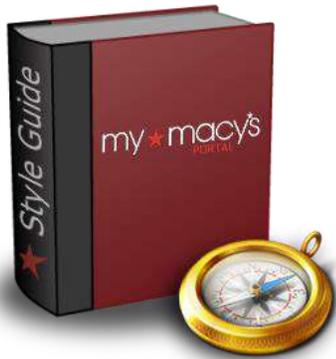


# 2013



## [PORTAL STYLE GUIDE]

- Documents policy, roles, responsibilities and expectations for gatekeepers and content-publishers
- Features usability advice, formatting standards and related conventions for the My Macy's Portal
- Includes tips and tricks for dealing with SharePoint 2010, browsers and hypertext markup

### **Macy's Systems and Technology**

Enterprise Portal Team

By Nick Zedlar

Last Update: March 15, 2013



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## This Document

### Online Version

The soft copy of this Guide is available as a PDF on the My Macy's Portal at <http://mymacys/applications/EnterprisePortal/KB/Knowledge%20Base/Portal%20Style%20Guide.pdf> or through the SharePoint 2010 Upgrade page at <http://mymacys/applications/EnterprisePortal/2010upgrade/Pages/default.aspx>.

### Author

My name is Nick Zedlar. I started in Web development in the mid-1990s, designing Web sites and browser-based applications. Over the course of my career in IT, I've been a coder, graphic designer, information architect (briefly), writer, translator and editor who gradually moved into the usability sphere. I have worked with Nokia, Bellsouth, SunTrust, McKesson, Delta Air Lines, Deloitte, AT&T, Coca-Cola and a host of other companies. I also operated my own business designing touchscreen user interfaces for high-end residential and commercial Crestron panels. I have over ten years of experience as a usability/UX specialist.

In March 2010 I joined Macy's as a member of the Enterprise Portal Team (EPT) at the Macy's Systems and Technology (MST) facility in Johns Creek, Georgia. I'm primarily responsible for the new look and feel of the redesigned My Macy's Portal that rolled out with the SharePoint 2010 upgrade. I have been tasked with putting into operation this Style and Standards Guide in conjunction with a governance mechanism to ensure compliance and consistency across the enterprise.

### 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 the home page, for instance. Font, list, table, image 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 cigarette lighter. 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, 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. 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 document represents the formally codified user interface guidelines for publishing content (including applications) on the My Macy's Portal. Unless otherwise advised, this guide represents the final authority on everything from appropriate image use and site information architecture to proper formatting of lists and tables.





## Tone

**Discussion in this document is frank and honest.** If our objective is to learn and disseminate best practices and guidelines for the benefit of all, then we have to be able to objectively view our own ways of doing things, dissect our failures and triumphs, and move forward with new knowledge. Sometimes there’s no gentle way to do that. Don’t be offended, ashamed or embarrassed.

Showing real-world examples is an excellent way to illuminate a particular method. If something you’ve done appears here, you are not being singled out for criticism or being picked on. These are opportunities to learn, and discussion points are added for the betterment of everyone. I will not use names, though there are no guarantees of anonymity. From screen captures, a smart person familiar with your business area or style may be able to guess your identity from context.

## Updates

Updates will occur irregularly, but frequently (in other words, changes won’t happen on a regular schedule, like, say, every Friday at 3pm). The Guide is considered a “living document,” meaning it will change often, particularly in the beginning of its development. You can tell new **NEW** or updated **UPDATED** material by the appropriate icon next to the section heading and its corresponding entry in the table of contents. The date of change will accompany the icon and will remain so marked usually for a month, after which the icon and date are removed. They look like **UPDATED** (mm/dd/yy) and **NEW** (mm/dd/yy).





## Portal History

### What Is the Portal?

The My Macy's Portal is an intranet portal. 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.<sup>1</sup>

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.

### From Federated to One Macy's

Before we delve in, a little background on the Portal's origins is in order. In mid-May 2008—after consolidation of the Federated patchwork under the “My Macy's” initiative—over a dozen disparate corporate intranets became one entity. 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 the SP2010 upgrade.

### SharePoint 2007

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. Wikipedia describes it as:

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<sup>1</sup> See Wiki *Intranet portal* ([http://en.wikipedia.org/wiki/Intranet\\_portal](http://en.wikipedia.org/wiki/Intranet_portal)).





[... 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.<sup>2</sup>

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. 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 store, modify, collaborate on, integrate, version-control and distribute.



**Delve Deeper:** Read more about SharePoint at [http://en.wikipedia.org/wiki/Microsoft\\_SharePoint](http://en.wikipedia.org/wiki/Microsoft_SharePoint) (Wiki) and <http://sharepoint.microsoft.com/en-us/Pages/default.aspx> (Microsoft).

<sup>2</sup> See Wiki *Microsoft SharePoint* ([http://en.wikipedia.org/wiki/Microsoft\\_SharePoint](http://en.wikipedia.org/wiki/Microsoft_SharePoint)).





## Growing Pains, Part 1

The newly formed My Macy’s Portal was assembled quickly. As a result, formal standards were never adequately prepared and documented. Nature abhors a void, though, and go-getters in business units all over the Company did their best with limited direction, few resources and no experience with this strange beast called SharePoint.

In the absence of comprehensive overarching style directives, gatekeepers and their teams devised their own. Corporate Communications and Education and Instruction Services (EIS) took on the responsibilities of establishing some loose conglomeration of rules, but didn’t have the ability, will, mandate or authority to oversee the entire Portal. Ultimately, the Portal became something of a Wild West scenario: a scattered group of sites—albeit with a vaguely common identity—trying to make sense of a puzzling infrastructure, characterized by weak governance and inadequate assistance due to its daunting scale. Sites came to look and behave differently from one another, a point of user complaint in the Portal Usability Survey conducted in 2010.

## 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 Header design... which is why it’s larger than before). 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 trend toward enterprise portal technology. Ever more companies are recognizing its benefits, and as a result the industry is growing at an astounding rate. As of this writing, annual licensing revenues for SP2010 have probably already surpassed the \$2 billion mark for Microsoft. Globally speaking, all SharePoint-related commerce may account for





\$14 billion a year.<sup>3</sup> Obviously, it's big business. More importantly, it cannot 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.

Seizing on the opportunity to modernize the look and feel of the Portal, the EPT expanded its team with the addition of **Nick Zedlar** ([nicholas.zedlar@macys.com](mailto:nicholas.zedlar@macys.com)) for user interface design and **Trygve Andersen** ([trygve.andersen@macys.com](mailto:trygve.andersen@macys.com)) for presentation layer development. Together, they've renovated the Portal to reflect new SP2010 features and concerns users voiced in the 2010 Usability Survey. Get to know the rest of the team by visiting our manager **Laura Webb's** ([laura.webb@macys.com](mailto:laura.webb@macys.com)) MySite page at <http://mysites/Person.aspx?accountname=FEDERATED%5CB06LDK>.

## Growing Pains, Part 2

The visual upgrade to SP2010 was exceedingly difficult, because SharePoint doesn't lend itself easily to rebranding. A number of useful and interesting features—such as third- and fourth-level cascading menu navigation, expandable/collapsible tree levels in the Left Navigation Pane, smooth expand/collapse animation, convincing menu drop shadows and other formatting—had to be abandoned due to the poor performance of IE7 (more on this later in this document). In point of fact, these features were built, but had to be “undone.”

The timetable was aggressive, necessitating the abandonment of many fixes and enhancements for initial release. Some of the quirks and workarounds, if applicable, are documented in this Guide. Please note that everything was not perfect when SP2010 went live. There remains much to fix, but rest assured that the EPT is here to help any way we can.

Phase II—the TBD period following initial release—will address many areas of concern. The EPT asks for your understanding and patience, while we get everything looking spiffy and working properly.

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<sup>3</sup> Sitroff Technologies. *SharePoint maturing into 2011?* (<http://www.sitroff.com/dev/industry-trends/sharepoint-maturing-into-2011-ecm-sharepoint/>).





## Standards Compliance Policy

### Feedback and Collaboration

Effective and realistic standards derive from our collective effort. We're a community. We thrive on mutual respect, feedback, collaboration and the free exchange of ideas and knowhow. If you have an idea, let us know. If certain styles, layouts, templates or Web Parts aren't working for you or you feel you have special need for additional styles or compliance dispensation, let us know. If you have an idea to make things better, let us know. If you have trouble with HTML or SharePoint or some other aspect of publishing on My Macy's, let us know.

**Bottom Line:** The EPT, the usability guidelines and the Portal standards exist to serve you and all Portal users, not the other way around.

### The Enterprise Portal Team

The EPT is not in the business of issuing edicts from on high like some kind of pompous despot. That's not what we're about. However, for the sake of order and consistency, we need some rules. Once those rules are in place, we must abide by them. Users count on us to maintain a certain level of excellence in both quality and usability. It makes everyone's jobs easier and fosters a more satisfying and productive user experience.

The Enterprise Portal Team (EPT) is responsible for formulating, documenting, disseminating and enforcing Portal standards. It is the final authority on style and standards policy for the My Macy's Portal. Any individual or business unit with content published on the My Macy's Portal is subject to its jurisdiction. Compliance is mandatory for all of our sakes.





## Procedure

### Pre-publication

This method applies to all new content **after** the SharePoint 2010 upgrade. If you have any questions about styles or standards before you hit the “Publish” button in SharePoint, do not hesitate at all to contact us. We’re here for you. All we ask is a little lead time, so we can look over your page(s) and point you in the right direction before you publish. Please also give finding the answer on your own an honest effort. Ask a colleague. Google it. Read a book or a blog. Experiment. Remember, you can try things out before you publish (look for the **Page > Preview** option in the Ribbon).



Even if you manage to mess something up badly, don’t panic. You can revert back to an earlier version of a page in the document history (look for **Page > Page History** in the Ribbon).





## Post-publication

This method applies to all content published **before** the SharePoint 2010 upgrade. The EPT constantly “patrols” the Portal. We’re also fixing things, changing things, moving things around and adding enhancements. That’s our job. If we run across a page or an application that does not comply for one reason or another, it’s our responsibility to make contact with the responsible party and provide oversight of the compliance procedure, plus any assistance we can. There are two objectives to the notification communiqué to:

- Educate the person(s) responsible about the standard or technique in question (so they won’t repeat it, but can also share this knowledge with others), and
- Publish the page in its compliant form as soon as possible.

When a page does not comply with standards in some fashion, an EPT representative will contact the person listed in the document history as having most recently modified the page. Please note, this person may or may not be the gatekeeper. The notified party then has the responsibility to:





- Inform the appropriate person(s) of the request (if they themselves won't be making the changes),
- Respond to the EPT rep with the name of the person who will make the change(s) (even if it is them) and an estimated completion time/date, and
- Ask for assistance if they need help with graphics, HTML, CSS or some other aspect of the change.

The EPT rep will either describe the solution and/or demonstrate the proper solution (in a hidden Web Part on the page, for example). Any further required consultation or discussion will take place.

The page-owner will have a reasonable, but limited, period of time to fix the page. This is typically five (5) business days. After that time, the EPT itself will make the appropriate changes and publish the page. For actual broken links, code, applications or images, this may be accelerated to 24 hours after discovery... or possibly even **immediate unilateral hiding of the offending item** until someone can deal with it properly (especially if found after business hours). If this action is taken by the EPT, a message to that effect will be dispatched to the person in the business unit who most recently modified the page.

If the page-owner happens to be on vacation or is otherwise absent from work for the "grace period," the next person in the document history will be contacted (possibly the gatekeeper as well). These situations will be dealt with on a case-by-case basis, so that the business unit will have a fair opportunity to make changes.

### Take It Seriously

This situation may never happen, but it must be mentioned here as a matter of policy. If a content-owner decides to routinely publish non-compliant pages and expects the EPT to keep fixing them, there are consequences. This is the equivalent of leaving dirty dishes in the sink and expecting someone else to clean up after you. You must learn how to do things on your own in accordance with this Guide. Please take your role and responsibilities seriously. If it's a training or resource issue, we can help. If you've tried to accomplish something, but can't figure out how to do it, contact us. Don't be embarrassed. We're here to help.





But if it's apathy, willful disregard for or even hostility against the Portal standards and policy, count on escalation to your management. You may lose publishing rights until the issue is resolved—maybe even permanently. Your management may take its own punitive or corrective measures. So, please do the right thing.

## Portal Applications

Special compliance rules apply to **legacy applications** on the My Macy's Portal. The styling and changing of applications (versus Web pages) is often more problematic, so applications that existed on the Portal prior to the SharePoint 2010 upgrade fall under a different compliance schedule. They are expected to adopt the new styles at some point—and sooner rather than later—but are not bound by the five-day compliance deadline.



**Warning:** However, all **new** applications out the gate must fully comply with the styles and standards outlined in this document. **That means well before going live, not afterward.** If you are planning an application, contact the EPT as early as possible, so we can help you with styles and standards. Do the right and considerate thing: don't wait to the last minute to engage with us. Portal styles and standards need to be integral to your design from Day 1. If on Day 283 you drop your application in the EPT's lap and say you're going live on Wednesday, guess what—you will probably **not** be going live on Wednesday. It takes time to do things right, and you may well have a ton of rework to do to come into compliance. You've also burned the very people who want to help you succeed the most by tossing them a hot potato. It's a cliché, but it holds true: your lack of planning does not constitute an emergency on the part of the EPT. Please plan ahead and give us the opportunity to serve you well.





## Portal Redesign Principles and Standards

### Browsers

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 (Opera, Firefox, Chrome, etc.), though it is optimized for Microsoft's Internet Explorer. After all, SharePoint is a Microsoft product.

### Internet Explorer

As of March 2012 our companywide target browser is **Microsoft Internet Explorer 8** (or **IE8**, for short). IE7, its predecessor, had some serious stability and performance issues. Thankfully, IE8 fixes most of them. Since the Portal was designed for IE7, some appearance and functionality issues may become evident. Styles may render differently, and some aspects of the interface may act differently or not at all.

**Some SharePoint 2010 features work only in IE browsers.** For example, if you want to drag-and-drop Web Parts while editing a page or need to get the full horsepower out of the new Ribbon, you must use Internet Explorer.

### How to Check Your Browser Version

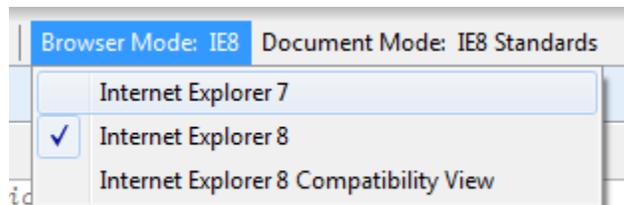
To determine your browser version, go to the menu bar and choose **Help > About Internet Explorer**. A pop-up like the one below will tell you what version you have installed.





In IE8, hit the **F12** key. This brings up the developer tools pane at the bottom of the browser window. Click **Browser Mode: IE8**. You should see this:





Make sure it reads **Browser Mode: IE8** and **Document Mode: IE8 Standards**. Test all your pages in this mode for best results. Though not *required* to do so, it is good practice to switch to IE7 mode and see how it looks. If you also check it in Chrome or Firefox, you'll have covered all your cross-browser compatibility bases for publication. We *recommend* doing this, so that your page(s) look and act similarly across browsers.



**Warning:** Upgrade to IE8 if you're at IE7 or below, but do **not** upgrade to Internet Explorer 9 (Microsoft's latest browser incarnation). Upgrading replaces your current version, and you cannot revert back to the earlier version. It is possible to have more than one version of IE on a machine, but it requires considerable effort to achieve (dual-booting or running multiple Windows XP Modes in Windows 7, as described at <http://blogs.msdn.com/b/ie/archive/2011/02/04/testing-multiple-versions-of-ie-on-one-pc.aspx>). These solutions are probably beyond typical users, so it's best to stick with IE8 alone.

### Google Chrome

One could download and install **Google Chrome** (<http://www.google.com/chrome>) for a more enjoyable and productive experience on the Portal (and elsewhere, for that matter).



**Warning:** Macy's tech support offers no help whatsoever for Google Chrome. In addition, you may be violating company prohibitions on installing third-party software. Use at your own risk and discretion.





**I am not officially endorsing Chrome or suggesting that you install it.** I merely mention it, because it is 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.

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 IE8.**

**You may also try the Chrome "IE Tab" plugin**

**(<https://chrome.google.com/webstore/detail/hehijbfgiekmjfkfjpbkbammjbdnadd#detail/hehijbfgiekmjfkfjpbkbammjbdnadd>).**

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—so if something goes wrong with it or you're having difficulties, there's no one to turn to in the Company for assistance. 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 IE8 at the [proper resolution](#) to make sure they look and perform the way you expect.





## Color

### Call to Action

The old SharePoint 2007 design had a large amount of red on the screen, particularly red hypertext, which made pages difficult to scan and read. The new design consciously uses red as a “call to action” (a prompt for the user to do something) sparingly, and eliminates as much “window dressing” red as possible. Now, with some exceptions, **red tells the user that something is clickable**. Perhaps a more elegant way to put it is that red indicates an interactive point within the interface. For example in the image below, red bullets, arrows or carats indicate that the accompanying text is a hyperlink or opens a dropdown. Red buttons and icons are clickable. In addition, the Portal logo, tabs and breadcrumb trail are functioning navigational elements.





Because red is such an important call to action in the Portal, only use it for that purpose. Of course some red in images is okay, but generally reserve red for the types of clickable elements as shown above. Otherwise, the user becomes confused between what's clickable and what's not, similar to when one underlines text for emphasis (**a big no-no**) that tells the user "click here" when they can't. Users begin to question what underlined text or red objects in the page mean. Let's keep it very clear what both of those things mean.





## Palette

Swatch	Hex Code	Example Styles	Description
	#000000 BLACK	s4-tn, menu, 4-search	Tab/left navigation/menu borders, button/tab labels, form input text
	#333333 DARK GRAY	Html, body, h2.MyMacysPageTitle	Page title, default body text, headers
	#525252 MED GRAY	ms-standardheader, ms-WPTitle, enterpriseFooter	Web Part header text, footer background
	#DBDBDB MED LT GRAY	customBreadcrumbs, ms-WPborderBorderOnly, ms-viewlsts	Breadcrumb trail and list (library, bulleted, MyLinks, stocks) dotted line, Web Part and inactive control borders
	#EEEEEE LIGHT GRAY	box2, linkitem: hover	Red bulleted list background hover, sub-heading background
	#FFFFFF WHITE	myMacysLinks, s4-tn li.static, ms-wpContentDivSpace	Body/Web Part backgrounds, button/tab labels
	#A41214 RED	ms-WPAddButton, ms-toolbarContainer, hyperlink	Text hyperlinks, most hover states, buttons and admin controls, active borders
	#814444 DARK RED	ms-WPTitle a: hover, tr.s4-itm- hover > td, tr.ms-itmhover: hover > td	Visited hyperlinks





## Size

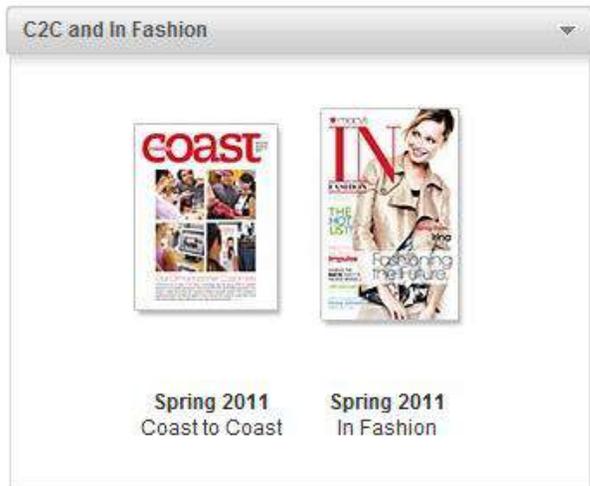
Your content must fit within a 1,024-pixel-wide browser window (read more about this [browser target resolution](#)). That means no spillover off the right edge that creates a horizontal scroll bar. That is expressly forbidden. Some tips:

- Be smart about which [page layout](#) you choose, since your content dictates which is most appropriate. If you have large tables or images (or other things that don't wrap well or at all), then use a single or double column as appropriate. Don't cram large elements into a small space and expect them to fit. You may need to reconsider why the thing is so big to begin with.
- Images are meant to enhance the experience, not detract from it. Keep them small.
- Tabular data that is huge is hard to parse. Break it into smaller tables conveying certain key bits of information, or figure out a better way to convey the points in the data. In this case, a graph or chart is often preferable.
- Link to a PDF, PPT, DOC or other self-contained document, especially for large, ungainly data stores.
- Less is often more. Design your information delivery in a way that the users themselves can delve down deeper where they want to, since not all data is relevant to all users. An avalanche of information is difficult to assimilate.
- Be brief. Find the shortest, most concise way to say something. This is not Dostoyevsky or Tolstoy.

## Alignment and Justification

As a general rule, left justify. There are few reasons to deviate from left alignment/justification. One exception is an image or group of images in a Web Part, as in the example below. They should be centered. Rows of images should likewise appear neatly stacked in columns, not randomly placed.





## Text

### Sub-titles

Sub-titles 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. There are two style options for sub-titles: simple bolded text in paragraph tags with a little top margin (see code below), and boxes with gray background color.





### Example: Sub-titles Bolded in Paragraph Tags

Not to Scale

MST Internal Departments

**Systems Development**

- Cust. Relations Management
- HFA
- Logistics/D2C
- Merchandising Systems
- Marketing, Pricing, ESS and SD

**Other MST Teams**

- MST HR
- EIS
- Facilities
- MST Lorain
- MST Finance
- MST Security Access
- Meeting Place (Audio Conferencing)

### Example: Sub-titles in Boxes with Background Color

Not to Scale

HR and EIS Contacts, Directories and Links

**MST HR/EIS Contacts**

- Talent Management/Recruiting
- Associate Relations
- Compensation & Benefits
- Diversity & Inclusion
- Education & Information Services

**MST and Nationwide Directories**

- MST 411 Directory [↗](#)
- MST Lorain Phone Directory (XLS) [↗](#)
- Central HR Directory [↗](#)
- Office of HR Compliance (PDF) [↗](#)

**Resources and Other Links**

- Employee Assistance Program (Access Code 5841) [↗](#)
- Solutions InSTORE
- Compensation & Benefits
- Learning & Development
- Career & Talent Resources
- Performance Reviews
- Everyday Magic
- EIS Solutions
- Diversity & Inclusion



**Copy and Paste:** You can use any of the green code in this document. Simply copy and paste it into any Content Editor Web Part in **HTML mode!** Just modify the bits in black with your own content. Easy as pie!





### The Code: Sub-titles Bolded in Paragraph Tags

```
<p style="margin-top: 12px"><b>Sub-title Here</b></p>
```

### The Code: Sub-titles Bolded in Table Header Row Tags

```
<div class="box2">
<table cellspacing="0" cellpadding="0" width="100%">
<tbody>
<tr><th>Sub-title Here</th></tr>
<tr height="5"></tr>
<tr><td id="column" valign="top" width="100%">
<div style="padding-bottom: 0px; padding-left: 8px; padding-right: 8px; padding-top: 0px">
<p>Content Here</p></div></td></tr>
</tbody>
</table>
</div>
```

Use the above code for images and paragraphs of text. For **static lists**, use the following code:

```
<!-- ***** START Sub-title 1 Box ***** -->
<div class="box2"><table cellspacing="0" cellpadding="0" width="100%"><tbody>
<tr><th>Sub-title 1 Here</th></tr>
<tr height="5"></tr><tr><td id="column" valign="top" width="100%"><table width="100%" cellspacing="0" cellpadding="0">
```





```
<tbody><tr><td width="100%" id="column" valign="top"><ul class="bulletlist">
<li>First static bulleted list item that appears on page</li>
<li>Second static bulleted list item that appears on page </li>
<li>Third static bulleted list item that appears on page/li>
</ul></td></tr></tbody></table></td></tr></tbody></table></div>
<!-- **** END Sub-title 1 Box **** -->
```

```
<!-- **** START Sub-title 2 Box **** -->
<div class="box2"><table cellspacing="0" cellpadding="0" width="100%"><tbody>
<tr><th>Sub-title 2 Here</th></tr>
<tr height="5"></tr><tr><td id="column" valign="top" width="100%"><table width="100%" cellspacing="0" cellpadding="0">
<tbody><tr><td width="100%" id="column" valign="top"><ul class="bulletlist">
<li>First static bulleted list item that appears on page</li>
<li>Second static bulleted list item that appears on page </li>
<li>Third static bulleted list item that appears on page/li>
</ul></td></tr></tbody></table></td></tr></tbody></table></div>
<!-- **** END Sub-title 2 Box **** -->
```

For lists of hyperlinks with mouseover effects, use the following code:

```
<!-- **** START Sub-title 1 Box **** -->
<div class="box2"><table cellspacing="0" cellpadding="0" width="100%"><tbody><tr><th>Sub-title 1 Here</th></tr><tr
height="5"></tr><tr><td id="column" valign="top" width="100%"><table width="100%" cellspacing="0" cellpadding="0">
```





```
<tbody><tr><td width="100%" id="column" valign="top"><div id="linkitem"><a href="http://add your URL here">Text that appears on page</a></div><div id="linkitem"><a href="http://add your URL here">Text that appears on page</a></div></td></tr></tbody></table></td></tr></tbody></table></div><!-- **** END Sub-title 1 Box **** -->
```

```
<!-- **** START Sub-title 2 Box **** --><div class="box2"><table width="100%" cellspacing="0" cellpadding="0"><tbody><tr><th>Sub-title 2 Here</th></tr><tr height="5"></tr><tr><td id="column" valign="top" width="100%"><table width="100%" cellspacing="0" cellpadding="0"><tbody><tr><td width="100%" id="column" valign="top"><div id="linkitem"><a href="http://add your URL here">Text that appears on page</a></div><div id="linkitem"><a href="http://add your URL here">Text that appears on page</a></div></td></tr></tbody></table></td></tr></tbody></table></div><!-- **** END Sub-title 2 Box **** -->
```

 **Add More:** You can add additional boxes ad infinitum by copying and pasting the whole chunk of code between <!-- \*\*\*\* START \*\*\*\* --> and <!-- \*\*\*\* END \*\*\*\* -->. Try it!

## Hyperlinks

Hyperlinks that occur in paragraphs will automatically pick up the “always red, always underlined” style (among other fixes). **You must use <p> tags for this to work.** If it doesn’t, let us know. There is a supplementary style sheet used to accomplish that, which needs to be attached at the site collection level. We’ve done so for the “sites/enterprise,” “projects,” “Q4M” and “applications” site collections.





**Note: 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 (i.e., 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](#): and when she had got its head down, and was going to begin again, it was very provoking to find that the hedgehog had unrolled itself, and was in the act of [crawling away](#): besides all this, there was generally a ridge or furrow in the way wherever she wanted to send the hedgehog to, and, as the doubled-up soldiers were always [getting up and walking off](#) to other parts of the ground, Alice soon came to the conclusion that it was a very difficult game indeed.

For any hyperlinks going outside the Portal (that is, any URL starting with something other than <http://mymacys/>) 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. This is accomplished by adding `target="_blank"` to your anchor `<a>` tag, and putting the  icon next to the hyperlink. Below is an example of the image in a bulleted list and with regular text in a paragraph `<p>` tag.





- [Expense Payable](#)
- [M\\*Mat](#)
- [ProcureIT](#)

[Property Development](#)

Direct Access to CSTAR, SAPA, Store DWF's, Design Review Software and more.

The code looks like this:

```
<a href="http://add your URL here" target="_blank">Text that appears on page</a>
```

Note that the image is **inside the anchor tags**. And there is a **no space** between the image and the closing anchor tag. In the red, add a **very brief** description—just a couple of words—or simply put “Open Link.”

### Bulleted Lists

One of the standards for bulleted lists of text links looks like this:





This Week at MST

- [MST News Over Webcast Site](#)
- [Congratulations on Projects Completed](#)
- [MCEPublic Reorg](#)
- [September Star Monthly](#)

When the user hovers over a row (as in the first one in the example above), the background color swaps to a darker gray and the text link turns red and underlined. It's easy to implement. Simply paste the following into a new or existing content editor Web Part in **HTML Edit Mode**:

```
<!-- ***** START Hover Row Table ***** -->  
<table width="100%" cellpadding="0" cellspacing="0">  
<tbody><tr><td width="100%" id="column" valign="top">  
<div id="linkitem"><a href="http://add your URL here">Text that appears on page</a></div>  
<div id="linkitem"><a href="http://add your URL here">Text that appears on page</a></div>  
<div id="linkitem"><a href="http://add your URL here">Text that appears on page</a></div>  
<div id="linkitem"><a href="http://add your URL here">Text that appears on page</a></div>  
</td></tr></tbody></table>  
<!-- ***** END Hover Row Table ***** -->
```





Then just change the items in black. Fill in your appropriate hyperlinks and change “Text that appears on page” to whatever text you want the user to see for the hyperlink. Voila!

If you have a simple bulleted list of **static text** (that is, not hypertext), go into **HTML Edit Mode**. Make sure there are no styles or classes associated with each list item (in other words, make sure each <LI> (list item) tag has nothing else in it; it should look just like that). Find the <UL> (unordered list) tag. Add the following:

```
<ul class="bulletlist">
```

It will give you a look like this:

From the **Policies & Procedures** site, you can find HR policies and procedures that impact associates in a variety of ways including:

- our work environment
- recognition and performance practices
- benefits
- compensation
- employment
- hiring



**List Item Order:** Most of the time, arrange items in a descending alphabetical fashion (that is, “A” from the top to “Z” at the bottom; place numeric and other non-alpha characters at the top before letters). If a list is getting too long (say, more than ten or 12 items at most), break it into smaller lists with descriptive subtitles.

### Document Type Icons

For hyperlinks in paragraphs or hover bulleted lists to non-SharePoint pages, use one of the following icons to indicate what type of file it is (Note: the “opens in a new window” icon supersedes these in the case of one of these file types *external to the Portal*):





The code looks like this (red in example is different for each image):

```
<a href="http://add your URL here">Text that appears on page</a>
```

Note that the image is **inside the anchor tags**. And there is a **no space** between the image and the closing anchor tag. In the ALT attribute (in red above), add a **very brief** description—just a couple of words—or simply put “Open Link.”

Icons	File Names (*.png)	Description & Example Extension(s)	Code
	type-access	Microsoft Office Access Database (ACCDB, ACCDE, ACCDT, ACCDR)	<code>&lt;img src="/sites/enterprise/PublishingImages/type-access.png" style="margin-left: 5px" alt="MS Access Database" style/&gt;</code>
	type-archive	Archive File (ARJ, CAB, RAR, TAR, ZIP, etc.)	<code>&lt;img src="/sites/enterprise/PublishingImages/type-archive.png" style="margin-left: 5px" alt="Archive File"/&gt;</code>
	type-excel	Microsoft Excel Spreadsheet (XLS, XLSM, XLSX, XLT, XLTM, XLTX, XLA, XLSB)	<code>&lt;img src="/sites/enterprise/PublishingImages/type-excel.png" style="margin-left: 5px" alt="MS Excel Spreadsheet"/&gt;</code>
	type-flash	Adobe/Macromedia Flash Animation (SWF)	<code>&lt;img src="/sites/enterprise/PublishingImages/type-flash.png" style="margin-left: 5px" alt="Adobe Flash Animation"/&gt;</code>
	type-illustrator	Adobe Illustrator (AI)	<code>&lt;img src="/sites/enterprise/PublishingImages/type-illustrator.png" style="margin-left: 5px" alt="Adobe Illustrator Image"/&gt;</code>





	type-multimedia	Multimedia (AVI, FLV, MOV, MP3, MP4, MPEG, WAV, WMA, WMV, etc.)	<code>&lt;img src="/sites/enterprise/PublishingImages/type-multimedia.png" style="margin-left: 5px" alt="Multimedia File"/&gt;</code>
	type-pdf	Adobe Portable Document Format (PDF)	<code>&lt;img src="/sites/enterprise/PublishingImages/type-pdf.png" style="margin-left: 5px" alt="Adobe Portable Document Format (PDF)"/&gt;</code>
	type-photoshop	Adobe Photoshop Image (PSD)	<code>&lt;img src="/sites/enterprise/PublishingImages/type-photoshop.png" style="margin-left: 5px" alt="Adobe Photoshop Image"/&gt;</code>
	type-powerpoint	Microsoft Office PowerPoint Presentation (PPTX, PPTM, POTX, POTM, PPAM, PPSX, PPSM, SLDX, SLDM, THMX)	<code>&lt;img src="/sites/enterprise/PublishingImages/type-powerpoint.png" style="margin-left: 5px" alt="MS PowerPoint Presentation"/&gt;</code>
	type-project	Microsoft Office Project (MPP, MPT, MPX)	<code>&lt;img src="/sites/enterprise/PublishingImages/type-project.png" style="margin-left: 5px" alt="MS Project File"/&gt;</code>
	type-visio	Microsoft Office Visio Diagram (VSD, VDX)	<code>&lt;img src="/sites/enterprise/PublishingImages/type-visio.png" style="margin-left: 5px" alt="MS Visio Diagram"/&gt;</code>
	type-word	Microsoft Office Word Document (DOC, DOCX, DOT, DOTX) or Rich Text Format (RTF)	<code>&lt;img src="/sites/enterprise/PublishingImages/type-word.png" style="margin-left: 5px" alt="MS Word Document"/&gt;</code>





## Body

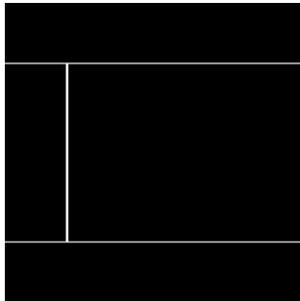
To pick up the proper styles, make sure all body text is enclosed in `<p>` (paragraph) tags. This will adopt the correct spacing and hyperlink styles, which include a larger, more easily read font size. **Arial is the official font of the My Macy's Portal.** Do not use other font faces or non-standard colors. If you have other fonts on your pages, you must remove them. In-line styles are not necessary; your pages will pick up the proper font attributes automatically.





## Anatomy of a Page

### The Four Main Sections



A typical Portal page is comprised of four main sections:

- [Header](#)
- [Left Navigation Pane \(LNP\)](#)
- [Page Body](#)
- [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.”





## Header



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. For example, on some pages the top-level gray navigation tabs are gone (which is why the red sub-navigation is as large as it is: it sometimes gets “promoted” to the top level). Note that in Search results pages, the Search field is not present in the Header (it would be redundant and confusing, if it were).



## Left Navigation Pane UPDATED (08/24/12)

The **Left Navigation Pane** is the expandable/collapsible area containing “local” site navigation text links that go three levels deep off the site root (**not** the Portal root); it is sandwiched between the Header and Footer and sits to the left of the Page Body.



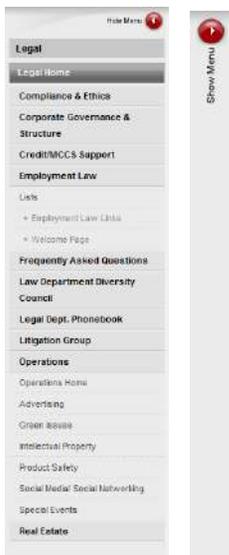


The LNP is not always present. Its appearance and content are at the discretion of the admin in charge of a given site. In the future, smoother expand/collapse animation is planned, as well as expandable/collapsible levels within it.



**Note:** Site admins can elect to use the LNP or not. They can also decide whether to use it expanded or collapsed by default. Whatever you decide, you should be consistent throughout your site. In other words, if you use the LNP on a page, you should use it everywhere. If it is collapsed by default, it should be collapsed everywhere in your site.





- The user toggles between two states: expanded and collapsed.
- Clicking the round red “Hide Menu” button when the LNP is expanded causes it to collapse. Clicking on “Show Menu” causes it to expand.
- The dark gray background on an item indicates the user is on that page in the hierarchy.
- The LNP shows up to four levels deep in the hierarchy. Each level has a distinctive style to help the user identify the relative depth.

Read the tip about how to [collapse it by default](#).

**Note: We are aware that the LNP does not always properly extend down the page to the footer. This is a design problem we are working to solve.**

## Page Body



The **Page Body** is the primary content area of the page; it is sandwiched between the Header and Footer and sits to the right of the LNP. At the top are the breadcrumb trail, page title (and description, which is currently not being used, so is not visible) and the two social notification icons on the far right. 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](#).





## Systems Development

### This Week at MST

- [MST NOW Site](#)
- [April Star Monthly](#)
- [MST Make Magic Six Fall 2010 Winners and Honorable Mentions](#)
- [MST NOW: Larry Lewark March 24 Webcast](#)
- [Star Monthly May](#)
- [Star Monthly June](#)

### About MST Systems Development

MST uses a mix of Internet, wireless, client/server, midrange, and mainframe technologies to meet Macy's business needs. MST management works closely with stores and Corporate to identify new opportunities and ensure that Macy's systems can adapt to changing business conditions.

### Leadership Responsibilities



**Brian Leinbach, SVP—**  
All systems development areas of MST



**Robert Dickey, GVP—**  
Direct to Consumer (D2C) systems



**Efrain Irizarry, GVP—**  
Customer Relationship Management, Credit, Store systems and Field Services



**Dean Compton, GVP—**  
Merchandising systems, Logistics and Operations systems



**Terry Horner, GVP—**  
HR, Finance, and Associate (HFA) systems



**Darryl McCaskill, GVP—**  
Marketing, Pricing, and Enterprise Support systems, Systems Development Services





## Footer



The **Footer** is the bar across the bottom of the page containing categorized text links. Some of these links are global (they always appear to all users) and others are targeted. For example, navigation tabs in the Header are targeted to certain groups, so different people in different business units see different tabs. The Footer mirrors those tabs in bulleted lists of links, so different users will likewise see different mirrored links below.

<p><b>Retail</b></p> <ul style="list-style-type: none"><li>Marketing</li><li>MCOM</li><li>Merchandising</li><li><u>Stores</u></li></ul>	<p><b>MLO</b></p> <ul style="list-style-type: none"><li>Communications</li><li>DC Locations</li><li>HR</li><li>Reports</li><li>Security</li><li>Systems</li><li>Transportation</li></ul>	<p><b>Departments</b></p> <ul style="list-style-type: none"><li>Corporate Communications</li><li>Credit &amp; Customer Service</li><li>Finance</li><li>Leadership Institute</li><li>Legal</li><li>Property Development</li><li>Tax</li><li>Travel</li></ul>	<p><b>Quick Links</b></p> <ul style="list-style-type: none"><li>BLM</li><li>Bloomingdales.com</li><li>Central Offices</li><li>Employeeconnection.net</li><li>GreenLiving</li><li>Help &amp; Support</li><li>Insite</li><li>Macys.com</li><li>MacysER</li><li>Macy's Inc</li><li>MCCS</li><li>MeetingPlace</li><li>MMG</li><li>Pipeline</li></ul>	
---	--	---	--	---





## Target Resolution

### Design for 1024x768



**Jargon Tip:** According to Wikipedia: “In digital imaging, a pixel, or pel, (picture element) is a single point in a raster image, or the smallest addressable screen element in a display device; it is the smallest unit of picture that can be represented or controlled.”

All Portal pages are currently intended for 1,024x768 displays (that is, monitors capable of showing at least 1,024 left-to-right pixels per row and 768 top-to-bottom pixels per column for a screen full of 786,432 pixels). In theory, this means that all side-to-side content should fit within this horizontal limit. Ideally, content top to bottom within the Page Body would also be visible without the user scrolling (this is referred in the design world as being “above the fold.” In practice, some larger tabular data is likely to “explode” out the right side and exceed these confines, but this situation should be rare. If possible, all your content should be above the fold. It is a challenge, yes, but not impossible, and your users will appreciate the effort by having to scroll much less! Read more about the [fold](#).

### Making Content Fit + Some Best Practices Tips

Here are some tips for staying within the target resolution and also staying above the fold...

- Remember the “KISS Principle”—Keep It Simple, Stupid. Often less is more, and a simple solution can be the most elegant and useful.
- Break content into smaller, more easily digestible paragraphs, lists, grids, graphs or other morsels.
- Paginate (that is, break things into multiple pages). Link to content elsewhere rather than putting it all in the page.





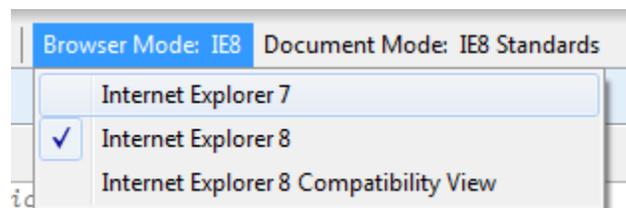
- Avoid unnecessary images or (Flash) animation, especially large ones that push content down or out of the 1024x768 confines.
- Be concise and brief in your writing. Avoid large blocks of text. Limit paragraphs to three sentences, if you can.
- Sometimes choosing a different SharePoint template (with different zones) or moving Web Parts around can solve layout problems. Try stacking them in different ways or combining or splintering them.
- Give big Web Parts with lots of content room to breathe, meaning a whole page-wide zone to themselves. Things like lists, small images and such can go in a single column down the right side or can be snuggled together in two- or three-slot zones across the page. Experiment!
- Eliminate redundant or unnecessary Web Parts altogether. If it doesn't add value, it subtracts it.



**Jargon Tip:** “Best practices” refers to standard recommended ways of doing things that the majority of experts in a given industry/profession agree is the optimal way to achieve a desired result. In the usability world, this refers to those methods that allow users to accomplish tasks in the most efficient, intuitive manner.

### Testing Your Design

The simplest way to resize your browser window is to use the **F12 key**. This brings up the developer tools pane at the bottom of the browser window. Click **Browser Mode: IE8**. You should see this:





Make sure it reads **Browser Mode: IE8** and **Document Mode: IE8 Standards**. Test all your pages in this mode for best results. For related information, see the [Browsers](#) and [Size](#) sections.

Another way to test your page design’s compliance with the resolution directive is to reset your desktop resolution. For instructions from Microsoft on how to do this, see:

- **Windows XP**  
[http://www.microsoft.com/resources/documentation/windows/xp/all/proddocs/en-us/display\\_change\\_screen\\_resolution.mspx?mfr=true](http://www.microsoft.com/resources/documentation/windows/xp/all/proddocs/en-us/display_change_screen_resolution.mspx?mfr=true)
- **Windows Vista**  
<http://windows.microsoft.com/en-US/windows-vista/Change-screen-resolution>
- **Windows 7**  
<http://windows.microsoft.com/en-US/windows7/Change-your-screen-resolution>

Test URL:   
Window Width:   
Window Height:

Another way is to use [http://www.yournew.com/resolution\\_test.cfm](http://www.yournew.com/resolution_test.cfm) to test your page. This method maintains your desktop resolution (it even tells you what your resolution is), but loads whatever URL you choose into a browser window at the appropriate dimensions. Remember to enter **1024** in the “Window Width” field and **768** in the “Window Height” field. Select the “Check It Now!” button to see how your page appears at the target resolution.



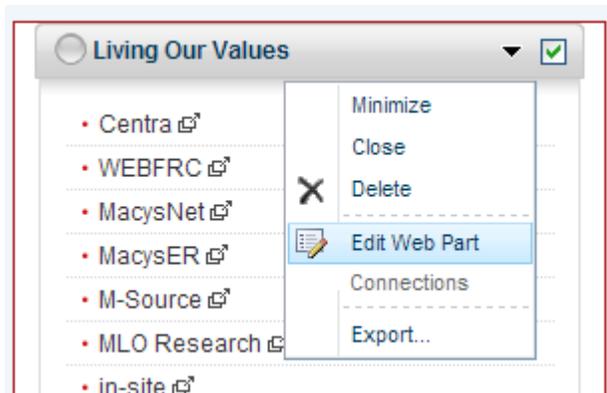
**Jargon Tip:** “URL” stands for “Uniform Resource Locator.” It is the global “address” of documents, media and other resources on the internet, sort of the Web equivalent of a path on your local computer or network.





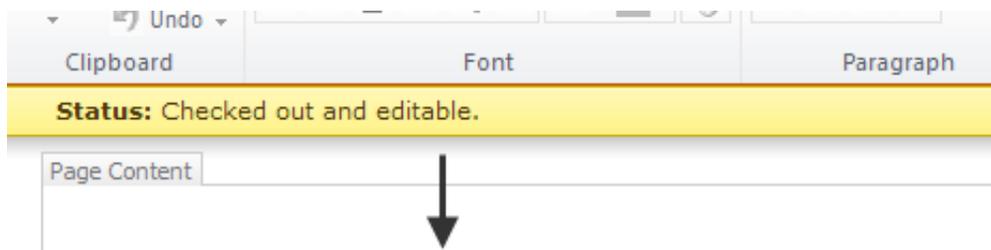
## Accidental Web Part Deletion (in SP2010)

### Problem



When one clicks on the down carat in a Web Part title bar to edit the Web Part, the page content shifts just enough to cause the selection in the dropdown to move up one selection (for instance, from “Edit Web Part” to “Delete”). If you’re too fast (meaning you selected and clicked “Edit Web Part” before the page content shifts down), you will delete your Web Part. There is no delete confirmation message; it just vanishes.

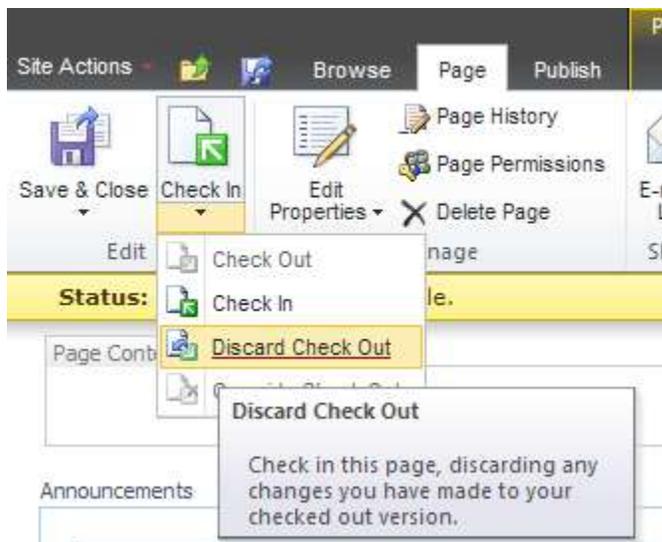
What’s possibly happening is the yellow Status bar is being inserted by SharePoint between the Ribbon and the page content. This pushes down everything below it just enough to change your selection on you. A difference in height between the header and the Ribbon may also be to blame. We’re working on it.





### Solution

The answer is: pay attention!



observe the shift, continue with your editing task.

It shifts so quickly that you may not realize what just happened. If you end up deleting a Web Part accidentally, regardless of what else you've changed on the page in other Web Parts, it's all gone. Well, sort of. At least the Web Part isn't actually deleted until/unless you check in the page.

You now need to choose the "Page" tab, click the down carat **under** the "Check In" button and choose "Discard Check Out." Unfortunately, you have to come back in and start all over with your changes.

The only real way to avoid this irksome bug is to **wait patiently** for the shift downwards that you know is coming. Click the down carat and **wait**. Don't choose anything from the dropdown. In my experience, it usually takes one to three seconds to do its thing.

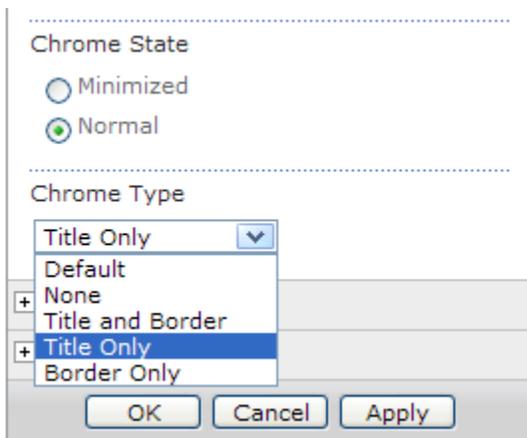
**Click, wait and count (One Mississippi, Two Mississippi, Three Mississippi),**





## Wrong Web Part Chrome Appearance

### Problem



WP body border); behaves at it should.

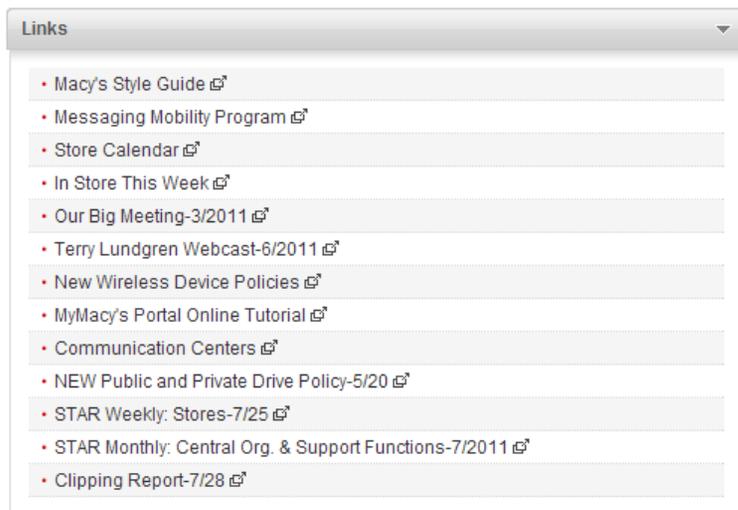
If you can modify a Web Part (WP), you can select its **Chrome Type** setting. These are as follows:

- **Border Only**—normally this applies **partial chrome** with only the WP body border (**not** the gray title bar); behaves at it should.
- **Title and Border**—normally this applies **all chrome** with both the gray title bar and the WP body border; **this is also “Default.”** When you create a new Web Part, if you don’t change the chrome type it’ll take this style. See the next page for an example; behaves at it should.
- **Title Only**—normally this applies **partial chrome** with only the gray title bar (**not** the WP body border); **it incorrectly appears as “Title and Border” does.**
- **None**—normally this applies **no chrome at all** (neither the gray title bar nor the





## Solution



**Default** (“Title and Border”) is the preferred style in most instances, particularly for tabular data or lists.

**! “Title Only” is a priority item to be fixed, so stay tuned.** I’ll communicate here when it has been resolved.

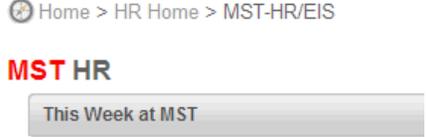
## Bad or Duplicate Page Titles

### Problem

Some pages may have duplicate or incorrectly formatted page titles. Notice that some are images, some are text, and some are Web Part titles used as page titles.





Example	Comments
 <p>Home &gt; IFS</p> <p><b>Home</b></p> <p>Infrastructure Services</p> <p>Leadership Responsibilities</p>	<ol style="list-style-type: none"><li>1. “Home” unacceptable name</li><li>2. Duplicate (correct) title should be where “Home” is</li></ol>
 <p>Home &gt; HR Home &gt; MST-HR/EIS</p> <p><b>MST HR</b></p> <p>This Week at MST</p>	<ol style="list-style-type: none"><li>1. Non-standard (multi-colored) page title</li><li>2. Acronyms should be spelled out, so users know what they mean</li></ol>



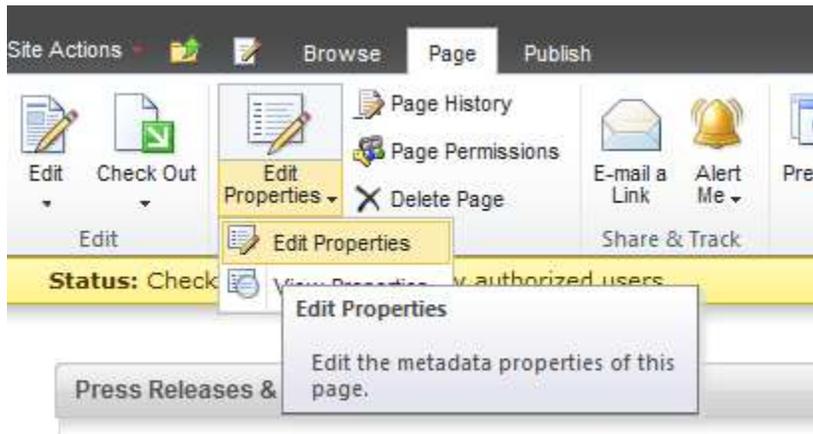


<p>Home &gt; Departments Home &gt; CCS</p> <p><b>Home</b></p>  <p><b>Credit and Customer Services</b></p>	<ol style="list-style-type: none"><li>1. "Home" unacceptable name</li><li>2. Duplicate (correct) title should be where "Home" is</li><li>3. Duplicate (correct) title is graphical, not real text</li></ol>
<p>Home &gt; HR Home &gt; Policies &amp; Procedures</p> <p><b>Policies &amp; Procedures Home</b></p>  <p><u>Policies &amp; Procedures</u></p>	<ol style="list-style-type: none"><li>1. "Home" unacceptable portion of page title</li><li>2. Duplicate (correct) title should be where "Policies &amp; Procedures Home" is</li><li>3. Duplicate (correct) title is graphical, not real text</li></ol>





## Solution



Just go to the page you want to add/change the page title on. In the "Site Actions" dropdown, choose "Edit Page." Click the **Page** tab, choose "Edit Properties." It looks like this:

(If you don't see it, click on the "**Site Actions**" drop-down control in the top gray bar of the page. Choose "**Show Ribbon**".)

Another possibility is that you don't have editing rights for the page in question. If this is the case, you need to contact the page owner to do this whole procedure outlined here **or** have him/her grant you permission so you can do it.

If it works for you, you'll see these fields (but, hopefully, not the silly title I just made up):

Title	<input type="text" value="Miss Piggy Loves Kermit"/>
Description	<div style="border: 1px solid gray; height: 100px;"></div>

Change the "Title" field to the value you want, and then click "**OK**".





Please, **do not use “Home” or “Home Page” in your title**, even if the page in question is the home page of your site. If it is the home page for, say, Logistics, use simply “Logistics,” not “Logistics Home.” Likewise, in other sections of your site, it is not necessary to reiterate “Logistics” (or whatever your area is). There is ample reinforcement for the user to know where they are. So, do **not** use “Logistics 2010 Reports,” for example, just use “2010 Reports.”

Do **not** try to make the title fancy with graphics, animation or multiple font faces, sizes, decoration or colors. The style in the enterprise style sheet is the official version. Also, if your breadcrumb trail is using acronyms (as it should to keep the navigation short), spell out the acronym in your page title and put the acronym in parentheses, like this:

>> Q4M

**Quality4Macy's (Q4M)**

Duplicate titles are usually the result of a pseudo-title manually added to either a Web Part at the top of the page or the “Page Content” field also at the top of the page that you can modify in edit mode. Delete any pseudo-title and clear all content out of the “Page Content” area. Please **keep the “Page Content” field clear**—even of HTML tags—and add any intro or explanatory text that you would have put there into a Content Editor Web Part (**in paragraph tags!**) into one of the nearby Zones. The practical reason for this is that “Page Content” content can’t be hidden or configured in the same way that Web Parts can. This will give you more flexibility.





## Duplicate Breadcrumb Trails

### Problem

Some pages may have duplicate breadcrumb trails, like this:

 Home > Departments Home > Legal

Home > Departments Home > Legal



The Legal Dep  
legal questions

### Solution

See the section on [Macy's templates](#).

## Content Floating Outside Its Web Part

### Problem

Sometimes legacy content floats partially or wholly outside of its parent Web Part. Search fields and buttons have been known to do this.

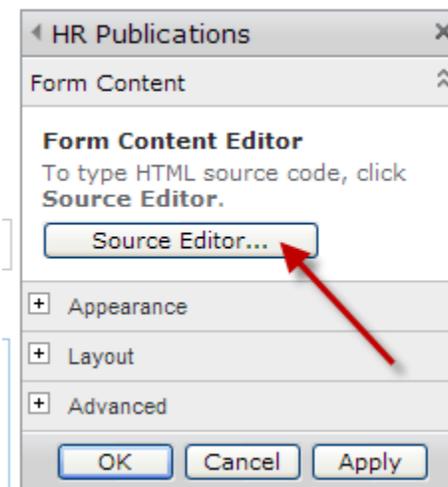
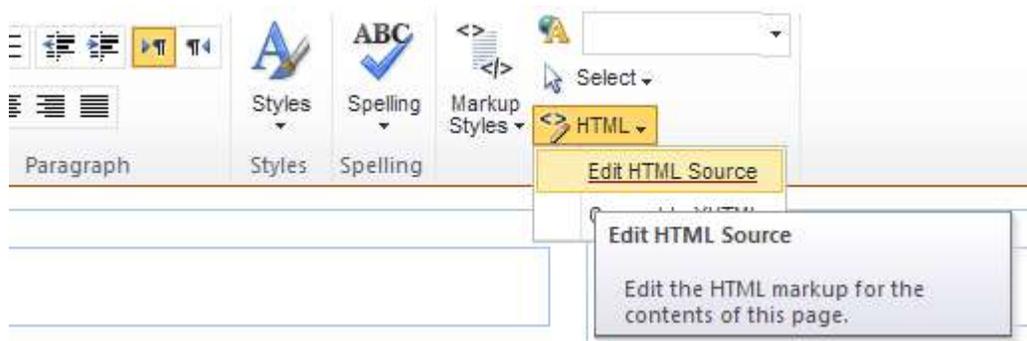




### Solution

There is a good solution and a bad solution. The good one involves editing the HTML. If you don't know how to edit the markup and/or script directly, ask someone to help you. This is the preferred solution by far.

Hit the Down Carat in the Web Part Chrome and choose "Edit Web Part." Click in the Web Part body. Then, on the Ribbon choose **HTML**, then **Edit HTML Source**. If it's a Form Content Web Part, click the **Source Editor...** button on the far right (you may have to scroll horizontally to see it).





There's a good chance you have content in a table or encased in deprecated code of one sort or another. Strip out everything and use DIV tags. If your content is just images or a single form field, center-align the whole works within `<DIV style="text-align:center"></DIV>`. If you have text, mixed content or bulleted lists, they will left-align automatically (if not, change "center" in the style to "left"). In the real-life example below, stripping out the table and "spacer" GIFs resolved the problem. Note: The accompanying rollover JavaScript is not shown.





### Broken Version

Not to Scale



```
<TABLE width="100%" align=left summary="">
<TBODY>
<!--**** SPACER ****--><TR>
<TD colspan=3><IMG
src="/sites/enterprise/hr/PublishingImages/blank_spacer_1px_1px.gif"></TD></TR>
<TR>
<TD><!--**** HR NEWS STORES ****-->
<A
onmouseover="MM_swapImage('roll-hrnewsstores','','/sites/enterprise/hr/PublishingImages/Communication%20vehicles/HR-NEWS-STORES-ROLL.jpg',1)"
title="" onmouseout=MM_swapImgRestore()
href="/sites/enterprise/hr/Pages/HRNewsIndex-Stores.aspx" target=""><IMG
style="BORDER-RIGHT: 0px solid; BORDER-TOP: 0px solid; BORDER-LEFT: 0px solid; BORDER-BOTTOM: 0px solid"
src="/sites/enterprise/hr/PublishingImages/Communication%20vehicles/HR-NEWS-STORES.jpg" align=top border=0 name=roll-hrnewsstores></A></TD>
<TD><!--**** HR NEWS CENTRAL ****--><A
onmouseover="MM_swapImage('roll-hrnewscentral','','/sites/enterprise/hr/PublishingImages/Communication%20vehicles/HR-NEWS-CENTRAL-ROLL.jpg',1)"
title="" onmouseout=MM_swapImgRestore()
href="/sites/enterprise/hr/Pages/HRNewsIndex-Central.aspx"
target=""><IMG style="BORDER-RIGHT: 0px solid; BORDER-TOP: 0px solid; BORDER-LEFT: 0px solid; BORDER-BOTTOM: 0px solid"
src="/sites/enterprise/hr/PublishingImages/Communication%20vehicles/HR-NEWS-CENTRAL.jpg" align=top border=0 name=roll-hrnewscentral></A></TD>
<TD><!--**** ASK LEGAL ****--><A
onmouseover="MM_swapImage('roll-asklegal','','/sites/enterprise/hr/PublishingImages/Communication%20vehicles/ASKLEGAL-ROLL.jpg',1)"
title="" onmouseout=MM_swapImgRestore()
href="/sites/enterprise/hr/Pages/ASKLEGAL.aspx" target=""><IMG
style="BORDER-RIGHT: 0px solid; BORDER-TOP: 0px solid; BORDER-LEFT: 0px solid; BORDER-BOTTOM: 0px solid"
src="/sites/enterprise/hr/PublishingImages/Communication%20vehicles/ASKLEGAL.jpg" align=top border=0 name=roll-asklegal></A></TD>
<TD><!--**** SPACER ****-->
<IMG style="BORDER-RIGHT: 0px solid; BORDER-TOP: 0px solid; BORDER-LEFT: 0px solid; BORDER-BOTTOM: 0px solid"
src="/sites/enterprise/hr/PublishingImages/blank_spacer_1px_1px.gif"
width=70 align=top border=0/></TD></TR>
<!--****ROW SPACER ****--><TR>
<TD colspan=3><IMG
src="/sites/enterprise/hr/PublishingImages/blank_spacer_1px_1px.gif"></TD></TR></TBODY></TABLE>
</DIV></TD>
</tr>
</table>
```

### Fixed Version

Not to Scale



```
<DIV style="text-align: center;">
<!-- **** NEWS STORES **** -->
<A
onmouseover="MM_swapImage('roll-hrnewsstores','','/sites/enterprise/hr/PublishingImages/Communication%20vehicles/HR-NEWS-STORES-ROLL.jpg',1)"
title="" onmouseout=MM_swapImgRestore()
href="/sites/enterprise/hr/Pages/HRNewsIndex-Stores.aspx" target=""><IMG
src="/sites/enterprise/hr/PublishingImages/Communication%20vehicles/HR-NEWS-STORES.jpg" border=0 name=roll-hrnewsstores></A></DIV>
<!-- **** NEWS CENTRAL **** -->
<A
onmouseover="MM_swapImage('roll-hrnewscentral','','/sites/enterprise/hr/PublishingImages/Communication%20vehicles/HR-NEWS-CENTRAL-ROLL.jpg',1)"
title="" onmouseout=MM_swapImgRestore()
href="/sites/enterprise/hr/Pages/HRNewsIndex-Central.aspx"
target=""><IMG
src="/sites/enterprise/hr/PublishingImages/Communication%20vehicles/HR-NEWS-CENTRAL.jpg" hspace="4" align=top border=0
name=roll-hrnewscentral></A>
<!-- **** ASK LEGAL **** -->
<A
onmouseover="MM_swapImage('roll-asklegal','','/sites/enterprise/hr/PublishingImages/Communication%20vehicles/ASKLEGAL-ROLL.jpg',1)"
title="" onmouseout=MM_swapImgRestore()
href="/sites/enterprise/hr/Pages/ASKLEGAL.aspx" target=""><IMG
src="/sites/enterprise/hr/PublishingImages/Communication%20vehicles/ASKLEGAL.jpg" align=top border=0 name=roll-asklegal></A>
</DIV>
```

Occasionally, changing the Chrome Type to “Title and Border” will also solve the problem, even if the Web Part has a title and border by virtue of being set to “Border Only.” The “bad” solution is quick and dirty, but it works. Simply go to the “Appearance” portion of the Web Part editing palette (see right-hand image above) and add a pixel height to the Web Part. Look at the other Web





Parts around it and play with the number to match the same level of whitespace “padding,” especially if your Web Part has a border. I do not recommend this solution, but if there’s no other choice, go for it.

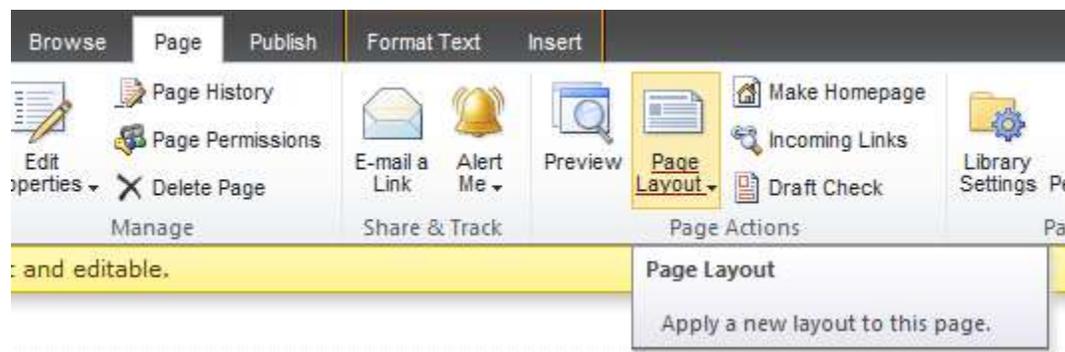
## Update Your Page Layout to a Macy’s Template

### Problem

You want to change to a Macy’s template, but don’t know how or what it’ll do to your page.

### Solution

SP2010 allows you to go to each page and select/change any template there is in real time without the “group” restrictions in SP2007. Neither do you have to export and then import Web Parts to the new page. **Be forewarned, though, when you do this, all your Web Parts will be rearranged and placed in a single zone on the page.** You won’t lose Web Parts, but you’ll have to move them around to get them laid out the way you want.



Put the page into Edit mode, click the Page tab and click “Page Layout.” Choose a template under the “Pages” section (the names start with “Macys.”

**One caveat:** for Article Web Parts, the text is preserved, but images are lost. You’ll have to re-add them to those types of Web Parts manually. A similar phenomenon appears to





happen with images in the “Page Content” field at the top of each page. Cut and paste all content out of the “Page Content” field into a new Content Editor Web Part before you swap templates.

Here’s an important point: [Page layouts](#) are templates of page zone arrangements upon which page-publishers build their pages. There are a limited number of them, and a change to any one of them affects everyone who chooses that layout.

If “Page Layout” is grayed out (disabled) in the Ribbon, it is likely that your page is detached from that page’s chosen page layout. Please open a ticket with us to reattach. This will fix a number of issues, including absent page titles and duplicate breadcrumb trails, plus any other fixes to the layout that were implemented while the page was detached.

## Spontaneously Duplicating Flash

### Problem

A Flash object duplicates itself each time you save the page in SharePoint.

### Solution

You have to change the Web Part from a Content Query Web Part (CQWP) to a Form Web Part. To do so, follow these steps:

- Open the CQWP that contains the Flash object. View and copy the HTML.
- Add a Form Web Part to the page. Paste the HTML into it (in **HTML Edit Mode**, of course).
- Ensure that the Flash Web Part performs as expected in the new Web Part.
- If you find no issues, delete the CQWP and save the page.





## Flash Hides Portion of Main Navigation

### Problem

When the user hovers over a main navigation tab with a cascading menu, the menu opens partially underneath, rather than atop, the nearby Flash animation.

### Solution

As black bolded in the example below, add `<param name="wmode" value="transparent">` under the `<OBJECT>` tag and `wmode="transparent"` to the `<EMBED>` tag:

```
<object height="218" width="385" classid="clsid:d27cdb6e-ae6d-11cf-96b8-444553540000" id="concept">  
  <param name="wmode" value="transparent">  
  <param value="/sites/enterprise/someflashmovie.swf" name="movie">  
  <param value="high" name="quality">  
  <param value="true" name="play">  
  <param value="true" name="loop">  
  <param value="transparent" name="wmode">  
  <param value="false" name="swLiveConnect">  
  <embed height="218" width="385" type="application/x-shockwave-flash" swliveconnect="false" id="concept"  
  wmode="transparent" loop="true" play="true" quality="high" src="/sites/enterprise/someflashmovie.swf">  
</object>
```





## Stuck Ribbon

### Problem

The Ribbon gets stuck in the load state. This fix also applies for users having issues where the page gets stuck in a loading state expanding out the group by headers for list or document libraries.

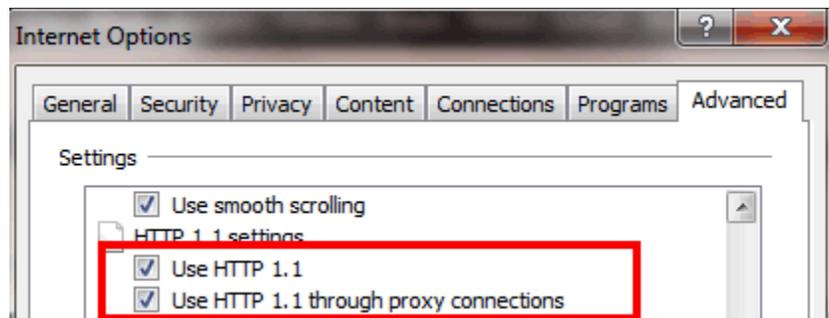


### Solution

You must flush cached files from your browser. In Internet Explorer:

1. Click **Tools > Internet Options**.
2. Choose the **Advanced** tab.
3. Ensure that the two items below are enabled:





4. Delete cookies, cache and history.
5. Close and reopen your browser.





## SharePoint Tips

### Add an Icon to Your Web Part Title Bar

The screenshot shows the 'Advanced' section of the Web Part Properties pane. It includes several checkboxes for permissions: Allow Minimize, Allow Close, Allow Hide, Allow Zone Change, Allow Connections, and Allow Editing in Personal View (checked). Below these are text boxes for Title URL (containing '/sites/enterprise/departments/'), Description, and Help URL. There is a dropdown for Help Mode set to 'Modeless'. At the bottom, there are two more text boxes: 'Catalog Icon Image URL' (containing '/\_layouts/images/itann.gif') and 'Title Icon Image URL', which is highlighted with a red arrow pointing to it.

This needs to be used exceedingly rarely. But it is a feature available to you, so I want to explain how it works and what the rules are regarding its usage.

**You must use one of the approved icons in the list below. If you have others you'd like added, submit them to the EPT and we'll consider each on a case-by-case basis.**

For design reasons, they have to be 16x16. To add an icon to your Web Part chrome, do the following:

- Click on "Edit Page" on the Ribbon to enter edit mode.
- Click on the down carat and choose "Edit Web Part" in the title bar of the Web Part you want to modify.
- Click on "Advanced" to expand the section in the control pane.
- In the "Title Icon Image URL" field, enter in this path:  
**/\_layouts/images/MyMacys2010/**
- In the following table, look up the image you want to add from the library and add its file name to the path (for example, **\_layouts/images/MyMacys2010/wp-icon-info.png**).





Icons	File Name s*.png)	Uses
	wp-icon-document, wp-icon-document2, wp-icon-document3	Unspecified documents type
	wp-icon-contact, wp-icon-contact2, wp-icon-contact3	Contact information
	wp-icon-warning	Urgent message
	wp-icon-announcement	Announcement
	wp-icon-bug, wp-icon-bug2, wp-icon-bug3	Bug reports, lists
	wp-icon-globe, wp-icon-globe2	Internet (external) links
	wp-icon-tip, wp-icon-info	Tips, information, advice
	wp-icon-security, wp-icon-security2, wp-icon-security3, wp-icon-security4	Security, passwords, logins
	wp-icon-money, wp-icon-money2	Sales reports, stocks
	wp-icon-user, wp-icon-people, wp-icon-people2	Users, people
	wp-icon-desktop, wp-icon-desktop2	Desktop PC repair, support, documentation
	wp-icon-laptop, wp-icon-laptop2	Laptop PC repair, support, documentation
	wp-icon-smartphone	Mobile applications, repair, support, documentation
	wp-icon-chart, wp-icon-graph2	Sales reports, stocks, survey results
	wp-icon-calendar, wp-icon-calendar2	Calendar of events, timelines
	wp-icon-list, wp-icon-list2	Lists (of people, documents, multimedia, whatever)





	wp-icon-links	Links internal and/or external
	wp-icon-education	Training, orientations, education-related
	wp-icon-help, wp-icon-faq, wp-icon-faq2, wp-icon-faq3	Help, FAQs
	wp-icon-book, wp-icon-books, wp-icon-book2, wp-icon-book3	Contacts, documents, libraries, resources
	wp-icon-rss	RSS
	wp-icon-tools, wp-icon-wrench	Settings, configuration, controls, dashboards
	wp-icon-paperbag	Bag Hunger campaign
	wp-icon-leaf	Green Living campaign (or environmental concern)

We can add to, modify or replace any of these over time, but for now, this is the approved list. Their use must be appropriate within the context of the Web Part they are attached to. **It must apply to everything in that Web Part, not just some of it.** Use sparingly, and, remember, if it doesn't add anything to the user experience, leave it off.

### Collapse Left Navigation Pane by Default

You can cause the left navigation on any page to appear in the collapsed state each time the page loads with the addition of the below JavaScript snippet in a hidden Content Editor Web Part. **It has to be added in HTML mode.**

```
<script language="javascript">
javascript:collapseNavigation();
</script>
```





**This should be rarely used.** Please only use this if your content is too wide no matter what you do and you need the little extra space this buys you. Otherwise, please leave the LNP open by default.



**Warning:** Make sure the Web Part is hidden. Click the down carat, choose “Edit Web Part.” In the right configuration panel, expand the “Layout” section and tick the “Hidden” checkbox. Since **even hidden Web Parts take up some amount of space in a page**, place the hidden CEWP in a slot at the bottom of one of the zones on the page. It won’t affect the top alignment of the other Web Parts or the spacing between them.

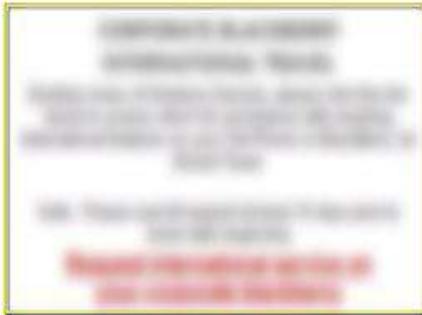
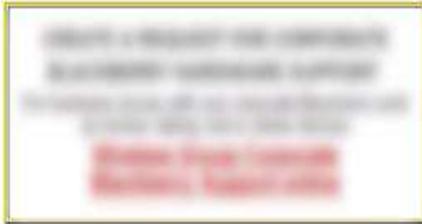
### Proper Use of Web Part Chrome

Do **not** create your own “container” for a Web Part, use the chrome for that purpose. Also, do **not** create a title **inside** a Web Part that applies to all the content in that Web Part. Sub-titles are okay inside the Web Part, but use the Web Part title bar to label all the content within it.





### The Wrong Way



### The Right Way

By Function

**Compensation & Benefits**

- Meet the Team
- What We Do

---

**Associate Relations & Recruiting**

- Meet the Team
- What We Do

---

**Education & Information Services**

- Meet the Team
- What We Do





## Page Layouts, Zones and Web Parts



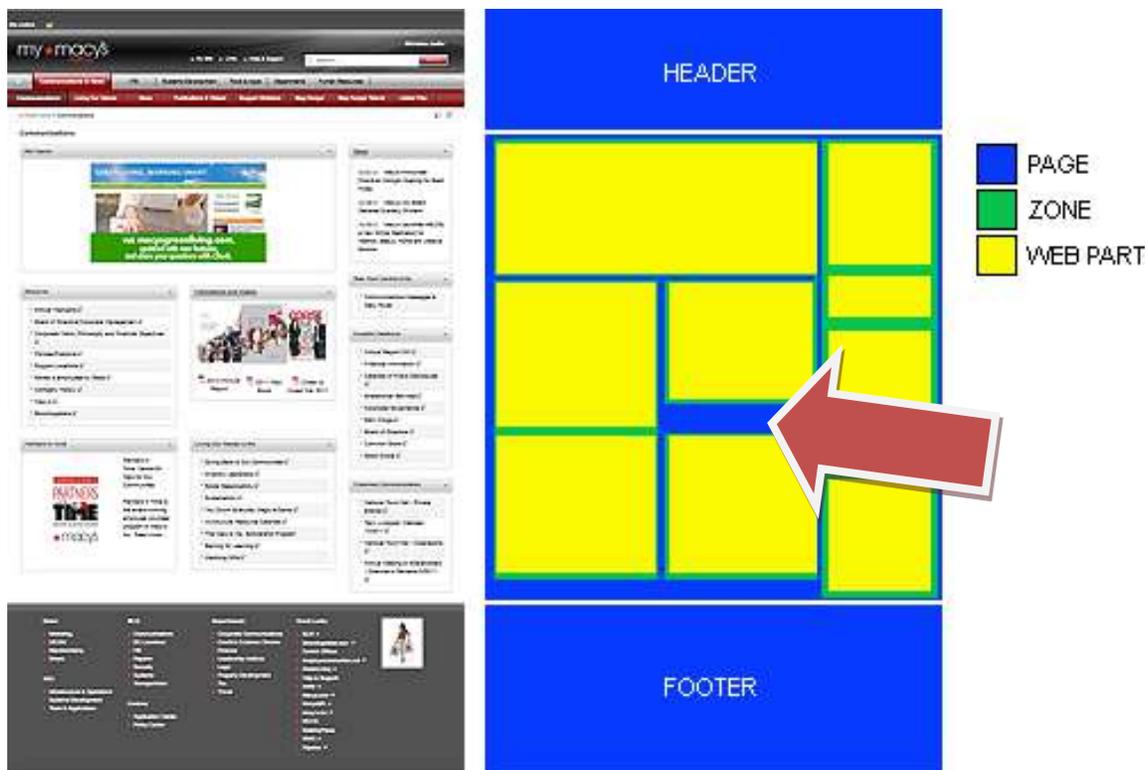
I like extended metaphors, so here's another one for you: think of dealing with SharePoint page layouts as kind of like developing land. Imagine that you have a piece of virgin land (in this case, the SharePoint page) that you want to build on. It's nice to look at, but kind of useless from a productivity point of view. So, you decide you want to subdivide it into parcels.

To do that, you start with choosing a template (page layout) composed of "zones." Zones dictate where you can place your buildings—known as "Web Parts" in SharePoint. Web Parts contain the "wings, floors and rooms"—your content—that are all things you want on the page. 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. Here's an example of how a typical page in SharePoint is divided up:





Working with 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).
- 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. See the arrow pointing at the blue “hole” in the middle of the page example above? That happens 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.



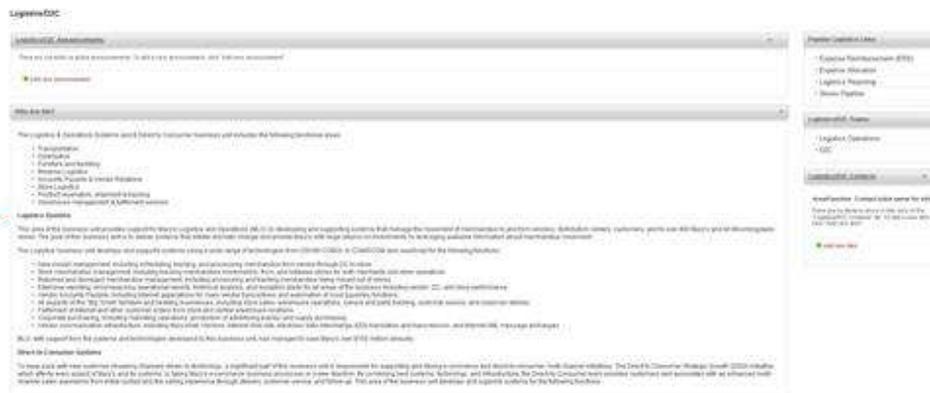
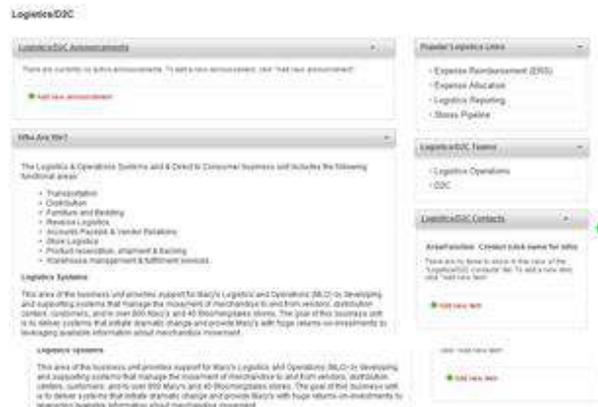


### Example: Screen 1,024 Pixels Wide

Not to Scale

### Example: Screen 1,920 Pixels Wide

Not to Scale



**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.





Page



KioskMacysBl



Macys1column



Macys3Column



Macys3Column



MacysBlankWe

Administrative Task



MacysHiddenL

Page



MacysHomeBl



MacysLanding



MacysNoLeftN



MacysNoLeftN



MacysNoLeftN



MacysQueryPe



MacysQueryPe

**Choose only one of the layouts depicted at left.** All have “Macys” in the name. Some rules regarding choice are as follows:

- 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.
- 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.

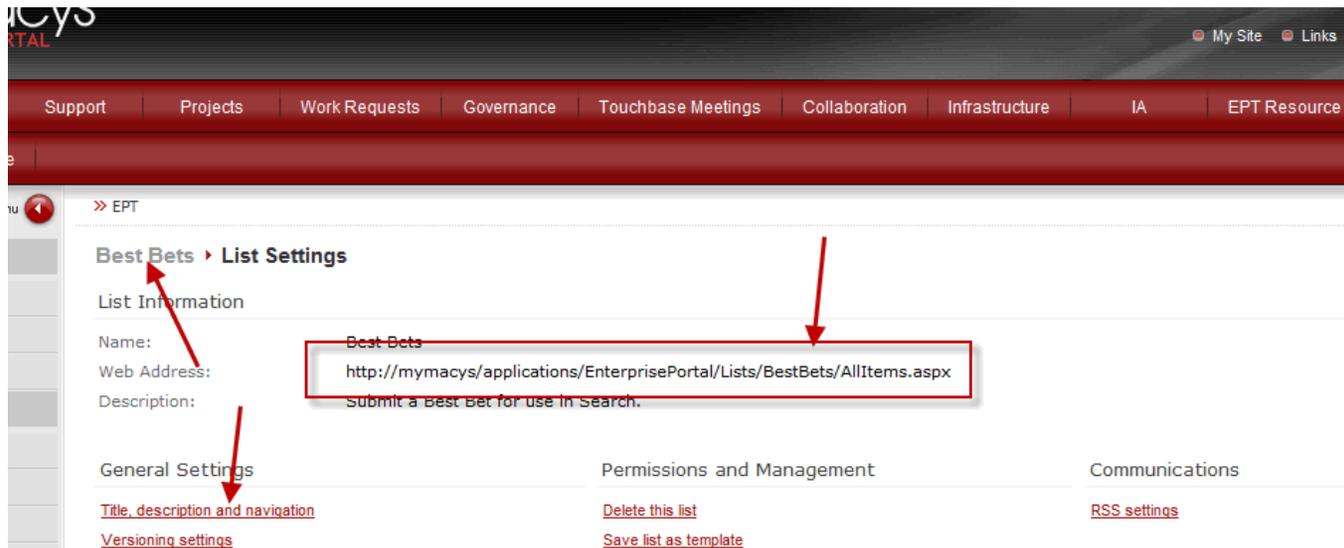




## Avoiding Spaces in URLs

### Lists

When creating a list, avoid spaces in the Name field. If you don't, SharePoint automatically adds "%20" to the URL (for example, "Best Bets" instead of </Best Bets/Pages/default.aspx> becomes </Best%20Bets/Pages/default.aspx>). Start with "BestBets," then go back and change the name. The URL will remain "clean" without the "%20." Notice below that the name has a space in "Best Bets," whereas the URL is "BestBets."



To change a list name, go into **General Settings > Title, Description, and Icon**. Add the necessary spaces to the **Name** field.





>> EPT 🔍 📄 🏠

**Best Bets** ▶ **List Settings** ▶ **General Settings**

---

**Name and Description**

Type a new name as you want it to appear in headings and links throughout the site. Type descriptive text that will help site visitors use this list.

**Name:**

**Description:**

---

**Navigation**

Specify whether a link to this list appears in the Quick Launch.

 Display this list on the Quick Launch?

Yes  No

## Sites

The same procedure applies to sites, except the field is labeled Title. Go into **General Settings > Title, Description, and Icon**. Add the necessary spaces to the Title field, but remove any and all spaces and/or “%20” from the URL Name field.





The screenshot shows a web portal administration interface. At the top, there is a navigation bar with links for 'My Site', 'Links', and 'Help & Support'. Below this is a secondary navigation bar with categories like 'Communications & News', 'IFS', 'Systems Development', 'Tools & Apps', 'Departments', and 'Human Resources'. A third navigation bar includes 'Desktop', 'Buying & Planning', 'Support', 'People', and ' Macy's Initiatives'. The main content area is titled 'Site Settings • Title, Description, and Icon' and is divided into three sections: 'Title and Description', 'Logo URL and Description', and 'Web Site Address'. The 'Title and Description' section has a 'Title' field containing 'Specialty Strategies' and an empty 'Description' field. The 'Logo URL and Description' section has a 'URL' field with the path '/\_layouts/images/HyMacys2010/mymacys/logo.gif' and a 'Click here to test' link, and an empty 'Enter a description' field. The 'Web Site Address' section has a 'URL name' field containing 'http://mymacys/sites/enterprise/merchandising/Spec... / Specialty Strategies', which is highlighted with a red box and a red arrow. At the bottom right, there are 'OK' and 'Cancel' buttons.





## Usability Advice

### The Fold

Though a growing body of knowledge supports the author’s conclusions below, this remains a complicated and rather controversial topic.

### History

The “fold” concept is a carryover from the print world, specifically in the newsstand sense. When mass dissemination of written information meant ink on paper exclusively, one had to consider carefully how the content appeared in relation to the literal fold of the paper. The idea, of course, was to entice the reader enough *above the fold* (note: this is the phrase you’ll hear the most) to get them to want more. Think about it: it’s the page one headlines and stories that sell the paper, not the stuff you can’t see on page 10.

The term today is used in interface design to refer to a somewhat similar phenomenon on computer screens: the area immediately visible to the user without having to scroll (or otherwise interact with the page) to see more content. In the Web’s early days, many designers came over from the print world. Naturally, they brought preconceptions with them about what constituted good design principles. After all, over 500 years of printing experience told them that the most important, attention-grabbing material needed to appear early at the top of the page. Intuitively, this makes sense.

Due to the simple logic of it, this philosophy remained entrenched throughout the Internet’s infancy. For a decade or more, challenging the preeminence of “above the fold” thinking as equally applicable to digital media was unthinkable. In recent years, however, that has begun to change.





## General Analysis

To many professionals in the Web design sphere today, concentrating on the fold is not altogether *wrong*, it's just *less relevant*. For starters, the fold does not appear in the same place for everyone. If you print two, 500 or a million copies of the same newspaper and fold them the same way, readers will experience the same presentation. Not so with electronic media served up on variously sized screens and in different browsers. For example, at standard computer resolutions, the breakdown is as follows:

- At 640x480: 310 pixels down.
- At 800x600: 430 pixels down.
- At 1024x768: 600 pixels down.
- At 1200x1024: 850 pixels down.
- At 1600x1200: 1,030 pixels down.

This doesn't even address smartphones, pads and other devices with their own screen resolutions/dimensions, which are rising in prominence, nor the available space disparity between different maximized browser windows (e.g., Internet Explorer 8 at full screen versus Chrome at full screen). Complicating the matter further still is the user's ability to resize at will the windows on their desktop.

So with the fold a moving target on the Web, one hallowed best practice has been to design for a lowest common denominator: the most widely used display resolution and the browser with the largest adoption. As you've read, the MyMacy's Portal does just that. It is designed for 1024x768 (and higher), using Internet Explorer 8. This isn't a perfect solution, though. Obviously, one size does not fit all, but it does attempt to create a common experience among the *majority* of users.

Another important factor in revisiting the fold debate has been user behavior. Over the years, UI designers and researchers have accumulated enough data to discern patterns that distinguish computer-based information consumption from paper-based. Plus, those behaviors have evolved over time with increased Internet use. The gulf between the two has widened.



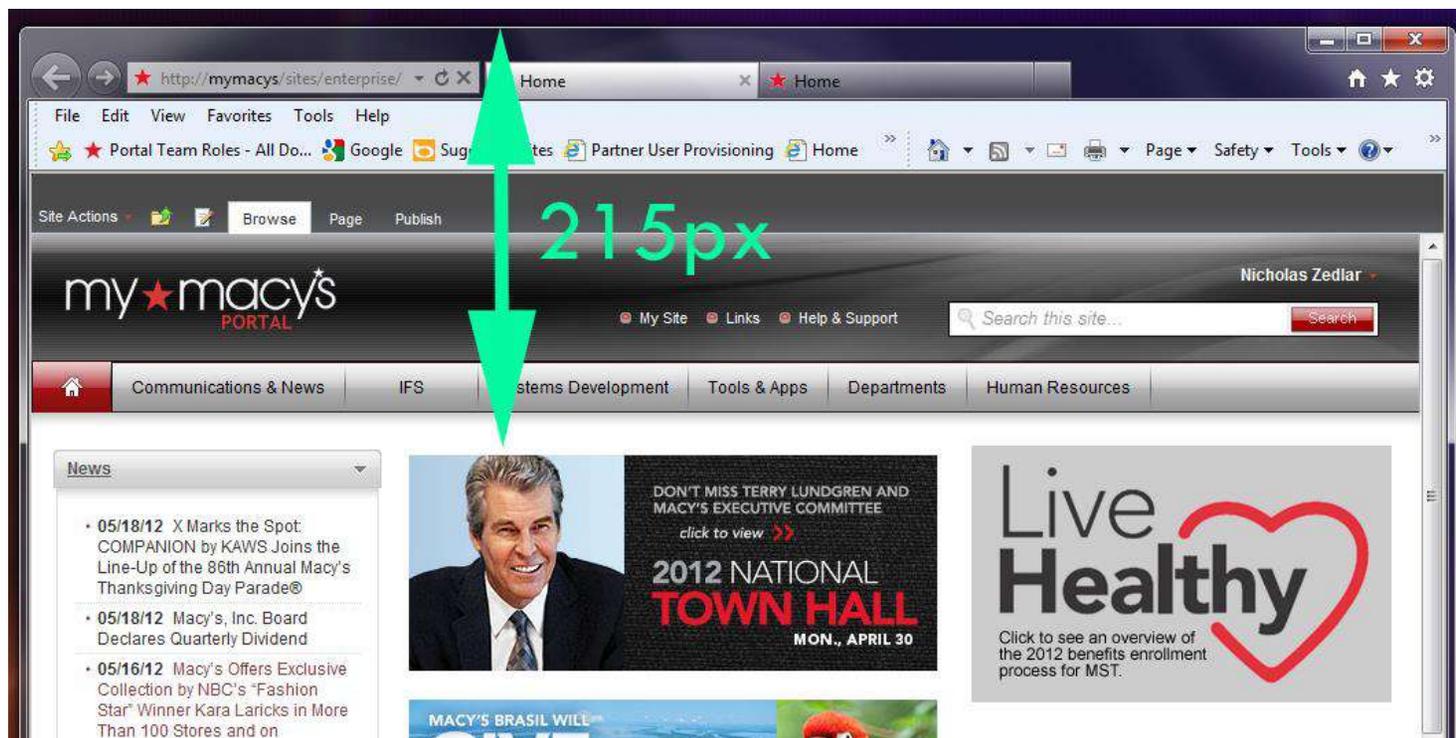


Whereas it's likely content above the fold will always have a higher click-through rate than content below it, recent studies indicate that users *will scroll* if they feel the content is relevant to them. In fact, they *expect* to scroll as integral to the browser experience.

### Portal-specific Analysis

Microsoft introduced the Ribbon with SharePoint 2010. Though a definite improvement over SharePoint 2007, it consumes far more space at the top of the page. In Internet Explorer 8/9 with the Menu Bar turned on, over 200px are dedicated to the header, main navigation and top page gutter before one ever sees content. It's an unfortunate side effect, and, as it happens, unavoidable.





In the intranet environment—more so than on the Web at large—users must scroll down the page to accomplish a given task. There are no alternatives, no choice of venue. They can't shop at amazon.com, then jump to overstock.com or buy.com in search of the best user experience, price or service. They are a captive audience, which inherently requires that users persist.





This does not excuse poor design on the part of designers or content publishers who take our users’ “captivity” for granted. It is merely recognition of the difference between an online shopper’s experience, for example, versus that of a worker on a corporate intranet.

## Conclusions

**In short, don’t fret the Fold.** If your content is worthwhile, your users will scroll with little detriment to the user experience. Good visual design and information architecture (that is, how you organize and present your site’s information) goes a long way towards mitigating the effects of the Fold. Some advice...

- Follow the tips and guidelines in this document for optimal format, layout and content grouping.
- Use SharePoint’s zones to your advantage, particularly multi-column page layouts.
- Use fluid design that expands and collapses with the browser window.
- Be concise and brief with your text.
- Be frugal with graphics: minimize their overall use and pare down their size.
- Use bulleted lists. They are efficient, intuitive and easy to scan.
- Don’t try to get fancy. The Portal is a work tool. Simple is almost always better.
- Don’t cram everything on a page. It’s okay to have the user drill down via hyperlinks to other pages. In the same way that the Fold is not some mythical nemesis, clicking, within reason, to reach content is fine—especially if the alternative is an overwhelming barrage of information.

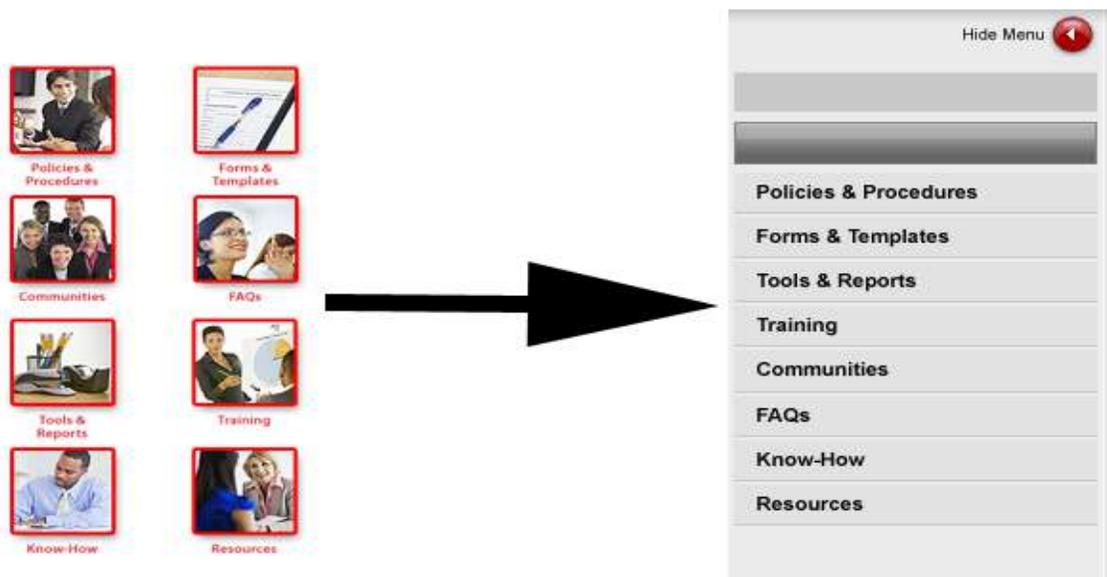
## Lots of Site Links? Move Them to (or Possibly Duplicate Them in) the LNP

If you find your main page is crammed full of links to other pages in your site, move those links to the Left Navigation Pane. It's very efficient space-wise, is expandable and collapsible as a whole by the user and dynamically updates. In the future, the levels





themselves will be expandable and collapsible too! Also, the same navigation appears as cascading menus in the top navigation bar (two levels deep).



If you're using some kind of generic corporate imagery for icons with the links in your page, the trade-off in my professional opinion is well worth transitioning the links to the LNP or to a simple bulleted list. Users aren't looking at the images to gauge where they should click; they're looking for clear context (like text labels underneath or to the side). As they scan across your links—from picture to text, picture to text and picture to text—it is a slow, inefficient and aggravating process. In the jargon of usability, this contributes to "cognitive overload."





## 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 nearly the same for someone Portal-surfing here firmly on the ground! 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. It works!

## Do-Not-Do List

### Custom Styles

**Do not create custom styles.** That means your only authorized font face is Arial. Do not use icons as bullets, especially the red Macy's star. In fact, don't mess with bullet styles at all. Do not use custom colors anywhere. Not borders. Not backgrounds. Not fonts. Not anywhere. Do not change any font styles, except as outlined in this document.





### “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.

### “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, 2012.” 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? John Cleese coined the phrase for a Monty Python sketch (or so they say). 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 and foolish. **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.





## 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). Here's an example of a raster zoomed in 500 percent. Notice how jagged the lines become:





- 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 onMouseOver), 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. Here is a notable example:





## Animation and Marquees

**Do not use animation unless you must.** Animation—be it Flash, GIF/PNG-based, a multimedia clip, a JavaScript slider or otherwise—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—if you do choose to employ it—should **not** be set to play automatically. Let the user choose to play it or not. **Do not use marquees at all. Ever.** Marquees used to interest people some 20 years ago when the Web was young, because it seemed to infuse some life into the inert page. But like any animation, it needed to enhance the user experience or prove itself worthless. Marquees fairly quickly did the latter. They aren’t just useless, however. They’re supremely annoying sappers, because they require the user to sit and wait for the scrolling text to appear, dribbling out information in a painful, linear lobe. Don’t subject our users this antiquated and ultimately foolhardy abomination. Find a better way to draw attention to important content, such as more prominent placement and/or some graphical cue.

## CAPS Shouting

**DO NOT USE ALL CAPS ANYWHERE, EXCEPT FOR ACRONYMS. THIS IS THE EQUIVALENT OF SHOUTING IN WRITING.** (See what I mean?)





Just as it's difficult to really listen to someone who's yelling at you, it's difficult to read "loud" text. Please tone it down. If you need to emphasize something, use **bolded** or *italicized* text (bold is preferred). But do so sparingly and only when you really have an important point to make or a legitimate reason to draw attention to a particular word or phrase. When **overused**, *this is also a distraction* to the *user*.

### 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.

### Keeping Users in the Dark

**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.

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), 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.

### Iframes and In-page Scrolling

**Do not use iframes or insert scrolling sections into the page**, unless there is absolutely no other solution. Better information architecture (IA)—that is, the way you organize your content—will often negate the need for long scrolling lists.

### 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.

### Over-the-Top Punctuation????!!! UPDATED (08/24/12)

**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. 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.





**Active Versus Passive Writing Style** UPDATED (08/24/12)

**Use active voice in your writing.** Everyone writes wimpy sentences from time to time. For example, my original sentence here was “Everyone is guilty from time to time of writing wimpy sentences.” Active voice is more economical (generally uses fewer words) and clearer (usually conveys who or what is doing something) than its passive counterpart.





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