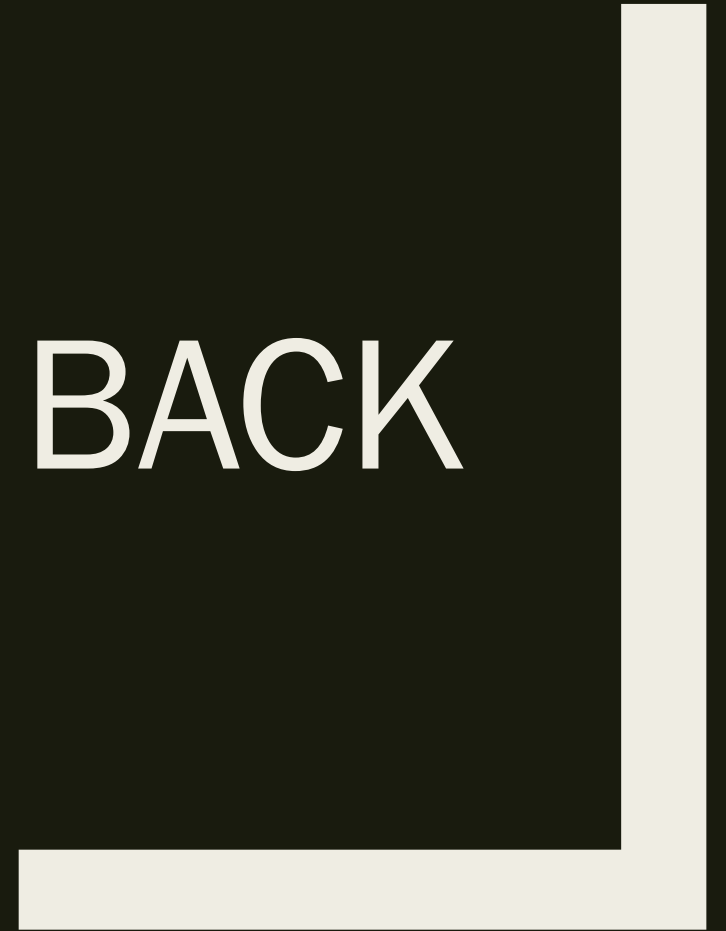# ORG ADMIN: IA AND NAVIGATION

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

December IA proposal

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

L2: Mobile

Profiles
Configuration
Settings

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: 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

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

Org Admin + OneAdmin IA proposal 2.0

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.

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

+ New user

Environments > CDS 2.0 Production Env > Dynamics 365 Settings

Details

Organization name
Fabrikam, Inc.

Custom Entities
2% used (6 of 300)

Organization URL name
powerflowbuild1234

System settings   Manage

Default app name
CDS 2.0 Production

Current fiscal period
Q4 FY 2018

Inactive session timeout
Enabled (20 minutes)

Languages
English (US), English (UK), Spanish, French

Auto save
Enabled

Additional services

Mobile access
Not configured

Yammer
Not configured

Relationship Insights
2 applications

Microsoft Social Engagement
Not configured

Document Management
SharePoint and OneDrive

Security   Manage

Users without roles
3 users

System administrators (7)
IS JO

User access auditing
Enabled

Entity auditing
Enabled (6 entities)

Email configuration   Manage

Processing
Server-side synchronization

Pending approval
2 users, 1 queue

Enabled features
Folder-level tracking
Conversation tracking
Smart matching

Server side synchronization
1 error, 2 warnings

Data management   Manage

Encryption
Enabled

Duplicate detection
Enabled (14 rules)

Advanced similarity rules
None

Duplicate detection jobs
3 completed

Just getting started with Dynamics 365? Try installing sample data or our ready-to-use business processes.

←| Import ∨ |→ Export ∨   + Add ∨   ↓ Download import template

Search Data Management

Analytics ∨

Privacy ⧉

Data integration ⧉

Common Data Service

Environments

Usage

Data policies ⧉

Applications

▷ Dynamics 365 Custome...

◯ Dynamics 365 Talent

⧉ PowerApps ⧉

Microsoft Flow ⧉

PowerBI platform

PowerBI ⧉

Environment Name 〉 Dynamics 365 Settings 〉 Data Management

Duplicate detection   Auto numbering   Announcements   Bulk record deletion   Data maps   Encryption   Performance logs

∧ Duplicate detection settings

Enable duplicate detection

⬤ On

Events that trigger duplicate detection
☐ Record creation
☐ Online connection
☐ Import

∧ Duplicate detection rules (4)

Rule name ↑	Status	Base record	Matching record	Created by	Modified on
Accounts with the same account name	Unpublished	Account	Account	James Oleinik	10/18/2017 2:50 AM
Accounts with the same email address	Unpublished	Account	Account	SYSTEM	1/1/2017 12:00 AM
Contacts with the same business phone number	Unpublished	Contact	Contact	SYSTEM	10/18/2017 2:50 AM
Leads with the same e-mail address	Unpublished	Lead	Lead	SYSTEM	1/1/2017 12:00 AM

∨ Duplicate detection jobs (3)

Assign users   + Add role   Copy   Delete

Search Security

Environment Name > Dynamics 365 Settings > Security

Users   **Security roles**   Hierarchy security   Business units   Teams   Auditing   Field service profiles   Positions

Role ↓	Business unit	Assigned users
Activity feeds	Corporate	3
CEO-Business Manager	Corporate	0
CompanyNewsAccess	Retail	20
CSR Manager	Support	50
Customer Service Representative	Support	500
Email app access role	Corporate	10
Environment maker	Corporate	10
Marketing manager	Marketing	10
Marketing Professional	Marketing	10
Relationship Insights Admin	Marketing	10
Sales Manager	Sales	10
Salesperson	Sales	10
System administrator	Corporate	7

Role edit scenario would require an L3 page and L4 edit panel.

Help + support

Analytics

Privacy

Data integration

Common Data Service

Environments

Usage

Data policies

Applications

Dynamics 365 Custome...

Dynamics 365 Talent

PowerApps

Microsoft Flow

PowerBI platform

PowerBI

Option B: Static List

- Each L1 grouping is semantic only – the L2 pages are individual settings pages, and linked directly.

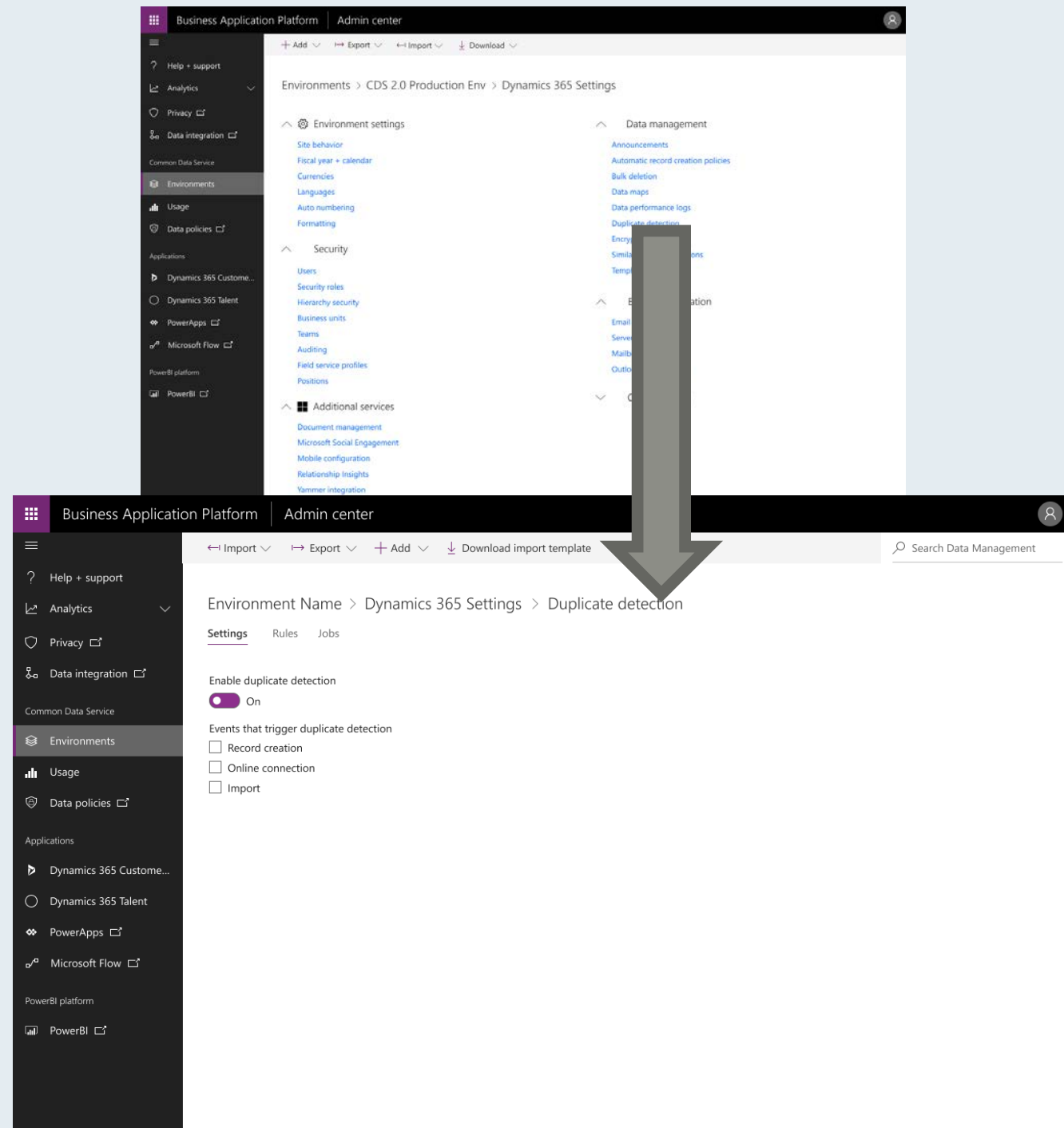- Pivots are used when L3 navigation is present.

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)

+ Add ⌄   Export ⌄   Import ⌄   Download ⌄

⚙ Environment settings

Site behavior

Fiscal year + calendar

Currencies

Languages

Auto numbering

Formatting

Security

Users

Security roles

Hierarchy security

Business units

Teams

Auditing

Field service profiles

Positions

▦ Additional services

Document management

Microsoft Social Engagement

Mobile configuration

Relationship Insights

Yammer integration

Data management

Announcements

Automatic record creation policies

Bulk deletion

Data maps

Data performance logs

Duplicate detection

Encryption

Similar record suggestions

Templates

Email configuration

Email settings

Server profiles

Mailboxes

Outlook App profiles

Customization

Sidebar:

? Help + support

📈 Analytics

🛡 Privacy ⌞

⧈ Data integration ⌞

Common Data Service

☰ Environments

📊 Usage

🛡 Data policies ⌞

Applications

▶ Dynamics 365 Custome...

○ Dynamics 365 Talent

◆ PowerApps ⌞

⌁ Microsoft Flow ⌞

PowerBI platform

📊 PowerBI ⌞

Assign users   + Add role   Copy   Delete

Help + support

Analytics
Organization insights
PowerApps
Microsoft Flow

Privacy

Data integration

Common Data Service

Environments

Usage

Data policies

Applications

Dynamics 365 Custome...

Dynamics 365 Talent

PowerApps

Microsoft Flow

PowerBI platform

PowerBI

> CDS 2.0 Production Env > Dynamics 365 Settings > Security roles

Role ↓	Business unit	Assigned users
Activity feeds	Corporate	3
CEO-Business Manager	Corporate	0
CompanyNewsAccess	Retail	20
CSR Manager	Support	50
Customer Service Representative	Support	500
Email app access role	Corporate	10
Environment maker	Corporate	10
Marketing manager	Marketing	10
Marketing Professional	Marketing	10
Relationship Insights Admin	Marketing	10
Sales Manager	Sales	10
Salesperson	Sales	10
System administrator	Corporate	7
System Customizer	Corporate	7

? Help + support

Analytics ∧

 Organization insights

 PowerApps

 Microsoft Flow

 Privacy ⬚

 Data integration ⬚

Common Data Service

 Environments

 Usage

 Data policies ⬚

Applications

 Dynamics 365 Custome...

 Dynamics 365 Talent

 PowerApps ⬚

 Microsoft Flow ⬚

PowerBI platform

 PowerBI ⬚

··· > CDS 2.0 Production Env > Dynamics 365 Settings > Security roles > Sales Manager

Privileges   Entities

∧ General (18)

Privilege ↓	Scope
Add Reporting Services Reports	None
Bulk Delete	None
Delete Audit Partitions	None
Publish Email Templates	Organization
Publish Duplicate Detection Rules	None
Publish Mail Merge Templates	None
Publish Reports	None

∨ Customization

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

Option A: Hub and Spoke

Option B: Static List

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.