



Unified Interface Playbook

Transition from the legacy web client to the Unified Interface

2019/2020



Purpose and scope







THE SITUATION

There is a fantastic opportunity to review the value of the Unified Interface as we move towards it being the strategic direction

PURPOSE

This playbook is intended to help customers, partners and Microsoft field roles plan and execute transitions from the legacy web client to the Unified Interface.

Audiences:

-  Customers
-  Partners
-  ISV
-  FastTrack Engineers
-  Customer Success Managers
-  Dynamics 365 CE Consultants

In summary, this guide will help you:

- ✓ Understand the Unified Interface
- ✓ Understand the transitioning process
- ✓ Develop a strategy for discussions and the transition
- ✓ Ensure a smooth transition
- ✓ Manage user inquiries and potential objections effectively
- ✓ Find the resources that will support the process

BASED ON EXPERIENCES TO DATE, A SOLID TRANSITION LARGELY DEPENDS ON 7 FACTORS:

SUCCESS

- Understanding the Unified Interface
- Seeing the value of the Unified Interface
- Assessing the scope of transitioning to the Unified Interface
- Managing the process of transitioning to the Unified Interface
- Taking advantage of key benefits of Unified Interface
- Accommodating changes and gaps in the Unified Interface
- Timely response to user inquiries and objections

INSIDE THIS PLAYBOOK:

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Chapter 2 EXPLORE

Where and when do I start?

Chapter 3 TRANSITION

Transitioning to the Unified Interface

Chapter 4 OPTIMIZE

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Chapter 1 INITIATE

The right conversations

What is the Unified Interface?

- It is the primary (and soon to be only) client for all Common Data Service apps, covering desktop Web, all Mobile & App for Outlook clients.

Why the Unified Interface?

- It is modern, responsive, fast, flexible

Why move away from the legacy web client?

- Maintaining a single code base
- Platform for ongoing innovation
- Part of modernization strategy

What is new and different?

- Streamlined screen layouts with responsive design
- New user experiences and improved extensibility
 - Standard and custom controls
 - Embedded Canvas Apps
 - New APIs & Features

Resources

Chapter 2 EXPLORE

Where and when do I start?

Create a test application (App)

- From default Site Map
- Quick check & identify gaps
- Gather some initial experiences

Create a pilot App

- Identify a small, high value use case
- Design the App
- Implement
 - necessary changes
 - some new features
- Deploy for a small group of users
- Collect feedback & make it better

When do I transition?

- Migrating from On Prem to Online
- Start *now* to deploy by the end of CY2019

Resources

Chapter 3 TRANSITION

Transition to the Unified Interface

Business Assessment

Select a transition path

- Targeted App(s)
- Full transition
- On Prem to Online Migration

Pre-planning

- Understand compulsory changes
- Rethink the user experience
 - Understand the App concept
 - Evaluate new capabilities

Determine the value proposition

- Better end-user productivity
- Reduced training / change mgt
- Improved user adoption

Plan & execute

- Define outcome, goals, expectations
- Assess and prioritize scope
- Deliver incrementally
- Measure for success

Resources

Chapter 4 OPTIMIZE

Maximizing the Opportunity

Work the change cycle

- Monitor adoption
- Review experiences
- Opportunity for innovation and doing more
- Derive and communicate the value proposition
- Plan future stages and rhythm of business

Roadmap

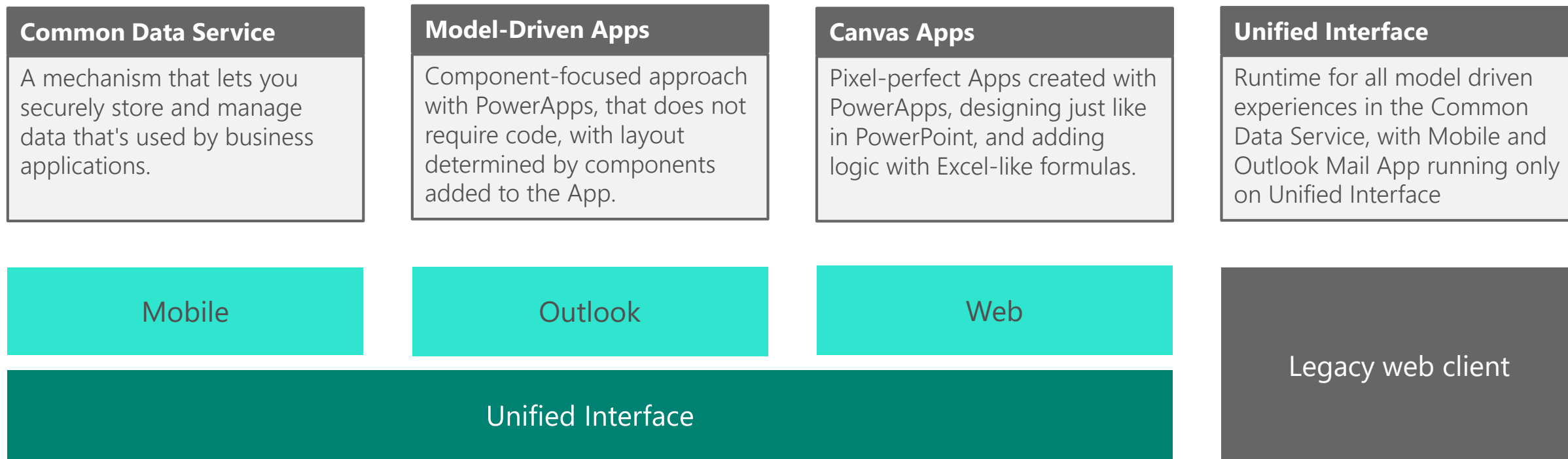
- Product considerations
- Cadence for refresh

Related Considerations

- Deprecations & discontinuations
- Gaps / issues
 - Understand what gaps exist
 - Understand when and how they will be addressed
 - Understand appropriate workarounds
- Information and escalation channels

Resources

Terminology | What is the Unified Interface & why replace the legacy web client?



Why is Microsoft investing in this?

To modernize fundamental design points
 To handle accessibility standards
 To reduce complexity, costs and time delays caused by

- Duplicated investments across core framework, languages, performance, supported browsers; both Microsoft & Customers!
- Forked code base resulted in feature differences and regressions

Important

- Legacy web client continues to co-exist to support customer needs
 - But should not be reason to stay on this interface
- Microsoft goal is to make Unified Interface the primary & *only* client infrastructure, all product roadmap investment is only there.

What is new and different in the Unified Interface?

Many new features combining to give a smooth experience across all devices and form factors

What's Different

Look and Feel

- New Site Map, Navigation and Ribbon Commanding experience
- New Form Design, Tabs are tabs again
- New Timeline Control, Custom Controls

Responsive Design

- Consistent responsive experience across all app surfaces and devices
- Reflow of fields, columns and sections
- Grids can reflow into compact card lists
- Native RTL support across all devices

Modularity

- Application Modules run on all form factors, one app
- Easy to build focused large or small applications to suit your needs

Performance

- Utilizing modern browser storage
- Efficient metadata synchronization

The screenshot displays the Dynamics 365 Unified Interface for a customer account. The top navigation bar includes 'Dynamics 365', 'Play', and the account name 'Blue Yonder Airlines (sample)'. The main content area is divided into several sections:

- ACCOUNT INFORMATION:** A table listing details such as Name, Phone, Fax, Website, Parent Account, Ticker Symbol, and Customer Rating (3 stars).
- PROGRESS - KEY CUSTOMER PROCESSES:** Three circular progress indicators showing 84% for KYC, 65% for Onboarding, and 35% for Profiling.
- OPPORTUNITIES:** A list of recent opportunities with details like 'Needs to restock their supply of Product SKU AX...' and 'They sell many of the same items that we do - ne...'.
- ADDRESS:** A table listing street addresses and the city 'Los Angeles'.
- Timeline:** A vertical list of activities and posts, including 'Auto-post on Contact information required' and 'Auto-post on Needs to restock their supply of Product SKU AX305'.

Unified Interface is going to be the **primary** user interface for model-driven Applications

Just Start!

Step #1 Super Quick Test

- Temporarily "Unified Interface Only" = On
- Do this in Dev/UAT, test a realistic User persona

Step #2 Create a Parallel Test App

- Create an App Module from default Site Map
- Quick check to identify issues/gaps
- Gather learnings from the way the app renders

Optional #3 Create & Launch a Pilot App

- Identify and target a small user group, ideally with a high-value use case
- Create an App with just the functionality needed to deliver this use case
- Look for some opportunities to take advantage of new and better user experiences
- Launch the App (in parallel with the older legacy web client)

Review and Follow Up

- Collect feedback, collect prioritized list of issues
- Improve & expand

Sooner better than later

Legacy web client considerations

- No new investments being made
- Bug fixes focused only on regressions
- Does not support newer capabilities
- Relatively slower
- Aged experience

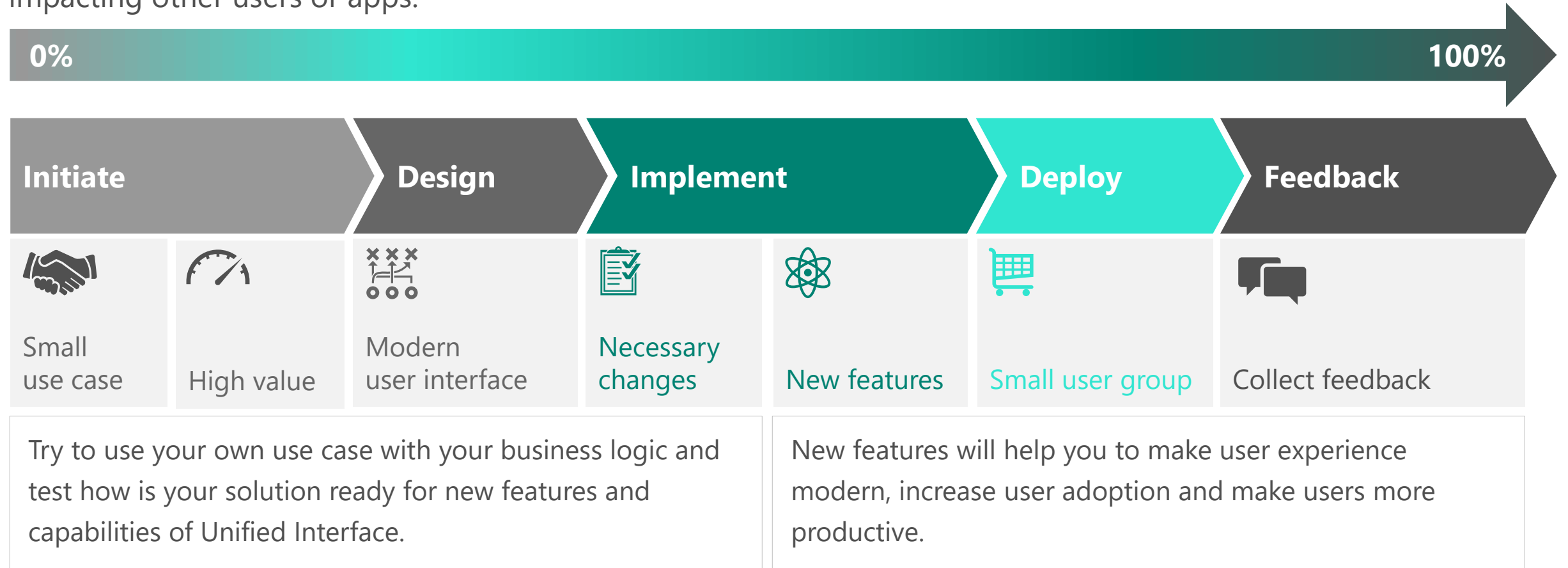
Timing considerations

- Starting the transition soon allows for a flexible and incremental approach
- Leaving it too long creates pressure
- Starting early introduces the benefits of the Unified Interface early.

TIP: Do ensure you **generate excitement** - as you set the precedence – if you are excited presenting the new UI - users would be less apprehensive.

Create a pilot App

The app module concept brought possibilities for creating unique experiences for separate group of users without impacting other users or apps.



Keep considering feature gaps, issues and opportunities for business process improvement

Setting a firm foundation for a successful transition

Understand the existing deployment alongside current business need to ensure transition makes a productive difference to the user

Understand Current State

Key questions to ask

- Q** Does your current deployment align well with the way the organizational processes work?
- Q** Are there any areas which are no longer relevant or inadequate for the user?
- Q** Do you have a clear idea on future considerations for the business?

Situation

Customers often deploy and grow footprint but rarely re-visit existing areas to optimize for changing business behavior.

Problem

- Unused functionality
- Gaps in business process
- Lack of adoption

Opportunity

- Observe
- Understand
- Simplify
- Re-work
- Test
- Deploy

- Power of Observation: Understand your business user before setting plans
- Identify: Patterns and groups of users for potential applications
- Sweat the small stuff: Look for the small changes that make usability impact
- Capture current state measures: Spot potential opportunity areas (E.g. Efficiency, Time Spent, Outcome for customer...)

Business Value Planning



Engage the business early & throughout



Agree common guidelines & partnership



Limit distractions on the deployment (Role Based)



Business value-based design



Focus on delivering insight not data



Align to supportability and product roadmap



Measure outcome and prepare for refinement



Communicate
Communicate
Communicate

Determine the transition path, maybe a hybrid of one of these 3 paths

Targeted App(s) – Incremental approach

Benefits

- Easy to get started (Low cost, quick time to market)
- End user impact is minimized
- Areas impacted by issues or gaps can be avoided
- Team learns from experience

Drawbacks

- Two user interface styles to support and maintain
- Users on legacy web client do not get the performance and usability benefits from the Unified Interface
- Legacy web client does not get updated with bug fixes and new features

Full transition – replace the legacy web client entirely

Benefits

- Single user interface to support and maintain
- All users get the performance and usability benefits from the Unified Interface
- User interface is regularly updated with latest bug fixes and new features

Drawbacks

- “Big bang” approach is riskier, all issues and gaps need to be considered
- All end users are impacted (training, change management)
- Team typically learns “on-the-go”

On Prem to Online migration

Considerations

- Moving from v8.2 (or older) to v9.x implies changes to:
 - Client scripts due to API deprecations
 - Making unsupported code supported
 - Changing integrations to work with the cloud
- Adding the transition to User Interface does add to the workload, but it is offset by doing the training / change management once

Understand compulsory changes

Checklist

Delivered via Model-Driven App(s)

Timeline control

Business process enhancement

Navigation

- Simplified Site Map
- New icons and colors (fluent design)

Reflow

On Demand Workflows

- Microsoft Flow must be enabled
- Microsoft Flow will become the new workflow engine for Dynamics 365

Dialogs discontinued

- Dialogs had many limitations
- Real world usage patterns (Approvals, Data validation, Data entry, Notification, Scripted actions)
- Plan for alternative options
 - Canvas Apps (PowerApps)
 - Microsoft Flow
 - Business process flows
 - Playbooks

Other

- Check latest blogs and release notes

The screenshot displays the Dynamics 365 user interface for an Opportunity record. The top navigation bar shows 'Dynamics 365' and 'Play' buttons. The main content area features a process flow diagram with stages: Qualify, Develop, Propose (7 Mo), and Close. A summary table is visible, listing key fields:

Field	Value
Est. Close Date	10/11/2018
Est. Revenue	€10,000.00
Status	In Progress
Owner	Paul Mare

The interface also includes a navigation pane on the left with options like Home, Recent, Pinned, and Customers. A 'Relationship Assistant' panel on the right indicates 'There are currently no insights.' The 'SALES TEAM' section shows 'Mare, Sarah' as a stakeholder.

Rethink the user experience

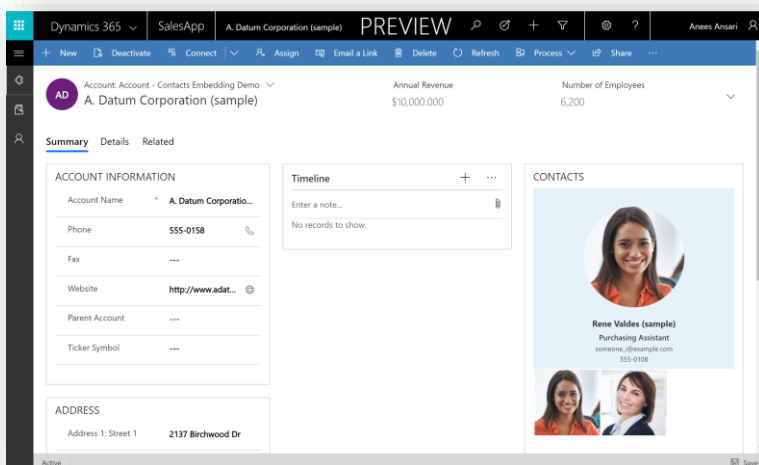
Understand the App Model

Understand Model-Driven Apps

- Create with the [application designer](#)
- Reduce clutter by just including the relevant items (Entities, Forms, Views, Business Processes, Dashboards, Charts)

Review Design Principles

- Base the design on user personas, and their goals and motivations
- Limit distractions
- Focus on insights not data
- Measure outcomes not actions



New Capabilities

Reference panel

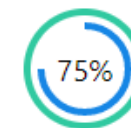
- A great way to get work done without leaving the form

Custom controls for business impact

- 20+ included controls
- Use the PowerApps Component Framework (PCF) to build your own

Canvas Apps for tailored experiences

- Build with PowerApps
- Run standalone, or as an embedded contextual experience on a form
- Hundreds of connectors



Radial Knob



Arc Knob



Linear Gauge



Linear Slider



Star Rating



Flip Switch



Option Set



Bullet Graph



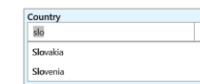
Number Input



Input Mask



Auto Complete



Website Preview



Multimedia Control



Barcode Scanner



Pen Control



UX Guidelines

Navigation

- Site Map
- Dashboards
- Interactive Dashboards

Form design

- Balance number of forms
- Tab order / No. of tabs
- Guard against complexity (7 Chunks)
- Design and test for reflow
- Optimize for create & consume
- Capitalization

Views and grids

Multiple Apps

Business Process

Custom theming

Principles

- Balanced use of color
- Reduce clicks and scrolling
- Reduce clutter

Put the user and the customer at the center of the system

Better end-user productivity

Personal value first

- Base the design on user personas, and their goals and motivations
- Limit distractions
- Focus on insights not data
- Measure outcomes not actions

Personal productivity drives business value

- 10% improvement in sales productivity implies more sales
- 10% improvement in customer service reduces costs and customer churn
- Reduced customer churn implies more revenue

Reduced training & change mgt

Fluent design is more intuitive

- When users can find their own way around an App, they often do not need much formal training

Innovations that add value

- Users will adopt this in a viral fashion
- Change management still important, but can be done in new ways
 - User focus groups
 - Power-users sharing stories
 - Tips and tricks

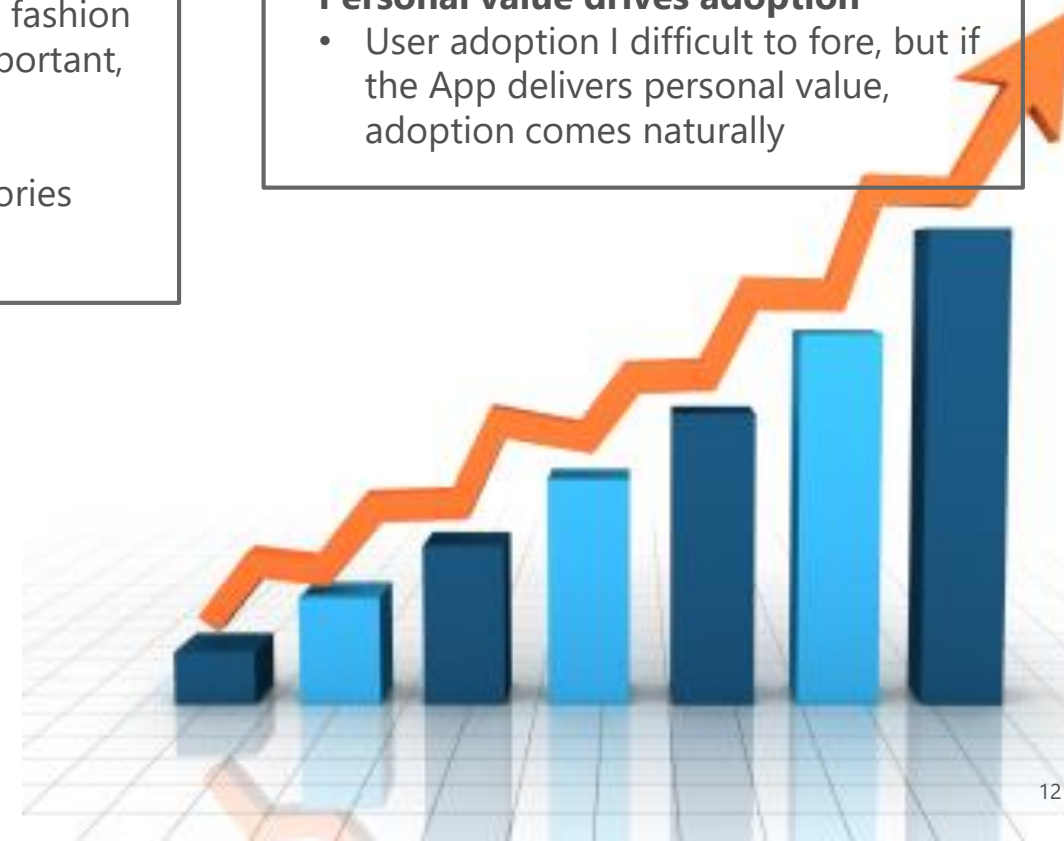
Improved user adoption

User adoption is still one of the top reasons for project failure

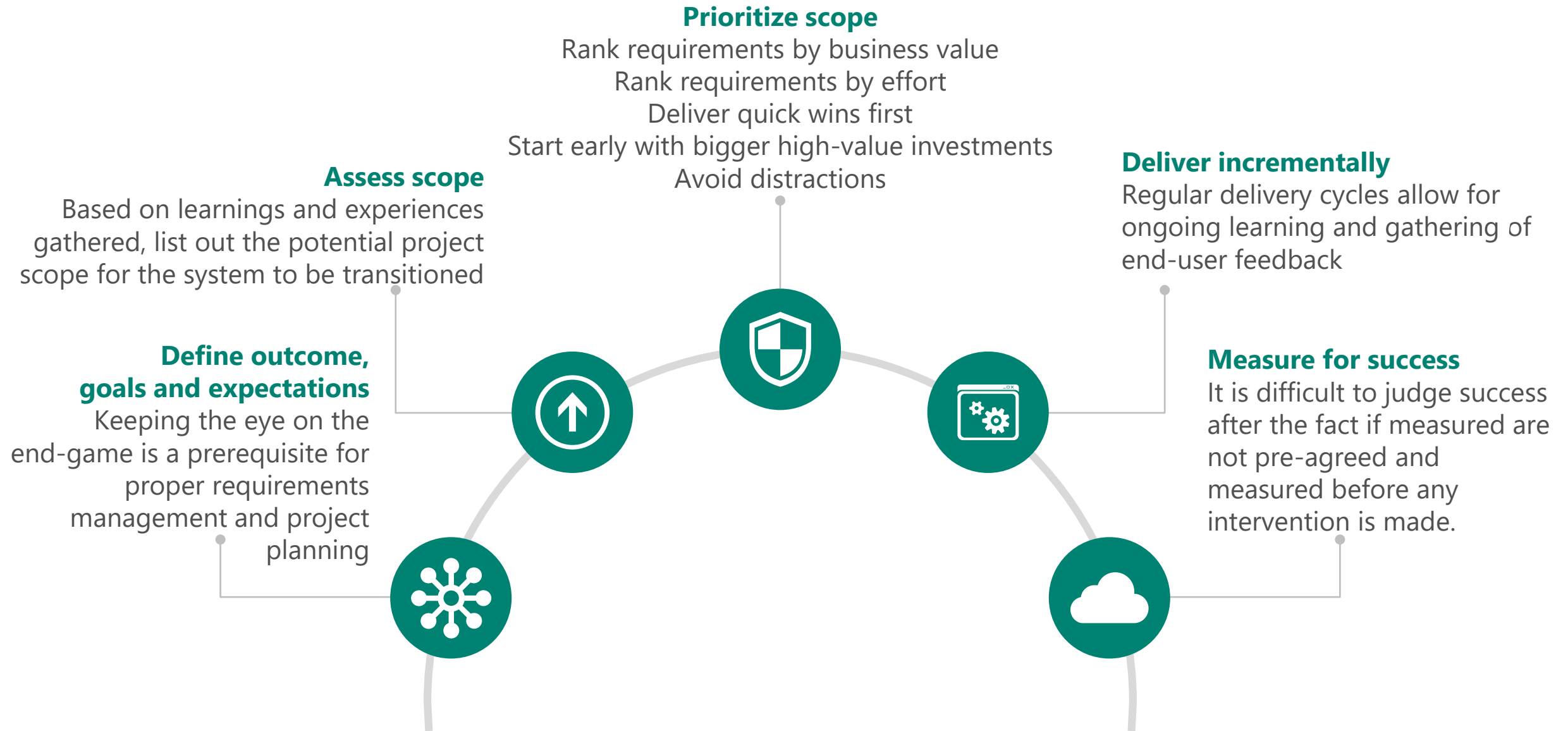
- Unified interface is a modern immersive experience that excites users

Personal value drives adoption

- User adoption is difficult to force, but if the App delivers personal value, adoption comes naturally



Ensure alignment with the methodology you plan to use



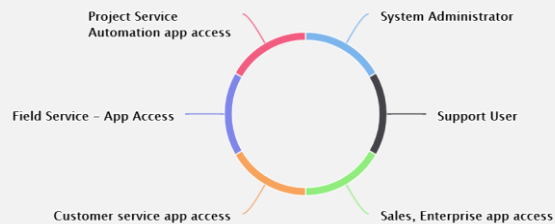
Monitor, Review and Innovate

Developing a system should never be seen as a one-time goal at the beginning of a launch

Measure for success

Monitor an adoption of your apps and ensure that users are using what you delivered

- Use dedicated security roles to provide access to specific apps to help you monitor their usage



Get a baseline on your existing system

Innovate existing processes and functionality

- A transition is a great opportunity to revisit and rethink how you are using your system
- Prepare your system to take advantage of new trends and improvements

Continuous communication & feedback loop

Consider user feedback actively and share information about the improvements being made

- Welcome page is a good way how to notify users what's new and where to start
- Utilize custom help feature directly within user interface

Work with your Customer Success Manager

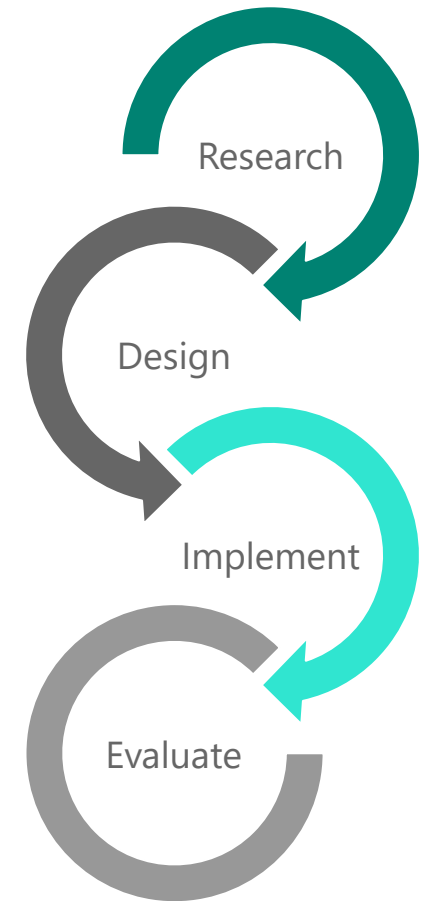
Work with your Microsoft and partner team to achieve your goals and deliver the greatest experiences

- Microsoft can help customers evaluate and develop their transition plan to Unified Interface
- Review design changes and gaps
- Provide feedback directly back to the Dynamics Product Group

Review Experience

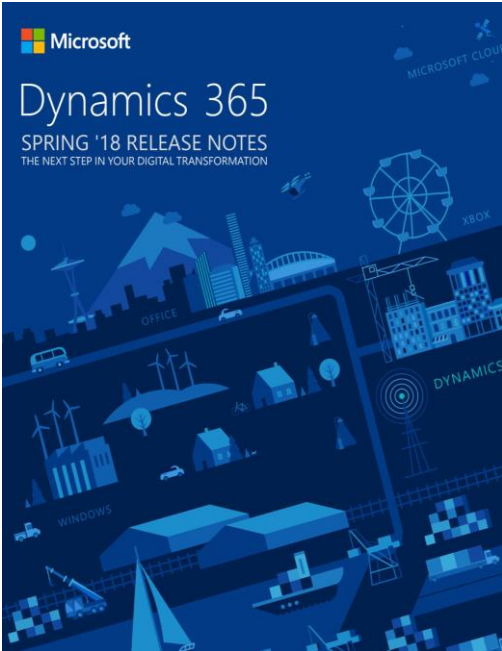
Dynamics 365 / Power platform has been expanded significantly in the last years – Many improvements make your daily work more productive and efficient.

- Revisit **high valuable processes** across business groups
- Redesign the original approach with involvement of **new capabilities**
- Build solutions with support for **mobile platform**
- Prototype with **key users** and **business stakeholders**
- Encouraging **agility** and innovation across the business
- Transform to **modern workplace**
- **Automate test process**
- **Retrain** users for using system in a right way
- Do a review for other functionalities



Feature Release Cadence

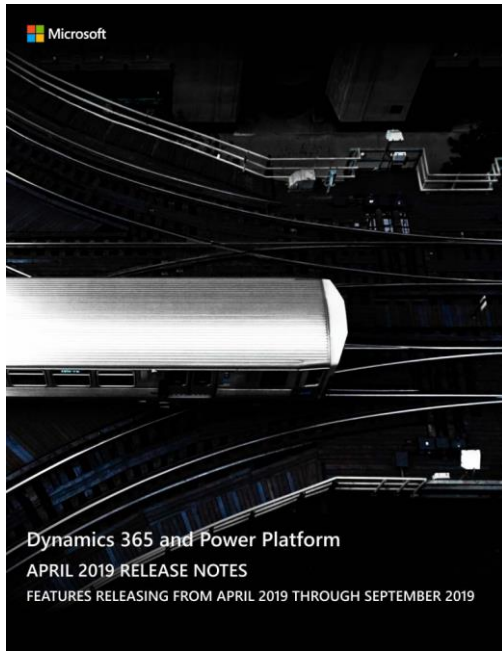
April '18
(Delivered)



October '18
(Released)



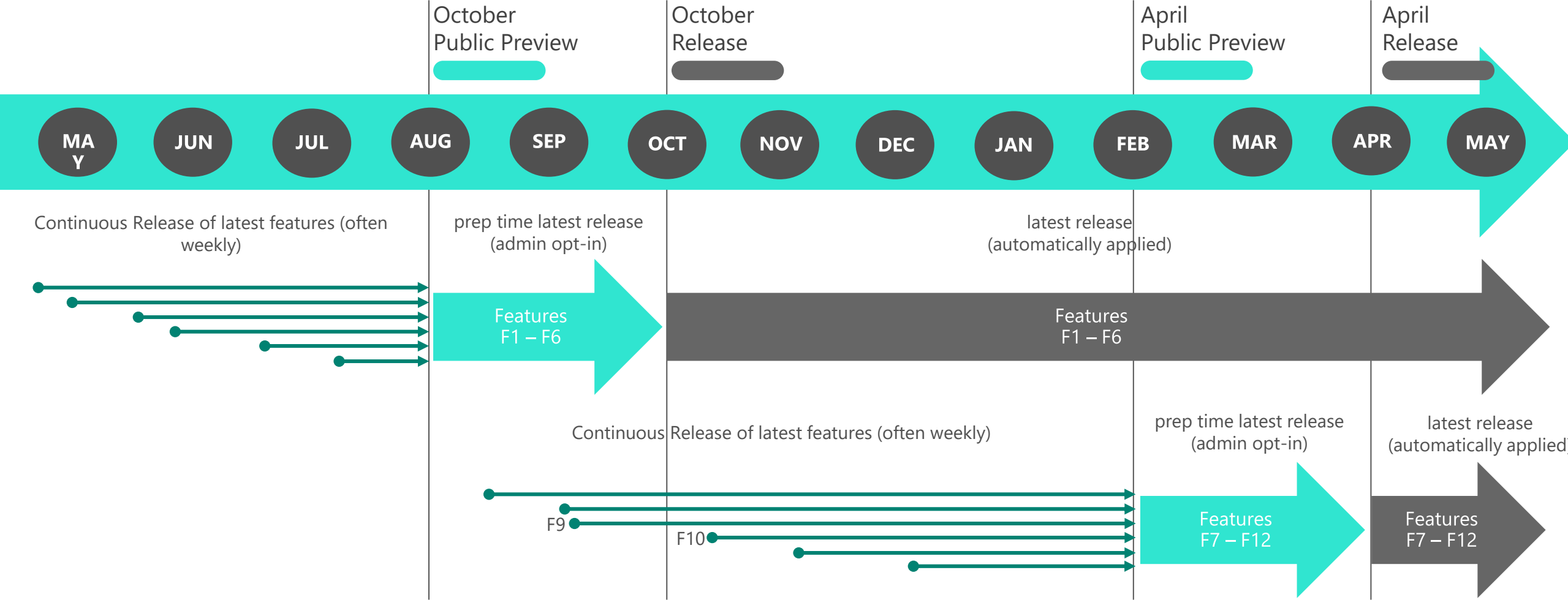
April '19
(Released)



October '19
(Released)



Refresh Cadence



- Feature code delivered continuously through weekly updates
- ➡ Opt-in to experience all UI features coming in the next scheduled update (preview)
- ➡ All GA functionality is automatically deployed on a semi-annual schedule

Each chapter in this playbook is supported by a more detailed TechTalk

Chapter 1
INITIATE

Having the right conversations

Chapter 2
EXPLORE

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Maximize the Opportunity

Key sites and resources

Official documentation:

<https://docs.microsoft.com/en-us/dynamics365/customer-engagement/admin/about-unified-interface>

Unified Interface Community Pages on <https://community.dynamics.com/365/unified-interface/>

If you participate in the FastTrack program, reach out to your assigned FastTrack Solution Architect

If you are engaged with MCS, reach out to the domain leads

If you are engaged during the presales cycle, reach out to your account team

If you are a partner, reach out to your partner account manager.

