






2010 MOS Win32 Identity Federation Client

Design Guidelines

Guidelines for MOS Properties

Documented properties include:

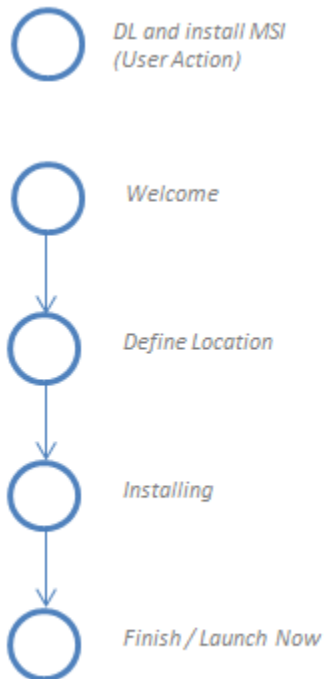
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MSI Installation Flow



This federation client is mainly a Win 32 application that connects your on-premise ADFS and MOS cloud. It applies relevant actions on managed and federated domains, as well as adding new domains. Post authentication, the client primary leverages two main pagetypes:

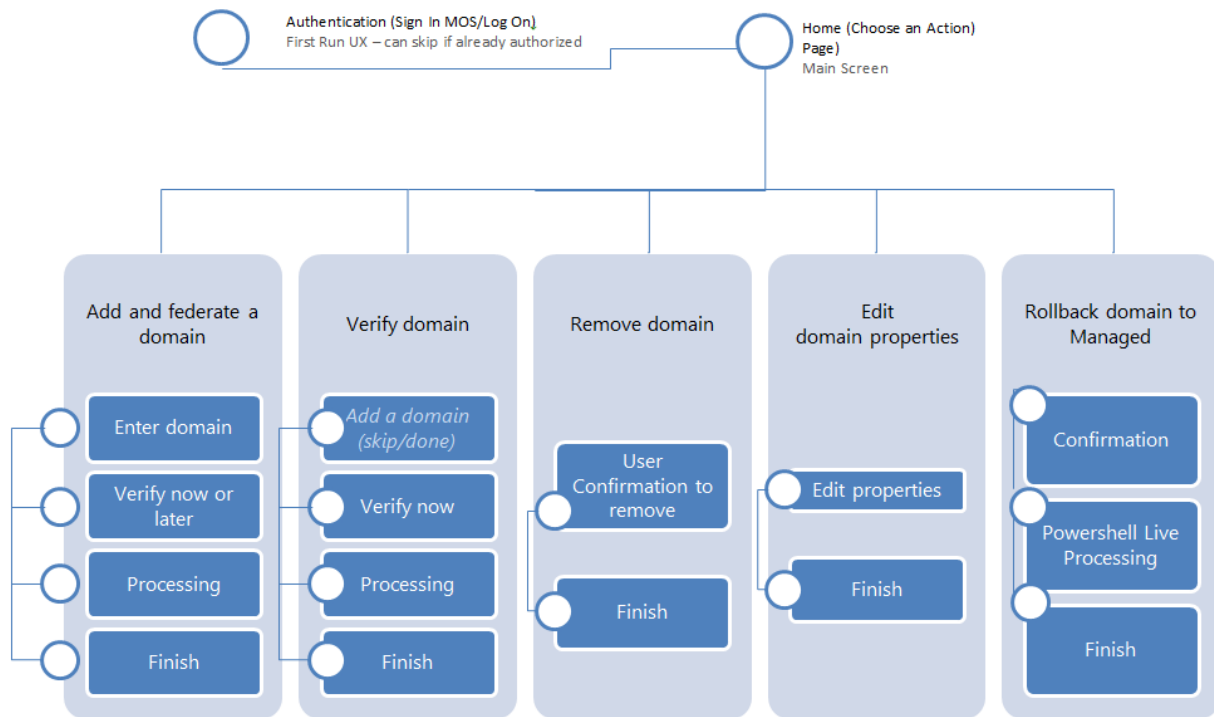
The Main Screen pagetype is modeled after common Win32 Administrative apps

The MOS Wizard pagetype provides an easy-to-use GUI providing easy access to our API

This currently used to be primarily accessed thru PowerShell, by entering complex advanced lines of code to achieve the same results.

The body is divided into vertical columns. Columns can be further divided by containers, which may contain sections, elements, and content. Each structural unit has layout and placement rules.

Navigation



Action Wizards ordered L to R by most common

Design
















ICONS

Union/ MOS icons are used to call the end user to recognize client actions & statuses easily and quickly, as well as knowing when there are errors and a clear sense of wayfinding.

ACTION ICONS














These Icons show in the right hand action pane.

Please look below at the table for appropriate icon usage:

BECOMES VISIBLE WHEN A DOMAIN IS	TITLE	DESCRIPTION/USAGE ADDL NOTES	REST	CLICKED	HOVER
UNSELECTED Or SELECTED	Add a new domain	This will start the wizard process for adding a new domain, the main scenario.			
SELECTED	Federate a new domain (PRIMARY)	If there is a domain selected, the Selected Domains contextual actions will push the action: Add a New Domain to the bottom.			
SELECTED	Verify this domain	This appears to give the solution as a contextual domain action if the user exits the step wizard at step 2 of federating a domain. This is an implicit choice because we don't want the user stuck at a dead end path of having to spend 15 on the same screen while going to their external DNS.			
SELECTED	Remove this domain	This shows as an option to remove a selected non-permanent domain.			
SELECTED	Rollback this domain to managed on-premise	This is the reverse process of rolling back the cloud federated domain back to on-premise standard authentication.			
SELECTED	Update this domain properties	Updating is a consistent selected domain option, because if something goes broken there needs to be a way to create the handshake relationship			

STATUS ICONS

These Icons show in multiple places to give the end user a sense of status.

AREAS	TITLE	DESCRIPTION/USAGE ADDL NOTES	REST	CLICKED	HOVER	INACTIVE
Last Wizard Step	Success	At the end of every step, there should be a confirmation check mark to show completions		-	-	-
Wizards with important message, Action Pane, Domain List	Important	This calls out information that the user must read to continue, and is for changes that are more permanent or harder to reverse. Also calls attention to an unverified domain				
Last Wizard Step, Domain List Alert, Domain List Status	Critical	This is if an error occurs if: A. It is critical, and user action must be taken immediately B. It marks if a process fails				
Desktop	Branded MOS MSI	An icon for the MSI or BIN to install a download				
Start Menu, Shortcut on Desktop	Branded MOS Admin Pack ID Federation App Logo	An icon for the Admin Pack or Fed Tool				
Every page where help is relevant and available.	Help	This launches the ID Federation Help and How To Article in a blank IE window.		-	-	-
Domain List	Managed domain	This is in the left of each managed domain in the list				-
Domain List	Federated domain	This is in the left of each federated domain in the list				

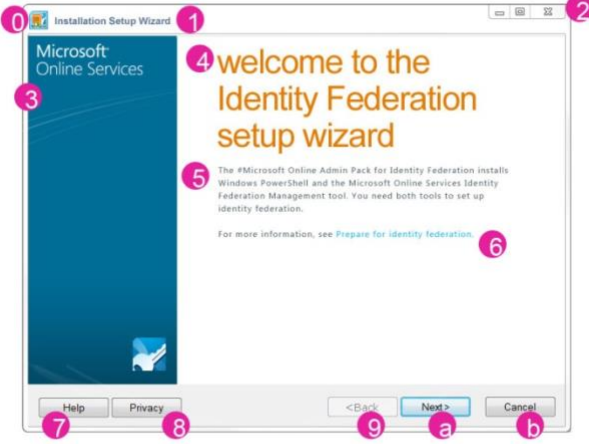
Domain Type	State	Supported Actions	Comment
Managed	Unverified	Verify, Delete	While not truly supported by the tool this would save a customer from using two tools. They can then also convert to federation later if needed. Note: Support for these actions is a P2
Managed	Verified	Convert, Convert Users	Converting a domain may be run more than once when not all users are converted back from a federated state. Convert Users allows for a domain that was converted from federation but where not all users in the domain were converted and need to be. Delete would not be supported as they would need to make changes to users potentially so supporting this in MOAC only makes more sense.
Federated	Unverified	Complete, Delete	We may want to say "Complete" rather than verify or Add as this is truly the process of completing the process.
Federated	Verified	Update, Convert, Properties	
N/A	N/A	Add	Allows the user to add a new domain for Identity Federation.
MORA	Verified	None	This is the default domain of the company and the user is not able to make any changes to this domain. This is shown to provide the same list of domains as that in MOAC.

Common Pagetype Patterns: Pre/during-auth

Pre-authentication (or sign in), there are two main pagetypes:

- Pre-auth: SETUP/INSTALLATION MSI/BIN
- During auth: Authenticate/Log on to MOS

SETUP/INSTALLATION MSI/BIN

Purpose: This is the general MSI format which should adhere to our style treatments but use common win32 components (i.e. buttons, checkboxes do not need branding.	#Callout	Details/Interaction
	0	Win 32 Fed ID Client Icon A descriptive icon to illustrate a concept of connecting software + on-premise. This remains consistent throughout all mocks.
	1	Win 32 Client Title Where the final title is of the tool in window title. This remains consistent throughout all mocks.
	2	Common Win 32 Controls Standard Minimize/WindowMode/Close window controls.. This remains consistent throughout all mocks.
	3	Sidebar image Standard installation image branding.. This remains consistent throughout all mocks.
	4	Title header freeva case Header with lowercase sentence start. This (tho content changes) remains consistent throughout all mocks.
	5	Directional UA This (tho content changes) remains consistent throughout all mocks.
	6	Prep for ID Link This (tho content changes) remains consistent throughout all mocks.
	7	Title header freeva case Header with lowercase sentence start. This (tho content changes) remains consistent throughout all mocks.
	8	Directional UA This (tho content changes) remains consistent throughout all mocks.
	9	Prep for ID Link This (tho content changes) remains consistent throughout all mocks.
	A	Title header freeva case Header with lowercase sentence start. This (tho content changes) remains consistent throughout all mocks.
	B	Directional UA This (tho content changes) remains consistent throughout all mocks.

AUTHENTICATE/LOG ON TO MOS

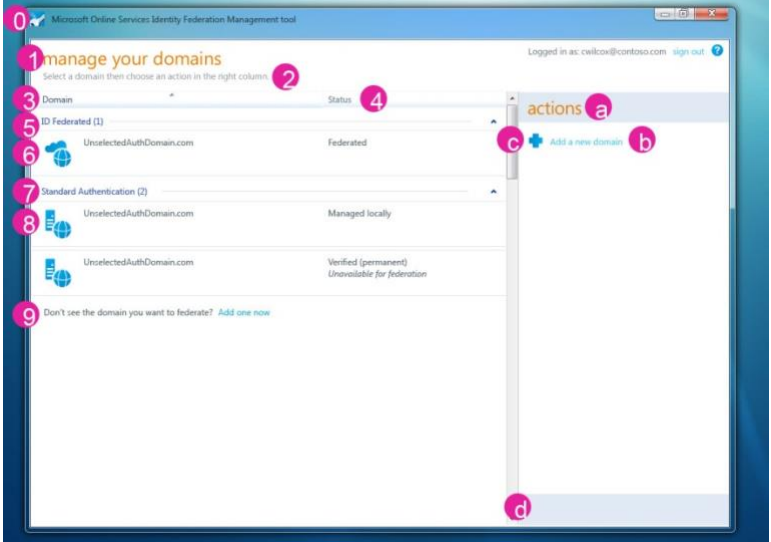
Purpose: pagetype clear calls to action to sign into MOS and log on to the server that has ADFS installed to establish a relationship between your account and your domains.	#Call out	Details/Interaction
	1	Sign In Header The main UA line to orientate people to authenticate into MOS and their admin machine
	2	Header UA A small explanation direction reinforcement of authenticating into MOS and their admin machine
	3	Step 1 Log In: Local admin machine User is called to this first to enter their MOS User Credentials, there are additional timesaving features such as reusing Windows Credentials to log on, and the standard remember ID and Pass.
	4	Step 2 Log In: Sign In: MOS User is called to this first to enter their MOS User Credentials, there are additional timesaving features such as reusing Windows Credentials to log on, and the standard remember ID and Pass.
	5	Local admin machine content Prefilled if possible.
	6	Local admin machine content Prefilled if possible.
	7	Step 2 Log In: Connect button After both steps are complete, button enables allowing you to connect to both services given creds are correct.
	8	Step 2 Log In: Cancel button This will close the window after a dialogue prompt connect to both services given creds are correct.
	9	Common Win 32 Controls Standard Minimize/WindowMode/Close window controls.. This remains consistent throughout all mocks.

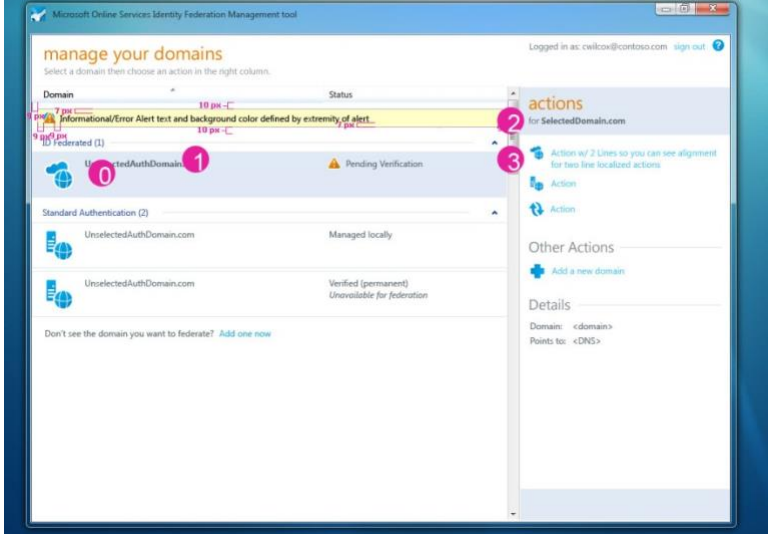
Common Pagetype Patterns: Post-Auth

Post-authentication, the client primary leverages three main pagetypes:

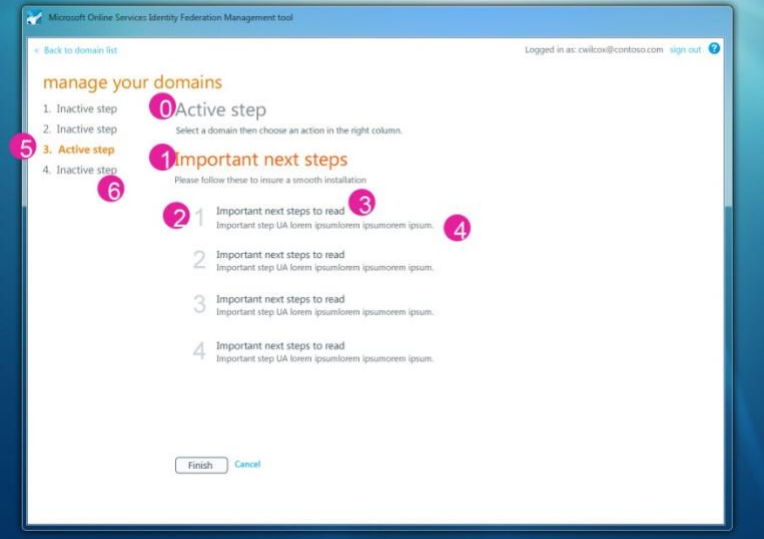
- MAIN SCREEN (DOMAIN DASHBOARD) pagetype is modeled after common Win32 Administrative apps
- WIZARD W/ POWERSHELL CHROME pagetype is a wizard with a window into the PowerShell API

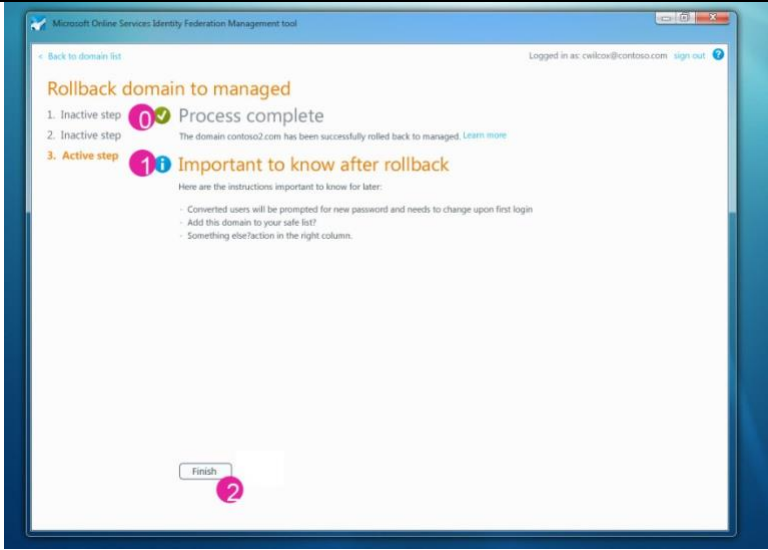
MAIN SCREEN (DOMAIN DASHBOARD)

Purpose: This screen is the control panel and is the main interaction starting point to launch into domain tasks, such as, Adding & Federating your domains, Editing Properties, Deleting (Removing), Verifying, Update DNS or other properties	#Callout	Details/Interaction
	1	Header The main UA line to orientate people to authenticate into MOS and their admin machine
	2	Header UA A small explanation direction reinforcement of what you can do from this screen: Add Domain to federate or Verify a current one for Federation,
	3	Domain Selection Window This is a scrollable area (when not enough items scrollbar disables,,
	4	Column Sorters You can sort the domain list by two factors, alphabetizing sort of domains, or by status completion degree.
	5	Federated expando A collapsible and expandable header that remains consistent, sorting and isolating domains managed on-premise.
	6	Fed Domain Item Has an indication icon of domain with cloud.
	7	Standard Auth expando A collapsible and expandable header that remains consistent, sorting and isolating domains managed on-premise.
	8	Unselected Domain When user clicks off a domain to lose focus in the list it un-highlights like example shows, As items A B C contextually changed based on domain selection, unselecting will produce general actions that are not specific to pre-existing domains. Namely, "Add a domain."
	9	Another Add A Domain Link Shortcut for action.
	A	Unselected/General Actions COMPLEX INTERACTION EXPLANATION - If unselected: Item A & C will disappear since context scope is set to general actions. Actions in B are not specific to pre-existing domains. Namely, the only option available is the "Add a domain." Unselecting doesn't affect area B, which is consistent to serve general actions (see below) except for vertical

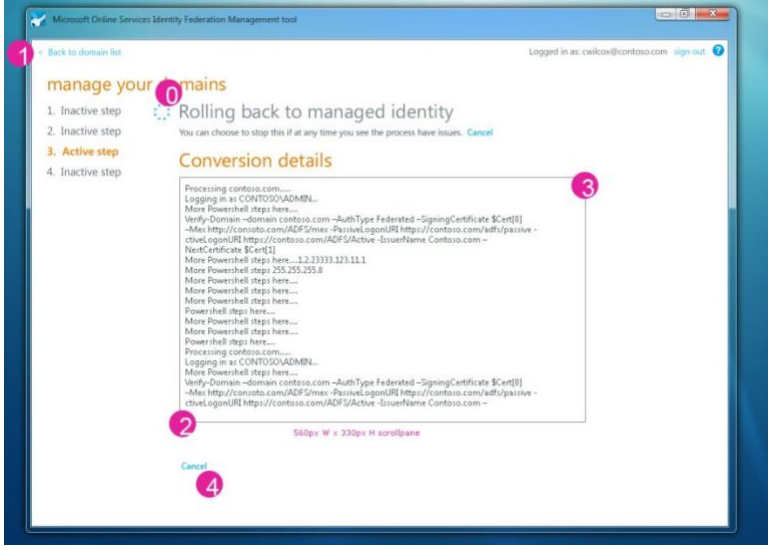
		<p>placement (scoots up to A's place when unselected) C disappears since this only appears when domain is selected..</p>
	0	<p>Selected Domain When user clicks a domain in the list it highlights like example shows. Items A B C contextually changed based on domain selection.</p>
	1	<p>Selected Domain Text When user clicks a domain in the list it highlights like example shows. Items A B C contextually changed based on domain selection.</p>
	2	<p>Alert This only appears, otherwise collapsed, when there is some process unfinished (such as verification) or something goes wrong with domain relationships, such as with your DNS redirect. This will also show in the item affected.</p>
	3	<p>Selected Domain Contextual Actions Selecting domain like example shows, items A appears contextually serving actions with selected domain. Selection doesn't affect area B, which is consistent to serve general actions (see below) except for vertical placement (scoots up to A's place when unselected) C appears and contextually changes to show selected domain status. Text becomes bold.</p> <p>A consistent placement of Other Actions for generic.</p> <p>Details of the selected domain are below</p>

WIZARD

Purpose: WIZARD pagetype provides an easy-to-use GUI providing easy access to our API without powershell. None of the wizards use over 3 steps.	#Callout	Details/Interaction
	0	Wizard Step Title Header Succinct overall direction description of overall process initiated. Active Step is always gray Segoe UI (arial for replacement font)
	1	Wizard Step Title 2ndary Header Succinct overall direction description of overall process initiated. Active Step is always gray Segoe UI (arial for replacement font)
	3	Wizard Secondary Step Title Header Succinct direction description of current step.
	4	Wizard Tertiary Additional Step Title Header Description
	5	Steps Module Orange bolded is the step you're on, and the gray delivers a wayfinding "YOU ARE HERE" within the process to the End User so they know what to expect
	6	Active Step Module Orange bolded is the step you're on, and the gray delivers a wayfinding "YOU ARE HERE" within the process to the End User so they know what to expect

	#Callout	Details/Interaction
	0	Finished Animated Glyph: Indented Progress Wayfinding Icon This icon is indented in the margin to draw attention whether the step is processing, important information or finished step of wizard.
	1	Important to Know Info/ Next Steps Icon (Indented) This icon is indented in the margin to draw attention whether the step is processing, important information or finished step of wizard.
	2	Finish Button Appears at the end of the process. Cancel is gone as an option since process is already done.

	#Callout	Details/Interaction
	1	Wizard Process Title Bar Marks what process user is starting
	2	Wizard Secondary Step Title Header Succinct overall direction description of overall process initiated.
	3	Wizard Secondary Step Title Header Succinct direction description of current step.
	4	Wizard Tertiary Additional Step Title Header Description
	5	Steps Module Orange bolded is the step you're on, and the gray delivers a wayfinding "YOU ARE HERE" within the process to the End User so they know what to expect
	6	ME Tile When logged in and authenticated, after sign in, this tells you who you are logged in as, and remains consistent until sign out is clicked.
	7	Back/Next/Cancel buttons Previous and Next Buttons only appear if option is available. Finish is the UA in the button of wizard is on last step. Next Button is default. And will continue to say Next if it is tertiary informational or is minor augmentation/editing of properties. It will contextually change to a verb (pictured: "Install") if implicit action needs user confirmation or is marking the end of a process (e.g. "Finish")
	8	Cancel Wiz and go back link There are two consistent ways to get out of the wizard, when available. This is one of them.

<p>Purpose: WIZARD pagetype provides an easy-to-use GUI providing easy access to our API, but this is used in the case the user needs to monitor the processes to be able to cancel midway through.</p>	#Callout	Details/Interaction
	0	<p>Process Working Animated Glyph: Indented Progress Wayfinding Icon</p> <p>This icon is indented in the margin to draw attention whether the step is processing, important information or finished step of wizard.</p>
	1	<p>Pending progress Glyph</p> <p>Spins to let user know a process is happening.</p>
	2-3	<p>PowerShell Frame</p> <p>This is a window into the background processes of rolling back a domain so user can end process early or get feedback what's happening to the domain on the backend.</p>
	4	<p>Cancel Process Link</p> <p>There is no next button because after processing, it immediately goes to the Finish Confirmation step</p>

Main Consistent Icons & Actions (domain unselected)



Add and federate a domain
(wizard process)

Secondary Contextual Actions (domain selected)



Verify Domain

Skips but is basically the same wizard as Add and federate a domain but starts on the second step. This was designed to allow the user to finish the process of verifying an external domain later. Reason implemented is that step 2 Verify is ambiguous and a variable task time duration since it commonly relies on external DNS [2 steps]



Remove domain

Supports the removal of selected domain. This has one step to confirm users action, step 2 to confirm [2 steps]



Rollback domain to

Managed

Used to specify that the domain should be converted back to Managed. When rolling back, there is an embedded powershell view so the user can monitor progress and interrupt. [2 steps]



Update Domain Properties

This is a fallback if something bad happens to the connection such as a power surge to on-premise. [2 steps]



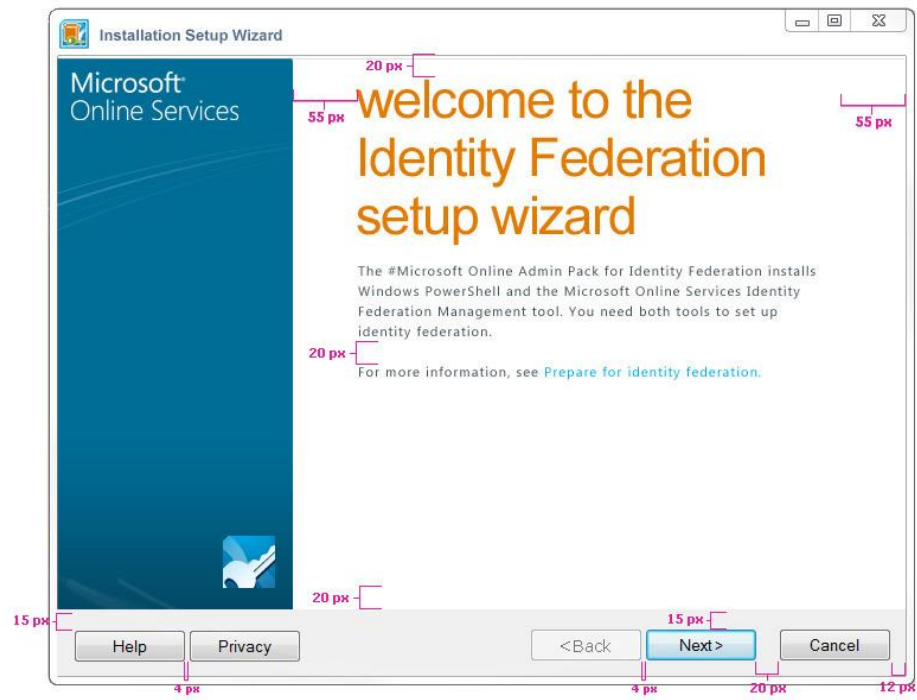
ID Federation Start Menu

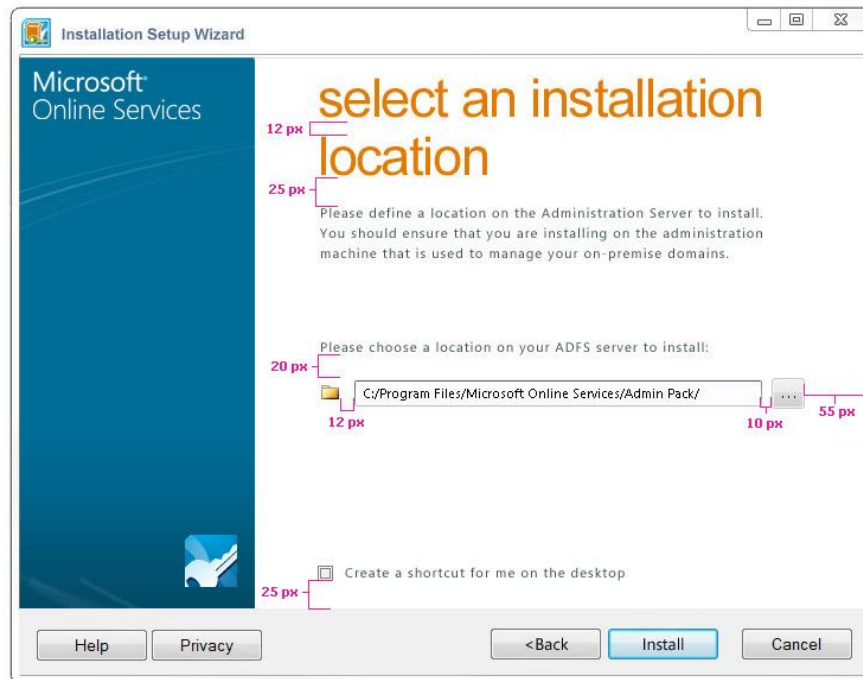
ALL: Scenario Flow

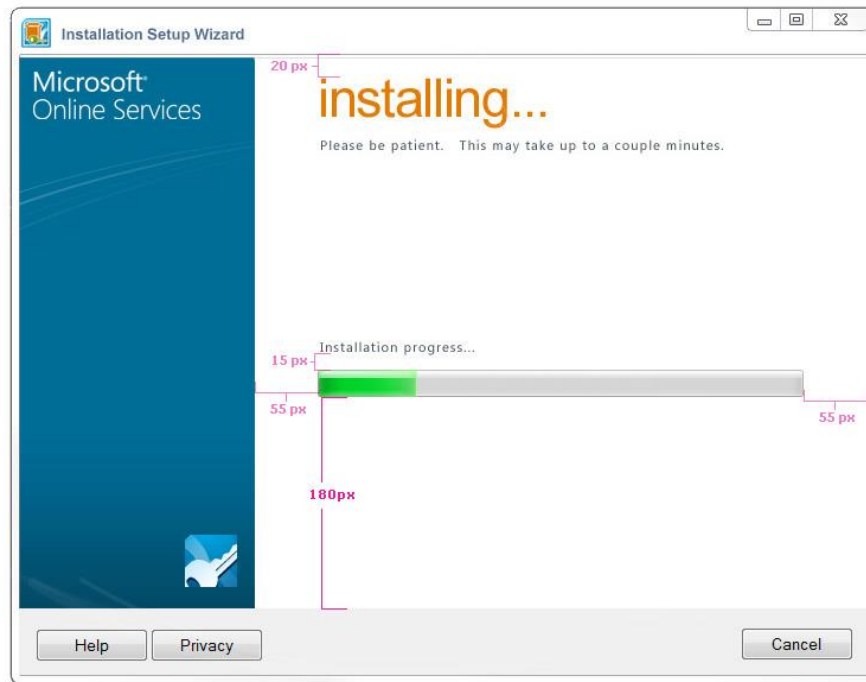
There is a PPT with all main scenarios. Here are the extracted PPT screens.

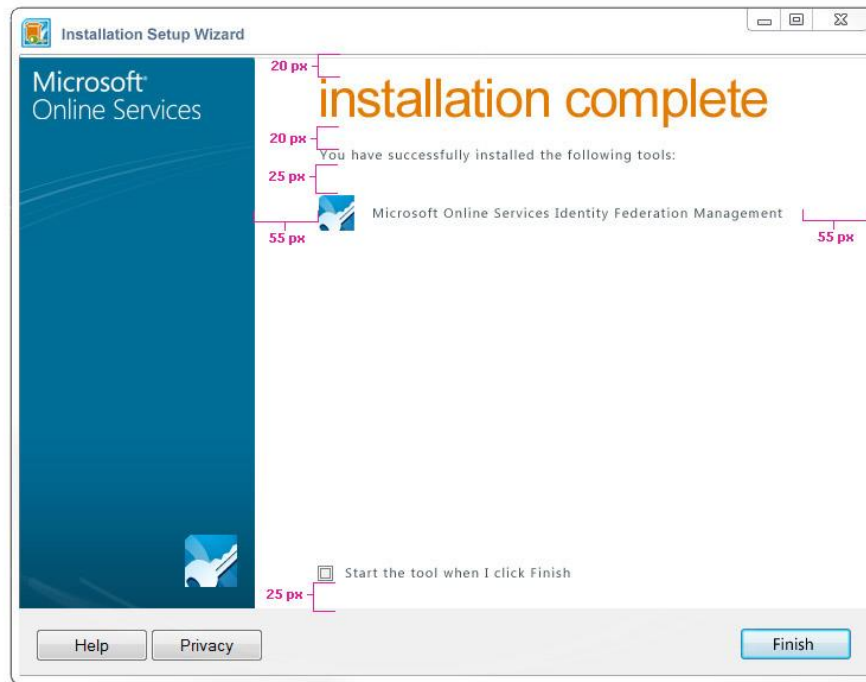
ALL: Pixels & Redlines

There are full res images bundled in this zip file. Also pictured below









Microsoft Online Services Identity Federation Management tool

Sign in and get started with identity federation

In order to synchronize the information in Active Directory to the cloud, you must first provide server credentials where you installed Active Directory Federation Services 2.0 and sign in with your Microsoft Online Services ID.

Step 1

Sign in to your local ADFS 2.0 Server

Enter your Windows credentials to log on to this machine:

☒ Use my Windows credentials to log on

Server name:
ADMINSRV

Domain\Username:
CONTOSO\CWILCOX

Password:

☐ Remember my ID
☐ Remember my Password

Step 2

Sign in to Microsoft Online Services

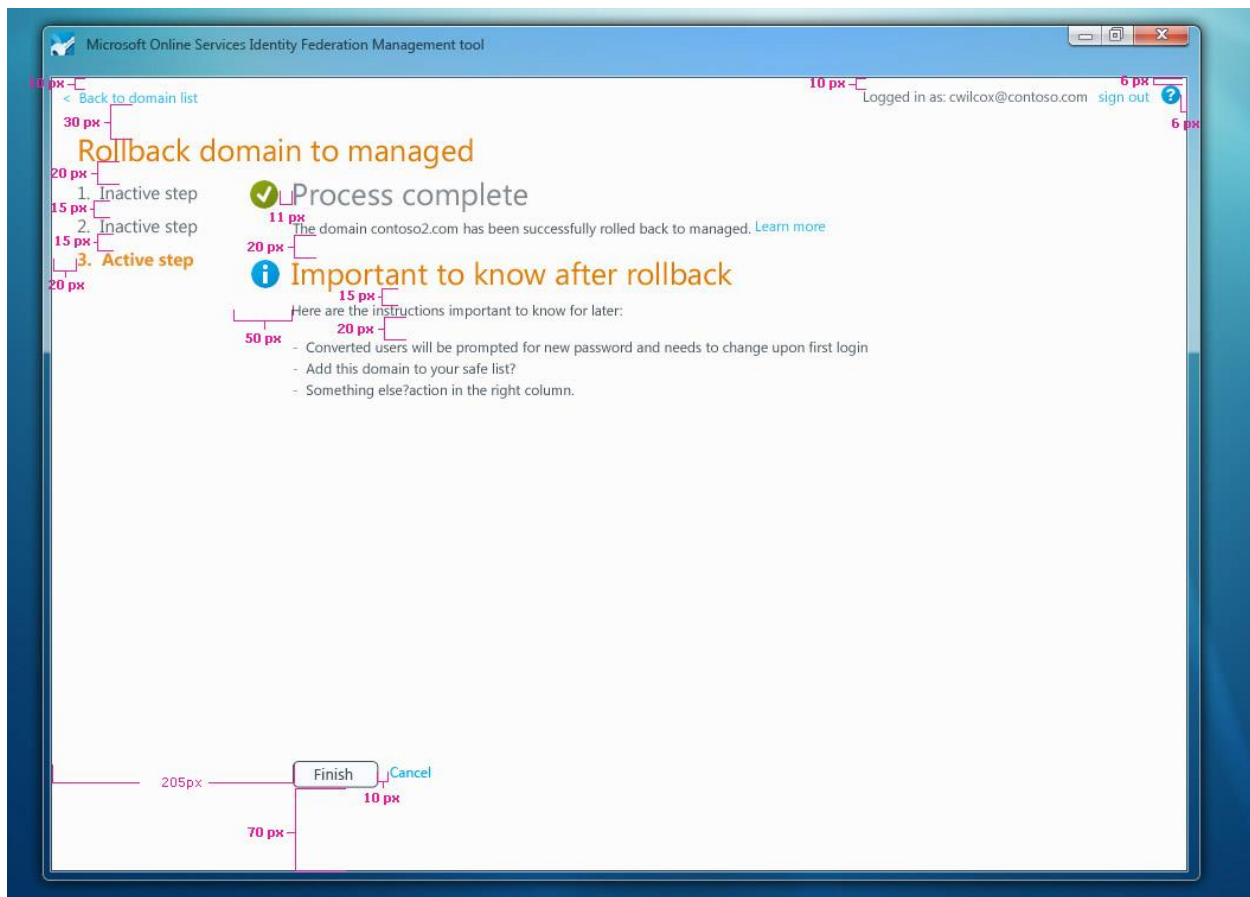
Then enter your Microsoft Online Services ID and password:

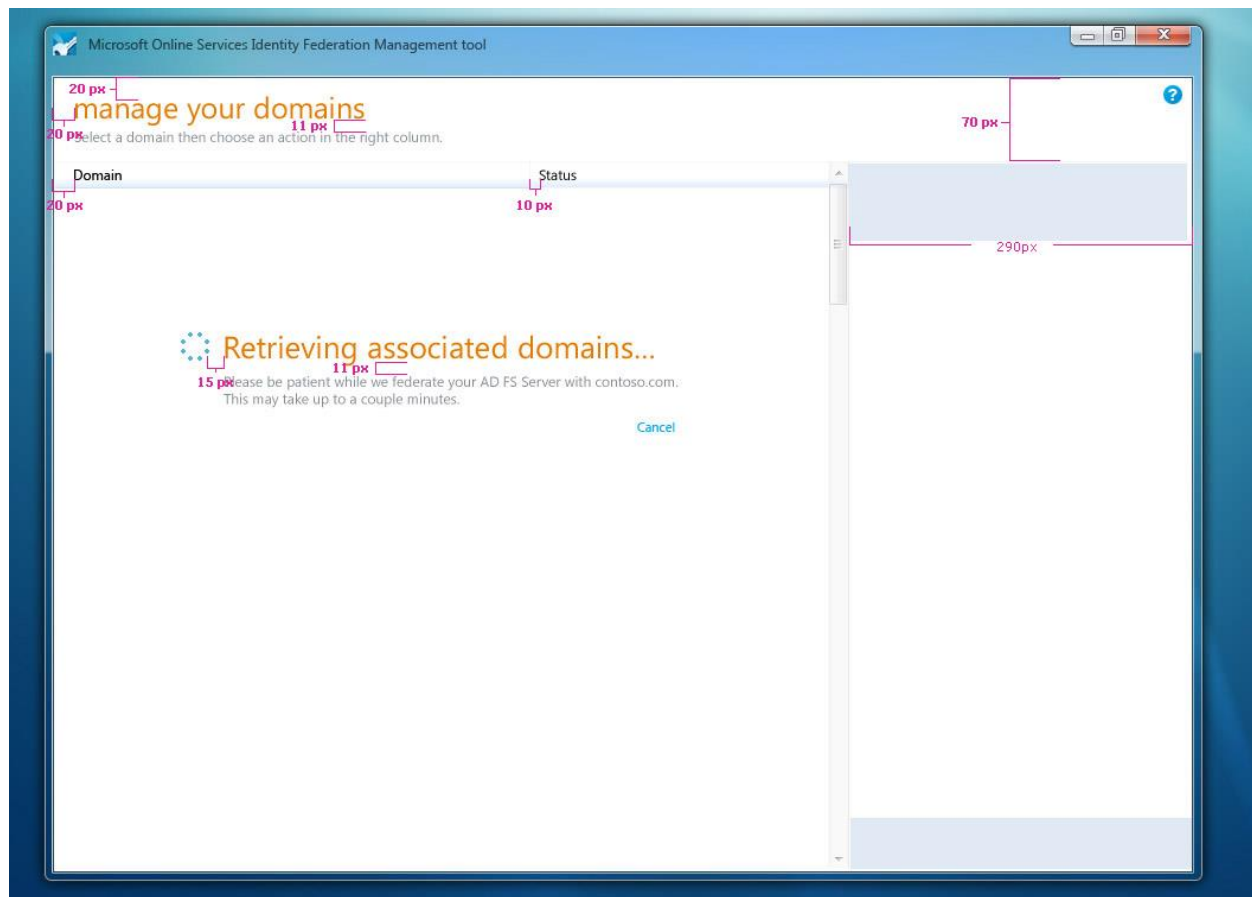
☐ Use my Windows credentials to log on

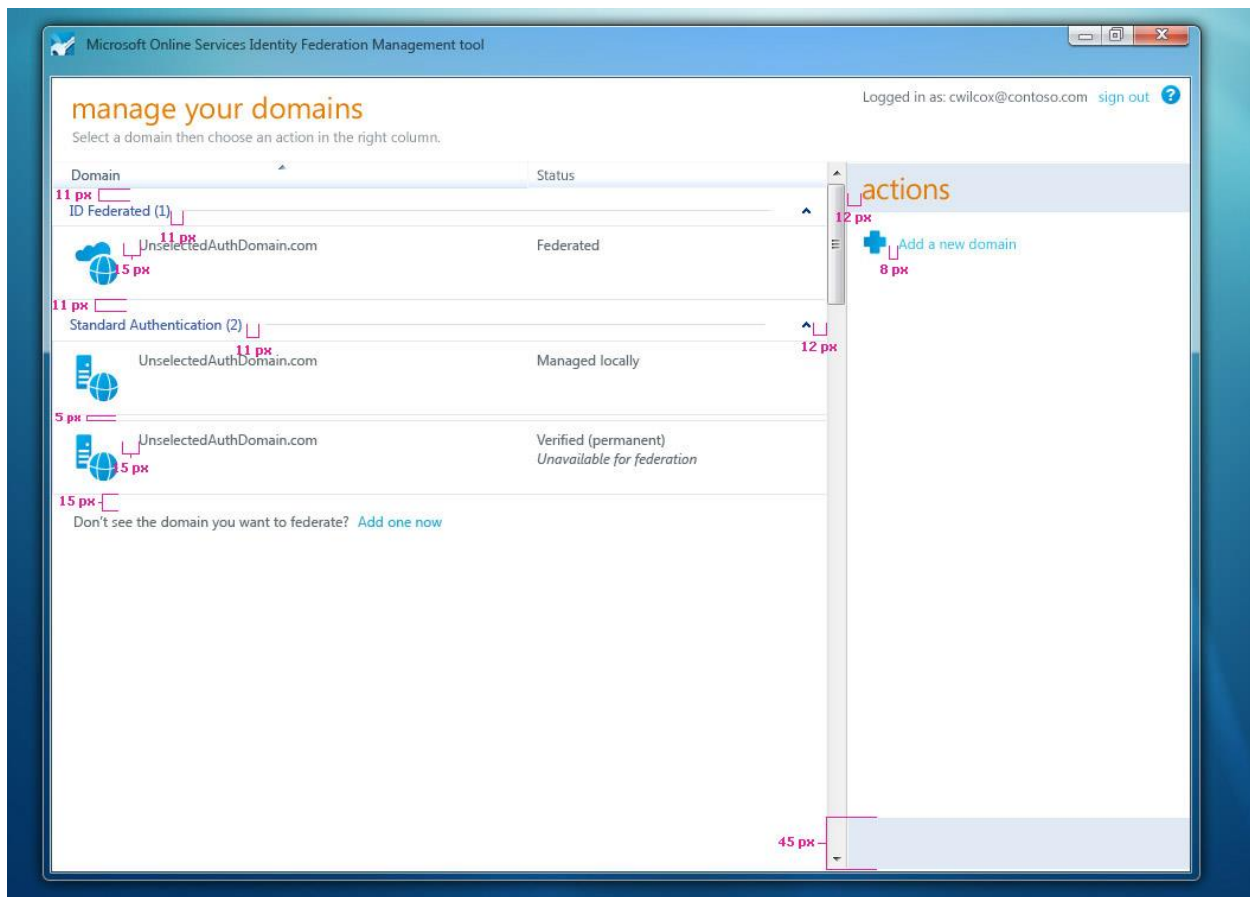
Microsoft Online ID:
Cwilcox@contoso.mso.com

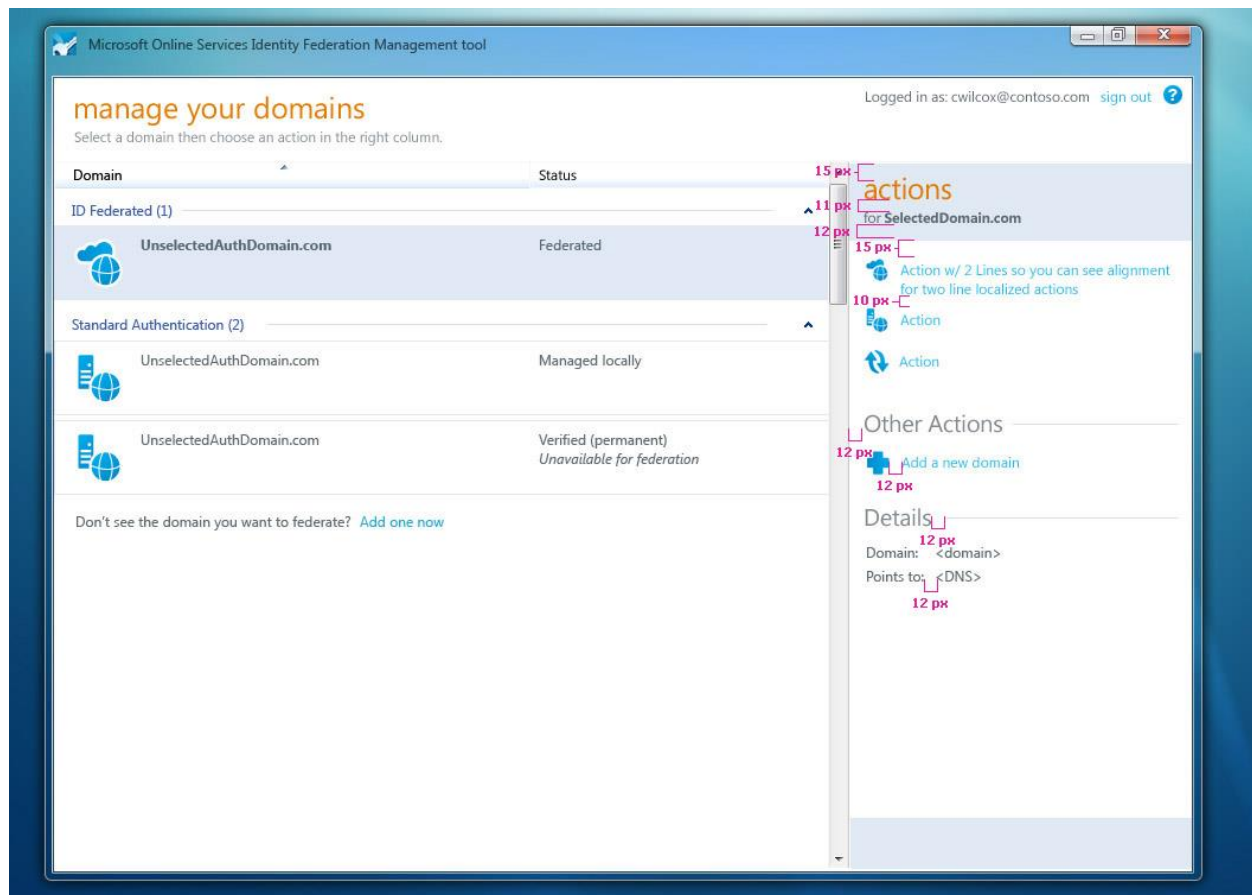
Password:

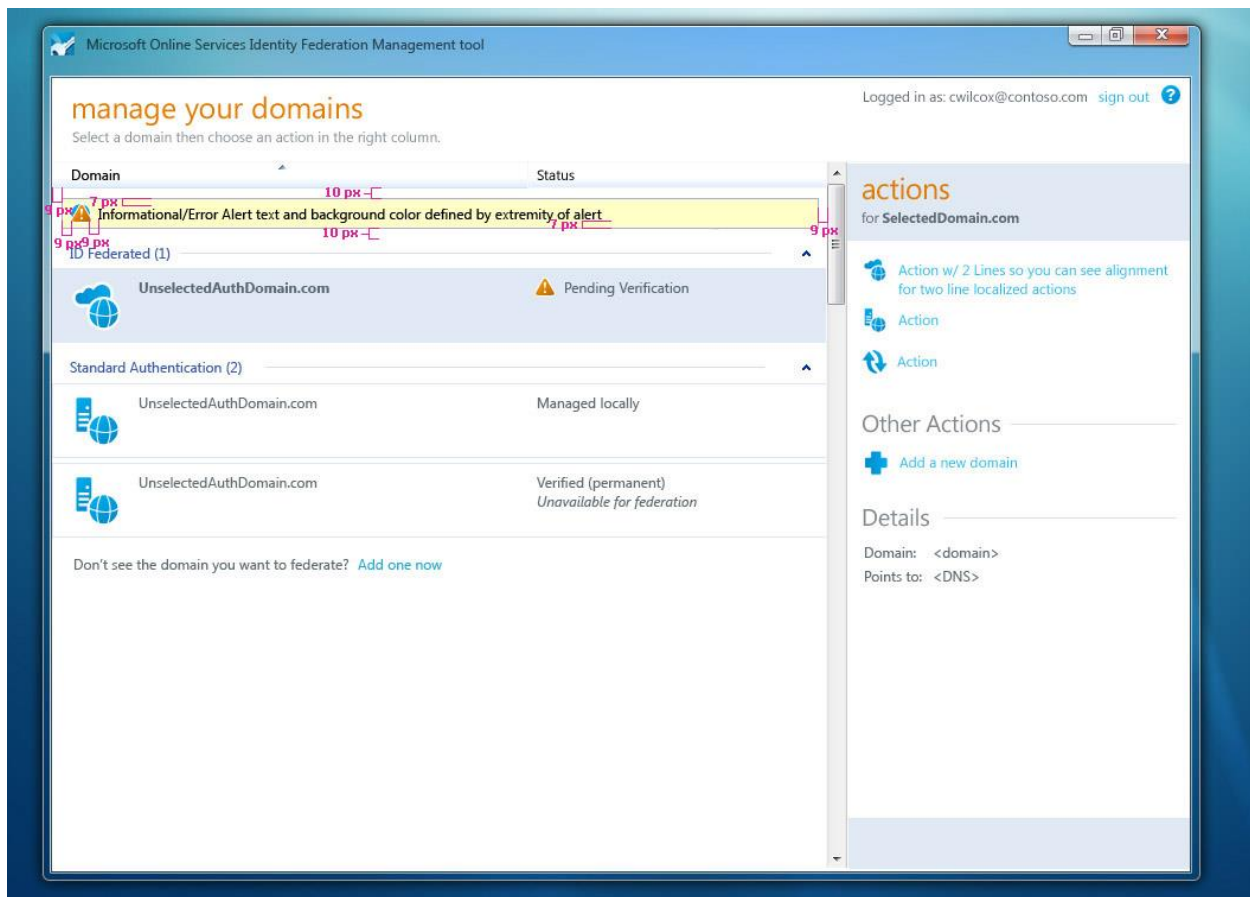
☒ Remember my ID
☐ Remember my Password

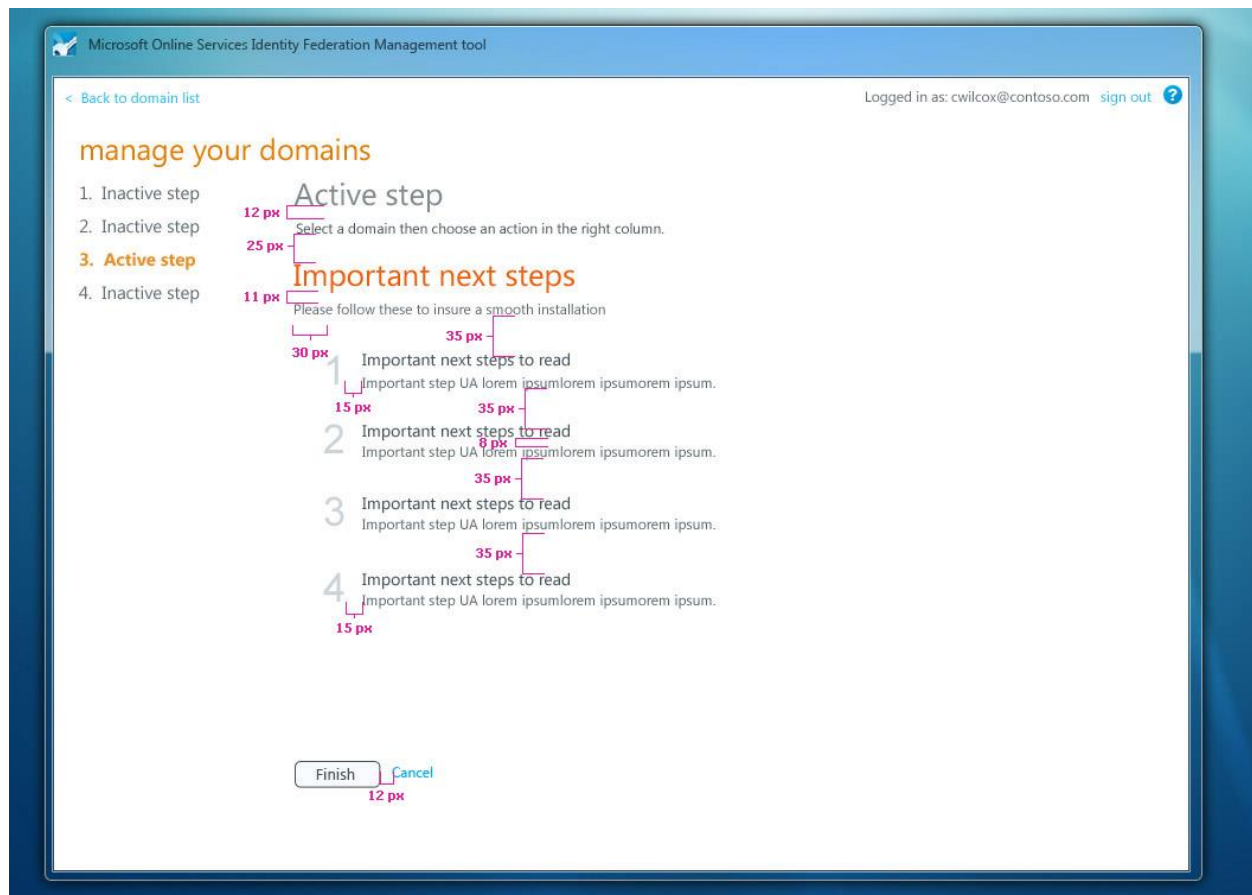


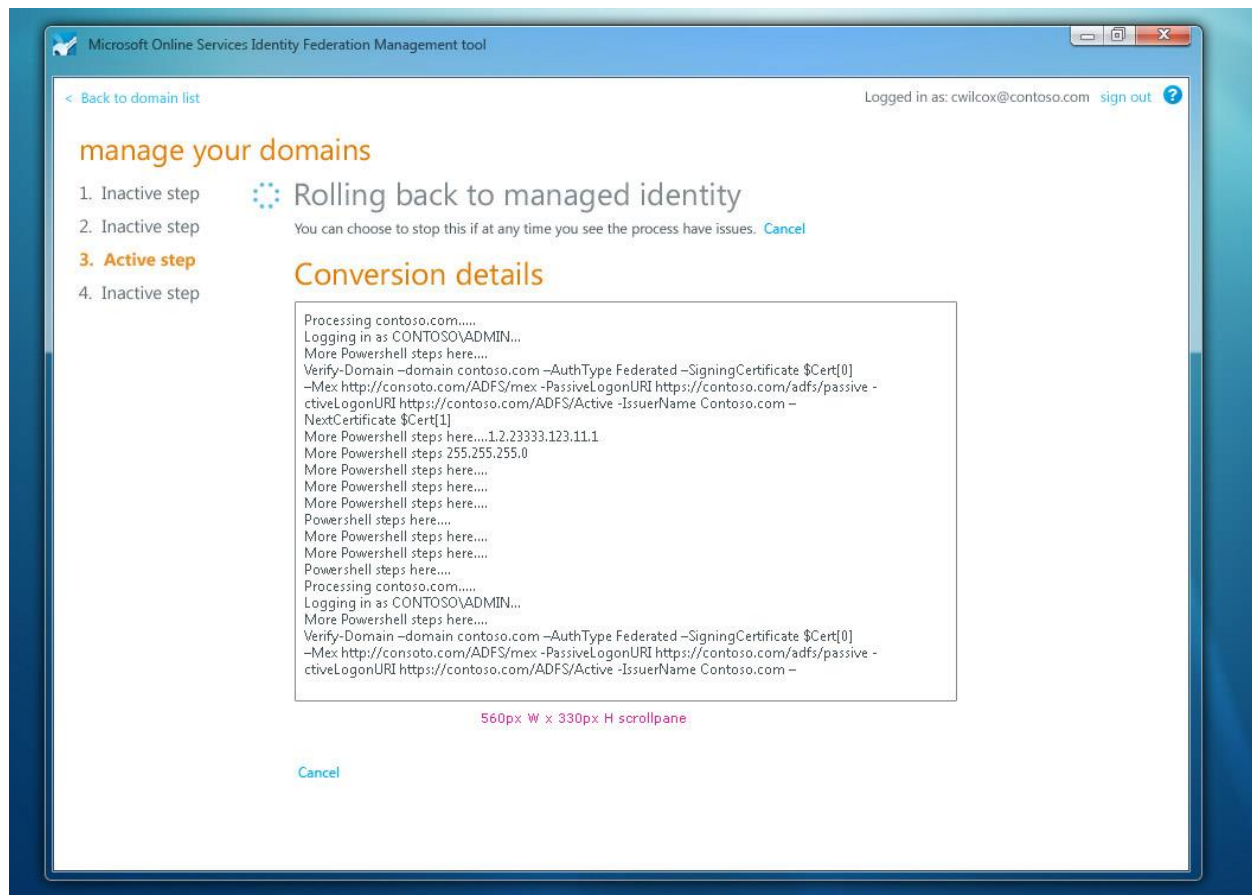




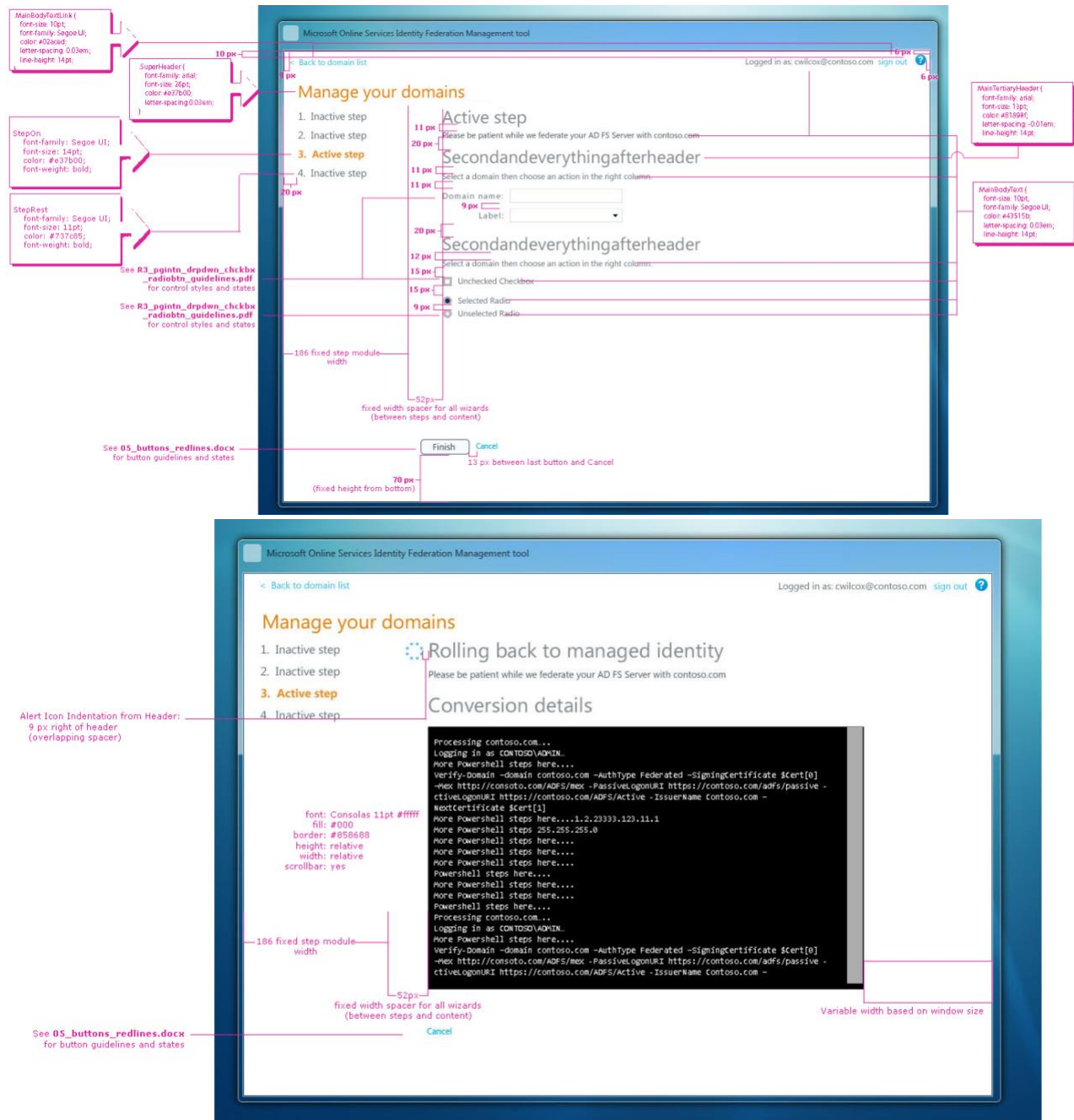








ALL: Fonts, margins, sizes and colors





Microsoft Online Services Identity Federation Management tool

Logged in as: cwlcox@contoso.com [sign out](#)

Sign in and get started with identity federation

In order to synchronize the information in Active Directory to the cloud, you must first sign in to both to Microsoft Online Services and the server where you installed Active Directory Federation Services 2.0.

Step 1

Sign in to Microsoft Online Services

Enter your Microsoft Online Services ID and password:

☐ Use my Windows credentials to log on

Microsoft Online ID:

Password:

☒ Remember my ID
☐ Remember my Password

Step 2

Sign in to your local ADFS 2.0 Server

Then enter your Windows credentials:

☒ Use my Windows credentials to log on

Server name:

Domain\Username:

Password:

☐ Remember my ID
☐ Remember my Password

Connect to services

Cancel

Microsoft Online Services Identity Federation Management tool

Logged in as: cwlcox@contoso.com [sign out](#)

Sign in and get started with identity federation

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☐ Use my Windows credentials to log on

Microsoft Online ID:

Password:

☒ Remember my ID
☐ Remember my Password

Step 2

Sign in to your local ADFS 2.0 Server

Then enter your Windows credentials:

☒ Use my Windows credentials to log on

Server name:

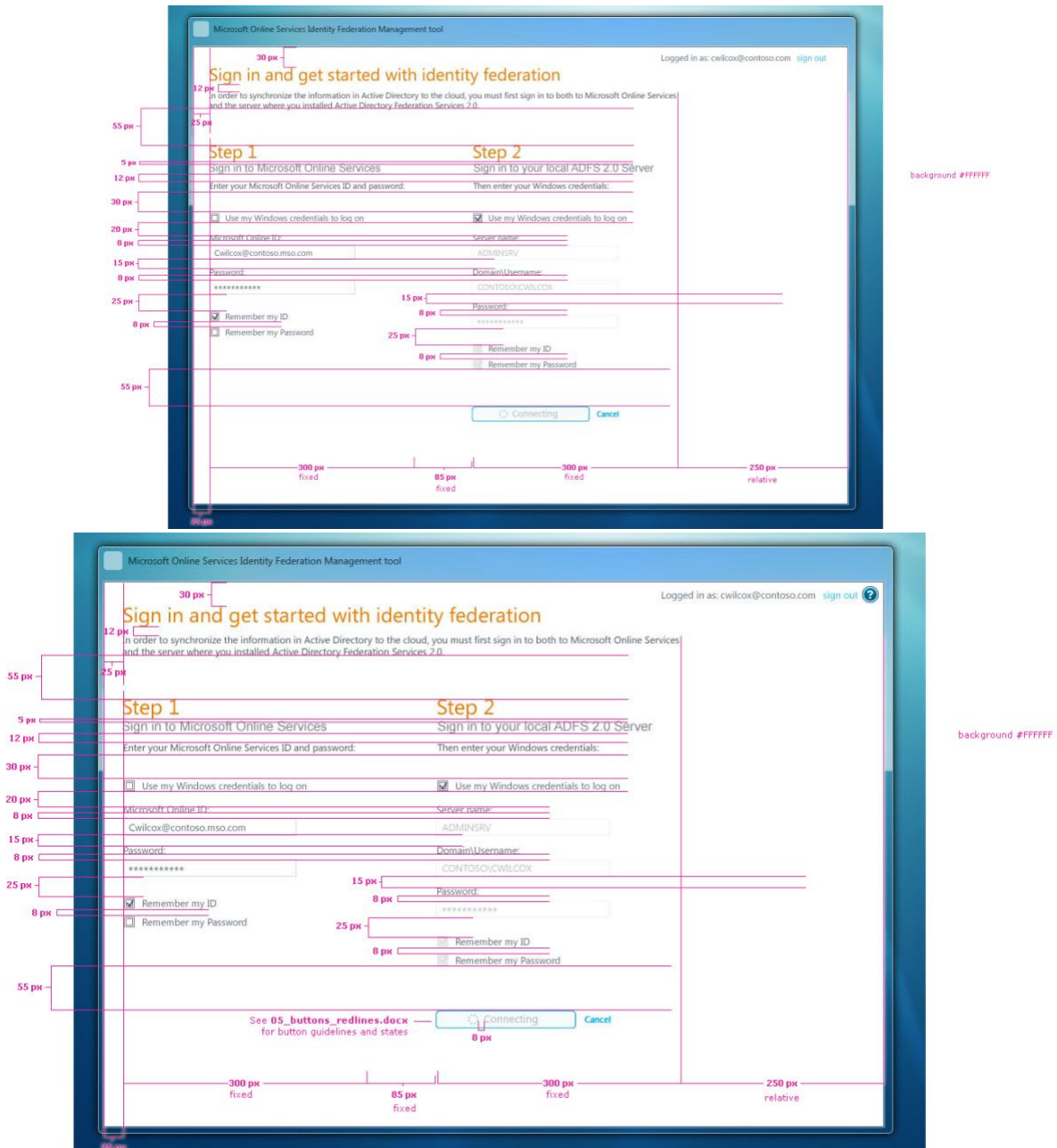
Domain\Username:

Password:

☐ Remember my ID
☐ Remember my Password

Connecting

Cancel



ISSUES/CONCERNS

[illegible]