Web Parts

The following are custom web parts built by the Enterprise Portal Team for use across the portal:

- [content slider](#) - a "slideshow"
- [tab control](#) - horizontal content-switching
- [tiles](#) - Windows 8-like navigation squares (currently static only)
- [accordion control](#) - vertical content-switching

Working with Zones and Web Parts

The interplay between zones and web parts can be tricky. Sometimes you have to choose another layout altogether or move things around a bit on the one you like before you achieve your desired results. Here are a few tips to help you:

- Choose a layout with the fewest zones and simplest layout that meets your needs. There are a number of reasons for this, one being that even empty or hidden web parts introduce space to the layout, something you want to avoid as much as possible.
- The zone column count in the layout you choose should reflect the number and wrapping capabilities of your various web parts.
- Place large, unwrappable objects (like big images or tables with lots of columns) into larger zones (that is, ones that take up most or all of the page width). That's like trying to stuff a manatee into your pocket.
- If content requires lots of sub-sections on the page, break them into separate web parts.
- Build your page to look good at the target resolution of 1,024x768. Pages need to be filled horizontally first, then vertically second. This uses space most efficiently, so users don't have to scroll so much.
- Put web parts you want to be the same width in the same zone, not different ones, because web parts in adjacent zones often work like adjacent Excel cells. If content doesn't fill up the vertical space, a gap appears between it and the next zone down. This would not have happened if the web Part below the blue hole was placed in the zone above it right under the other web part.
- Leave web part widths and heights undefined most of the time. There are few defensible reasons to tinker with the dimensions of a web part. Keeping them "fluid" allows them to expand and collapse with increasing and decreasing browser window size. They will also adapt better to changing content in and around them. If you have clearly larger content in one portion of the page (such as large blocks of text, tables or images), you can lock the widths of all the web parts in the (usually right-hand) narrow zone to the same figure (say, 250 pixels) and leave the larger ones free to expand on their own (see image below). You may have to play with the width setting to get the desired result. However, do not lock the widths in all adjacent zones across the page. Doing so circumvents the default fluid "fill-the-browser-window" behavior of the design.
- Warning:** Since even hidden web parts take up some amount of space in a page, place hidden web parts in zone slots at the bottom of the page, even if that's not where you ultimately want to place them when they're viewable later. Remember, we're just "storing" them where they won't affect the top alignment of other web parts or the spacing between them. If you plan on never using a particular web part again, please delete it. If you ever need it again, you can easily retrieve it from an older page version in the history. You can also export it, but that's another topic.
- Choose only one of the layouts with "Macys" in the name.
- Use the same layout from page to page, if appropriate for your content.
- If you choose to use or not use the left navigation pane, continue that choice from page to page to be consistent, unless there's a good reason to deviate.
- Do not use fixed-width layouts without consulting with the EPT. The same rule that applies to web part widths (so they dynamically adapt to fill the page) apply to using SharePoint layouts. There are rare exceptions, but in virtually every case, a good fluid design is the best option.

Minimizing Web Parts

Do not set web parts' chrome state to "minimized." They must remain "normal." Users can choose to minimize web parts in their own browser on a per-session basis.

Use Web Part Chrome

Do not create your own "container" for a web part. Instead, use the chrome for that purpose. Also, do not create a title inside a web part that applies to all its content. Sub-titles are okay inside the Web Part, but use the Web Part title bar to label all the content within it.



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Zones

Working with Zones and Web Parts

The interplay between zones and web parts can be tricky. Sometimes you have to choose another layout altogether or move things around a bit before you achieve your desired results.

Main Concepts

- Choose a layout with the fewest zones and simplest layout that meets your needs. There are a number of reasons for this, one being that even empty or hidden web parts introduce space to the layout, something you want to avoid as much as possible.
- The zone column count in the layout you choose should reflect the number and wrapping capabilities of your various web parts. In other words, if you have wide content, such as large images or tables, don't try to cram it into a zone that extends only a quarter or a third of the way across the page. Place large, unwrappable objects (like big images or tables with lots of columns) into larger zones (that is, ones that take up most or all of the page width). Otherwise, it's like trying to stuff a manatee into your pocket: pointless, frustrating and painful for all parties involved.
- If content requires lots of sub-sections on the page, break them into separate web parts.
- Build your page to look good at the target resolution of 1024x768. Pages need to be filled horizontally first, then vertically second. This uses space most efficiently, so users don't have to scroll so much.
- Choose only one of the layouts with "Macys" in the name.
- Use the same layout from page to page, if appropriate for your content.
- If you choose to use or not use the left navigation pane, continue that choice from page to page to be consistent, unless there's a good reason to deviate.

Width and Heights

- Put web parts you want to be the same width in the same zone, not different ones, because web parts in adjacent zones often work like adjacent Excel cells. If content doesn't fill up the vertical space, a gap appears between it and the next zone down. This would not have happened if the web Part below the blue hole was placed in the zone above it right under the other web part.
- Leave web part widths and heights undefined most of the time. There are few defensible reasons to tinker with the dimensions of a web part. Keeping them "fluid" allows them to expand and collapse with increasing and decreasing browser window size. They will also adapt better to changing content in and around them. If you have clearly larger content in one portion of the page (such as large blocks of text, tables or images), you can lock the widths of all the web parts in the (usually right-hand) narrow zone to the same figure (say, 250 pixels) and leave the larger ones free to expand on their own (see image below). You may have to play with the width setting to get the desired result. However, do not lock the widths in all adjacent zones across the page. Doing so circumvents the default fluid "fill-the-browser-window" behavior of the design.
- Other than the landing page layout, do not use fixed-width layouts without consulting with the [Enterprise Portal Team \(EPT\)](#). The same rule that applies to web part widths (so they dynamically adapt to fill the page) apply to using SharePoint layouts. There are rare exceptions, but in virtually every case, a good fluid design is the best option.

Minimizing and Hiding Web Parts

Do not set web parts' chrome state to "minimized." They must remain "normal." Users can choose to minimize web parts in their own browser on a per-session basis.

Warning: Since even hidden web parts take up some amount of space in a page, place hidden web parts in zone slots at the bottom of the page, even if that's not where you ultimately want to place them when they're viewable later. Remember, we're just "storing" them where they won't affect the top alignment of other web parts or the spacing between them. If you plan on never using a particular web part again, please delete it. If you ever need it again, you can easily retrieve it from an older page version in the history. You can also export it, but that's another topic.

Use Web Part Chrome

Do not create your own "container" for a web part, such that you create your own version of a header or bounding box.

Instead, use the out-of-box web part chrome for that purpose. Also, do not create a title inside a web part that applies to all its content. Sub-titles are okay inside the web part, but use the web part title bar to label all the content within it.

For instance, you wouldn't label a web part "Projects" that contained both links to project documents, but also a directory of email addresses. They're unrelated. You can name it something that applies to both or separate them into different web parts (recommended) or, alternatively, hide the chrome title altogether (not recommended).



Rating

☆☆☆☆ | 0

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Slider

What Is It?

The slider web part is a custom "slideshow" enterprise web part created and supported by the [Enterprise Portal Team \(EPT\)](#) for unrestricted use across the Portal. It is designed to efficiently share the same prime landing page space between corporate communications and the business unit (BU).

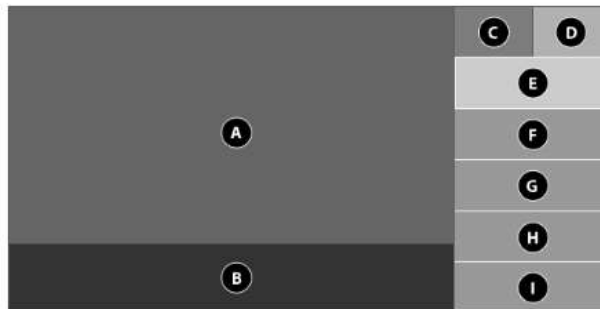
It is mandatory on landing pages, where it appears automatically as part of the page layout and cannot be removed. It is optional anywhere else.

How Does It Work?

If a user has the appropriate permissions to add, move, delete and edit web parts on a given page, the slider appears in the Macy's web part gallery and can be added.

On landing pages, when the page loads, the slider autoplays, cycling through any corporate slides (up to five - E through I below). After showing the last corporate slide (I below), it switches tabs (from C to D below) and cycles through any BU slides, also up to five.

The slideshow continues in the fashion until the users clicks/taps anywhere on the slider. An example would be changing tabs (C or D below) manually or choosing a slide title (E through I below). Clipping either the image (A below) or the title (B below) hyperlinks the user to that particular piece of content.



The components of the slider are as follows:

- A** The image
- B** The description
- C** The corporate communications tab (denoted by "CORP")
- D** The business unit tab (at present denoted by "FOB"); in the future this may show the FOB name up to perhaps five characters, but this functionality is just conjecture
- E** The title of the first slide (selected in this example)
- F** The title of the second slide (unselected in this example)
- G** The title of the third slide (unselected in this example)
- H** The title of the fourth slide (unselected in this example)
- I** The title of the fifth slide (unselected in this example)

Slider Setup Process

Some pages will not accept the slider.



Learn to use and configure the enterprise slider web part.

Rating
★★★★★ | 1

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[Nick Zedlar](#)

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Site Contents

Some pages will not accept the slider.

An Article page, for example, will not. You must be on a page that has the "Add a Web Part" capability in Edit mode. Otherwise, you're just wasting your time.

Step 1 - Make Your Images

Start by creating a 600x300 Images suitable for the slider.

These can be any format supported by SharePoint, such as GIF, JPEG or PNG. **The EPT recommends PNG** for best color depth, file size and lack of compression artifacts.

The slider will attempt to resize an image, but it is not perfect. If one dimension of an image is significantly larger than the other, it's possible to have blank portions of the slider image area not occupied by your image. To avoid this and other problems, **always create an image that's 600 pixels wide and 300 pixels high**. That way there will be no distortion or blank portion eyesores.

If you are artistically challenged -- and be honest about this; everyone is convinced they're a DaVinci, though they're not -- recruit someone with graphics skills and the appropriate software. Photoshop is the gold standard, but there are others that will get the job done. Even free ones. [Google it](#).

Step 2 - Upload Your Images

Use the right tool. **To ensure that this goes smoothly, use Internet Explorer only**. Chrome or other browsers lack full functionality when working behind the scenes in SharePoint.

When your image is ready, upload it to your site. Put it in one of the images folders in your site, such as "Site Collection Images" or "Style Library/Images." If you create your own folder, be smart and name it "Slider Images" or something easy to find later on. For instance, open your browser to your site. Usually, this is <http://mymacys.net/sites/yoursite> or <http://mymacys.net/sites/yourparentfobsite/yoursite>

You should see a collection of red tiles on a page called "Lists, Libraries and other Apps." Click on "Site Collection Images" or "Images" or your custom location. You can now drag and drop your image(s) to upload.

Step 3 - Note Where Your Images Are

You need to know where you put your images for this to work.

The best time to do this is immediately when you upload. Navigate to where you see the image thumbnails. Hover your cursor over the one(s) in question. Click the three white dots in the lower right corner. A callout appears. The text field there is the URL of your image.

You can write this down, but the easiest way is to copy and paste it somewhere you can easily get to it when you configure your slides. The EPT recommends pasting into Notepad and saving it to your desktop. When you're done later, you can simply delete the text file.

An easy way to later figure out image URLs is to click the "Settings" gear in the upper right of the header next to the red ? (help) button. Select "Site Contents." You should see a collection of red tiles on a page called "Lists, Libraries and other Apps." Navigate to where you put the image. It's that simple.

Step 4 - Create Your Slider List

SharePoint stores your slide configuration in the list you're about to make.

To start, open your browser to your site. Usually, this is <http://mymacys.net/sites/yoursite> or <http://mymacys.net/sites/yourparentfobsite/yoursite>. Click the "Settings" gear in the upper right of the header next to the red ? (help) button. Select "Site Contents." You should see a collection of red tiles on a page called "Lists, Libraries and other Apps."

Click the uppermost left icon that reads "Add an app." Scroll down to **Enterprise Slider List**. Enter a relevant and useful name for this particular instance of the slider. Remember, you may have multiple sliders in the future, so name it according to the specific page it's on or what its unique purpose is. Click the "Create" button.

Step 5 - Configure Your Slides

If all went well with the previous step, your new list will appear in alphabetical order on the page with a green "new!" under its title. You may have to scroll and/or step through the paginated list. Click on the tile representing your list to open it. Here's where you configure each slide. Starting out, you can click either "new item" or "edit."

There are ten settings you can configure for each slide. Only five of them are mandatory. For each slide, you will have to create this form.

The top field is **Title**, which is an obligatory field. This is the text that will show on the right side of the slider. **Keep this short and specific, but do not treat it as a description.** A good example would be "Bag Hunger 2014."

EnterpriseSliderImage is where you paste the URL to a slide image you uploaded. Each slide can have only one picture. You do not have to upload an image at all, if you don't want to. If you don't, the slider automatically allocates the slide image area to your "EnterpriseSliderDescription" text (described in detail below), which allows you to write an even longer description. This can be useful in certain circumstances, but is obviously less aesthetically pleasing and may be less eye-catching.

You will need to monitor how much text you enter, since there is a character limit after which the text will not show. Do not feel obligated to fill up any of these areas. Be short and concise. The more verbose you are, the less inclined users will be to read all your text.

EnterpriseSliderImage description field describes the image, not the slide. This information is **not** mandatory.

EnterpriseSliderLink is the URL to which the given slide links. It can be to any valid URL you wish... with one caveat: if it is to a resource outside of the mymacys.net domain, you must add a bit of JavaScript until we add this as an easy-to-use feature in the form itself in the future. Copy and paste in the following including the quotation marks:

```
"javascript: window.open('http://your_external_url_here.com/some_page_out_there');" 
```

Note that this is a voluntary field. Your slide does not actually have to link anywhere, as you could just be conveying some information... though usually you are asking the user to do something, like complete annual reviews. Why not provide a link to get them to it?

EnterpriseSliderLink description field describes the URL, not the slide. This information is **not** mandatory.

EnterpriseSliderEffectiveDate is the 'go-live' date/time for the slide in question. You can have slides start showing immediately via the current date, or you can have it automatically appear in the slider at a future date and/or time. It is a mandatory field.

EnterpriseSliderExpirationDate is date/time the slider will stop showing the slide in question. It is a mandatory field.

EnterpriseSliderRank tells the slider what order to show its slides in. The larger the number, the later in the order it will appear. Any slide ordered to appear after the sixth will not be visible, as the slider has a six-slide limit. Values in this field can be any number -- even decimals. Think of the Dewey Decimal System. 1.1 comes before 1.14 but after 1.02 or 0.1 and so forth. I'd stick to whole numbers for simplicity's sake, but that's up to you.

EnterpriseSliderDescription is the description that the user sees overlaying the bottom of the image. It accommodates more text than the title, but should also be kept as brief as it takes to get your information across. You cannot embed hyperlinks in this text, as both the whole image and description area links to the "EnterpriseSliderLink" URL.

EnterpriseSlidersVideo checkbox places a "watermark" over the slide image to indicate that by clicking on the slide, the user is going to launch a video. Leave this unchecked in any other case.

When done, click "Save" and continue to the next step of adding the slider web part to your page.

Step 6 - Add the Slider to Your Page

Open the page you want to add the slider to in Internet Explorer.

In Edit mode, click on "Add a Web Part." Scroll to the "Macys" Category and choose **Enterprise Comm Slider** not "Enterprise Slider." Click the "Add" button.

You will see a red image that reads "My Macy's" with a **ERROR: There are no slides to display message**. Don't panic; this is the default state until you point the web part to a valid slider list.

In the slider web part's gray chrome header that reads "Enterprise Comm Slider," click the red right-hand down caret and select "Edit Web Part." The web part is now in Edit mode. The web part configuration panel is on the right. You may need to scroll horizontally to see it.

You are here to change one property only: the **ListNameURL** field under **Macys Property Group**. Leave all other settings in the first three accordion sections alone.

Step 7 - Point to Your Slider List

You have to tell the slider where to look for your slider list, so it can load all the images, titles, descriptions and configuration data.

To do this, in the **ListNameURL**, type or paste in the relative path to the slide list you created. No worries. There are a number of ways to get it. You can navigate to it via the **Settings > Site Contents** procedure described earlier in this article. If you click on your list file, the URL will show in the browser's address bar. Alternatively, you can click on the three gray dots to the right of the tile and select **Settings** from the callout. The URL is the **Web Address** just under the **Name**.

Type or copy and paste the URL as a relative link, that is, start with **/sites**. **Do not include the http://mymacys.net part**. For example, the slider list for the slider on the MST landing page is as follows:

```
| /sites/mst/Lists/MST Slider/AllItems.aspx
```

Your URL will be different, of course.

Step 8 - Wrap Up Configuration

The remaining options are two checkboxes. Under most circumstances, don't touch these. Leave them checked. That said, if you don't have your own image for a slide and want the slider to load the default image you saw when you first dropped it on your page, uncheck **WithImage**. You might find this useful if you want to publish a slide, but don't have an image ready for it. It's perfectly acceptable to do this, though it always preferable to create your own images.

The last one, **InSameWindow**, should also remain checked in the majority of cases. Only uncheck this if you explicitly want the URL to open in a new browser window. The singular real case where this is not only advisable, but required by Portal standards, is when the link is going outside of mymacys.net. Otherwise, leave this checked.

Click the **Apply** button, then **OK**.

Step 9 - Troubleshoot, Tweak and Publish

Congratulations! If you did everything correctly, your slider is now on the page and ready to go. If there are any errors or you are getting results that you didn't expect, go back through the steps outlined in this article. Many errors are due to faulty URLs of one sort or another. Recheck them carefully.

You can always navigate to your list via **Settings > Site content** and click "edit" to create, rename, change or delete slides.

If you've checked and rechecked everything a dozen times and still are stumped, **open an EPT work request** for assistance.

When the slider looks ready, publish it.

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Tabs

Add the Web Part

The enterprise tab web part has been deployed and can be chosen by clicking **Add a Web Part** in edit mode, choosing the **Macys** category and selecting **Enterprise Tabs** from **Parts**.

Create and Populate the Tabs

The way it works is simple: place it in a zone. Underneath it in the same zone, add whatever web parts strike your fancy. All of these web parts will show as a discrete tabs in the tabbed web part. The chrome title of each will correspond with a tab in the order they appear from top to bottom. Web parts above the it will appear as normal on the page and not be subsumed by, and appear in, the Enterprise Tabs web part.

Change the stack order in the zone to change the order of the tabs from left to right, such that the top-most web part will be the first tab, the next one down will be the second, and so forth.

Fix Height and/or Width

Fix the height and/or width to line up with surrounding web parts. This will also keep the Enterprise Tabs web part from "jumping" around, as it's size is otherwise dictated by the content it contains. In other words, if there's a short paragraph of text in one tab and the user clicks on another with a short line of text or a small image, the bottom edge of the whole web part will jarringly move upward.

It's best to determine the minimal height that accommodates all the content in all the tabs—preferably without any scrollbars appearing—and fix the height of the web part to that value.

Be Smart

It makes little sense to add tabbed web parts or sliders inside the tabbed web part. Tiles may be pushing it. If you are considering these scenarios, you've probably missed easier, more effective ways to present your content.

Also, use tabs sparingly. The fact that they require user interaction to reveal content diminishes their utility in providing important or common content.

Also—and this is key—**tab content should be logically related**. Throwing wildly differing content into the Enterprise Tabs web part is treating it like a junk drawer. It takes a lot of effort to sift through it to find things. You'll frustrate users when there's no guarantee that what they're looking for is even there to begin with. If there's no obvious connection, split up your content into different web parts.

For an example, see [Enterprise Tabs Example](#).

Comment on this article:

Post

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Gary Storey 5/25/2016 10:58 AM
Per my previous comment, the Title field for a Tile web part is now exposed. This allows users to add Tiles to a tab and the Title for the Tile web part will be displayed.

Delete



Gary Storey 7/3/2014 2:48 PM
John,
Currently, the Tile webpart does not expose it's title to the Tab web part. This is on our enhancement list and will be added in a future release (probably sometime in July or early August). Also, there is no way to exclude one webpart from being converted into a Tab. The work around would be to place the other web part into the adjacent zone below the Tab web part.

Delete



Learn how to use and configure the enterprise tabbed web part.

Rating
★★★★★ | 1

Last Modified
7/1/2015 11:51 AM

Modified By

[Nick Zedlar](#)

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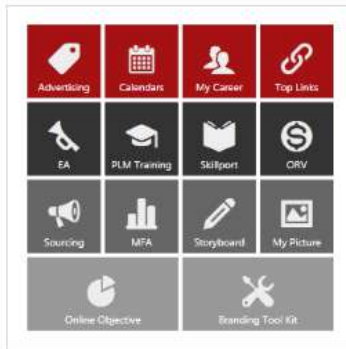
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User Experience

Tiles

The new Portal looks to Microsoft's "metro" UI for inspiration, in particular the introduction of tiles as integral parts of the user experience.

Tiles are well-suited to mobile devices, because they present a discrete, appropriately sized target area for users with touch-based interfaces. According to this paradigm, static tiles are variously colored flat squares of several predetermined sizes with monochromatic icons and an optional text label, like so:



An example of proper color use, symmetry and size variety.

Tiles that are "static" do not show dynamic information, like real-time weather or stock information, an email message count, or a number of new documents. They are simply hyperlinks to some other page or piece of content. At present, all tiles on the Portal are static. That doesn't mean they're necessarily inert, however.

All tiles provide some interactive feedback, such as a subtle background color change on hover. Medium and large tiles also have the capability of showing a text description in place of the icon, and small tiles display a tooltip-like callout description. Of course, these only work in conjunction with a mouse pointer "hovering" over them, so touch users will not benefit... at least not at this time.

In the near future, expect dynamic capabilities to enter service. The underlying functionality for changing tile properties on the fly has been coded, which opens up some exciting possibilities for giving users more detailed morsels of information at a glance on tiles.

Tiles in My Macy's are added as groups into a single web part. You can have multiple tile web parts on any given page, each with their own collection of tile sizes, colors, positions, etc.

Caveats

You are not required to use tiles, and probably shouldn't in many cases.

Tiles are not always the most appropriate choice for presenting links. Space is at a premium on pages, especially above the **fold**, so use them sparingly and wisely. Often bulleted lists or other methods for presenting links are more rational choices.

When using tiles, think carefully about how you organize them. Put them together into logical groups based on similarity. Ideally, items grouped together should be the same color or at least be in the same general area on the color spectrum. Also, think symmetry in color and size. In the example above, **from a size perspective** the tile group is perfectly bilaterally symmetrical—that is, from side to side it mirrors itself. This is pleasing to the eye, and demonstrates that you composed it with usability and aesthetics in mind.

Check out the [EPT Home](#) for an actual working tile web part that uses conservative colors and symmetry.



Advice on tile use, and an overview of available size, color and icon combinations.

Rating

★★★★☆ | 3

Last Modified

3/23/2016 2:56 PM

Modified By

[Nick Zedlar](#)

Links

- [How to Add and Configure Tiles](#)

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2/21/2014, 11:47 AM

Additionally, be consistent from page to page in your color choice. For example, if a "Projects" tile on one page is green with a particular icon, make it green with the same icon on every other page, even if it links to different projects. Users will come to associate that color/icon combination and will be subconsciously expecting it. If you meet their expectations, you've accomplished the core precept of good usability.

Icon, Size and Color Choices

You may use only predetermined font glyphs (icons), tile sizes and tile colors, but you can create them in any combination you wish. Note, however, that you may not alter *text properties* (e.g., color, decoration, size) for glyphs, labels and descriptions. Go to <http://mymacys.net/sites/EPT/showcase/Pages/Using-Tiles.aspx> for swatches.

Recommended Uses

Tile Icons

[+ new item](#) or [edit this list](#)

Icons	Uses	Related
Airplane	travel, vacation, holiday	Bag
Alarm	reminders, announcements, important, error, problem, emergency (procedures)	Exclamation
Android	Android device or OS	
Announce	announcement, event, schedule, meeting, press, news	Trumpet
Apple	Apple device or iOS	
Audio	audio, sound files, music	
Award	awards, commendations, winner, recognition, talent	
Bag	travel (preference is "Airplane"), vacation, holiday, portfolio	Airplane
Barchart	chart (particularly bar type), analytics, metrics, data, report	Linechart, Piechart
Building	facilities, location, store, office, property development	
Book	(style) guide, manual, training, course, class, learning, graduation, education, policy, Earning for Learning, policy	Books
Bookmark	link list, recommended links	Link
Books	guide, manual, training, course, class, learning, graduation, education (success) stories, policy	Book
Bug	bug, problem, caveat	
Calc	calculator, tabular data, spreadsheet, cost	Table
Calendar	event, schedule, meeting, vacation, TimePlus	Alarm, Announce
Cart	shopping, store, sale, customer, omnichannel	Creditcard, Shirt, Tag
Chat	feedback, support, communications, social, conversation, dialog, interview	People
Checkmark	yes, affirmative, help, assistance, agreement, positivity	
Clip	related item, download/upload, document	
Creditcard	credit, buy, shopping, purchase, customer	Cart, Creditcard, Shirt, Tag
Database	database, data, information, details, hardware	
Desktop	desktop, PC, computer, user, support, display, .com, online, web	
Dollar	purchase, buy, shop, sale, profit, expenditure, expense(s), compensation, pricing, finance	Dollarbill
Dollarbill	purchase, buy, shop, sale, profit, expenditure, expense(s), compensation, pricing, finance	Dollar
Download	download, get, save	Clip

Exclamation	important, error, problem, emergency (procedures)	
Film	video file, interview, television, movie, video conference, CDN	Play
Find	find, search, investigation, review, clarification	
Fire	"hot" info, safety	
Folder	folder, list, dossier, related items	Pencil
Food	diet, menu, lunch & learn, meal, Bag Hunger	
Gift	gift, present, giving, donation, charity	Heart
Heart	favorite, health, fitness, wellness, charity, Giving Back	Gift
Help	help, support, work request(s)	
Home	home site/page, domesticity	
Image	graphic, gallery, image, photo	
Iphone	iPhone, mobile device, smartphone	Apple
Key	security, idea, concept, solution	
Leaf	nature, sustainability, green initiative, Green Living, recycling	
Legal	legal department, justice, policy	
Linechart	chart (particularly line type), analytics, metrics, data, report, stocks	Barchart, Piechart
Link	hyperlinks, list of links, supply chain	
Lock	security, idea, concept, solution	Key
Meter	dashboard, analytics, metrics, data, review, report	Barchart, Linechart
Mobile	mobile device, smartphone	Iphone
Org	org chart, hierarchy, relationship, distribution	
Page	web page, document, identification, dossier, file	
Pencil	edit, draw, write, create, composition, opinion, editorial, blog	
People	users, human resources, social, career, employee(s)	
Phone	phone numbers, contact, marketing, tielines	Phone
Phonebook	phone numbers, contact(s), marketing	
Piechart	chart (particularly pie type), analytics, metrics, data, report	Barchart, Linechart
Play	video file, interview, television, movie, sound files, music, video conference, CDN	Audio, Film
Puzzle	integration, system, parts, Office	
Question	FAQ, questions, help, support, lost and found	Help
Settings	settings, configuration	
Shield	security, antivirus, protection, anti-malware, risk, asset protection, shortage control	Key, Lock
Shirt	sale(s), merchandising, shopping, store, sale, customer, omnichannel	
Table	spreadsheet, Excel, tabular data, grid, table	
Tablet	tablet, mobile device, smartphone, iPad	Iphone, Mobile
Tag	sale(s), merchandising, shopping, store, sale, customer, omnichannel	Cart, Creditcard, Shirt
Ticket	event, meeting, Big Ticket	Calendar
Tools	application(s), settings, configuration, procedures	Settings
Training	guide, manual, training, course, class, learning, graduation, education, Macy's Inc. Scholarship Program	Book, Books
Truck	logistics, transport, shipping	

Trumpet	announcement, event, schedule, meeting, press, news, bulletin, newsletter	Announce
Unix	Unix OS	
Windows	Windows OS	

How to Add and Configure Tiles

Go to <http://mymacys.net/sites/EPT/showcase/Pages/Using-Tiles.aspx> for detailed instructions.

Note that space is limited on pages using the slider in the default location.

You can only fit combinations that are no more than five "units" across, in other words, only five 1x1 tiles. This is true of both the landing and home page layouts. "Standard" layouts are limited only to what will fit in a **1024x768 window**.



Of course, you may use whatever combination that fits that you want to. To line up with the bottom of the slider, restrict your configuration to four rows. Remember, you are not obligated to fill the whole space up, but it will look better if you do.

Comment on this article:

Post

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- Jacob Nye** 10/28/2015 2:00 PM

Is there a way we can target say tile A1 to managers and tile A2 to all associates? All while having A1 and A2 in the same list.

Delete
- Gary Storey** 9/24/2015 2:21 PM

If you are using the Enterprise Tiles web part, only the icons we supply are allowed. For your other custom web parts, you are not limited to these icons. However, no other custom "Tile" solutions are allowed.

Delete
- Chris Odegard** 7/16/2015 1:28 PM

Is it acceptable to use customized icons with other web parts that are not the Enterprise Tiles? I'm thinking specifically of the icon sets you can create with tools like Syrnifusion Metro Studio.

Delete
- Gary Storey** 7/3/2014 2:54 PM

Earl,
If you are still having an issue, open up an EPT Work Request (<http://mymacys.net/sites/EPT/workrequest/Pages/CustomerRequest.aspx>).

Delete
- Rob Michaels II** 6/19/2014 4:29 PM

For some reason my static tiles will not appear on my page. I get to where you edit the web part, enter the site URL, and the list name; but the tile will not appear. If I try to add it as an app part it will only list it in row and column form, not tile.

Delete

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Animation

Flash, GIFs, JavaScript, etc.

Do not use animation unless you absolutely must. The only officially sanctioned use is with the [slider](#).

Animation methods come in myriad forms: Flash, GIF/PNG-based, a multimedia clip, a JavaScript slider and so forth. Regardless, it should be used exceedingly sparingly. Animation needs to add value to a page, not just exist for the "cool" factor. Otherwise, it's an insidious thief that robs you of:

- Space on the page.
- Users' attention from meaningful content.
- Bandwidth and resources, both client and server.
- Development time.
- Your credibility.

Always ask yourself if the animation is worth the price it exacts from the user experience.

Further, in 99 percent of the cases, animation should not be set to play automatically. Let the user choose to play it or not. Admittedly, we've violated our own rule on the Portal with the [slider](#). Sometimes business realities, political or otherwise, in the end dictate that exceptions occur. Sure, that happens.

But, if you can, stick to your guns when it comes to usability best practices. Remember, users count on us to advocate for them and make smart interface choices.

Marquees

Do not use marquees at all. Ever.

MARQUEES ARE STUPID.

I'm not kidding. If you ignore this rule and do it anyway and the standards police discover it, you'll have to take it down immediately. Your family will be shamed for six generations, and you'll be personally responsible for the failure of organic molecules to coalesce into life on Jupiter's moon Europa.

Okay, maybe not that last bit, but marquees really are so twentieth century. They used to interest people some 20 years ago when the interwebs were young, because it seemed to infuse some life into the inert page. But—like many things in life, from the mundane to the momentous—it needed to prove its usefulness to enjoy longevity. In the end, marquees failed the test.

Marquees aren't just useless, they're practically evil. They require the user to sit and wait for the scrolling text to appear, dribbling out information at a painful, linear lope.

Don't subject our users to this antiquated, foolish abomination. Find a better way to draw attention to important content, such as more prominent placement and/or some graphical cue.

Or just use the [slider](#)* or [tiles](#).

*Here's the irony: if it's really important, don't use the slider, put it right on the page instead.

Comment on this article:

Post



Use animation sparingly and appropriately. Here are hints, tips and guidelines.

Rating

★★★★★ | 2

Last Modified

7/23/2014 2:51 PM

Modified By

[Nick Zedlar](#)

Links

Color Palette

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Color Palette

When designing and publishing content, pages, sites and other Portal assets—such as applications and reports—adhere to the following colors.

Red #e41214 R:164 G:18 B:20	Light Gray #e6e6e6 R:230 G:230 B:230	Medium Gray #999999 R:153 G:153 B:153	Dark Gray #4d4d4d R:77 G:77 B:77
Black #000000 R:0 G:0 B:0	Macy's Red* #e11a2b R:255 G:26 B:43		



Brand pages properly with the official color palette of the Portal: reds, grays and black.

Rating

★★★★☆ | 2

Last Modified

11/21/2014 5:07 PM

Modified By

[Rachael L Wright](#)

Links

Hyperlinks

Hyperlinks automatically pick up styles from the global style sheets. You need not do anything for this to happen.


There's no reason to bold hyperlinks unless they happen also to be headings or sub-headings. Bulleted lists work great for lots of links. Note: the red, underlined "links" below aren't real. Sometimes a single word—**active verbs** are best—or a short phrase is sufficient, so that the whole sentence isn't a hyperlink. Like so:

- [Drive to Kroger](#) with an albino hamster on the roof.
- [Choose a cantaloupe](#) that looks like your Uncle Clive's head.
- [Take swigs from all the milks](#) and put them back in the case.
- [Pay cash to the cashier](#), so the NSA can't track your purchases.
- [Return home](#) while singing "Purple Rain" backwards.

Of course you can use nouns too, as long as you're consistent. For example, stick with all nouns or all verbs in the same list. In paragraphs it works much the same. Like so:

The chief difficulty Alice found at first was in managing her flamingo: she succeeded in getting its [body](#) tucked away, comfortably enough, under her [arm](#), with its [legs](#) hanging down, but generally, just as she had got its [neck](#) nicely straightened out, and was going to give the hedgehog a blow with its head, it would twist itself round and look up in her [face](#), with such a puzzled expression that she could not help bursting out laughing...

For any hyperlinks going outside the Portal (that is, any URL starting with something other than <http://mymacys.net/>) or links to Word documents, Excel spreadsheets, PDFs, PowerPoint presentations or other file types that open in a different application, we want to open a new tab/window and indicate to the user that the link is an external one before they hover over it or click on it.

These links will soon automatically pick up styling—including appending with the  icon—from the global stylesheets. If your URL is correct, you do not need to do anything for this functionality to occur. **Do not remove this icon or replace it with any other.**



Format hyperlinks in MyMacy's that are compliant with standards, are grammatically and visually consistent, and read easily.

Rating

☆☆☆☆☆ | 0

Last Modified

4/4/2017 4:01 PM

Modified By

[Nick Zedlar](#)

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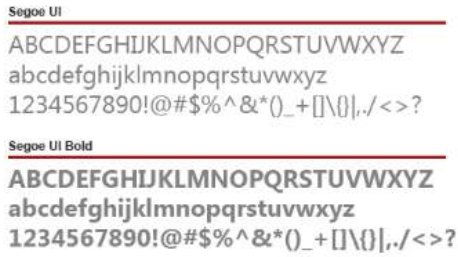
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Fonts and Glyphs

Portal Fonts

Arial is no longer the default My Macy's font face. Segoe UI is. Segoe UI is the new out-of-the-box, sans serif font.



Segoe UI will be picked up automatically from the Portal style sheets.

According to Microsoft, Segoe UI comes standard with all versions of Windows since Vista, and accompanies Microsoft Office since the 2007 release. For users who do not have Segoe UI on their machine, the My Macy's styles use "backup" fonts to approximate.

In addition, SharePoint 2013 makes use of web fonts. These are fonts downloaded automatically to the client machine, such that the user need not have them preinstalled to use them.

Interestingly, this allows for font glyphs—think the symbols in the Wingdings font—to be used instead of **images** for icons. They scale better, can be styled with cascading style sheets, and load quickly. Examples in the new Portal are the "icons" in the red "Navigate" and "Search" and gray navigation tabs at the top of each page.

Note that these glyphs are reserved for use in this context and cannot be appropriated elsewhere for any other purpose.

There are also font glyphs in **tile web parts** that are predetermined by the Enterprise Portal Team. If you use them, please use them consistently, such that a glyph doesn't show up in different places in your site associated with different things. In other words, if you're using a specific glyph to denote "Reports" somewhere, don't use it elsewhere to mean "Forms," "Documents" or "Policies." Pick one for each context and stick with it.

Font glyphs are recommended in most cases over image icons for most web part use at your discretion. If you have a valid business reason for an additional glyph that is not present in the mymacys font library, submit a work request to the EPT for an evaluation. Please do not use your own web fonts either locally or by linking to external font providers like Google Fonts.

Related Fonts

Avenir

Avenir is considered Macy's official font for branding purposes. If you insist on **embedding text in graphics**, you can't go wrong with this one.



Comply with both the Macy's Style Guide and the MyMacy's Portal Style Guide. Use the appropriate font face for all your Macy's documents, images and multimedia.

Rating
★ ★ ★ ★ ★ | 1

Last Modified
1/20/2015 1:07 PM

Modified By

Nick Zedlar

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Avenir is the "Macy's font."

Arial

Arial is still the font you are asked to use when you "publish all internal communications," according to [The Macy's Style Guide](#). Note that this does not apply to publishing pages on the Portal.



Arial: the old internet standby.

Myriad Pro

Myriad Pro is remarkably similar to Segoe UI. It is a good alternative to Segoe UI in certain circumstances.



Myriad Pro: the sometimes useful Segoe UI poser.

Font Glyphs

For detailed information on the icons used for tiles, see the tiles section.

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Images and Icons

Meaningless Icons

Do not use generic icons. An icon should at least convey some discrete aspect of the link it accompanies. If it doesn't, swap it for one that does. Better yet, consider using text in a bulleted list or some other method. Some concepts are just too abstract for a meaningful icon. One sure way to tell if your icons are poorly chosen: if they're interchangeable with one another.

Icons are predefined in 2013 for navigation elements and tiles. See [tiles](#) for a catalog of icons and their **recommended use**.

Background Images

Background images are strongly discouraged, as doing them right is a skill unto itself. Because they make reading text difficult if the contrast is not correct, don't use images for backgrounds in tables or table cells, pages or any HTML elements. If in doubt, contact the portal team.

Embedded Text

In general, do not embed text in images. Images are some of the most misused, abused and maltreated elements in Web design. Generally speaking, if you can use text to accomplish the same thing you plan on using a graphic for, choose the text. The cardinal sin is embedding text in images, especially for vital navigational or informational elements. This is particularly bad, because:

- Images use more bandwidth and can potentially slow your page load to a crawl, especially for users on dial-up or older hardware.
- They're not editable without using a graphic-manipulation program like Adobe Photoshop, which makes updating slow or impossible.
- Raster (pixel-based) images are not scalable, so they pixelate when one uses the browser's zoom tool (or dimensions larger than the actual dimension are hard-coded).
- Users can't increase the font size for readability, which is a disservice to the visually impaired. For blind users, text in images is not readable by text readers (using the <ALT> tag partly mitigates this, though).
- Search cannot index (and thus find) text in images.
- Images are static, so they do not indicate various states to the user (unless one is swapping images on hover), such as a visited link or hover feedback (other than the hand cursor) that the cursor is over a link.
- Font attributes in an image cannot be affected by style sheets, making them editing black holes in your site.

There are exceptions to just about every rule. Sometimes in limited space situations, such as on the homepage, you may want to use fancy text to draw users' attention. This is usually reserved for big events or important announcements.

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Be discerning with your choice of images on the Portal. Pick the right format and learn about best practices for image use, particularly icons.

Rating

☆☆☆☆☆ | 0

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9/21/2016 11:37 AM

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Enterprise Web Parts

Naming Conventions

"Portal" or "Home"

Do not refer to anything other than the My Macy's Portal as "portal." Please pick another term to avoid confusing users. Refer to your slice of My Macy's as "gateway," "site" or whatever you feel is most appropriate for your users—just not "portal."

Likewise, do not call your site's homepage "home"—not in the title bar (<title="">), page title or anywhere else. Simply give it the name of your business unit, the initiative or whatever it is.

Also of note for SharePoint 2013, there are two different types of pages that in the past would have both been lumped under "home page": landing pages, which share space with the Corporate Communications slider, and home pages, which do not, but are considered the "home" of a business function.



Learn about proper naming of web parts, pages, sites and other assets on the Portal.

Rating

☆☆☆☆☆ | 0

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7/23/2014 2:53 PM

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Text Formatting

Font Attributes

Do not customize fonts. These are predefined in the global style sheets to ensure consistency across the enterprise. If you feel a style is missing or incorrect, submit a work request with the EPT for a consultation. Examples of things not to override are:

- font family (face)
- size
- style
- variant type (all caps, for example)
- weight (boldness)

Font Styles

Bold and italics are acceptable if you use them sparingly, where appropriate, and consistently. Do **not** bold:

- hyperlinks.
- entire paragraphs. They become too difficult to read and this causes *caecus hyperlinkia*, a painful condition that can lead to permanent vision loss.

Be consistent. If you use italics for emphasis, use it elsewhere on the same page. Maintain this consistency across your entire site. Likewise for bolding.

Decoration

Underlining or overlining text decoration is strictly forbidden. Only hyperlinked text receives underlining, and this occurs automatically. Do not add underlining yourself to hyperlinked text. This is never appropriate for emphasis. Line-through (strike-through), however, is permitted in moderation and where it makes sense to convey a change in word choice or an important reversal or shift on a previous statement that also needs to be shown.

Effects

Effects like glow, drop shadow or animation are not allowed, except in special circumstances with the prior consent of the [Enterprise Portal Team \(EPT\)](#). Submit a work request, if you feel the need is important and pertinent.

Alignment and Justification

As a general rule, left justify. There are few reasons. One exception is an image or group of images in a web part. They should be centered. Rows of images should likewise appear neatly stacked in columns, not randomly placed.

Subtitles

Subtitles allow you to combine like tasks and information into a single web part. The method is space-efficient and groups similar options in close proximity. A good example of where this is especially important is in the [mega-dropdown](#).



Formatting text can be tricky. For best results, follow these simple rules regarding attributes, styles, decoration, alignment, justification and more.

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☆☆☆☆☆ | 0

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Scrolling and the Fold

The Fold

Historically, in print media all the eye-catching, important information is placed above the page fold, where it's easy to see. On a newsstand, it's the first half of a newspaper's front page or a magazine's front cover.

The principle is the same today as in this March 6, 1953 example from the early years of the Cold War:



In Soviet Russia, Pravda folds you.

You know the saying "you never get a second chance to make a first impression"? It's absolutely true in selling newspapers. To stimulate sales, you have to tantalize and titillate the casual reader enough for them to pick up the paper to learn more. That's when they're hooked!

The modern-day equivalent is the web page. So, when you hear someone use the term "above the fold," they mean everything users see without scrolling or otherwise interacting with the browser.

Important Content Above the Fold

When users search for content, they want to find what they're looking for—and quickly. The area above the fold& should give a pretty clear indication of the type of content users can expect below the fold. In this way, users can ascertain if the even unseen content on a given page is likely to yield what they seek.

Since display heights are variable, the location of the fold is not constant. An introductory paragraph, a clearly written title and description, as well as a relevant rolup image and appropriate navigation can make all the difference.

Scrolling

In general, content on pages should be kept succinct and on topic. Content on a single page should be related. Breaking large amounts of information into several different pages is beneficial to both the reader and the system that organizes the information. Tagging can be more accurate, and the system's search will perform considerably better at finding relevant content if each page of content is clearly about a single topic.

Excessive scrolling can indicate unrelated—or tangentially related—content has been incorrectly lumped together. This can happen when content is migrated from Word documents or other long-form files to the Portal. Inventory content types and their suitability for division into logical chunks first to avoid this problem.

Scrolling is perfectly fine. Trying to squash everything in the first 500 pixels of a page is foolish and counterproductive.

Remember information above the fold leads users in the right direction. There's a mistaken assumption that putting all relevant content above the fold is better than smart, selective choices. If you are unsure of how to effectively parse out the content, consulting with the Enterprise Portal Team (EPT) can help.

Tips for Efficient Space Use

Fitting everything you'd like to on the page can be challenging, but there are a few principles that will help.



Learn what the Fold is and why it's important. Respect it, but don't buy into the scare tactics about it. Good design is about recognizing limitations of a medium and optimizing the user experience despite them. Here is some advice on how to get the most out of your pages.

Rating

★★★★☆ | 3

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Usability Tips

Good Redundancy

Not all redundancy is bad.

If you happen to be in an airplane when a primary system fails and its backup system kicks in allowing you to land safely, you will be very pleased indeed it was there and functioned as designed.

Granted, the risk to life and limb isn't as dire for Portal users here on terra firma. But if usability is about safeguarding the user experience from failure, then redundancy is as essential to good Web design and publishing as it is to aviation.

Commercial transport connects people with a physical world of destinations. We connect users with a virtual world of information. There's nothing wrong with having multiple links to the same content, just presented in different ways and in different places.

For example, you may offer a link to a particular important page from the left navigation pane, but also place it in a list or a paragraph in the body. You don't want to overdo it—this is not a solution to having anemic content or bad information architecture—but the "get-there-by-the-best-way-that-suits-you" model has been around in computing for a while now. Think of how your favorite operating system provides shortcut keys, menus, lists, form elements and other ways to get to the same content.

Quite simply, it works. If your users are having trouble finding things on your site, consider adding redundant links, but presenting them in different ways.

"Under Construction"

Do not ever put up "Under Construction" or equivalent graphics/text for content that doesn't exist yet.

This goes for both pages and Web Parts. For heaven's sake, if it's not ready to publish, don't publish anything at all. If your page or Web Part is completely blank, don't publish it. If you feel you absolutely need to have a "placeholder" up, then in standard body text just say "Coming soon." Better yet, add the date it will be ready, like "Coming August 7, 2015." At least that tells users when to expect it, and it commits you to a delivery date.

"Click Here"

Do not ever write "Click Here." Ever seen those funny t-shirts with "Department of Redundancy Department" written on them? It's said that John Cleese coined the phrase for a Monty Python sketch.

There are plenty of real-world examples like the image at left seen on a gas station pump. I heard Rose Scott on WABE Public Radio the other day say "two consecutive days in a row" in one of her reports. It's funny... unless you're the one who wrote it and were trying to be serious. Then it's just embarrassing. "Click Here" is the equivalent in web writing. The convention of underlining hyperlinked text is already a cue to the user to "click here," so it's unnecessary to spell it out again.

The only caveat is that users recognize the link in question as a link. If they can't distinguish it from other text, then there's a problem.

Keeping Users Informed

Do not withhold information from your users. When you're designing your site or adding content, think about the paths you'll be sending users down. The way you lay out the "roads" and "highways" of your site has a profound impact on the user experience.

Ever had your GPS send you on some wild goose chase? Mine once had me driving back and forth between two exits on the New Hampshire Turnpike. Back and forth and back again; I thought I'd missed something. I heard about a woman who drove her Mercedes SUV into a lake, because her GPS told her a road was there. We trusted those infernal machines, and they let us down!

Well, conceptually, users trust us too to get them where they want to go. They expect the route to not only be correct, but also fast. Users, like drivers, expect to be informed as well about what's coming around that next curve, so to speak.



Learn some fundamentals of usability best practices. Your users and you will benefit.

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☆☆☆☆☆ | 0

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Tell users what clicking on a certain link means if it deviates from the typical expectation, which is "this is going to take me to another page in the Portal." Use the [] icon (even with clear wording) to indicate, for example, whether or not a link opens in a new window (reserved for a number of applications and all domains outside mymacys.net), or is a non-HTML format, such as PDF or DOC. That's the equivalent of a road sign cueing the user that "Hey, the road or traffic ahead is different somehow, so be alert."

Extra clicks are speed bumps on our Portal roadways. Eliminate them and other obstacles. If you're describing a page or site where someone can get certain information, for Pete's sake, provide a direct link. Make it convenient. If you mention someone's name, provide one-click access to either their My Site profile (preferred) or their email address (better than nothing). Same goes for organizations. If someone is directed, for instance, to "Contact your HR Representative," provide a way for them to determine who that person is and easily reach them by phone, Sametime, email or other means.

The same principle holds for interaction with forms or applications. Always keep the user informed about what is about to happen or what just has happened. If the user is expected to take an action, clearly communicate what the consequences of action or inaction are. Don't leave the user in the dark. After an action has taken place, communicate where the user is and what the result was. For example, if a database was just updated, a user profile or file was deleted, or an email was successfully or unsuccessfully sent, tell the user.

In a multi-step process, keep the user up to date on how many total steps there are and where they are at any moment in the process. Communicate every failure or success, but also design interactions logically, such that the conditions for failure or success are known up front. If certain characters are considered invalid or are required, for instance, tell the user beforehand, not after validation shoots down their entries. That's something of a trap. We shouldn't set up users to fail.

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SharePoint Developer Resources (MSDN)
<http://msdn.microsoft.com/en-US/office/dn48478>

SharePoint IT Pro Resources (TechNet)
<http://technet.microsoft.com/en-us/sharepoint>

Free Online Learning Resources

Basic SharePoint Use Case Information (End User-ready Content)*
<http://www.discoversharepoint.com/>
* SharePoint app based on the cloud model; try it: <http://aka.ms/dspapp>

SharePoint 2013 Development Training (MSDN)
<http://msdn.microsoft.com/en-US/office/dn48488>

SharePoint 2013 IT Pro Training (TechNet)
<http://technet.microsoft.com/en-US/sharepoint/fp123606>

SharePoint 2013 IT Pro and Developer (Microsoft Virtual Academy)
<http://www.microsoftvirtualacademy.com/product-training/sharepoint>

2014 SharePoint Conference Resources
<http://channel9.msdn.com/Events/SharePoint-Conference/2014/>



A collection of links to SharePoint-related resources on the web.

Rating
☆☆☆☆ | 0

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Writing Advice

Know Your Readers

Assuming that you intend to be truthful and forthright with your readership, writing is all about getting what's in your head into someone else's in the most efficient and accurate way possible.

This is no easy task. You have to convey sometimes quite complex concepts to others without causing confusion or otherwise muddying the facts.

To accomplish this you must:

- know who your audience is and tailor your message to it,
- distill your message to its essence, and,
- formulate a simple, straightforward presentation.

Recent research shows that the average person in the U.S. operates on a seventh grade literacy level. Yes, seventh grade. Ponder that fact as you write.

Since I'm writing about writing to writers here, I can write at an *eighth grade level*, and throw in words like "ossification," "transmute" and "deoxyribonucleic acid." In this case, do as I say, not as I do!

Over-the-Top Punctuation????!!!

Be conservative and minimalist with punctuation, particularly question marks and exclamation points.

Do not use multiple contiguous instances of any punctuation. For example, adding two, three or four question marks doesn't add any more meaning than one. They don't convey double, triple or quadruple the amount of incredulity or interrogative intent. One is sufficient.

It's the same for exclamation points. Three periods at the end of a sentence make no sense, neither do three exclamations. Regardless, there's little reason to use exclamations in business writing. As in most things, there's wisdom in moderation.

However, habitual (over)use is usually a sign that the writer is trying to cheaply generate false or unwarranted excitement in the reader. It, therefore, draws too much attention to itself and tends to ring hollow. Here's an example:

Included in your spa package: a free tour of the station reactor core! Three random drawings a day for 750g of iodine-131!*

*Uh, I appreciate the enthusiasm, but no thanks.

Active Versus Passive Style

Corporate writing is rife with passive voice, perhaps as a result of centuries of "official" language handed down to modern times by corrupt Roman magistrates and venal Han dynasty Guardians.

Use active voice in your writing when you can. Be mindful of your poor word-choice tendencies, and you'll find that active voice is more economical (it uses fewer words) and clearer (it conveys agency) better than its passive counterpart.

- **Passive:** Being needed, the report was written by the analyst who had been assigned.
- **Active:** The assigned analyst wrote the needed report.

Passive is not intrinsically bad and it does have its uses, but it can be a double-edged sword. Readers/listeners variously perceive it as pompous, evasive, bureaucratic or obfuscatory, like you're trying to hide something or dodge responsibility. It is a well-known phenomenon that in the courtroom, jurors perceive passive-using witnesses as relatively untrustworthy and unreliable.

So, use passive selectively and sparingly. Active voice is often the best policy.



Writing is a special skill. Here are some general rules as well as specific advice for effective business writing and pitfalls to avoid before you publish on the Portal.

Rating
★★★★★ | 1

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