ORG ADMIN: IA AND NAVIGATION

C+E Studio // Admin Experience Team Cheryl Platz April 11, 2018

LOOKING BACK

Administration

Announcements

Privacy Preferences

System Notifications

Yammer Configuration

MSFT Social

Auto Numbering

Languages

Subscription Management

Resources in Use

Data Performance

Virtual Entity Data Sources

System Settings

General	Auditing
Email	Currencies
Outlook	Calendar
Customization	Formats
Reporting	Synchronization
	Previews

Data Management

Duplicate Detection Settings

Duplicate Detection Rules

Duplicate Detection Jobs

Bulk Record Deletion

Data Maps

Templates

Imports

Add Ready to use Processes

Exports

Advanced Similarity Rules

Data Encryption

Business Management (partial)

Fiscal Year Settings

Business Closures

Currencies

Automatic Record Creation and Updates

Security

Users

Security Roles

Teams

Business Units

Field Security Profiles

Hierarchy Security

Positions

Access Team Templates

Document Management

Settings

SharePoint Document Locations

SharePoint Sites

Enable Server-based SP integration

Enable OneDrive for Biz

L1: System Settings

General	
Fiscal Year	
Business Closures	
Currencies	
Languages	
Calendar	
Formats	
Previews	
Privacy Preferences	
System Notifications	
Subscription Mgmt	
Resource Usage	

L1: Data Management

Similar Records Suggestions
Data Maps
Encryption
Duplicate Detection
Bulk Record Deletion
Import
Auto Numbering
Templates
Auto Record Creation and Update Rules
Announcements
Data Performance
Auditing

L1: Services

Relationship Insights
Mobile
Email Configuration
Yammer
MSFT Social Engagement
Document Management

L1: Security

Users (+L3 user)

Security Roles (+L3 role)

Teams

Business Units

Field Security Profiles

Hierarchy Security

Positions

Access Team Templates

L2: Auditing
 Settings
 Entity and field tracking

Summary view

Log management

L2: Mobile Profiles Configuration Settings

L2: Email Config Email Server Profiles Migrate Email Router Data Server-Side Sync Monitoring MailBoxes Email Configuration Settings Email (System Settings) Dynamics 365 for Outlook Sync Errors Outlook (Settings)

L2: Document Mgmt
Document Management Settings
SharePoint Document Locations
OneDrive for Business

Sharepoint Sites

Manage Document Suggestions

Dynamics 365 outlook app

OneNote Integration

L1: Customizations

Solutions

Customize this System

Export Field Translations

Publishers

Developer Resources

Dynamics Marketplace

Themes

Processes

Activity Feeds Rules

Activity Feeds Settings

December IA proposal: opportunities for improvement

- Lopsided information architecture some areas quite deep, some quite shallow
- Lists of objects and setting forms were not distinguished here: there's a hidden level of create/edit for any listview
- Fabric does not scale well to L3+ will have to adapt patterns
- Certain key features are buried, like email

L1: System Settings

General Fiscal Year Business Closures Currencies Languages Calendar Formats Previews Privacy Preferences

System Notifications

Subscription Mgmt

L1: Data Management

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Ī	Data Maps
	Encryption
	Duplicate Detection
	Bulk Record Deletion
	Import
	Auto Numbering
	Templates
_	Auto Record Creation and Update Ru
	Announcements
	Data Performance

Auditing

L1: Services

Relationship Insights
 Mobile
 Email Configuration
 Yammer
 MSFT Social Engagement
 Document Management

L1: Security

- Users (+L3 user)Security Roles (+L3 role)
- Teams
- Business Units

Field Security Profiles

Hierarchy Security

Positions

E Access Team Templates

L2: Auditing
 Settings
 Entity and field tracking
 Summary view
 Log management

- L2: Mobile Profiles Configuration Settings L2: Email Config **Email Server Profiles** × Migrate Email Router Data M Server-Side Sync Monitoring Mailboxes **Email Configuration Settings** Email (System Settings) Dynamics 365 for Outlook Sync Errors **Outlook** (Settings)
- L2: Document Mgmt
 Document Management Settings
 SharePoint Document Locations
 OneDrive for Business
- Sharepoint Sites

Manage Document Suggestions

Dynamics 365 Outlook app

OneNote Integration

L1: Customizations

Solutions Customize this System Export Field Translations Publishers Developer Resources Dynamics Marketplace Themes Processes Activity Feeds Rules

Activity Feeds Settings

- Listview (+1 level for create/edit)
- 🗞 Link out
- Monitoring
- ✤ Plugin/wizard

LOOKING FORWARD

Round 2 Overview

- Flatten the tree for complex features: Email configuration and Document Management
- Explore moving wizards, job creation and one-time actions to the Command Bar
- Move monitoring data elsewhere -it's not a setting

L1: System Settings

General Fiscal Year + Calendar Business Closures Currencies Languages Formats Previews

Privacy Preferences

CMD: Manage Subscriptions

L1: Document Mgmt

Settings Sharepoint Sites SharePoint Document Locations Manage Document Suggestions OneDrive for Business OneNote Integration L1: Data Management Announcements Auditing* (+L3) Auto Numbering Auto Record Creation Rules Duplicate Detection* (+L3) Data Maps Encryption Jobs (Dupe Detect, Import, Bulk, etc) Templates CMD: Add (Sample Data, etc) CMD: Download Template

CMD: Import

CMD: Bulk Delete

L1: Email Configuration

Server Profiles

Mailboxes

Email settings

Synchronization settings

Dynamics 365 for Outlook (+L3)

CMD: Migrate Router Data

CMD: New (server profile, mailbox)

L1: Security

Users

Security Roles

Teams

Business Units

Field Security Profiles

Hierarchy Security

Positions

Access Team Templates

L1: Customization

Solutions

Customize this System

Publishers

Themes

Processes

Activity Feeds Rules

Activity Feeds Settings

CMD: Export Field Translations

LINK: Developer Resources

LINK: Dynamics Marketplace

L1: Add-ons

Relationship Insights

Mobile

Yammer

MSFT Social Engage

Move to Analytics

Server-side sync monitoring Sync errors Data performance logs??

Move to Environment

System notifications Resource usage

Open Questions in Round 2

- What is the most common use case for these settings?
 - An admin checking configuration across the system
 - An admin coming in to change a very specific setting or group of settings
- Which sets of pages would benefit from mutual context?
- Does Customization section need work?
- Which lists are a few items (10s) versus at scale (100s-1000s)?
 - Scale requires virtual list, filtering, pagination
- Any other branches that should be flattened?
 - Duplicate detection, Auditing, Mobile all candidates
- There are many types of Jobs scattered across Admin. Can we consolidate or develop new patterns?

APPLYING OUR IA TO FABRIC PATTERNS

Option A: Hub & Spoke

- Each L1 grouping is represented by a card on a settings hub.
- Key settings are previewed in the card.
- In some cases, a direct link to an actionable list may be included in the card.
- Each card has a "Manage" link that opens a new page for that setting group. Pivots are used to expose L2 groupings.
- Services can be directly selected; in this case Document Management would not need to be an L1 grouping.

Environments > CDS 2.0 Production Env > Dynamics 365 Settings

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+ New user

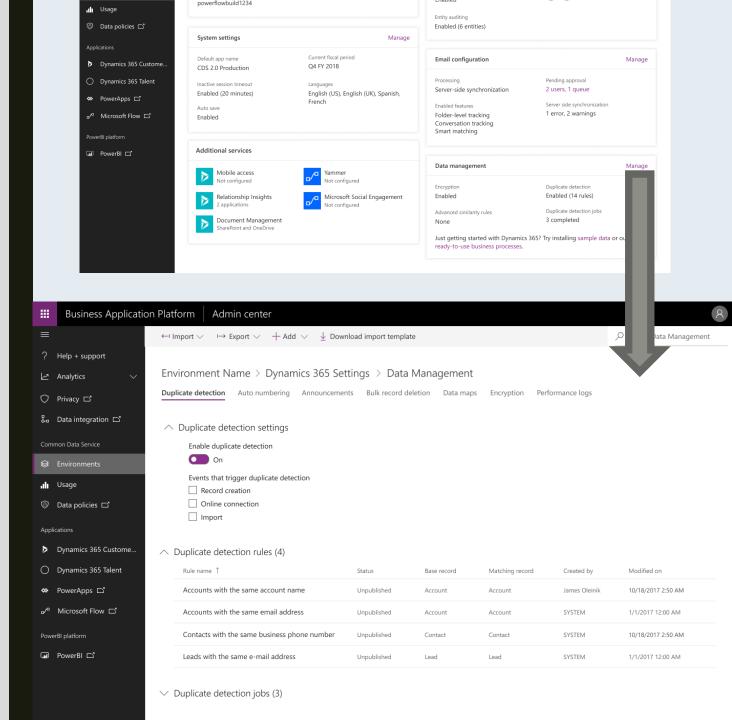
Option A: Hub & Spoke

PROS:

- Easy to scan important configuration details
- Pattern keeps related pages contextually available using pivots

CONS:

- Pattern breaks down for large settings groups
 like Data Management pivots might scroll
- Additional click required for most edit setting scenarios (comparable to old portal)
- High cost of changing L1 groupings later on



Business Application Platform Admin center

? Help + support

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🗘 Privacy 🗖

Analytics

Lata integration

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Common Data Service

Environments

Usage

Applications

Dynamics 365 Custome...

O Dynamics 365 Talent

↔ PowerApps 🗅

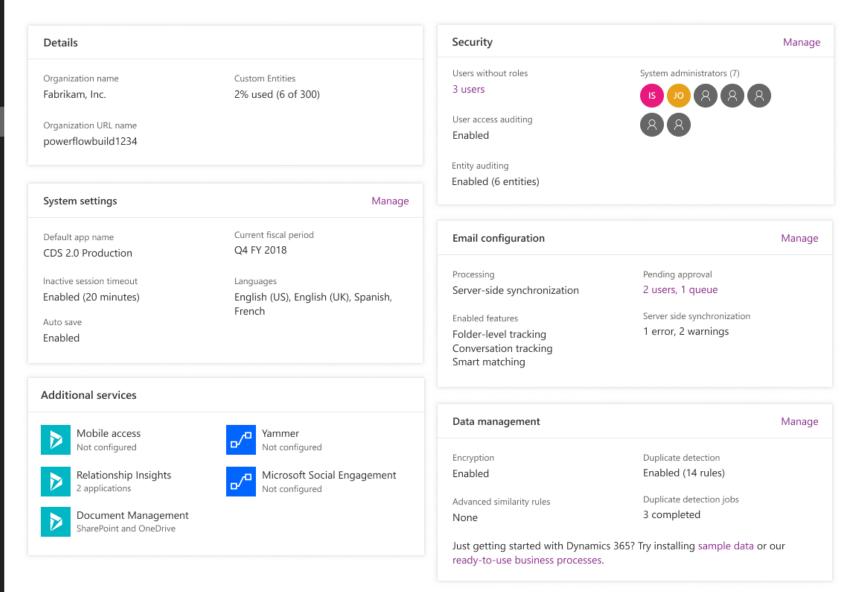
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PowerBI platform

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+ New user

Environments > CDS 2.0 Production Env > Dynamics 365 Settings



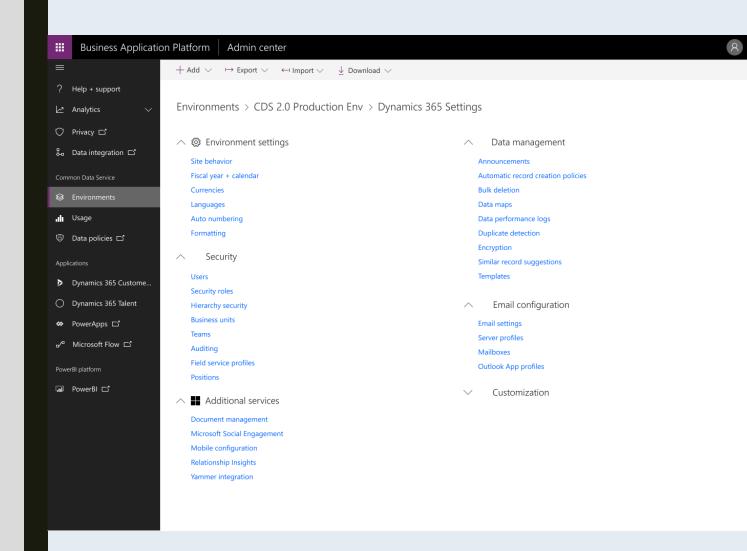
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PowerBI platform	Contacts with the same business phone number	Unpublished	Contact	Contact	SYSTEM	10/18/2017 2:50 AM
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 \checkmark Duplicate detection jobs (3)

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		System administrator	Corporate	7	

Option B: Static List

- Each L1 grouping is semantic only the L2 pages are individual settings pages, and linked directly.
- Pivots are used when L3 navigation is present.



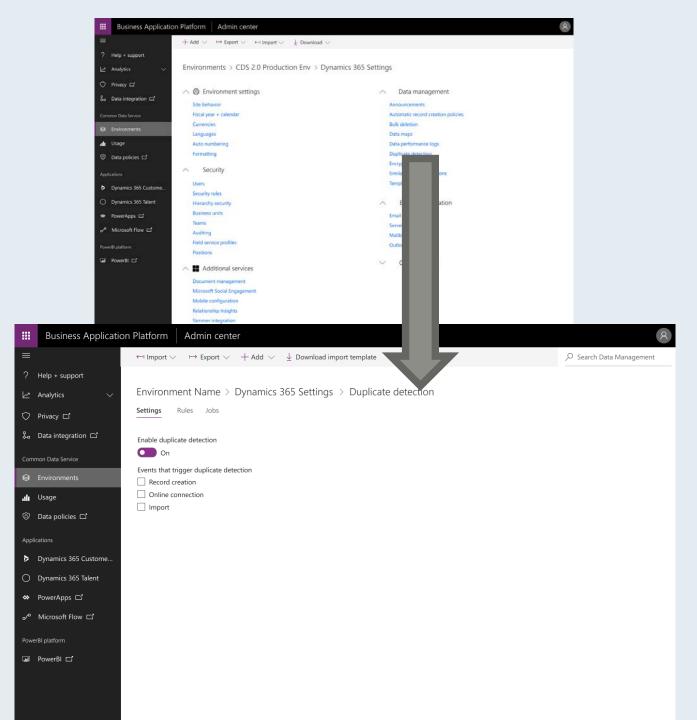
Option B: Static List

PROS

- Command bar is more useful (narrow scope)
- Pivots can be used for L3 navigation when needed
- L1 groupings can be changed easily
- One less click to get to most L2 pages

CONS

- Not a lot of context on the settings landing page
- L1 list is unwieldy on narrow screens
- L1 context is lost on L2 (not in breadcrumb)



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SIDE-BY-SIDE COMPARISON: NAV TO L2 (DUPLICATE DETECTION)

Option A: Hub and Spoke

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Option B: Static List

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Moving Forward

Plan of record

- Group prefers Option B
 - Timeline considerations
 - More amenable to partial rollout
- Preliminary agreement on new L1 groupings
- Design to move forward with:
 - Delivery of Option B L1 design
 - Breadcrumb behavior
 - Long-term content engagement
- After Option B delivered, move on to System Settings L2 first

Future opportunities

- SCENARIO: a new update has been applied, changing setting values and availability. How do we help admins cope?
- Take the hub design and apply it focusing on jobs-to-be-done, as a supplement to Option B rather than an alternate navigation mechanism.
- Explore potential for streamlining 'global' settings constructs like Add, Import, Export, and Jobs to further simplify the overall info architecture.