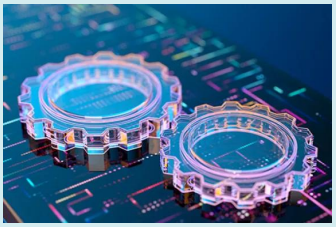
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Define and Design New Pages



Overview, Layout, and Configuration Guide

Overview

Users create new instances of application objects using the New page. The page contains the following elements:

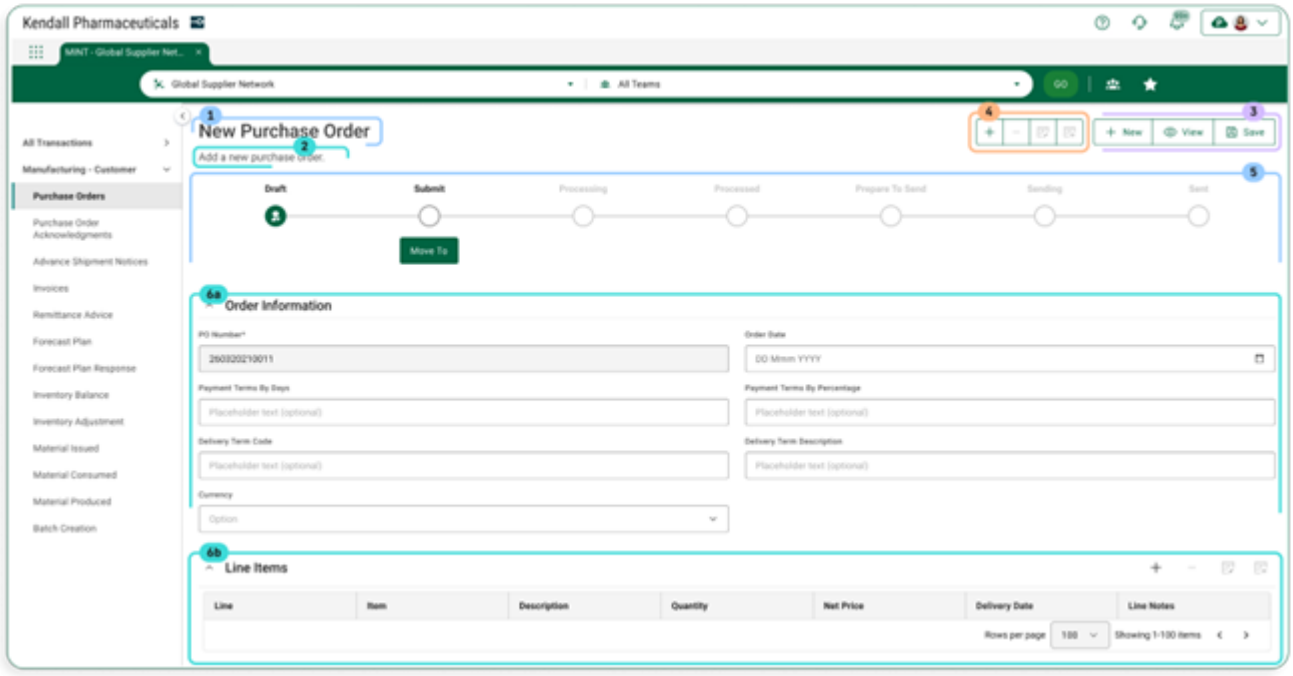
1. Page title
2. Assistive text
3. Object operations toolbar
4. Collection operations toolbar
5. Workflow progress indicator bar
6. One or more form sections which contain either:
    - Simple fields and groups
    - A collections table
7. Push panel for collection operations New and Edit

Layout

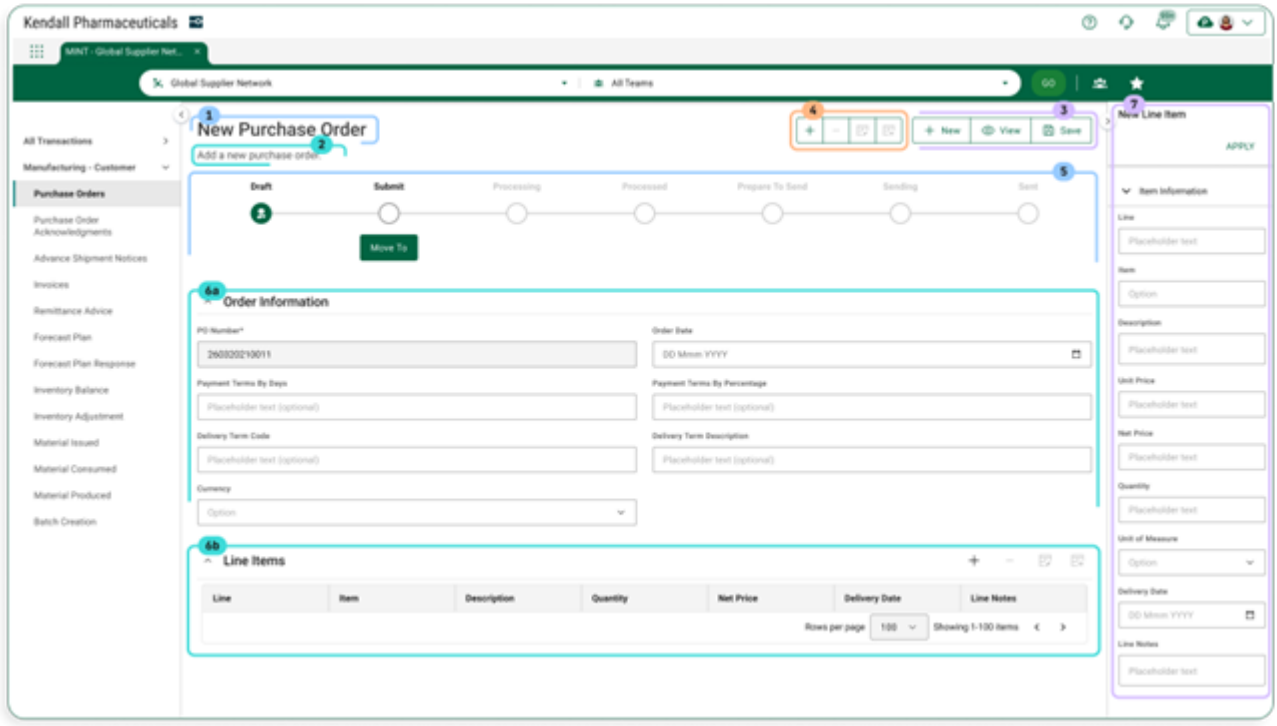
Sample Screen (User)

Default View

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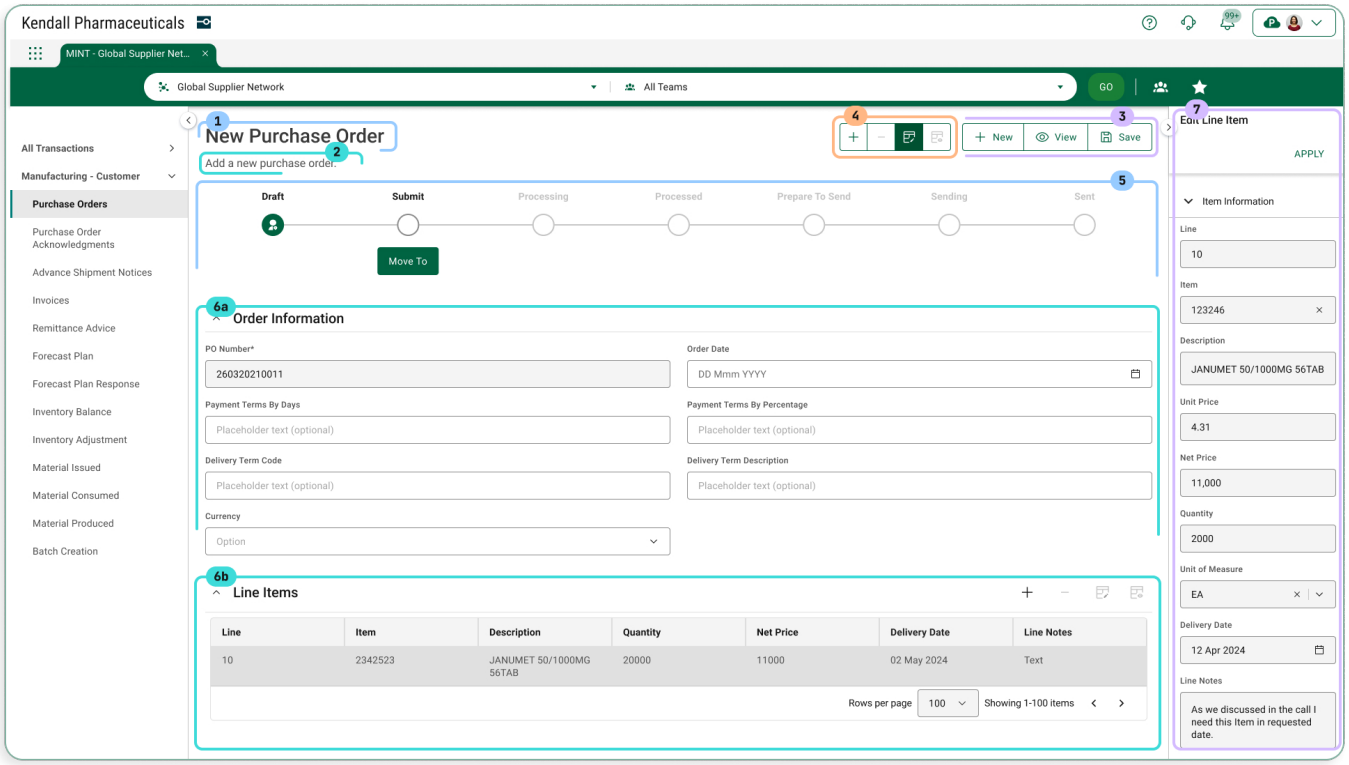


With Add Collection Row Push Panel



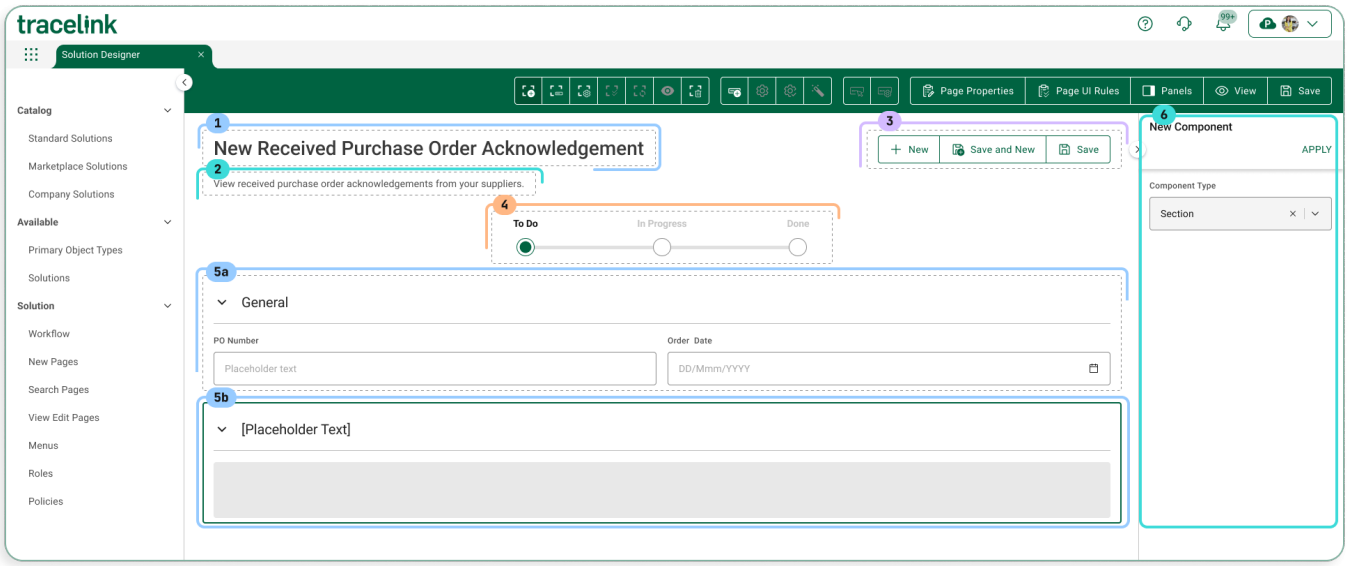
With Edit Collection Row Push Panel

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Sample Screen (Solution Designer)

Default View



Configuration

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Page Title

The page title shows the page's title. The convention is that the value is "New" followed by the object that is being created (e.g. New Purchase Order).

Contents

Data Type	Value	Example
Static Text	New [Object Type]	New Purchase

Information for Solution Designers

The page title is a required element that cannot be removed from the page.

Design Conventions

Page title is "New [Object Type]" (e.g. "New Purchase Order").

Configuration Options

Not applicable. The page title element's design cannot be modified.

Assistive Text

Assistive Text is a text value that is set by the Solution Designer.

Contents

Data Type	Value	Example
Static Text	[Set by Solution Designer]	Enter information for the new purchase order. At a minimum, you must supply values for the required fields.

Information for Solution Designers

Assistive text should always be displayed on Search pages.

Design Conventions

Property	Convention

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Property	Convention
Text length	No more than 100 characters.
Writing style	Adheres to the OPUS Writing Guidelines

Configuration Options

Property	Parameter	Option	Description
Hidden	On/Off	Off (default)	The page instructions are visible (i.e. not hidden). As a best practice, assistive text should always be visible in accordance with the design conventions.
		On	The page instructions are hidden.

Object Operations Toolbar

The buttons in the object operations toolbar apply to the page or main object, as opposed to the buttons on the collections toolbar, which apply to collections inside the page.

Contents

Element	Type	Description
New	Toolbar Button	Selecting this button navigates to a blank version of the same page, which is the same as reverting the page back to its default state. Any values entered are not saved.
Save and New	Toolbar Button	Selecting this button does the following: • Validates the user's entries (i.e. ensures that all required fields have values). • If validation does not pass, the user sees a corresponding error snackbar. • If validation succeeds, a new object instance is created with the current values of all fields, and a success message appears verifying the object is created. • The page refreshes and all fields revert back to their default state, so the user can create another new instance of the object.
Save	Toolbar Button	Selecting this button does the following: • Validates the user's entries (i.e. ensures that all required fields have values). • If validation does not pass, the user sees a corresponding error snackbar. • If validation succeeds, the new object instance is created and the user is navigated back to the object Search page.

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Information for Solution Designers

Design Conventions

The object operations toolbar can be hidden, but only if there are no operations that can be performed on the page. Otherwise the object operations toolbar design cannot be modified.

Configuration Options

Applies To	Property	Parameter	Values	Description
Toolbar	Hidden	Off/On	Off (default)	The toolbar is visible (i.e. not hidden).
			On	The toolbar is hidden.
Toolbar Button	Hidden	Off/On	Off (default)	The button is visible (i.e. not hidden).
			On	The button is hidden.

Collection Operations Toolbar

The collection operations toolbar contains actions that apply to collections within the new object. Collections are a type of data element that can have multiple values within a particular object instance. For example, a collection of transaction IDs contains all transaction IDs that apply to a single Purchase Order. The collection operations toolbar appears at the top of the New page and above each collection table.

Contents

Element	Type	Description
New	Toolbar Button	Selecting this button opens the New collection row push panel.
Edit	Toolbar Button	Selecting this button opens the Edit collection row push panel with data from the selected row in the active collection table. This button is only enabled if a row is selected.

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Element	Type	Description
Remove	Toolbar Button	Selecting this button removes the selected row from the active collection table. This button is only enabled if a row is selected.

Information for Solution Designers

Design Conventions

Not applicable. The collection operations toolbar design cannot be modified.

Configuration Options

Applies To	Property	Parameter	Values	Description
Toolbar	Hidden	Off/On	Off (default)	The toolbar is visible (i.e. not hidden)
			On	The toolbar is hidden.
Toolbar Button	Hidden	Off/On	Off (default)	The button is visible (i.e. not hidden).
			On	The button is hidden.

Progress Indicator

The progress indicator is an optional component that illustrates the state of the object instance. This is particularly useful for objects that go through a workflow. For example, a Purchase Order object may go from “To Do” (i.e. not started) to “In Progress” to “Done.”

Contents

Element	Sub Element	Type	Description
Active State	State Name	Text	The name of the state (e.g. ”To Do,” “In Progress”). Configurable by the Solution Designer.
	State Icon	Icon	Indicates the state is active.

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Element	Sub Element	Type	Description
Non-active State	State Name	Text	The name of the state (e.g. ”To Do,” “In Progress”). Configurable by the Solution Designer.
	State Icon	Icon	Indicates the state is not active.

Information for Solution Designers

Design Conventions

Property	Convention
First state name (i.e. the initial state of the object)	Use “To Do”
Last state name (i.e. the state of the object when the workflow is completed)	Use “Done”

Configuration Options

Applies To	Property	Values	Description
Progress Indicator	Hidden	Off (default)	The indicator is visible (i.e. not hidden)
		On	The indicator is hidden.
Progress Indicator	Number of states	Number	The number of states in the workflow.
State	State Name	Text	The name of the workflow state to display.

Form Section

A form section contains a form header and either:

- A combination of simple fields (e.g. Name, ID) and groups (a predefined set of logically connected fields)
- A collections table (described in the Collections Table section)

Contents

Element	Type	Description
Section Name	Text	The name of the section.

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Element	Type	Description
Section Inputs	Simple fields and groups or Collections table	A section can contain a combination of simple fields and groups or a single collections table. A collections table cannot be mixed with other inputs.

Information for Solution Designers

Design Conventions

Property	Conventions
Section Layout Columns	Fields inside TraceLink form groups can either appear in a one-column layout (with long fields) or a two-column layout (with shorter fields).
Section Name	Use descriptive nouns for group names (e.g. “Shipping Address”). Do not include verbs in the section name. If the page has only one section, hide the section name because it will be redundant with the page title.
Section Fields and Groups	Each section should contain logically connected fields and groups. The best practice is to have between 3 and 8 fields per section. • If a section has fewer than 3 fields, consider merging it into another section, if they can be logically combined. • If a section has more than 8 fields, consider splitting it into separate sections, if they can be logically separated.

Configuration Options

Applies To	Property	Parameter	Values	Description
Section Header	Hidden	Off/On	Off (default)	The header is visible (i.e. not hidden).
			On	The header is hidden.
Section Header	Collapse	Off/On	On (default)	The section can be collapsed and expanded. The corresponding icons are present.
			Off	The section cannot be collapsed and expanded. The corresponding icons are not present.

Collection Table

A collection is a particular data element that can have multiple values within a

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particular object instance. For example, a Purchase Order object instance might have multiple transaction IDs, thus transaction IDs are a collection inside the Purchase Order object. Each collection inside an object is displayed in its own collections table.

Contents

Element	Type	Description
Table Fields	Field List	The ordered set of fields contained in the table.
Table Field	Text, Select List, or Date/Time	An individual field for entering data to an item in the collection.

Information for Solution Designers

Design Conventions

Property	Convention
Field Order	Key fields that help identify a particular row (e.g. Name, ID) should appear first (leftmost). Fields that are less likely to be used to identify a row (e.g. Date, Description) should appear after the key fields.

Configuration Options

Not applicable. The collection table design cannot be modified.

New Collection Row Push Panel

The New Collection Row push panel (accessed by selecting the New icon on the Collection Toolbar when a collections table is active) provides a means for users to add a new data row to a collection.

Contents

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Area	Element	Description
Header	Push Panel Title	“New” static text.
	Apply Button	Validates the user’s entries (e.g. ensures values supplied for all required fields) and then: • If validation fails, TraceLink shows the corresponding error message. • If validation passes, TraceLink adds the row to the collection table.
	Close Button	Selecting this button closes the push panel.
Push Panel Content	Field List	All fields that are displayed in the push panel. The fields that appear here can be set in the OPUS Solution Environment (OSE).
	Field (inside Field List)	The label and corresponding data entry field.

Information for Solution Designers

Design Conventions

Property	Convention
Field List	The push panel should contain the same fields that are in the collection table.
Field List Order	The order of the fields in the push panel should match the order of the fields in the corresponding collection table.

Configuration Options

The user sets the push panel field contents per the above conventions.

Edit Collection Row Push Panel

The Edit Collection Row Details push panel (accessed by selecting the Edit icon on the Collection Toolbar when a row in an active collections table is selected) provides a means for users to edit a row in a collection.

Contents

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Area	Element	Description
Header	Push Panel Title	“Edit” static text.
	Apply Button	Validates the user’s entries (e.g. ensures values supplied for all required fields) and then: • If validation fails, TraceLink shows the corresponding error message. • If validation passes, TraceLink updates the row in the collections table with the values that were entered in the push panel.
	Close Button	Selecting this button closes the push panel.
Push Panel Content	Field List	All fields that are displayed in the push panel. The fields that appear here can be set in the OPUS Solution Environment (OSE).
	Field (inside Field List)	The label and corresponding data entry field.

Information for Solution Designers

Design Conventions

Property	Convention
Field List	The push panel should contain the same fields that are in the collection table.
Field List Order	The order of the fields in the push panel should match the order of the fields in the corresponding collection table.

Configuration Options

The user sets the push panel field contents per the above conventions.

TraceLink University

Related Content

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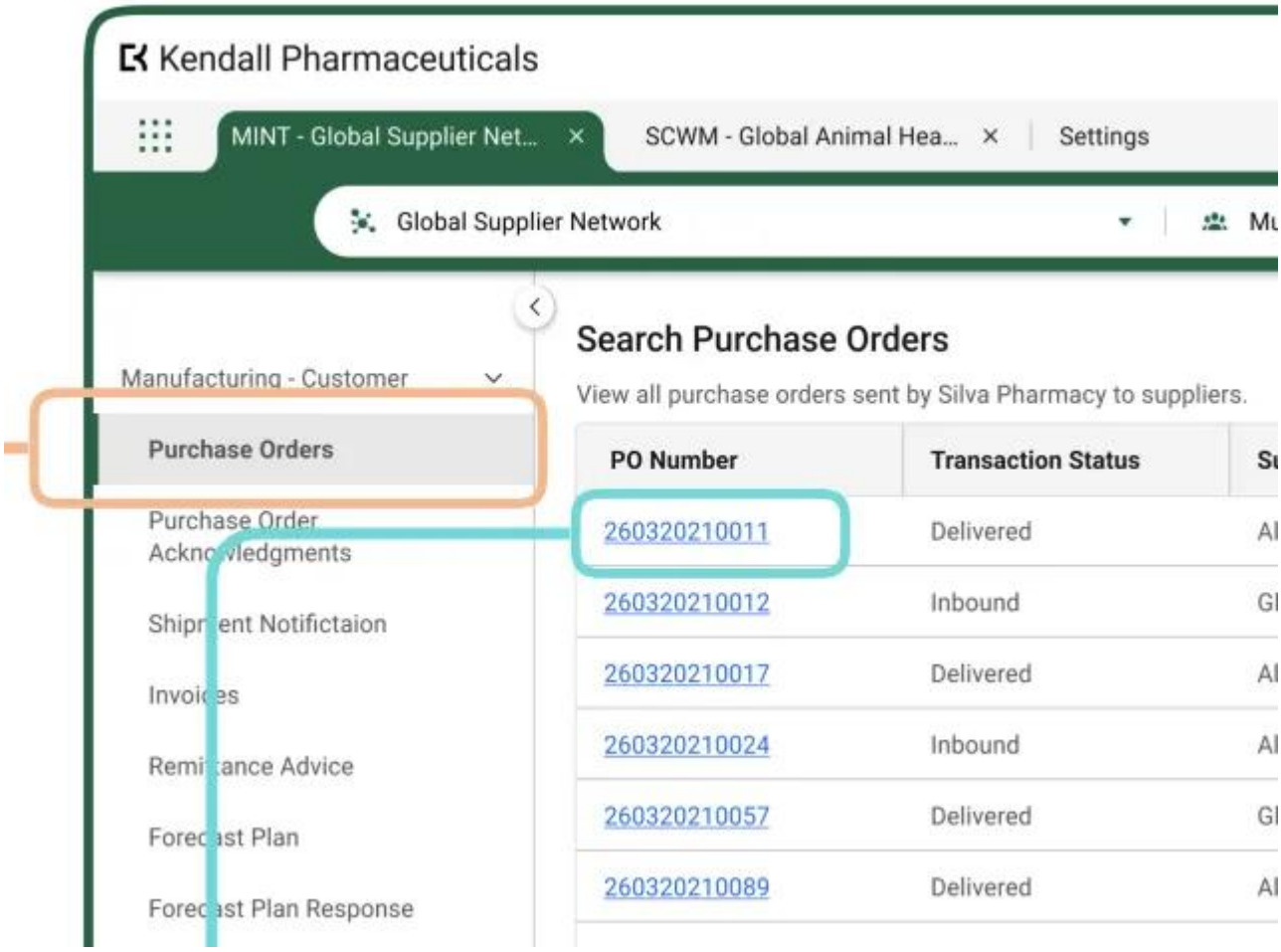


Get Started Designing on the OPUS Platform With OPUS Anthem

Anthem is TraceLink's Design System that establishes consistent design conventions across the OPUS Platform, allowing designers to quickly create solutions that meet various business and user needs.

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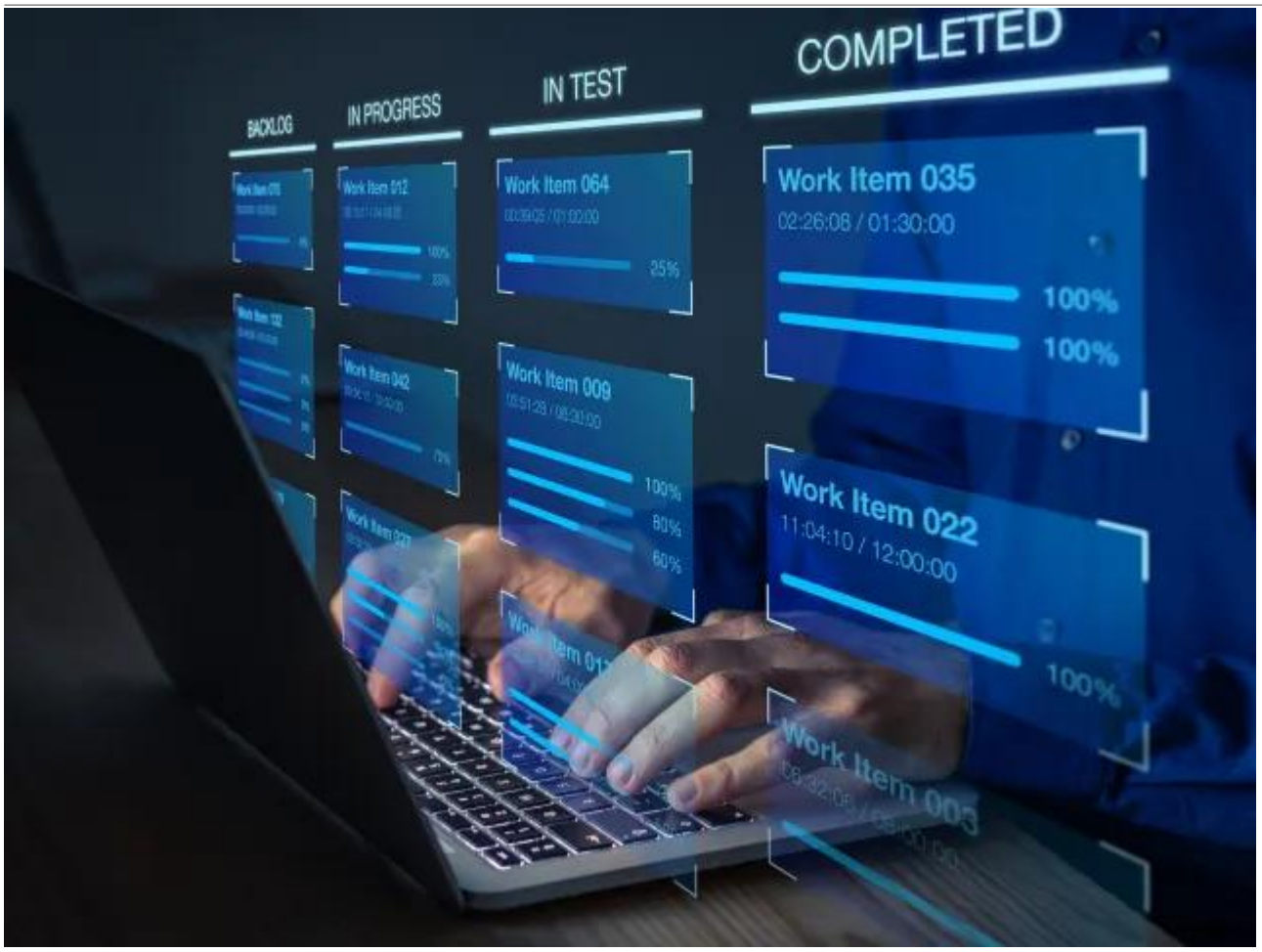
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Understanding Page Types within the OPUS Solution Environment (OSE)

Page types enable Solution Designers to efficiently create user-friendly pages using a drag-and-drop interface, allowing them to organize information for optimal usability.
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Define and Design Workflows

This guidance outlines essential practices for designing effective workflows that enhance efficiency and flexibility in business processes, focusing on primary objects to help OPUS Solution Designers create impactful solutions.

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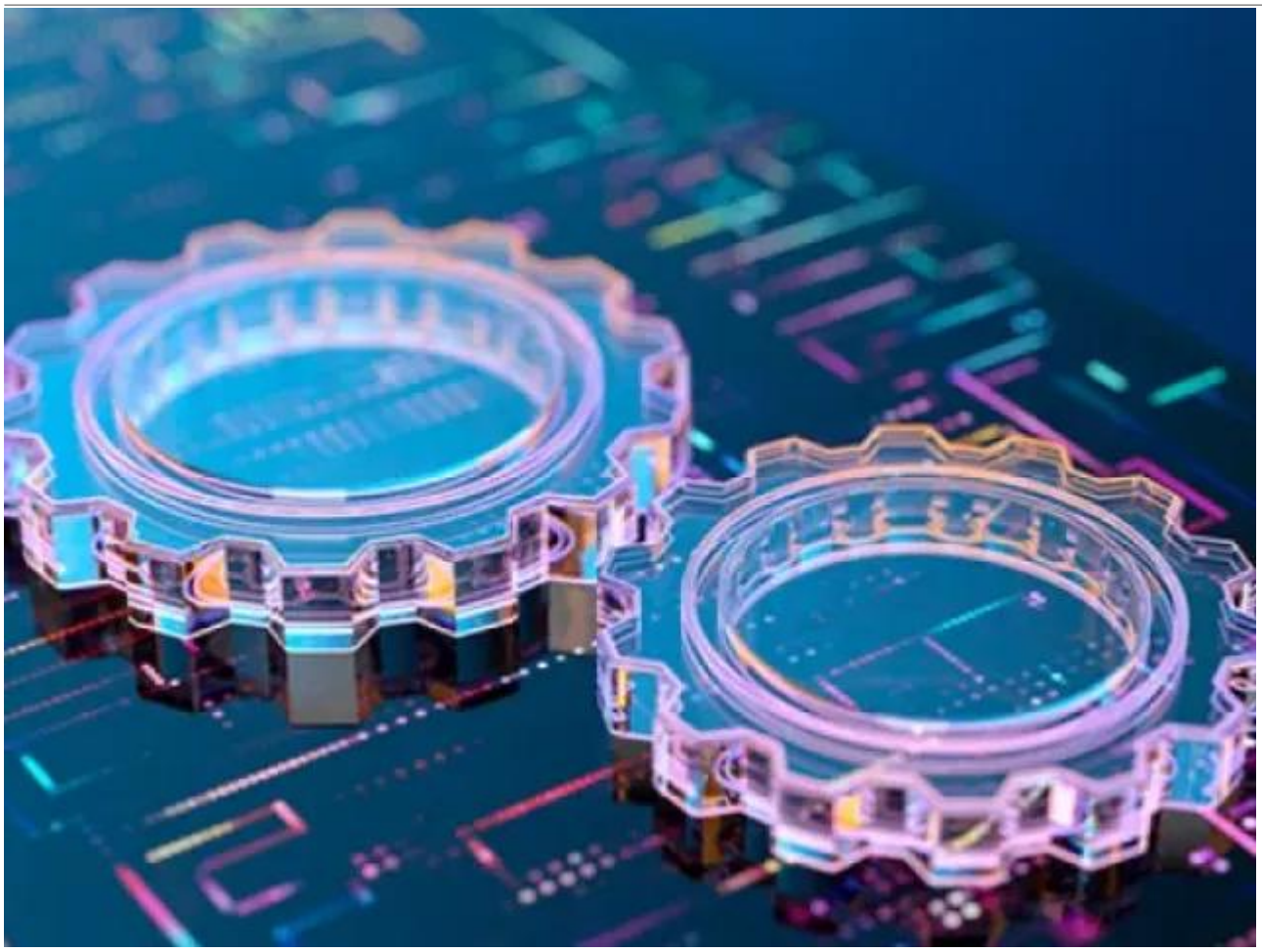


Design Considerations With Roles and Policies

User access in a solution is managed through permissions, roles, and policies: permissions define specific actions, roles group these permissions for streamlined access, and policies enforce the logic that determines what users can do, ensuring data protection and security compliance.

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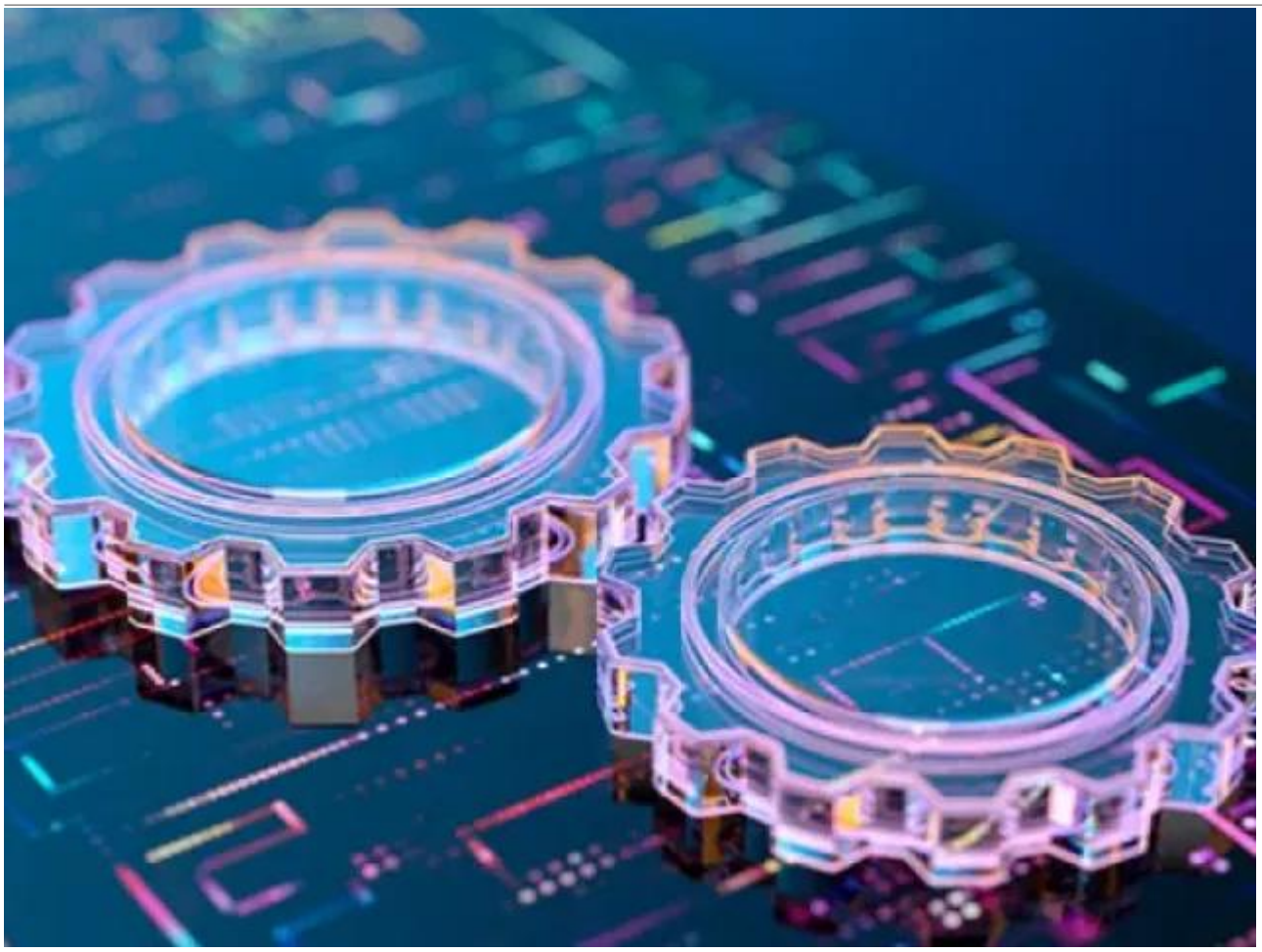


Define and Design Search Pages

Search pages enable users to view, search for, and create new object instances, typically serving as the landing page when navigating to a solution, except when only one instance exists (like the Profile page in Settings), in which case the user is directed to the View/Edit page.

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Define and Design View/Edit Pages

Overview, layout, and configuration guide for defining and designing view/edit pages/
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