LOOK AND FEEL ENHANCEMENTS

CONTENTS

OVERVIEW

The 6.1 release has some exciting Look and Feel enhancements. This document covers the most important enhancements for this release.

TOP BAR

The top bar now integrates the logo display and updates the appearance of the top right tool bar.

The control to minimize the icon appears only when the user mouses over the top bar.

LEFT PANE CHANGES

TOOLBAR EXPAND AND COLLAPSE

A single icon now has control over the expansion or contraction of the sub-menus under each table. This makes it easy to quickly condense the Left Pane to just the table list. The sub-menus can all be expanded or collapsed by mousing over the minus sign then clicking the appropriate option:
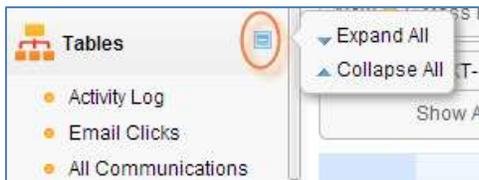
TABLE ICONS

The display of the icon next to the table name may be set to display the colored icon only when moused over or selected and to display a default "unselected table" icon or a greyed out version of the table icon otherwise. This is an option that can be set for each table by an admin user.
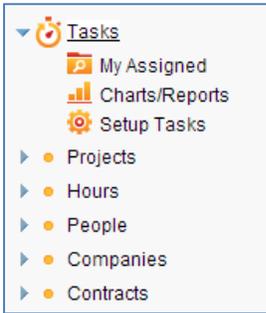
DEFINING HOW TABLE GRAPHICS ARE DISPLAYED IN THE LEFT PANE

Options have been added to the Table Setup Wizard on the Graphics tab to determine how the

Table icons will behave for both unselected Tables and Last Opened items in the Left Pane.


CHANGING THE DEFAULT UNSELECTED ICON

The default unselected icon is set in the Staff Look and Feel Scheme on the Icons tab. To change it, go to Setup > Look and Feel > Manage Staff Look and Feel Schemes and edit the existing scheme, then go to the Icons tab and scroll to the bottom.

RECORD EDIT FORM CHANGES

CONSOLIDATED RECORD BUTTONS

The Finish button has been replaced with a Save button and moved to the left of the form tabs.
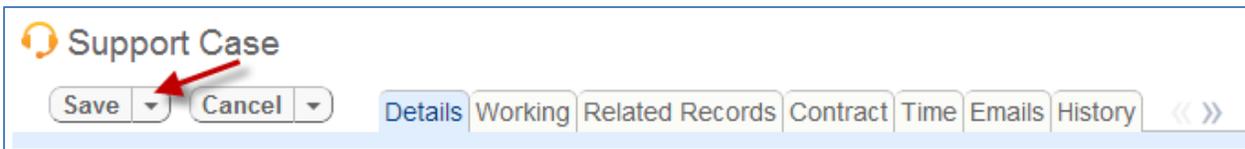

Additionally, the Save & New, Save & Next (previously Finish & New, Finish & Next) buttons have been moved to the drop-down of the Save button. Cancel and New and Cancel and Next have been added as options and are accessed from the drop-down of the Cancel button.
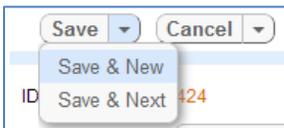
The display of the New and Next options for Save and Cancel is optional. Controls to specify whether they are included as drop-down options are accessed from the Buttons link, next to Set Alignment, on the Table Layout tab. Note: a change to New or Next options affects both the Save and Cancel buttons.

The Back and Next buttons have been removed and are replaced with arrows found just to right of the form tabs.
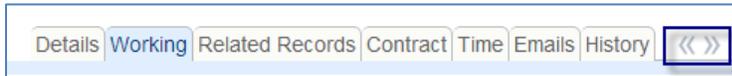
COMMON AREA MOVED BELOW TABS

The Common Area for the record has been moved below the record tabs to present a unified appearance. It can be distinguished from the other fields using a colored separator and a different background color, if desired. This is set in the Look and Feel Scheme on the Forms tab.
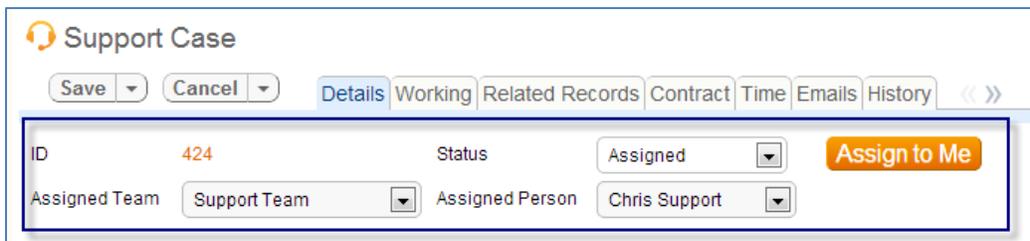
CHANGES TO TABLE VIEWS

NEW ICON COLUMN

This feature provides a new method to represent records based on a specific trait such as Status or Priority in the View Wizard.


This option can be turned on or off just like the View and Edit icons. On the Order/Colors tab, there is a new option to define the icons that will appear in the Icon Column:

Clicking the Define Notification Icons button brings up a Wizard similar to the Set Row Coloring Wizard. The user selects a choice field, and once selected, navigates to the next screen, which shows each choice value for the field next to a graphics selection option.

A new graphic can be uploaded or selected from an existing set of graphics using the standard Select/Manage Images screen:
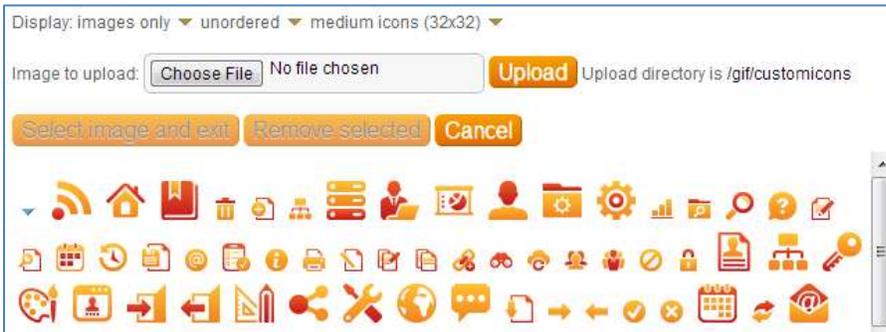

Once the icons are defined, when a Table View is launched, if the Icon Column is checked in the View, then the correct graphic is shown based on the value in the choice field.

MULTIPLE RECORDS SELECTION

The previous Select All box is replaced by a popup that appears upon clicking the top box. The new options select all found records or only records displayed on the current page was added to prevent people from accidentally acting upon records not visible on the screen.
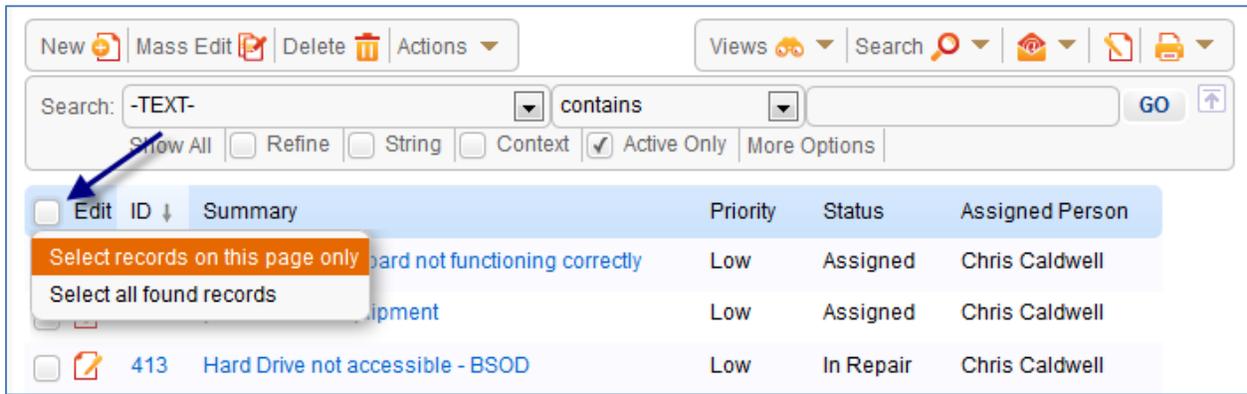
CUSTOMIZABLE ACTION BARS

Multiple enhancements have been made to the Action Bar that is displayed above the Table View. The Action Bar can now be customized to select and organize the menu items in the desired order. Different Teams may be shown different Action Bars. Additionally, custom Action Buttons can now be placed on the Action Bar.

## DEFAULT CHANGES TO THE ACTION BAR

The Action Bar is split into two halves as illustrated below. Additionally, a Menu Item for Actions has been added to the Action Bar.
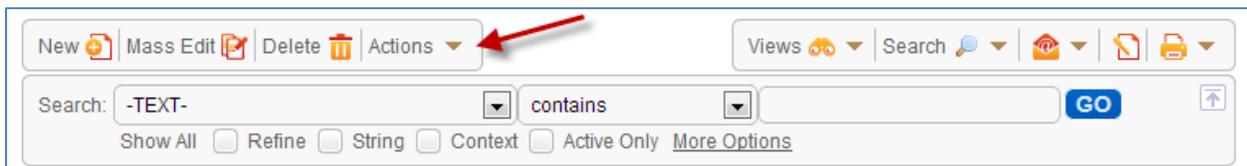
Copy, Convert, Link, Import, Export, and the general Help Menu Items are now listed in the Actions drop-down menu. Note: Import and Export have been removed from left pane.
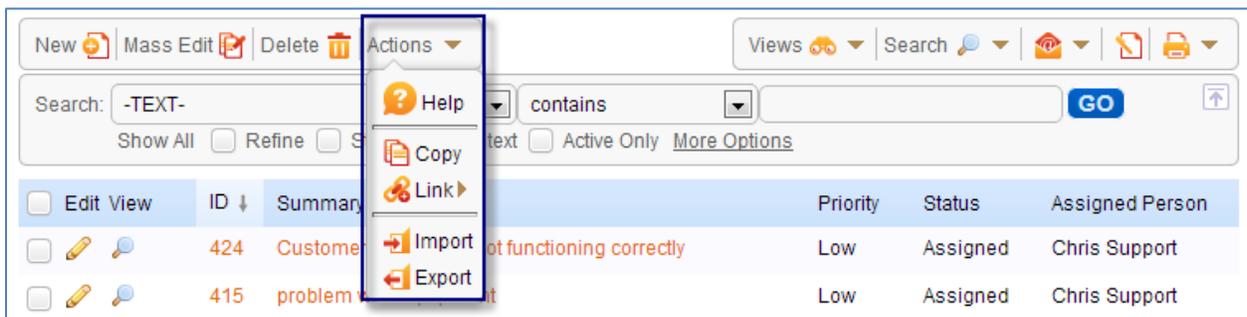
Search has been changed to a mouse-over drop-down that shows the Saved Searches, Help, Expand or Collapse Search Options, and Show All to make the collapsed Search Block more useful. The search criteria and the link to count records are now viewable only if the user clicks on Click for details.

6
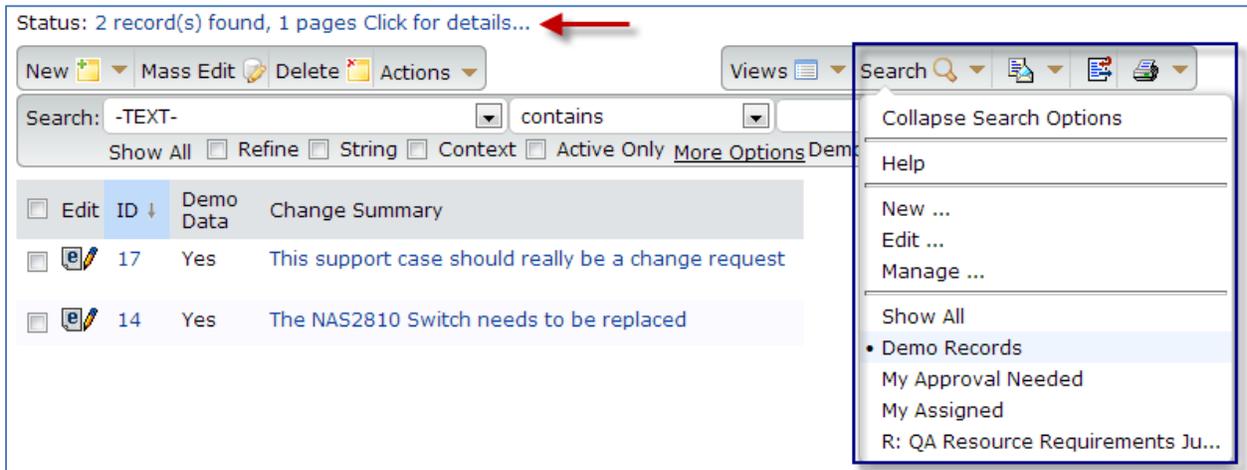
NOTES

- No Menu Item that is permission controlled will appear unless the user has permission access to that Menu Item.

- Clicking the word "Search" expands or contracts the Search Block. Mousing over the arrow next to the word Search brings up a drop-down menu showing the menu options and saved searches.

- Users who do not have permission to create and save their own searches (the existing minimal search permission for each table) will no longer see the New/Edit/Manage menu on the search drop-down.

- The Copy Menu Item will only appear for groups who have a new explicit permission to copy records.

- The Link Menu Item will only appear to groups who have an explicit permission to link records.

- The Email icon/dropdown and Note icon remain where they are now to the left of the Printer Menu Item.

CUSTOMIZING THE ACTION BAR

A new tab in the Table Setup Wizard called Action Bar has been added after the Layout Tab. Clicking the tab will bring up a Table View showing the existing Action Bars, as there may be more than one defined for a table.
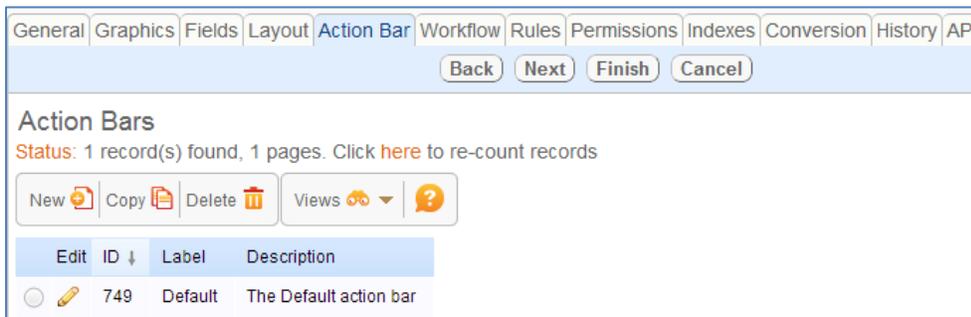
All tables start with one Action Bar named Default. It is not possible to delete the Default Action Bar. If a team has no other specified Action Bar applied to them, then the Default Action Bar will be used.

Note: the Default Action Bar does not have an Apply tab as it is the default Action Bar for all teams that do not have a specified Action Bar.

When a user copies an existing Action Bar, she is asked to give it a new name. Note: the Apply tab values are not copied. There can be only one default Action Bar for each Team.

If an Action Bar is selected for deletion, a check is made to see if it is used as the default for any Teams and if so, the user is asked to select another Action Bar before deleting. A check is also made to see if it is used for any Related Table or linked fields shown in other Tables and a warning is issued if found.

Clicking the Edit icon next to an Action Bar brings up the Action Bar Wizard. It contains the following tabs: General, Design, and Apply (the Apply tab is not shown for the Default Action Bar).

GENERAL TAB
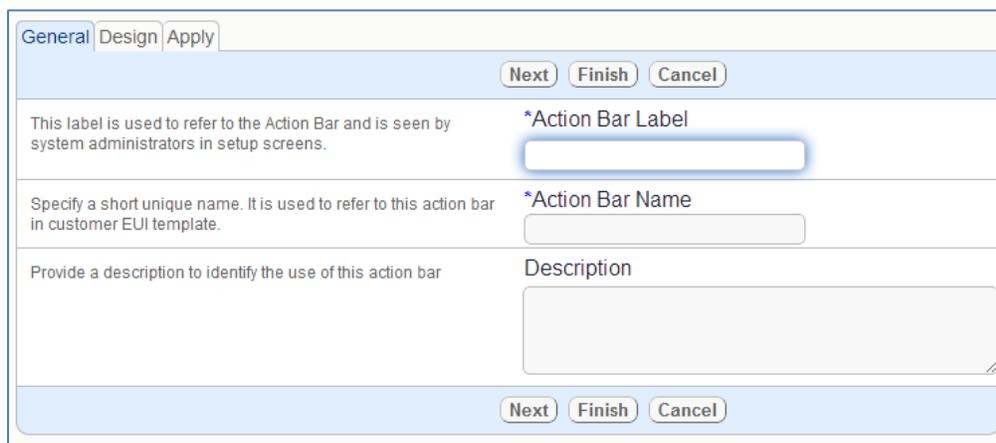
The General Tab contains the Action Bar Label, the Action Bar Name and a Description field.

DESIGN TAB

In this tab, the available actions shown on the left are filtered by the Type of Action: System Menu Item or Action Button Item. On the right are the selected Actions that will be shown in the Action Bar across the top as horizontal menu groups/items.

Buttons are used to add or remove menu items to and from the right; to edit the menu items; and to insert new menu titles and separators. The existing actions on the left can be moved onto the Menu of selected actions on the right. Note: The same action can be placed in multiple places. It will not be removed from the left when it is added.

The vertical items in the list on the right represent the top level horizontal items on the Action Bar. Items below a plus sign open up as a sub-menu of that Menu Item. Click New Menu Item to add a new Menu Item to the top level or any other level under which you may group items. Actions can be moved up or down in the right using drag and drop.

In use, an Action is clickable and runs when clicked. A Menu Item opens up the items indented below it in the tree when clicked or moused over. The Menu Item is essentially a title which when clicked opens

up the items beneath it in the tree. If there are no items at a lower level, then it functions like a text title separator.
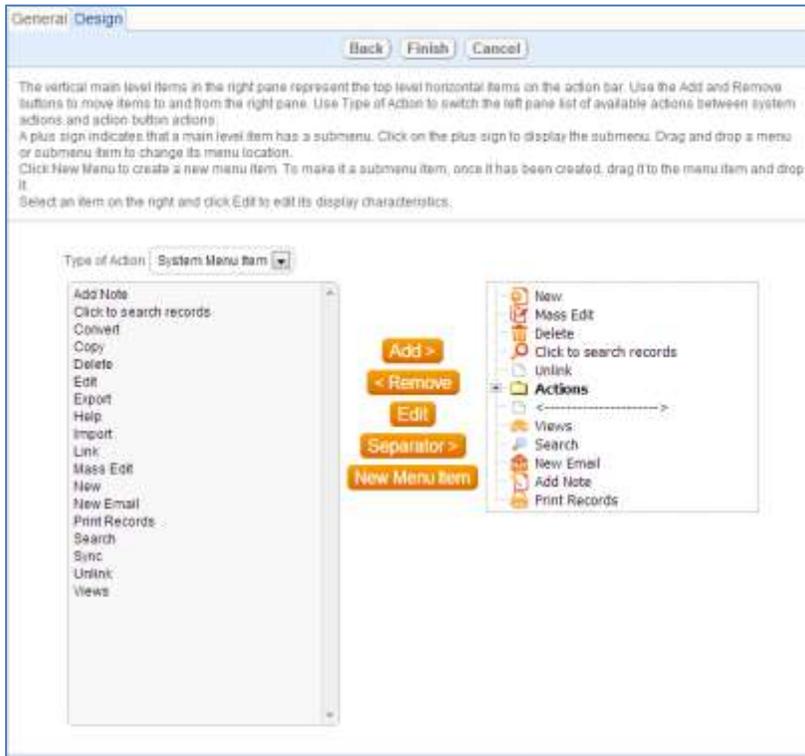
You can select an item on the right and click Edit to define its display characteristics. The following dialogue appears. Note: Clicking Edit will not affect any items on the left.
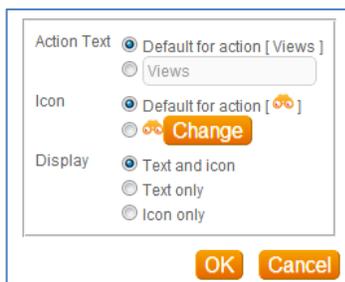
The New Menu Item button brings up the following dialogue and allows the user to enter text for a Menu Item, upload an icon, and define what is displayed.
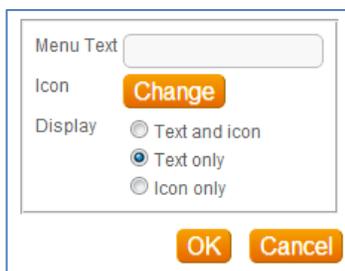

Action Button Selection and Editing

If the user selects Action Button Item as the Type of Action to display in the list of available items on the Design tab, a list of all Action Buttons defined for the Table is displayed by field label.

If an Action Button is added to the list of selected items on the right without editing it, its display options are based on how it was defined as a field. The Action Button text and Icon for an Action Button in the Action Bar are based on how the Action Button itself is defined.   The user is able change these for the display in the Action Bar by selecting the Action Button in the list on the right, followed by clicking the Edit Button.

Behavior of Action Buttons on the Action Bar

All existing System Menu functions will operate as before. Action Buttons act on selected records. If no record is selected, the user receives an error message informing him that at least one record must be selected.

If multiple records are selected and an Action Button is clicked to run on those records, a confirmation dialogue will appear.
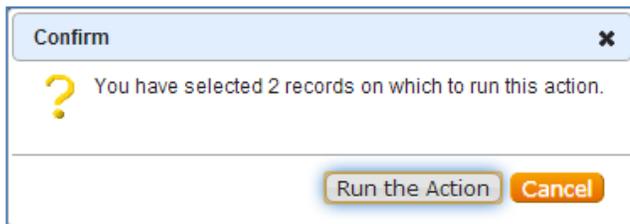
If the user does not have edit permissions for some of the records, then the following message is added to the dialogue: The action will not be run on records: [id's listed] because you do not have the appropriate permissions.

If the user clicks Run the Action, the action is run on the selected records for which he has the appropriate permissions.

APPLY TAB

The Apply tab contains the Teams specification for the Action Bar.
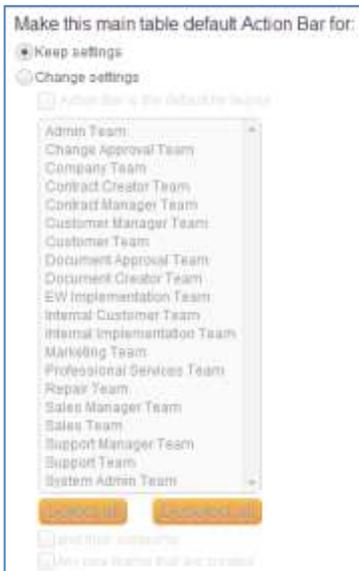
By default, the Default Action Bar is applied to all Teams and their Subteams. A Team may only have one Action Bar as its default. If an admin creates a new Action Bar and assigns three Teams to it, they are removed from the Default Action Bar, or the one they were previously assigned to.

If you remove a Team from an Action Bar on this screen, so that the Team is no longer associated with any Action Bar, that Team will be shown the Default Action Bar.

NEW OPTIONS FOR EMBEDDED TABLE DATA TYPES

One of the great benefits of enabling multiple Action Bars is the ability to fine tune the options that are presented when working with embedded Tables. For the following data types: Related Table, Embedded Search Result, Communication Search Result, and Link to Selected fields with multiple values enabled, a custom Action Bar can be specified to be displayed. The following option in the Display tab for the Field Wizard has been updated to include selection of the Action Bar.

The display of the Action Bar with the embedded Table is hard coded here and does not have any dependency on which Action Bar is assigned as the Default for a user's Team, unless the second option is selected: "Display the user's default action bar for the source table."

LOOK & FEEL WIZARD

Several additions have been made to the Staff Look and Feel Wizard to control new styles and objects on the screen.

LEFT PANE

GO BUTTONS

The display of the GO button has been enhanced with controls for the border color, width, style and radius in the Look and Feel Wizard on the Left Pane tab.

BODY

USER INFO/LANGUAGE BAR

This section of the Look and Feel Wizard has been integrated with the entire Top Bar and simplified. Users now have control over hyperlinks specifically in this bar.

TABLES

ACTION BAR

Options for configuring a border color, width and style have been added to the Look and Feel Wizard on the Tables tab. The amount of overall white space in an action bar is now determined by the amount of Padding used.

TABLE HEADER

Options for rounding the Table Header and configuring a color for the divider bar between the table columns headings have been added to the Look and Feel Wizard on the Tables tab. The Divider Color and Border Radius options control the appearance of the table header border and the divider between columns.

An arrow to illustrate which way the table is being sorted has replaced the triangle icon. The option to specify a different color or color gradient for the columns that are being used for sorting has also been added. Note: consider the color of the sort order arrow, which is dark grey, when selecting a background or gradient for this column.

ROW MOUSE-OVER EFFECT

Controls for the highlighting of rows when the mouse is passed over a row have been added to the Tables tab in the Look and Feel editor.

CELL PADDING

The amount of white space in a view is now controlled by using Cell Padding in the Look and Feel Wizard. Increase the amount of padding for a table to appear less crowded. The Cell Padding option is found on the Tables tab of the Look and Feel Wizard.

FORMS

CUSTOM FIELD LABELS

An option has been added to the Forms tab of the Look and Feel Wizard to specify how field labels are displayed. Users now have the option to set a font, font attributes, font coloring, background coloring, padding and the choice of whether or not to display a colon character after the label.

ACTION BUTTONS

Options for the display of Action Buttons have been added to the Forms tab in the Look and Feel Wizard that allow a gradient to be applied to the button, as well as control over the border width.