

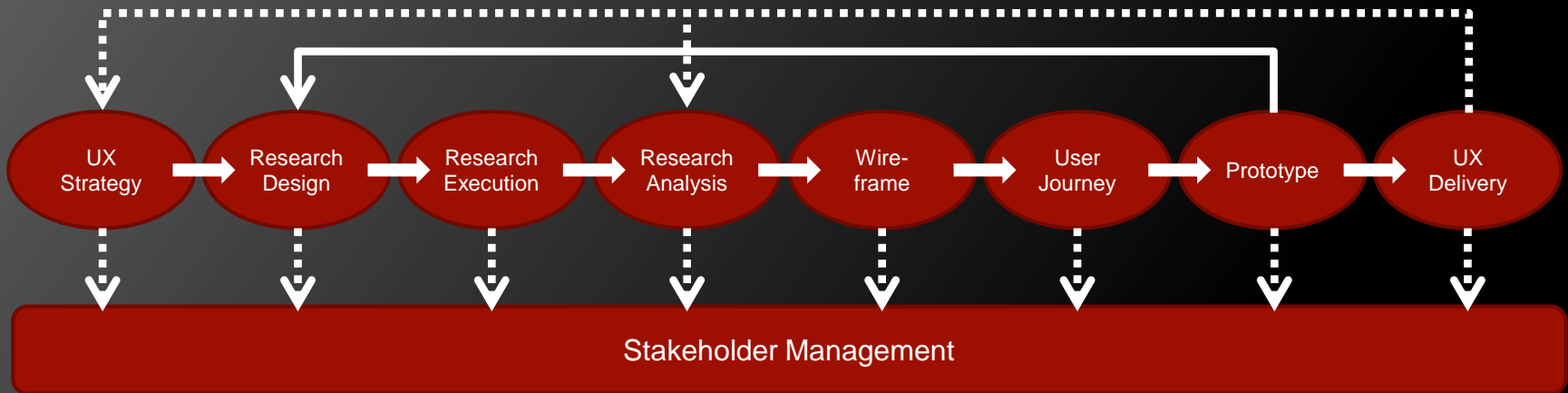


# ENTERPRISE PORTAL TEAM

## User Experience Design Primer

Nick Zedlar  
Macy's Systems and Technology  
November, 2015

## Kaizen User Experience Process



- The UX role starts at the very beginning, when initial dialog with the customer starts. It then extends all the way through go-live and includes the bug fix, upgrade and enhancement phases of the life-cycle.



- The designer starts with broadly defined features.
- As the design becomes more focused, the artifacts begin to adopt more and more details, until an increasingly clearer vision coalesces.
- In fact, the first steps are simply text descriptions of the problems and brainstormed ideas on how to solve them. Even a sketch on a napkin works!



- Gather requirements with business analysts, developers, product and project managers and client personnel. Understand the physical and virtual environments; user capabilities, such as low-bandwidth internet connections, color blind users, factory floor workstations, low-end PC hardware, etc.; browsers, operating systems, etc.

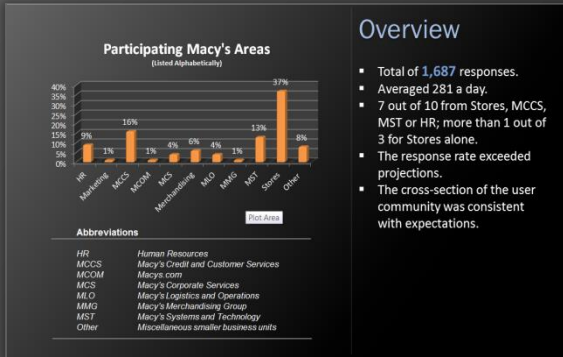


For instance, here's an example of our real requirements summary from My Macy's Mobile. A user should be able to:

- view news items in a carousel
- search for docs by author name
- step through an approval workflow
- submit a work request via a form
- read through a sales report
- monitor a dashboard
- save a URL as a Favorite
- find a user's status and contact info
- share a large multimedia file
- get help on a SharePoint issue

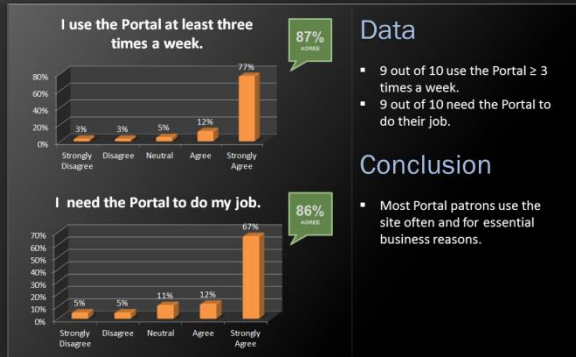
The interface must contain all the vectors above and more to support these activities.

The next slide describes the project scope.



## Overview

- Total of **1,687** responses.
- Averaged 281 a day.
- 7 out of 10 from Stores, MCCS, MST or HR; more than 1 out of 3 for Stores alone.
- The response rate exceeded projections.
- The cross-section of the user community was consistent with expectations.

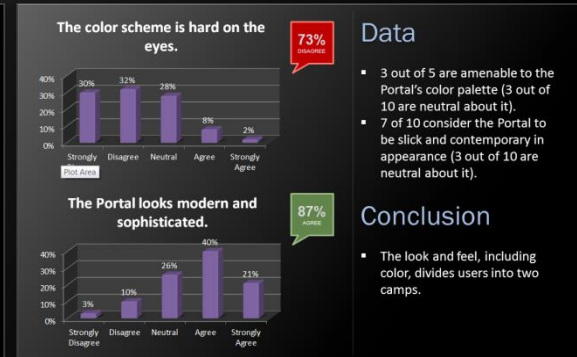


## Data

- 9 out of 10 use the Portal  $\geq$  3 times a week.
- 9 out of 10 need the Portal to do their job.

## Conclusion

- Most Portal patrons use the site often and for essential business reasons.

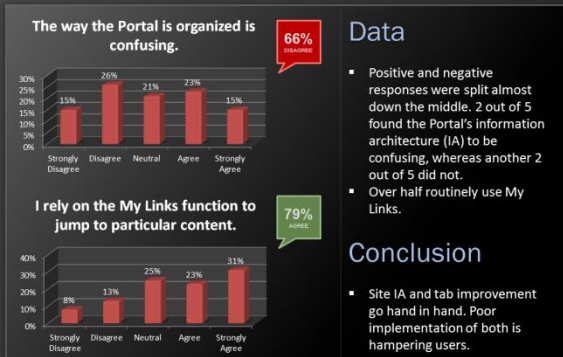


## Data

- 3 out of 5 are amenable to the Portal's color palette (3 out of 10 are neutral about it).
- 7 of 10 consider the Portal to be slick and contemporary in appearance (3 out of 10 are neutral about it).

## Conclusion

- The look and feel, including color, divides users into two camps.

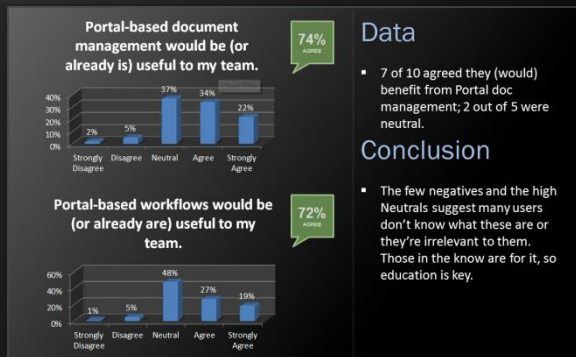


## Data

- Positive and negative responses were split almost down the middle. 2 out of 5 found the Portal's information architecture (IA) to be confusing, whereas another 2 out of 5 did not.
- Over half routinely use My Links.

## Conclusion

- Site IA and tab improvement go hand in hand. Poor implementation of both is hampering users.

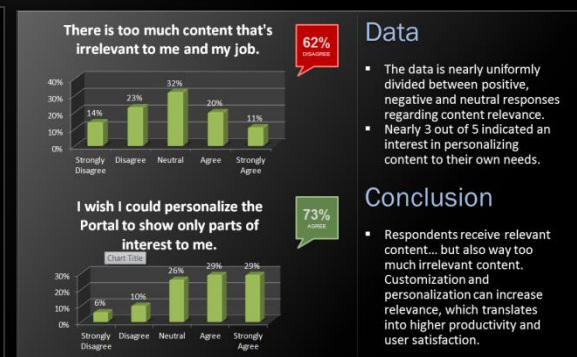


## Data

- 7 of 10 agreed they (would) benefit from Portal doc management; 2 out of 5 were neutral.

## Conclusion

- The few negatives and the high Neutrals suggest many users don't know what these are or they're irrelevant to them. Those in the know are for it, so education is key.



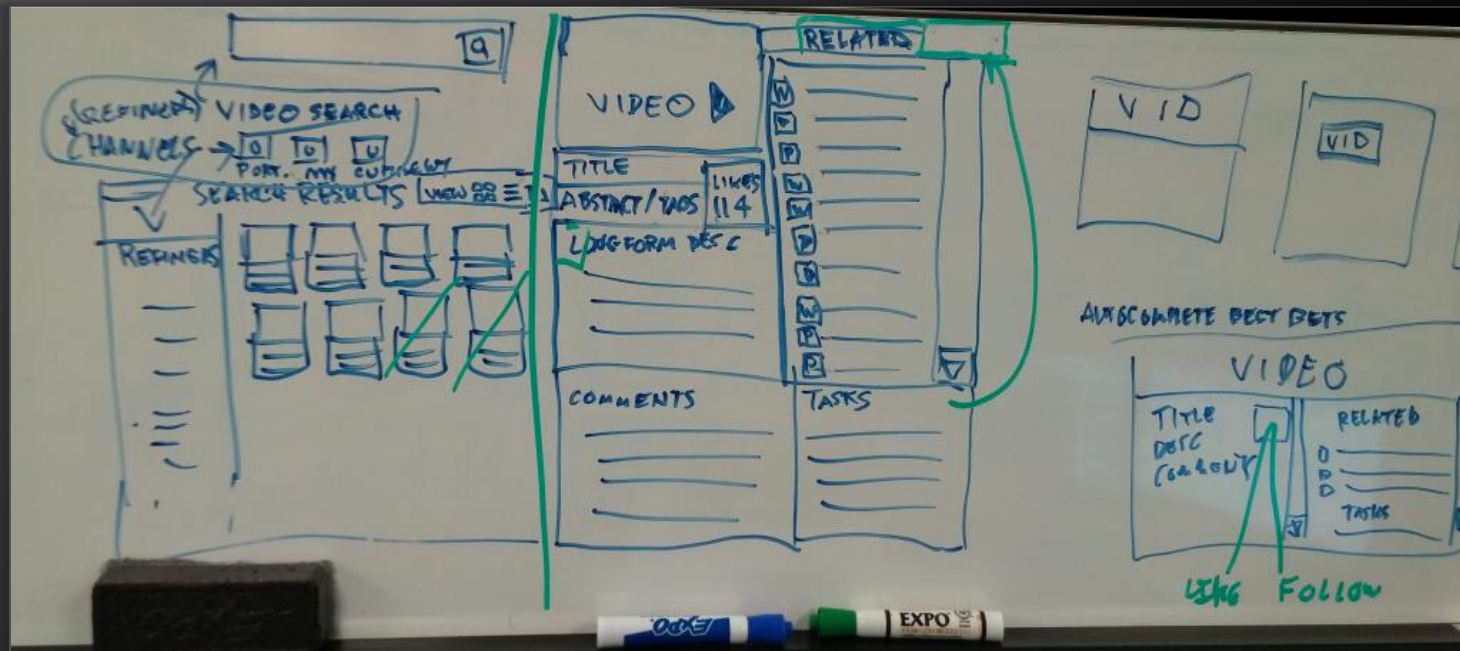
## Data

- The data is nearly uniformly divided between positive, negative and neutral responses regarding content relevance.
- Nearly 3 out of 5 indicated an interest in personalizing content to their own needs.

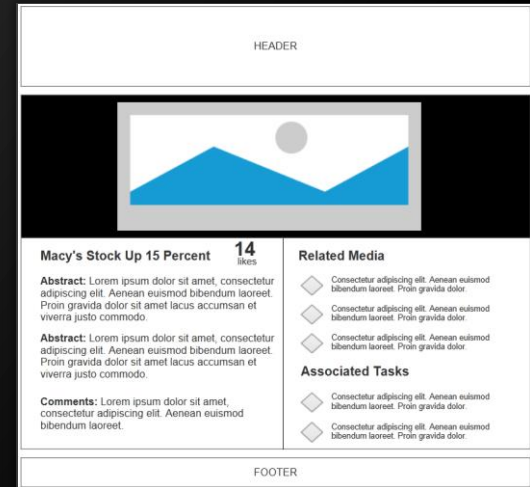
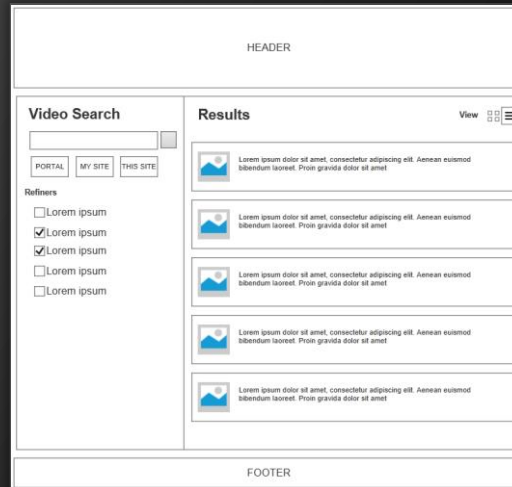
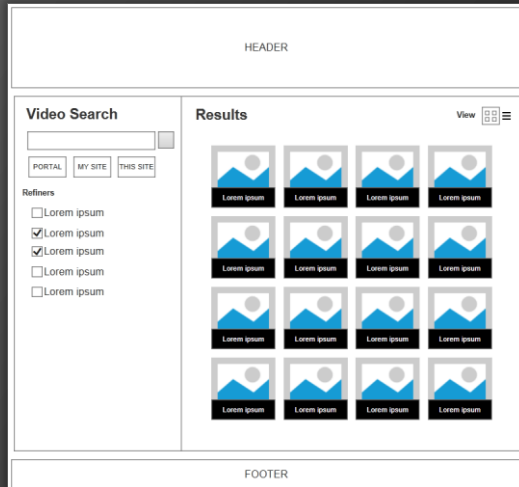
## Conclusion

- Respondents receive relevant content... but also way too much irrelevant content. Customization can increase relevance, which translates into higher productivity and user satisfaction.

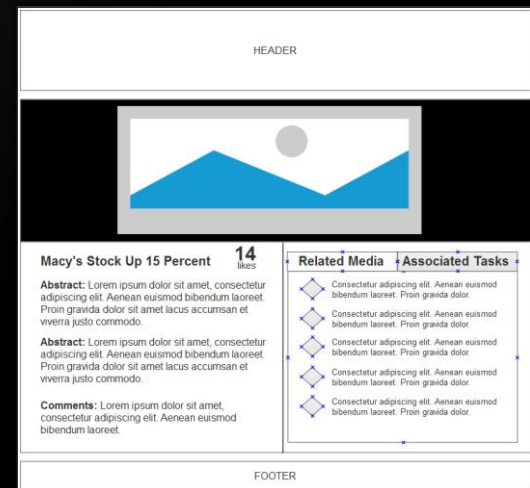
- Gather objective data via interviews, observation, A-B testing and surveys.
- In the absence of these, designers have to rely on their experience, best practices and educated guesses. Sometimes that's enough, but hard data is best.



- This “chicken scratch” is the first graphic representation of design features.
- Notice they convey only layout with a few labels.
- No look and feel or branding considerations are being addressed at this phase.
- This is a quick way to jot down broad design strokes and rapidly address possibilities with developers.



- The next step is to prepare wireframes (low-fidelity, computer-generated representations) to show interface layouts floated during the sketch phase.
- These can be done in Visio, Word, Photoshop or any of the software solutions designed specifically for this purpose, such as Axure.





HEADER

## Page Title

Alert Box

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HEADER

## Search

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Entire Portal

People Only

Apps Only

BU Only

Current Business Unit: MST
▼

▼
🔍

Results found in MST ▼      Preference for results in English ▼

### Tasks

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 mymacys.net/sites/mst/ea/ESC/Lists/Tasks/AllItems.aspx

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HEADER

## Search

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**Portal** **People** **Apps** **Business Unit: MST** ▼

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Results found in MST ▼      Preference for results in English ▼

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Time Estimate				
Phase	Low (Lo)	High (Hi)	Optimistic (Op)	Hours (Hr)
Phase 1: Fact-Finding and Discovery (Pre-Design)	60	120	80	83.33
Phase 2: UI Design – Lo-Fi (Wireframes)	80	200	100	113.33
Phase 3: Concept Testing and Analysis (Post-Design)	20	40	30	30
Phase 4: UI Design – Hi-Fi (Mockups)	200	500	300	416.66
Phase 5: Style and Standards Doc (Development)	150	300	230	228.33
Phase 6: Style and Standards Doc (User)	180	350	250	255
			Total	1126.65



# ENTERPRISE PORTAL TEAM

# UX Design

## Style Guide, Standards and Help Documentation

### 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. The switches below show your options. Note, however, that you may not alter text properties (e.g., color, decoration, size) for glyphs, labels and descriptions.

A grid of 100 icons representing various system functions and a color palette with 24 swatches. The color swatches include: Purple, Dark Blue, Steel Blue, Blue, Light Blue, Sky Blue, Light Green, Green, Dark Green, Dark Yellow, Yellow, Light Yellow, Light Gold, Gold, Light Red, Red, Dark Red, and Light Gray.

**Red**  
#a12124  
R:164 G:18 B:20

**Dark Gray**  
#4d4d4d  
R:77 G:77 B:77

**Light Gray**  
#e6e6e6  
R:230 G:230 B:230

**Black**  
#000000  
R:0 G:0 B:0

**Medium Gray**  
#999999  
R:153 G:153 B:153

**Macy's Red\***  
#e11a2b  
R:255 G:26 B:43

A screenshot of the 'My Macy's Portal Style Guide' page. The page title is 'My Macy's Portal Style Guide'. It includes sections for 'Introduction', 'Audience and Purpose', 'Portal Overview', 'Portal History', 'Standards Policy', 'Hardware and Software Requirements', 'Supported Browsers', 'Target Resolution', 'Mobile Devices', 'The "C-Clamp"', 'Page Anatomy', 'Header', 'Body and Current Nav', 'Footer', and 'Navigation'. The main content area features a 'Welcome to the My Macy's Portal Style Guide.' message and a 'Style Guide' book icon.

### Target Resolution

Desktop Viewport Size

Your content must fit within a 1024-pixel wide browser window. That means you cannot create a horizontal scrollbar. That is expressly forbidden.

1024 pixels

Read up on [Scrolling and the Fold](#) for more information on what these display and what the implications are for scrolling and content hidden in a critical consideration that should drive [page layout, zones and web page accordion vs. tabs](#).

Test Your Page

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

Tools	Validate	Browser Mode: IE9	Compat View	Document Mode: IE9	Standards
Resize		800x600	Ctrl+Shift+L		
Change user agent string		1024x768	Ctrl+Shift+Z		
Clear entries on navigate		1280x768	Ctrl+Shift+J		
Show ruler	Ctrl+L	1280x824	Ctrl+Shift+4		
Show color picker	Ctrl+K	Custom...			
Outline Elements...	Ctrl+D				

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)

A grid of navigation icons including: Advertising, Calendars, My Career, Top Links, EA, PLM Training, Skillport, ORV, Sourcing, MFA, Storyboard, My Picture, Online Objective, and Branding Tool Kit.

### Mobile Devices

SharePoint 2013 introduces a number of exciting possibilities for different devices with varied operating systems, browsers, screen sizes, keyboard/mouse, for example) and hardware capabilities.

Some content, different hardware, browsers and operating systems.

### Navigate

#### Navigation Links Area

The Markup

For your navigation in the mega-dropdown menu, you don't need to worry about styling applied if you follow the formatting below. If you don't know HTML, don't panic. The

```

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

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

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

```

## Page Layouts

At present, there are four official MyMacy's page layouts. There are pros and cons to each. The one you choose to use will dictate the best choice(s).

### Macy's Standard Page



This general-purpose layout efficiently uses the page navigation. Recommended for most page content. It's a good choice for pages with wide

### Fonts and Glyphs

Portal Fonts

Arial is no longer the default My Macy's font face. Segoe UI is the default font.

**Segoe UI**

ABCDEFGHIJKLMNOPQRSTUVWXYZ  
abcdefghijklmnopqrstuvwxyz  
1234567890!@#%&^\*()\_+[]\|,./< > ?

**Segoe UI Bold**

ABCDEFGHIJKLMNOPQRSTUVWXYZ  
abcdefghijklmnopqrstuvwxyz  
1234567890!@#%&^\*()\_+[]\|,./< > ?

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



# ENTERPRISE PORTAL TEAM

# UX Design

Continuous Improvements

## My Macy's - SharePoint 2007 Version



First-generation MyMacy's Portal in SharePoint 2007.

## My Macy's - SharePoint 2010 Version



Second-generation MyMacy's Portal in SharePoint 2010.

## My Macy's - SharePoint 2013 Version



Third-generation MyMacy's Portal in SharePoint 2013.

**Web 1.0 Design**  
First Generation

**Web 2.0 Design**  
Second Generation

**Flat Design**  
Third Generation