

TREE VIEW and LIST VIEW

OVERVIEW

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PERSONAL PROFILE – GROUP NAVIGATION DEFAULT INTERFACE

OVERVIEW

In the ECM application, users have two navigation options for selecting groups, positions and users:

- **List View** in which the user navigates through the hierarchy of organizations and groups displayed in lists, and
- **Tree View** which allows the user to use a tree-view approach similar to the way that the Windows Explorer interface works.

These options are provided for all screens that need to select groups, positions, and/or users. The Personal Profile Screen allows the user to select either view as their default preference. The user also has the option to move from List View to Tree View and from Tree View to List View by clicking the <TREE VIEW> or <LIST VIEW> button on the right of the screen.

SELECT GROUP/POSITION

Figure 1 shows the “List View” method for selecting a group or position.

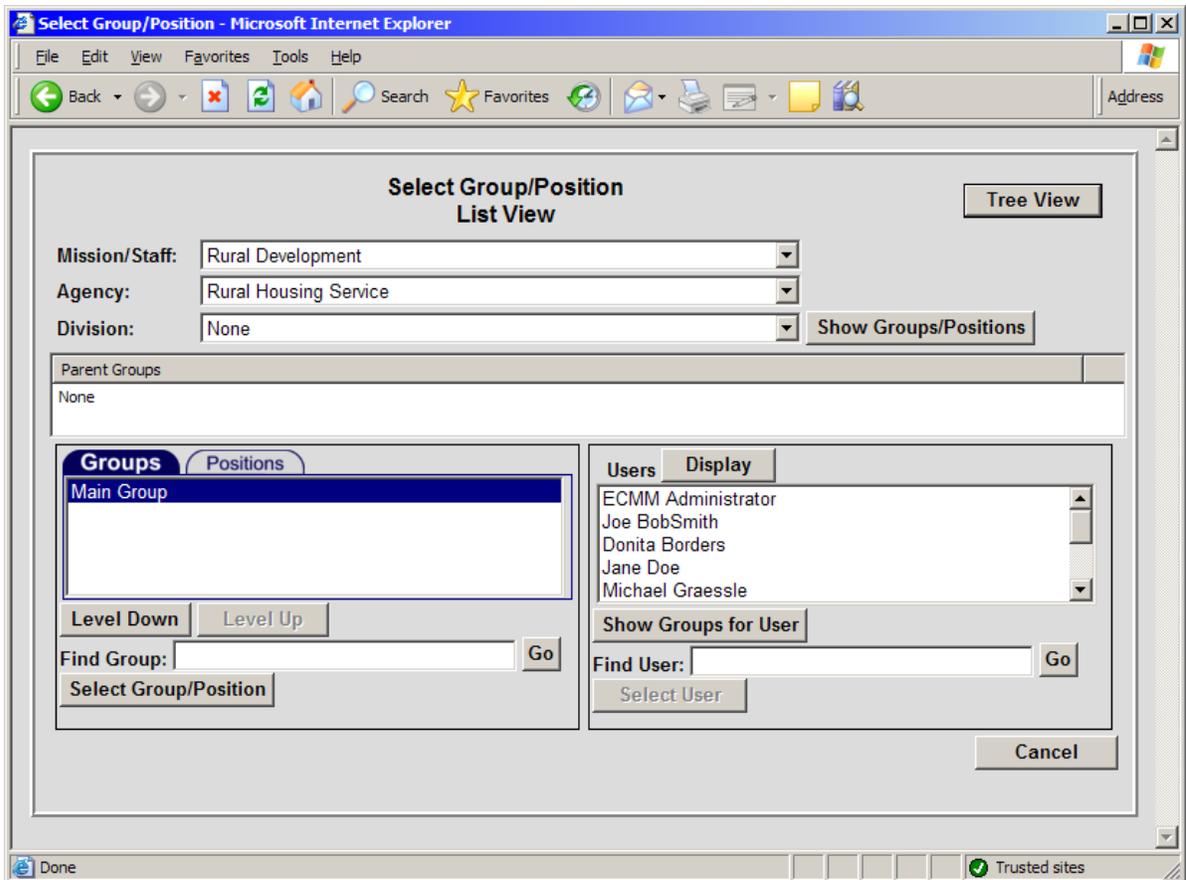


Figure 1: Select Group/Position List View

To access the Tree View interface, the user clicks the <Tree View> button. The Tree View is shown in **Figure 2**.

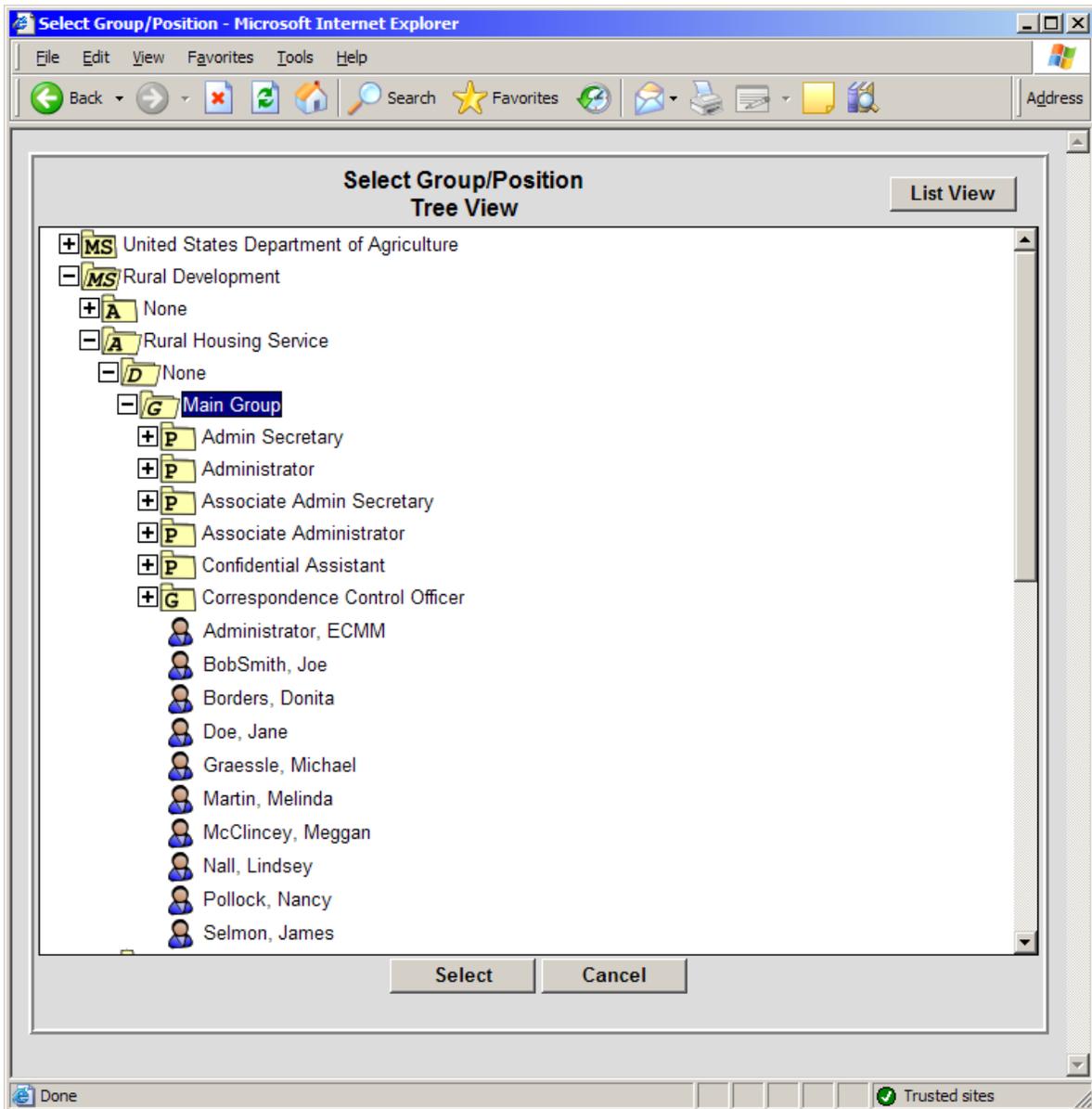


Figure 2: Select Group/Position Tree View

The organization hierarchy is shown as folders and person icons. Person icons are names of individual users. Folder icons have letters to indicate their level. Folder icons include:

- MS – Mission/Staff
- A – Agency
- D - Division
- G – Group
- P – Position

To see more detail within a level, the user clicks the <+> operator. To see less detail, the user clicks the <-> operator. To make a selection, the user highlights the desired Group, Position or User and clicks the <Select> button.

SELECT FINAL SIGNER

The Select Final Signer function allows the user to select one or more final signers. The current List View screen is shown in **Figure 3**.

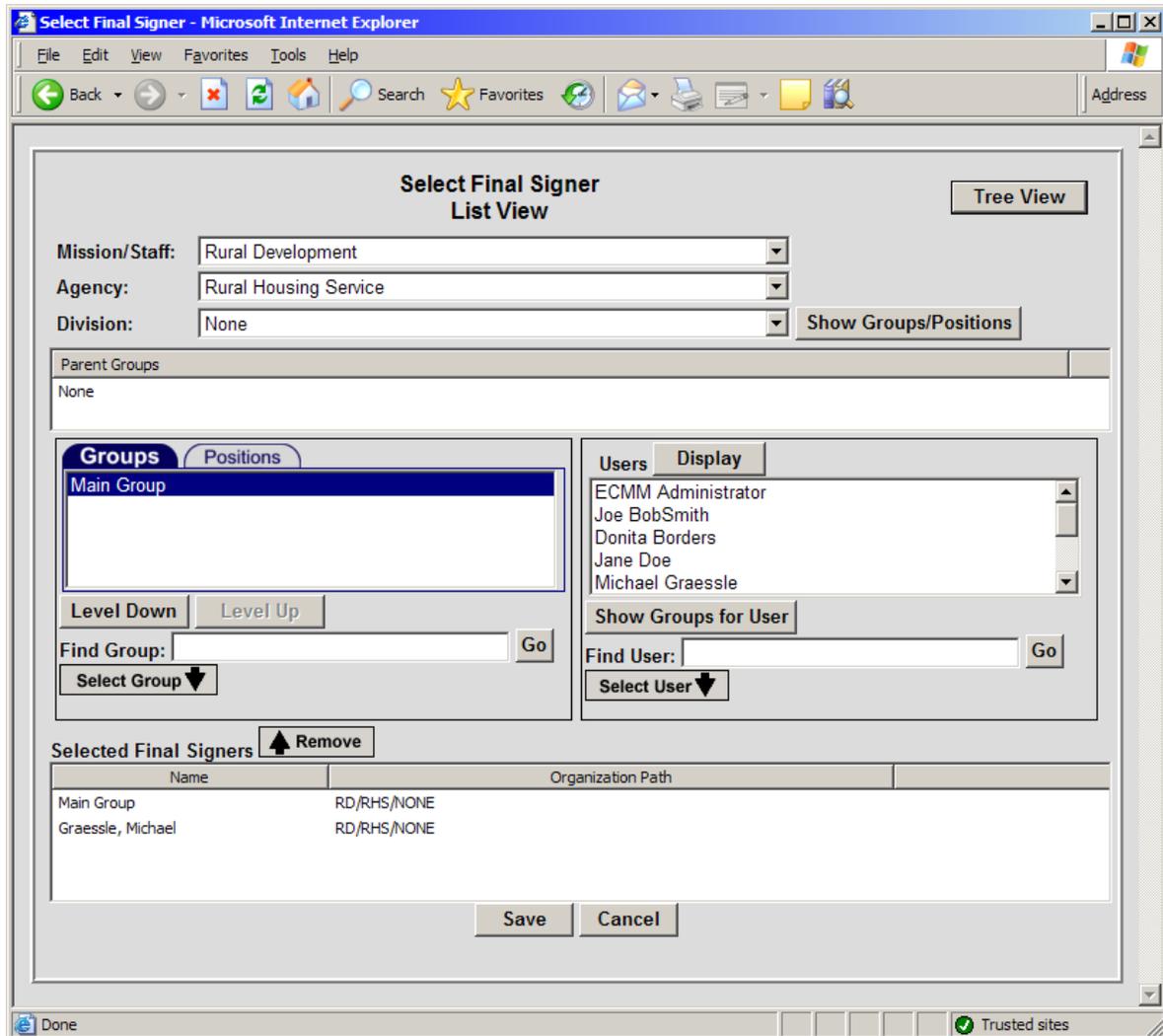


Figure 3: Select Final Signer List View

The Select Final Signer Tree View screen is shown in **Figure 4**.

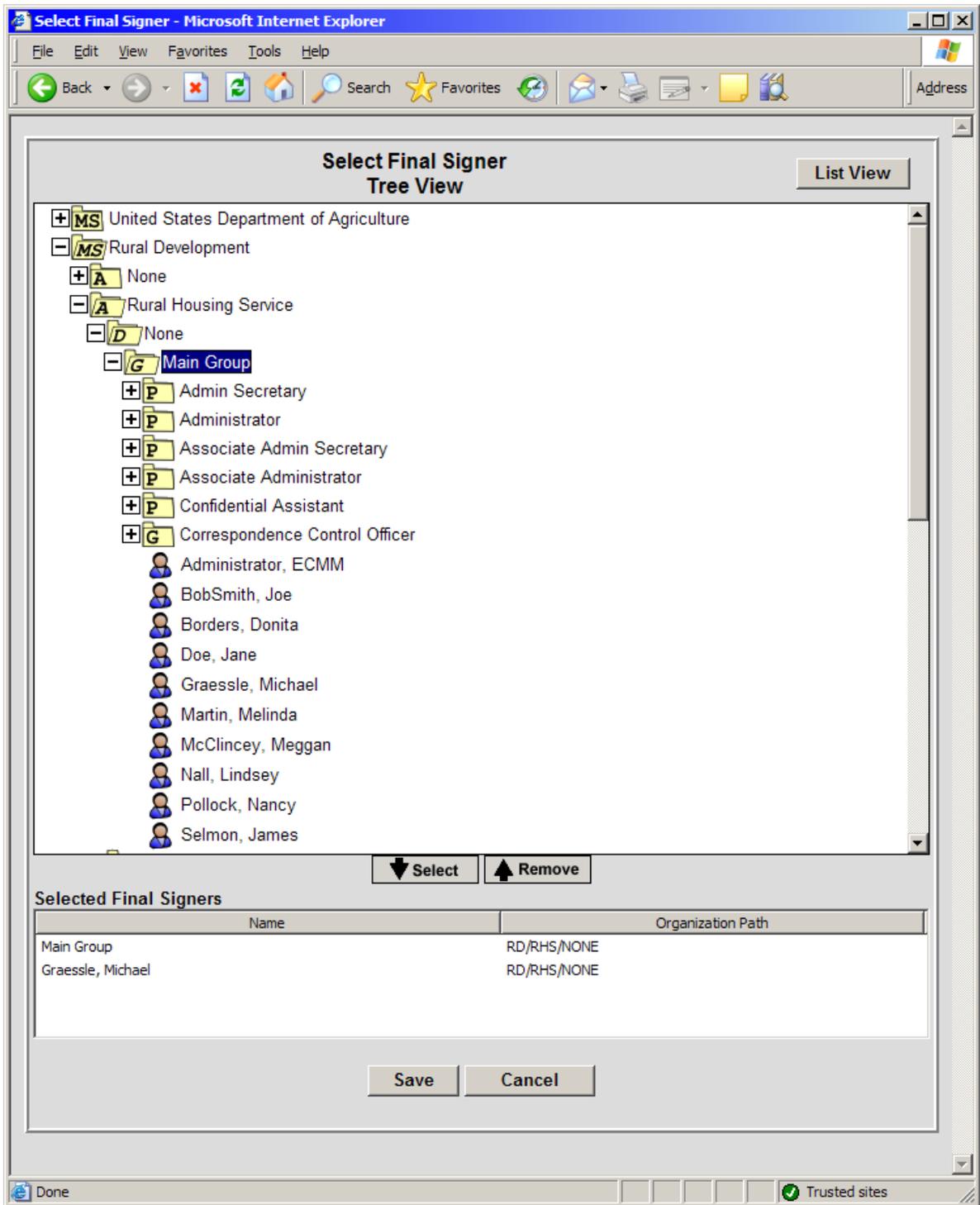


Figure 4: Select Final Signer Tree View

SELECT ASSIGNEE

The Select Assignee List View screen is shown in **Figure 5**.

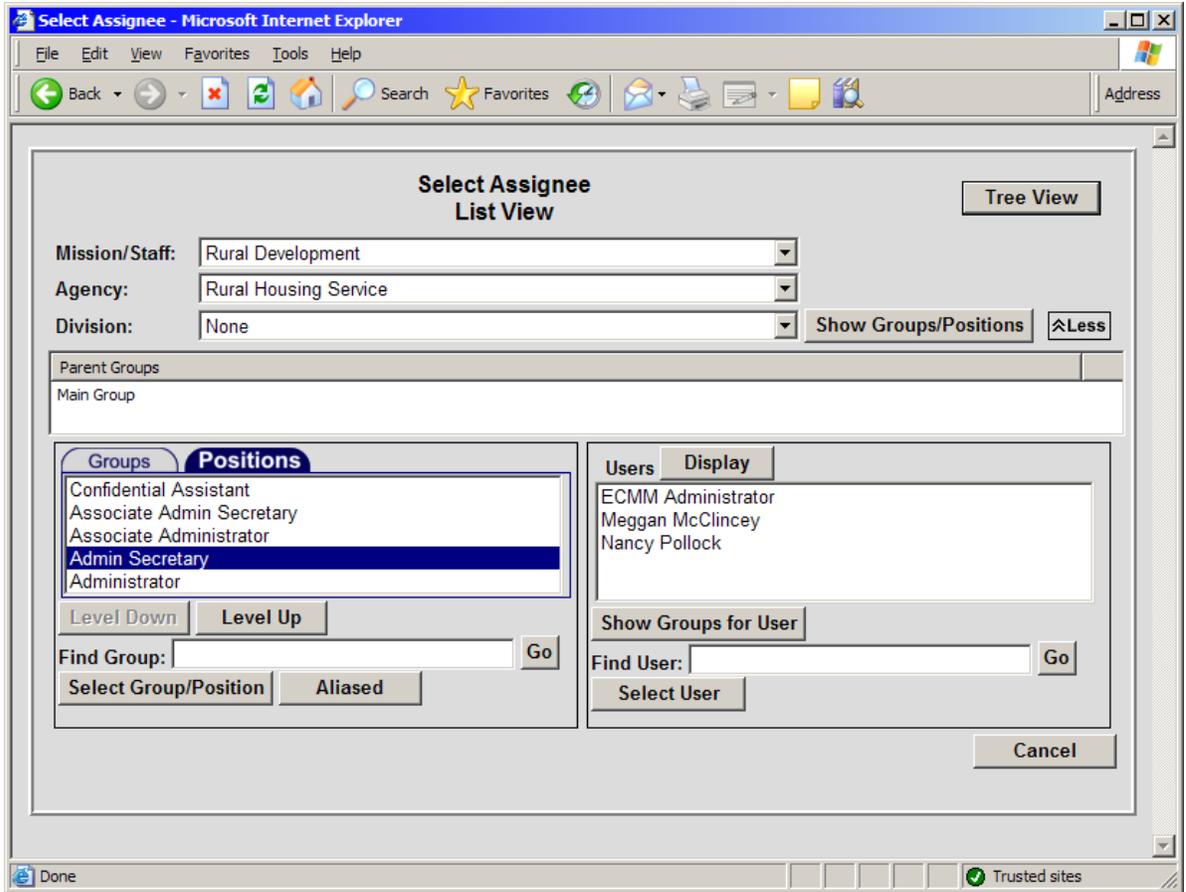


Figure 5: Select Assignee List View

This screen allows users to select an assignee for a task. In addition to being able to select a Group, Position or User, this screen allows the user to select an aliased assignee. The aliased assignee resolves to the person(s) in the selected group or position based on the Folder organization. The Select Aliased Assignee screen is shown in **Figure 6**.

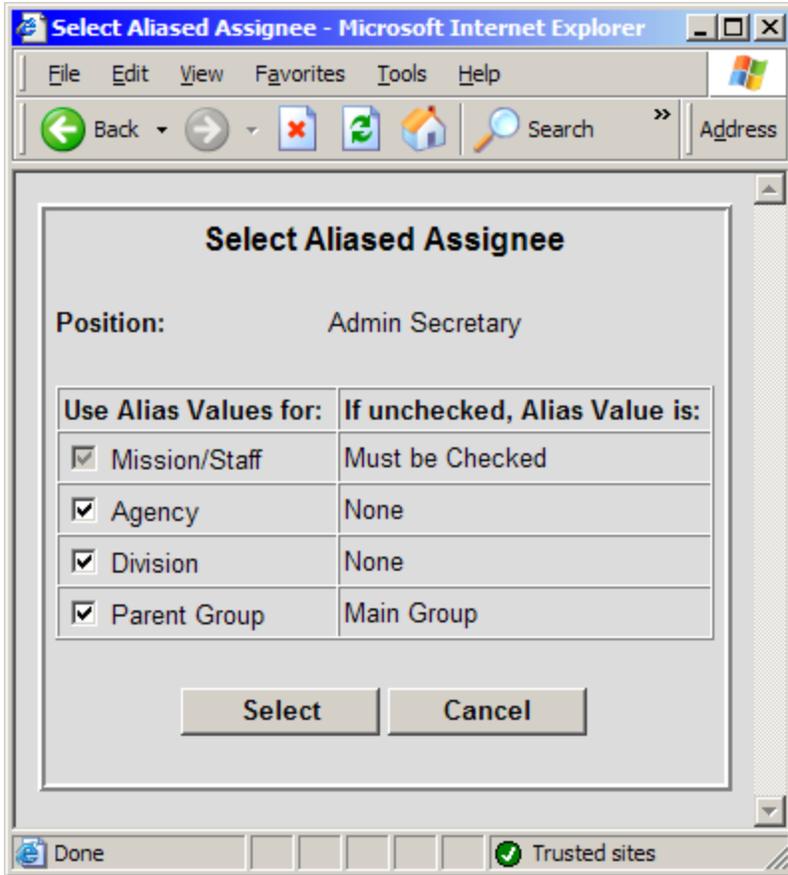


Figure 6: Select Aliased Assignee List View or Tree View

This same screen is displayed when selecting an aliased assignee from either interface.

Figure 7 shows the Select Assignee Tree View screen.

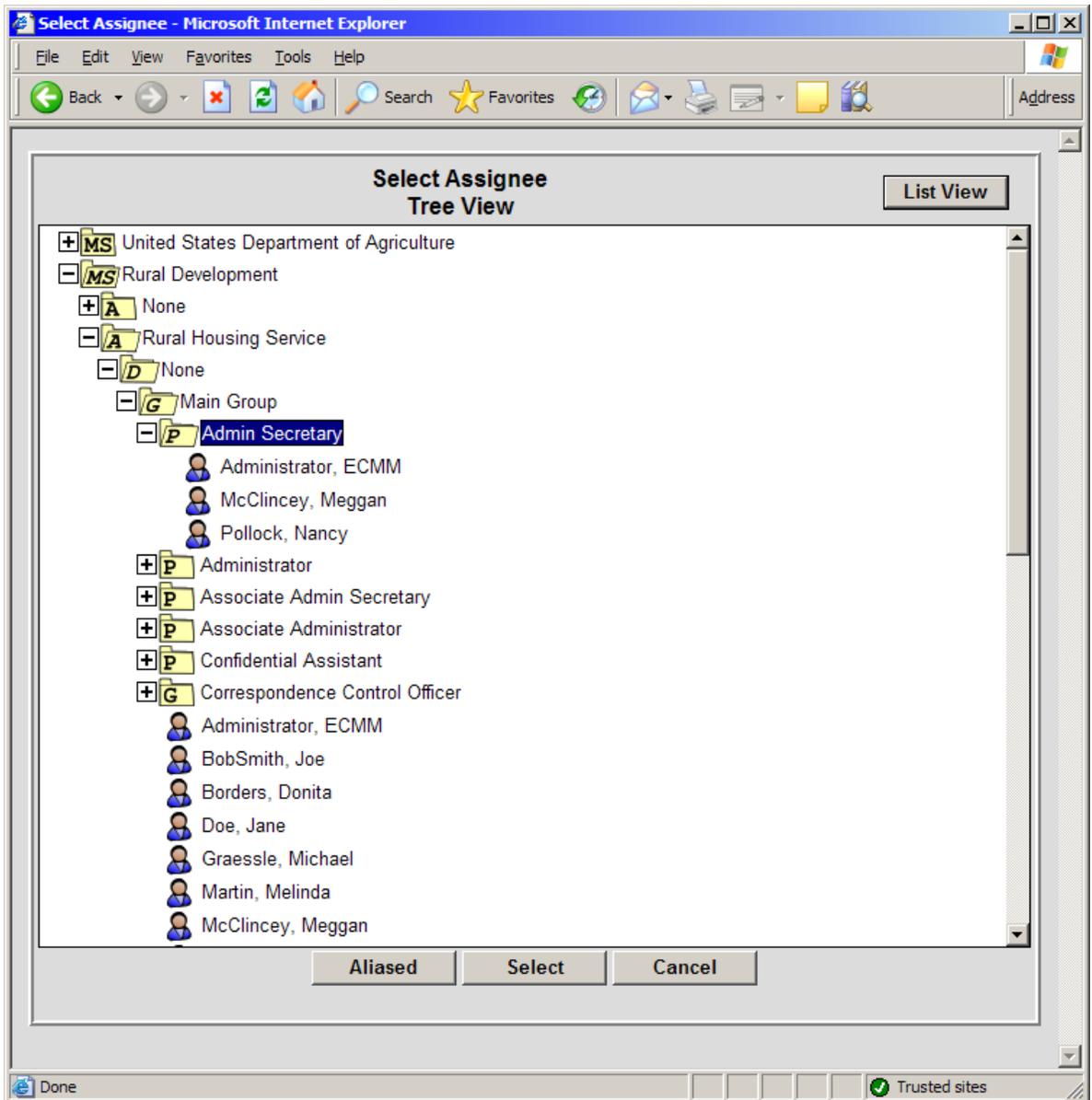


Figure 7: Select Assignee Tree View

To select an aliased assignee, the user clicks the <Aliased> button.

PERSONAL PROFILE – GROUP NAVIGATION DEFAULT INTERFACE

Each user can select their preferred interface on their Personal Profile screen as shown in **Figure 8**.

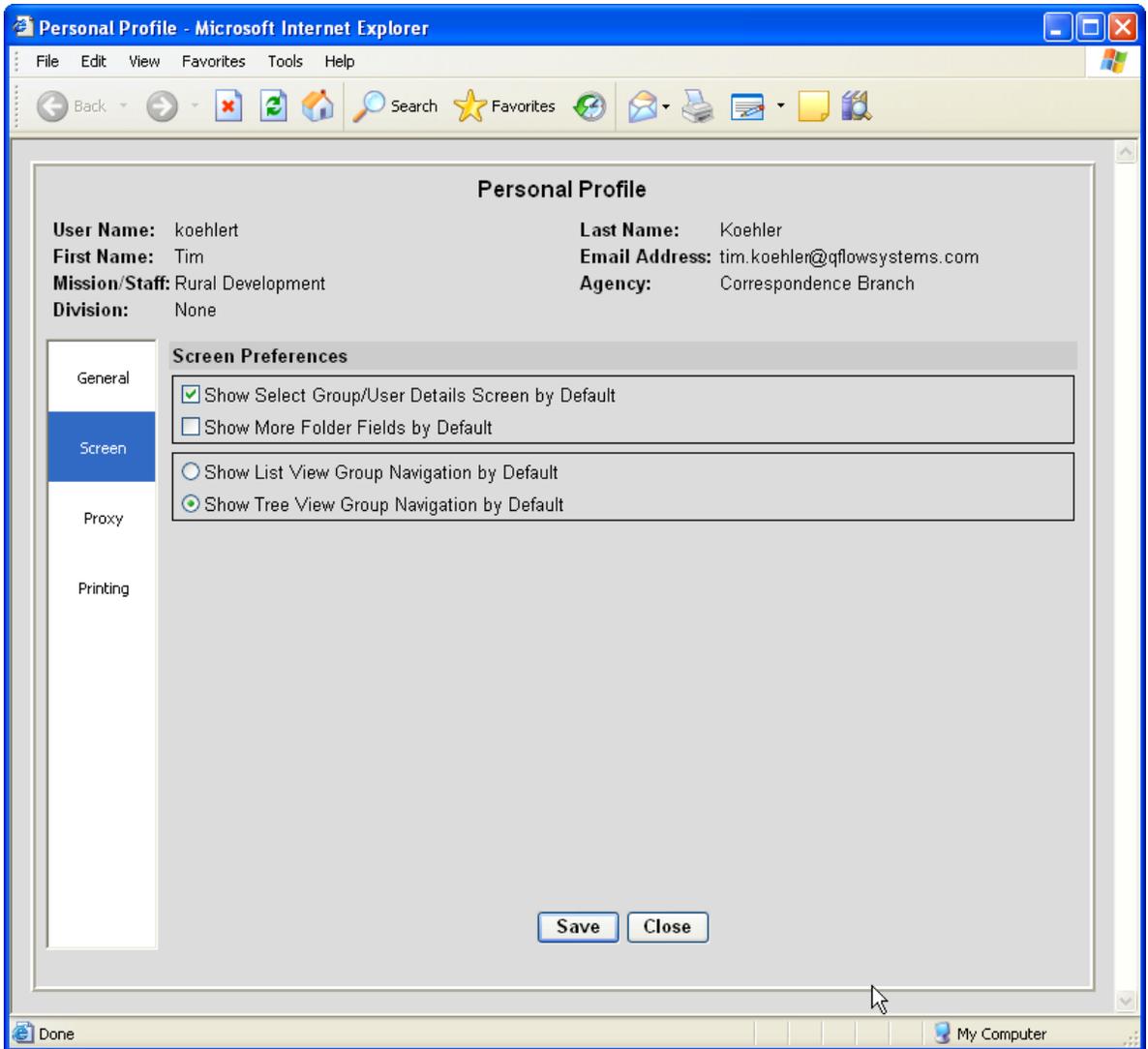


Figure 8: Personal Profile - Group Navigation Interface Selection

To use the 'List View' by default, the user selects 'Show List View Group Navigation by Default.' To use the Tree View by default, the user selects 'Show Tree View Group Navigation by Default.'