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Portal Mobility Roadmap

Overview, Features and Design Rationale

Macy's Systems and Technology
Enterprise Portal Team

April, 2015

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Why Mobile?

A Mobile Platform

The driving force behind BYOD is a new IT self-sufficiency among company employees who already own and use personal laptops, tablets and smartphones.

The Enterprise Portal Team is building a mobile platform that other business units and store personnel can leverage to boost productivity across the enterprise.

The platform will be a browser-based, not an app.

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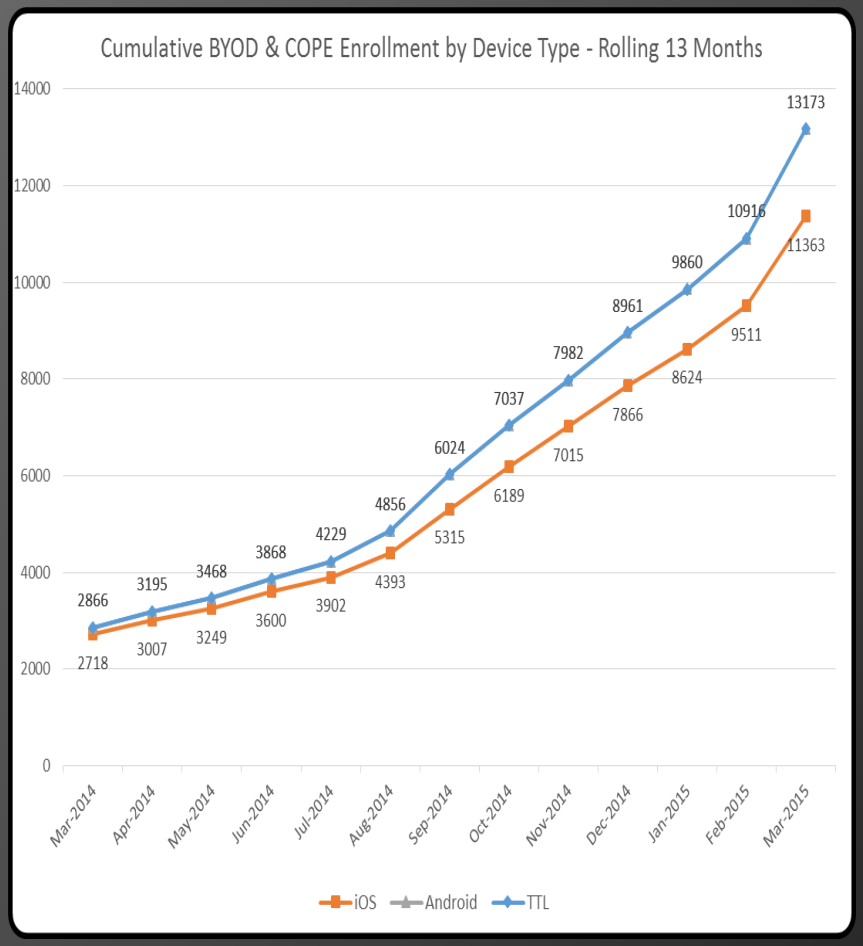
Why Mobile?



Enrollment Way Up

Within Macy's, BYOD stats show an accelerating paradigm shift from desktop portal usage to mobile.

From March 2014 through March of this year, cumulative BYOD and COPE enrollment has more than quadrupled, rising from 5,584 devices to 24,536.

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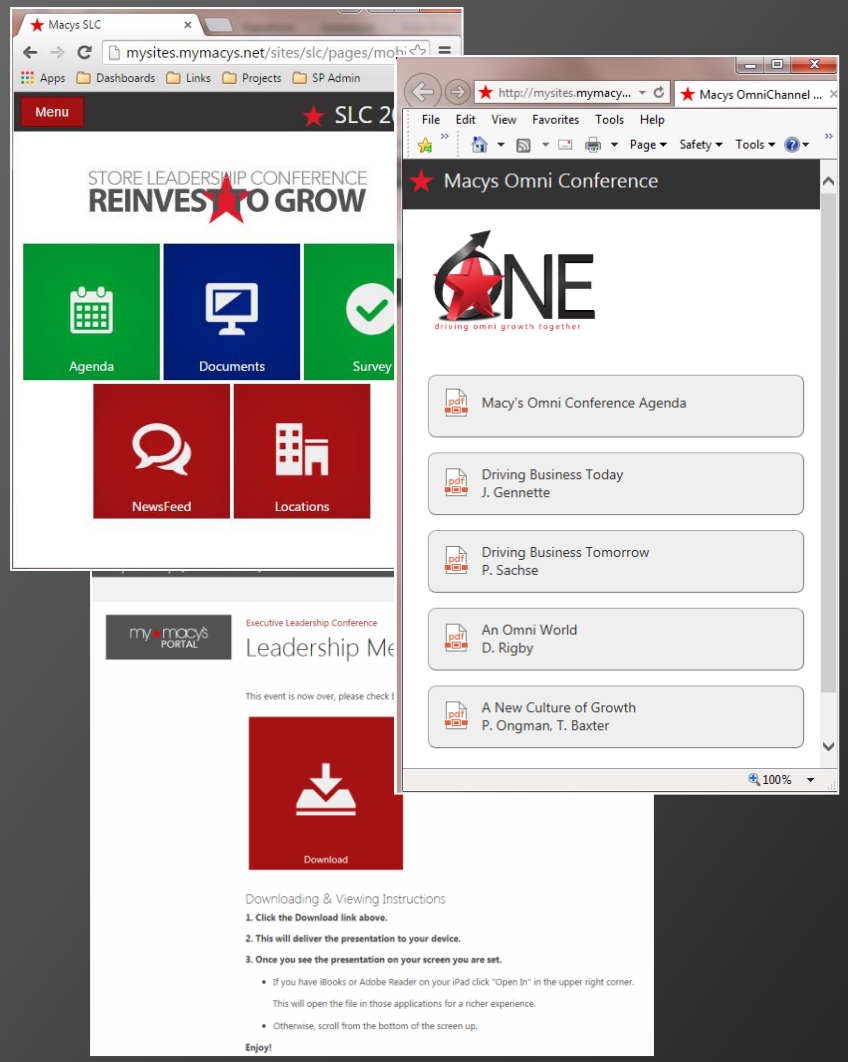
Three Test Runs



Conference Sites

The Portal Team developed a mobile site to support the **Stores Leadership Conference**. This was a good test run to try out early mobile designs. The site was a big hit. It provided users with the ability to collaborate without needing to access the federated domain. Key functionality included: Agenda, Documents, Locations, Newsfeed and Survey.

We built our next two functional mobile sites to support the **Executive Leadership Conference** and the **Merchant Omnisync Conference**. Both provided users with the ability to access a business critical document for an off-site conference.

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Design Premise

What MyMacy's Mobile Is Not

The mobile experience won't be and shouldn't be a desktop UI crammed into a smaller viewport.

Or, put another way, **it is not a scaled-down desktop version**.

That is a fruitless approach.

Mobile users have fundamentally different needs and expect the UI to be appropriate to how they consume information on the go.

It's our mission to meet those expectations.

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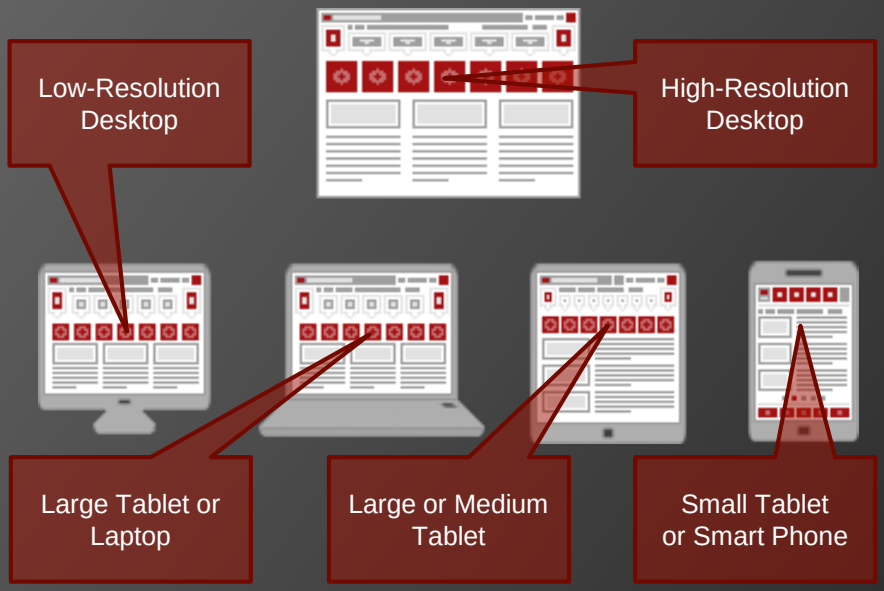
Design Premise



What MyMacy's Mobile Is

There is no single mobile design.

There are similarities that ensure consistency in functionality and appearance, but the experience is appropriately different across platforms, due to browser, hardware and OS considerations.

Think of Mobile as a family of experiences tailored to quite different use cases. The interface should be branded similarly and use the same icons, colors, fonts, etc.

Metaphorically speaking, consuming data in different ways is like consuming food and drink in different contexts, for example, in a vehicle versus in a dining room versus on a picnic vs. in a spacesuit.

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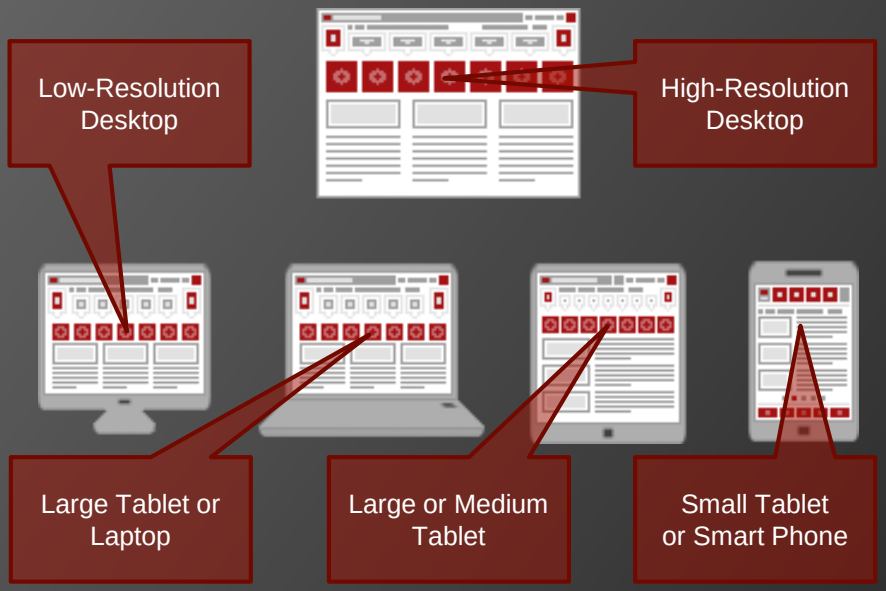
Mobile Challenges



How Mobile Is Different…

Purpose determines design.

A touch interface requires more economical and contextual content delivery and navigation than its desktop counterpart. Items must be larger and spaced out more to avoid “fat finger” problems.

There are no hover effects to cue users, but there are touch nuances that are equivalent to scrolling and paging, right- and left-clicking, zooming in and zooming out, etc.

There are bandwidth considerations and integrated GPS, camera, telephone and multimedia functionality.

Data consumption is mostly read-only with the exception of form interaction.

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Task Distillation

Just the Essentials

Distilling the mobile UX to its essence strips out unnecessary remnants of the desktop version.

What's left are the mobile users' essential stories, specific tasks that answer the question "What do users want to accomplish?"

In general, most user stories in SharePoint involve interacting with OOB and custom web parts.

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Task Distillation

Support Core Tasks, Lose the Rest

For instance, a user may want 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.

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Project Scope

What's In for Phase 1

1. **Out-of-Box and Custom Web Parts**
    - calendars
    - list views, for tabular data
    - content queries to find content
    - tiles to provide large links
    - tabs for more efficient space

2. **Header**
    - Disappears when scrolling down
    - Reappears when scrolling up

3. **Navigation**
    - Global
    - Left Left-Hand In-Page Navigation
    - Favorites

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Project Scope

What's In for Phase 1 (cont.)

4. **Footer**
   - security statement
   - copyright notice
   - links

5. **Search**
   - results
   - scopes, to narrow search parameters
   - best bets, to show common links
   - refiners, to narrow search parameters
   - tap icon to go to the Search page

6. **Content/Page Body**
   - read-only
   - shareable
   - "Back to Top" link
   - "View Desktop Version" link

7. **Forms**

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Project Scope

What's Out for Phase 1

- custom error pages
- messaging
- equivalent of the gray tabs
- equivalent of "My Nav"
- social features
- tour of the interface
- editing capability
- sliders

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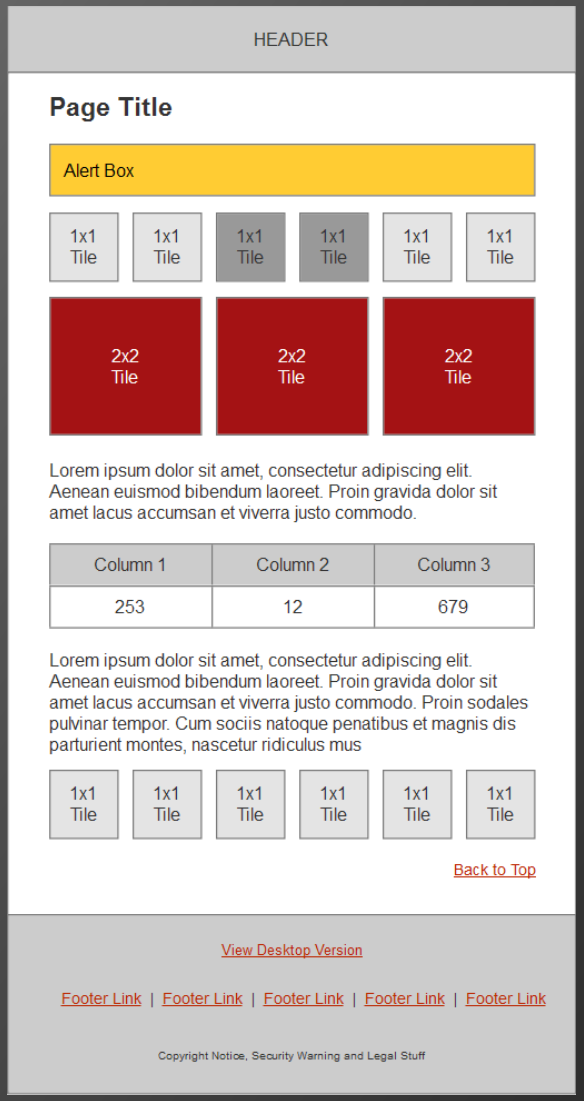
Layout - Page



Features

- Simple flat design
- Large text and objects
- Good spacing
- Important links in footer
- Option to view desktop version instead
- “Back to Top” link
- Header recedes as user scrolls down

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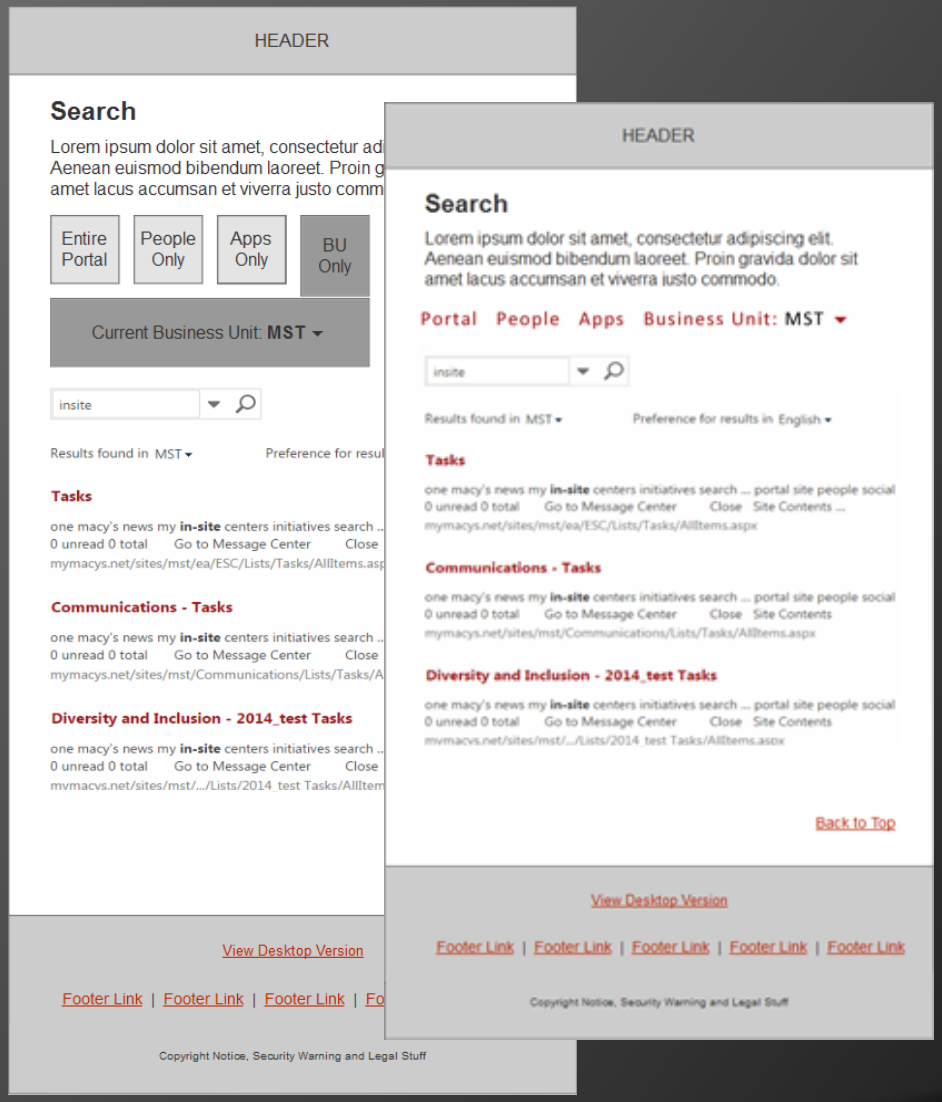
Layout - Search



Features

- Large scope selectors
- Description of selected scope
- Results under Search field/scope tiles
- Scroll only results?

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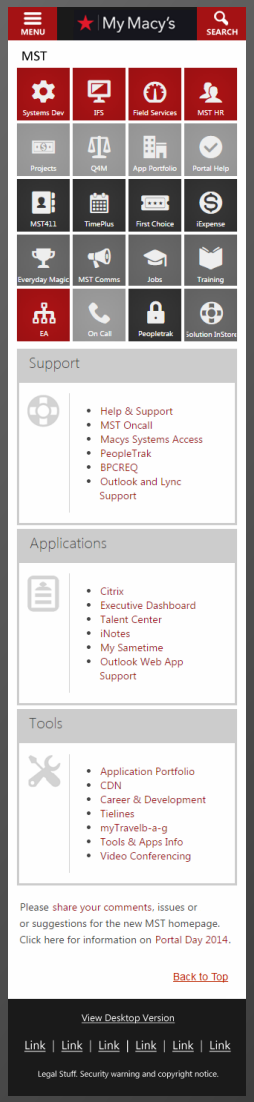
Styles – Content



The Mobile Page

The mobile page is a single-column design. It fits nicely into the width of a smart phone in portrait orientation.

Sizing is appropriate to a touch interface, from buttons and tiles to text links and form elements.

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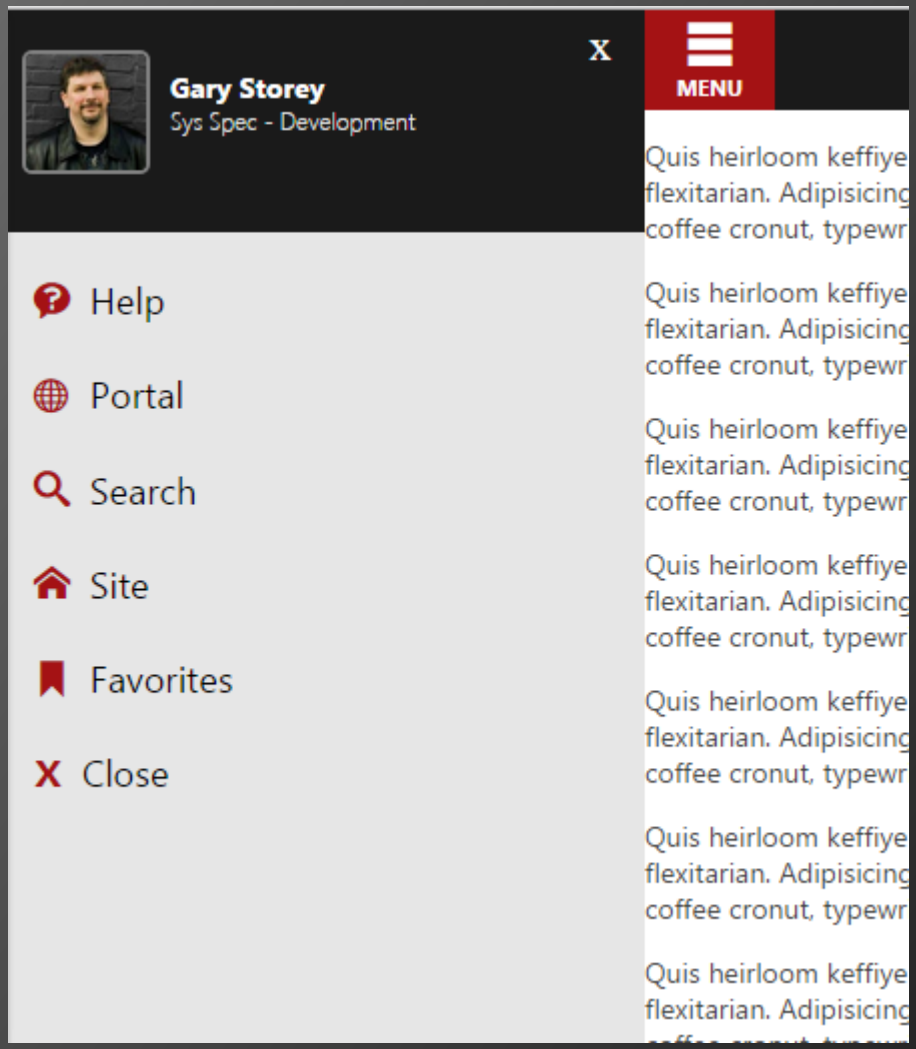
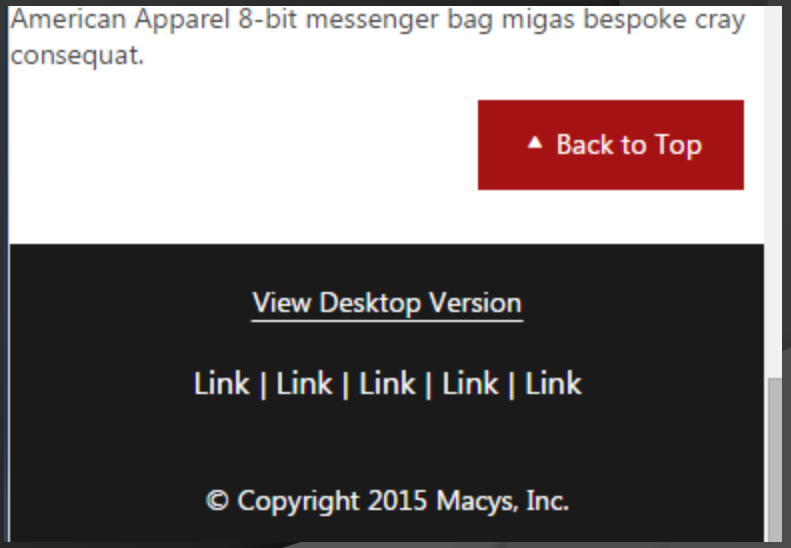
Development





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Roadmap

How Does This Affect Me?

Business unit leaders and/or gatekeepers should include this new functionality in their own roadmaps, because its potential for revolutionizing business processes is huge.

Be at the forefront of mobile platform changes, as Macy's embraces mobile work options.

Users can experience the Portal and its content while using a mobile device if they have:

- LAN/VPN (available today, but not easy)
- An event site (available today for only certain sites)
- Connected to a cloud presence for SharePoint (potentially available in the future)

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