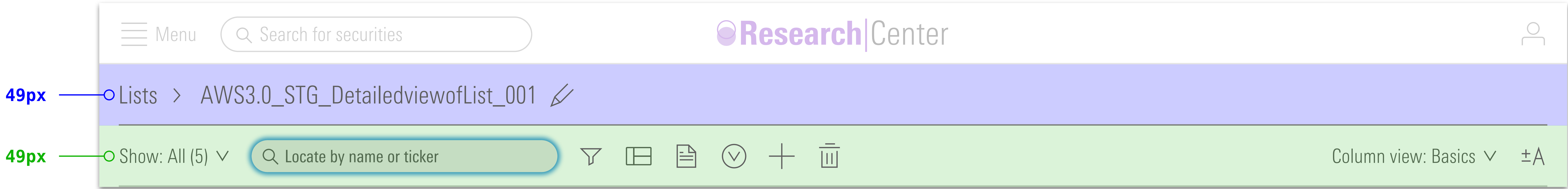
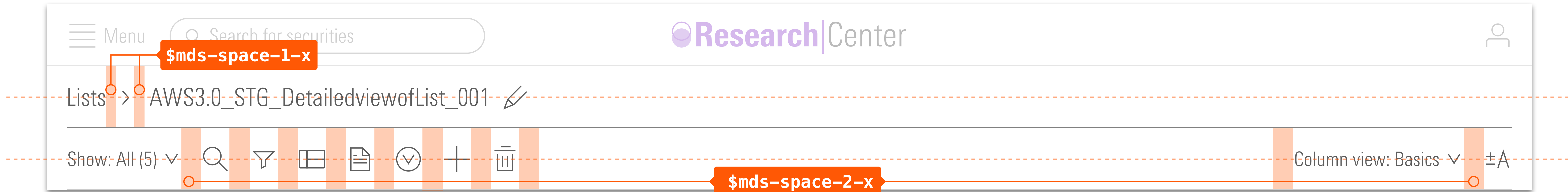


Primary Toolbar & Framework Spec

H1 & Toolbar Heights (both total 50px, INCLUDING bottom border 1px)



Vertical Spacing (content center aligned. Page margins are still 2x space)



Use MDS V3 Button icon-only button container for implementing spacing

H1 & Toolbar Pt 2

Applied to all instances

Buttons (H1 is a breadcrumb string of buttons, or text, & icons)

mds-button variation="flat" size="large" ~label is parent page~

icon: angle-right

ALT: If read only, use @include mds-level-5-heading()

mds-button variation="secondary" size="large" icon="pencil" ~label is name of list~

mds-search-field "Locate by name or ticker" variation="secondary" label="Locate" size="small"

icon-only buttons: default size. Label like tooltips

Default tooltips

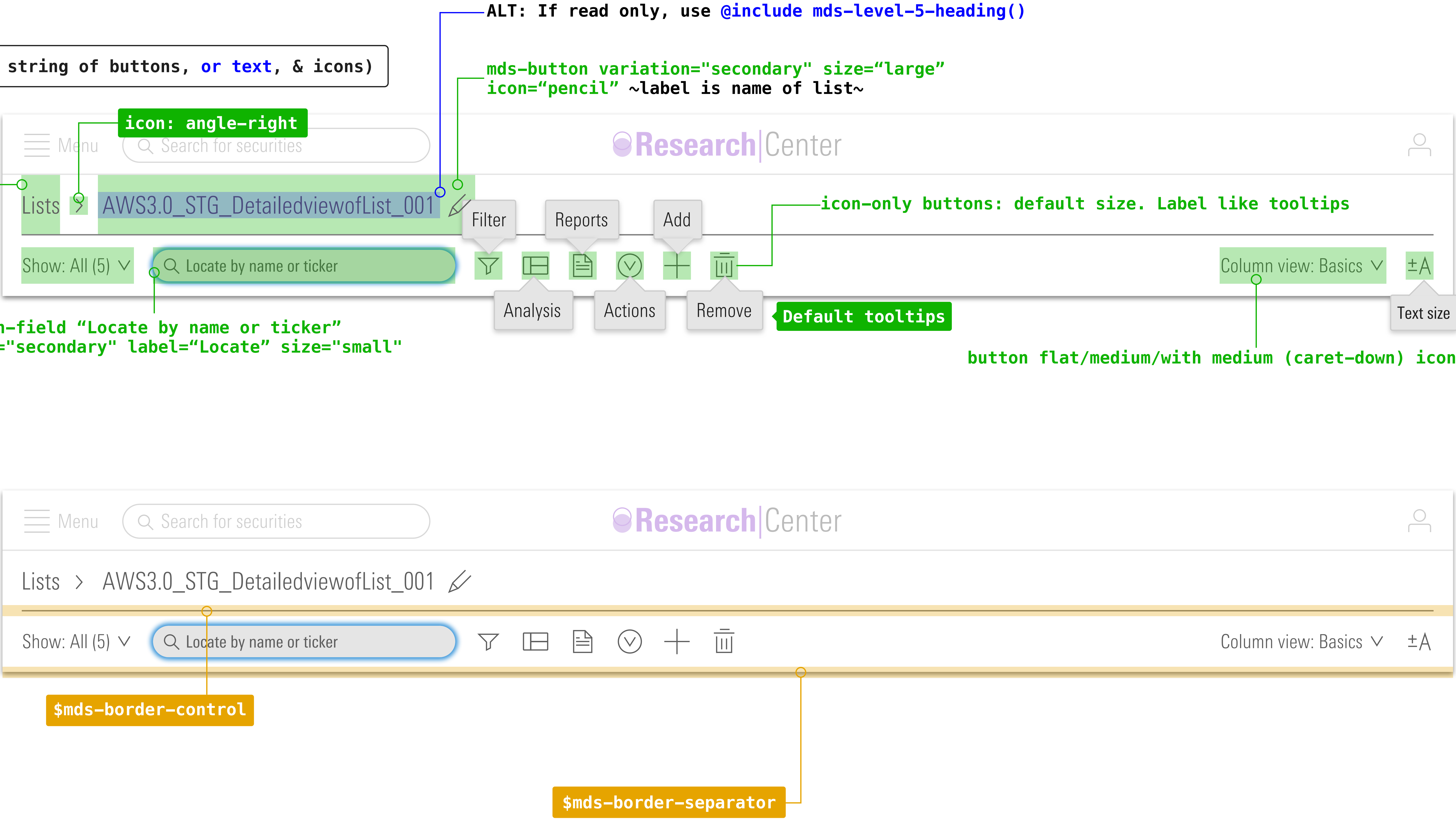
button flat/medium/with medium (caret-down) icon

Header & Toolbar Borders

Notes on Header!

'Pencil' icon button only appears for named investments.
-> See pages 5,6,11

"Untitled" (H1, Level 5)
is used at the end of an [object]
create] breadcrumb
-> See pages 7-10



Toolbar in Context:

Grid

Analysis

Object Creation/Edit

Column View Edit

Toolbar w. Grid Only

(This is a List)

Note:  →  Locate by name or ticker

- ‘Locate’ behavior applies in every instance. This way the user can see the located items and still perform actions on grid

- Secondary search width is responsive.

- Some actions are ‘disabled’ until securities are checked

- For List: ‘Funnel’ icon label/tooltip is “Filter”
(Screener is different)

- Secondary search
Max: 250px
Min: 200px (responsive)

Note:
User can rename a created object using the popover from name button in the header. This is a default size form and save button within a 300px popover

Search expands to 250px width, small secondary search

\$mds-space-2-x
between
toolbar and
page content

Search expansion pushes other icons


Become active when securities are checked

☰ Menu

🔍 Search for securities





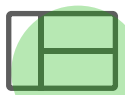

ResearchCenter

👤


Lists > AWS3.0_STG_DetailedviewofList_001 

Show: All (5)

🔍 Locate by name or ticker



Filter

Column view: Basics  ±A

☐

#

Name

Ticker

Type

Morningstar Page

Global Fund Report

Morningstar Category

Fund Objective

▼ BENCHMARKS

☐

AB Municipal Income California A

☐

American Funds Tax-Exempt Fund of CA A

☐

C&S Risk Parity Glb Natural Resources NR

☐

Calvert US LC Core Responsible PR USD

INVESTMENTS

Average

☒

11290 Diversified Bond R

☐

21290 DoubleLine Dynamic Allocation A

☒

313D Activist A

☐

413D Activist C

☐

513D Activist I

Enter document name

AWS3.0_STG_DetailedviewofList_001

Save

Toolbar w. Grid Only
(This is a List)
Responsive

Grid:

WHEN THE GRID IS ≤768PX
- Updated toolbar within grid:
'Analysis' and 'Reports' and 'Column view: NAME' and "add" and "delete" are now rolled up into the 'Actions' icon.

NOTE: The 'Reports' and 'Column view' menus are accessed by the > icon

- 'Locate' icon expands into SMALL secondary search UI. The width of this is repsonive to the available space, up to 250px. Leave \$mds-space-2-x margin between each toolbar object.
-> This employs the spacing used for Button Container in MDS V3 for spacing between button groups
-> Use in all instances

🔍 - 'Funnel' icon is ONLY present in List toolbar as a filtering mechanism

SEE MENU POPOVER STRUCTURE ON THIS PAGE

600px

☰ 🔍 ResearchCenter

Lists > AWS3.0_STG_DetailedviewofList_001

Edit

Show: All (5) 🔍 Locate by name or ticker 🔍

☐ # Name

▼ BENCHMARKS

☐ AB Municipal Income California A

☐ American Funds Tax-Exempt Fund.

☐ C&S Risk Parity Glb Natural Resou.

☐ Calvert US LC Core Responsible P...

INVESTMENTS

Average

☑ 1 1290 Diversified Bond R

☐ 2 1290 DoubleLine Dynamic Allocation A

☑ 3 13D Activist A

☐ 4 13D Activist C

☐ 5 13D Activist I

Actions

☐ Analysis

☐ Reports

+ Add to...

☐ Delete

☰ Column view

use Cloud custom icon here

use right slot in list group

☰ 🔍 ResearchCenter

Lists > AWS3.0_STG_DetailedviewofList_001

Edit

Show: All (5) 🔍 Locate by name or ticker 🔍

☐ # Name

▼ BENCHMARKS

☐ AB Municipal Income California A

☐ American Funds Tax-Exempt Fund

☐ C&S Risk Parity Glb Natural Resou

☐ Calvert US LC Core Responsible PF

INVESTMENTS

Average

☑ 1 1290 Diversified Bond R

☐ 2 1290 DoubleLine Dynamic Allocation

☑ 3 13D Activist A

☐ 4 13D Activist C

☐ 5 13D Activist I

☐ Back

Reports

POPULAR

Fund vs Fund

Global Fund

Investment Detail

Sustainability

► More reports

TOOLS

Hypothetical Illustrator

Security Report Builder

Morningstar Page

Global Fund Report

Morning

[small] back button left

TOOLBAR MENU HEADERS – Level 8, Center
– multi-weight bottom 2px border

This is different from MDS;
Leave as is in STG for now

768px

Analysis Panel – Open

Grid:

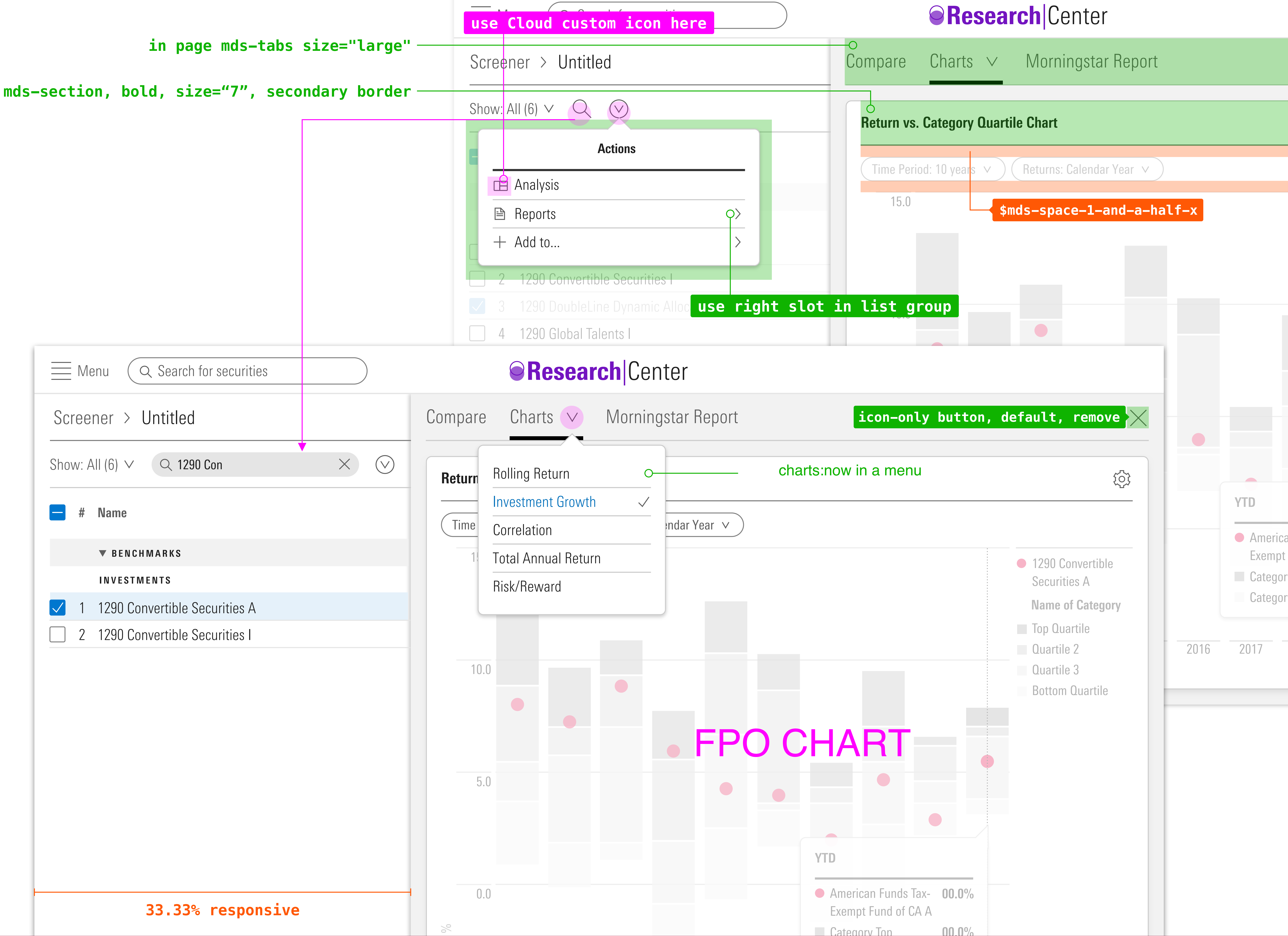
- Updated toolbar within grid: `Analysis` and `Reports` and `Column view: NAME` are now rolled up into the `Actions` icon.

Analysis Panel:

- replaced panel header with large in-page tabs only
- Updated tabs labels

Chart Component:

- updated component header and gear icon size (default)
- chart secondary buttons vertical spacing changed to 1 and a half x



Screener Panel – Always open

Toolbar:

Employ the 2x spacing used for Button Container in MDS V3 for spacing between button groups

Screener Panel:

- Updated header: Quick Screener
- Removed tabs
- Added `Convert to advanced` button (note, the user cannot convert back to `Quick screener`)
- the added `save` button in the H1 allows user to save: optional action

Menu

Search for securities

ResearchCenter

Screener > Untitled

Quick Screener

Convert to advanced

button flat/medium

@include mds-level-7-heading()

\$mds-space-2-x

\$mds-border-separator

width:275px

Advanced Screener

Cancel

Quick -> Advanced
Move the quick criteria to Advanced without interruption.

Advanced -> Quick
Cannot move the advanced criteria to quick. User should save the in-session advanced criteria before viewing the quick.

Cancel triggers: "do you want to save" dialogue
-> loads new Quick Screen

Menu

Search for securities

ResearchCenter

Screener > Untitled

Save

Quick Screener

Convert to advanced

Choose

US Mutual Funds

▼ Characteristics

Brokerage Availability

No Preference

Category

No Preference

Fund Family

Multiple Selections

Fund Objective

No Preference

Share Class Type

No Preference

▶ Ratings

Show: All (12)

Q

✓

+

Column view: Basics

±A

				Morningstar	Global Fund		
	#	Name	Ticker	Type	Page	Report	Morningstar Category
<input type="checkbox"/>	1	AB Municipal Income California A	ALCAX	MF	—	—	US Fund Muni California Intermediate
<input type="checkbox"/>	2	American Funds Tax-Exempt Fund of CA A	TAFTX	MF	11/30/2019	06/10/2019	US Fund Muni California Long
<input type="checkbox"/>	3	BlackRock California Muni Opps Inv A	MECMX	MF	—	—	US Fund Muni California Intermediate
<input type="checkbox"/>	4	Eaton Vance CA Municipal Opportunities A	EACAX	MF	—	—	US Fund Muni California Intermediate
<input type="checkbox"/>	5	Fidelity Advisor® California Muni Inc A	FCMAX	MF	11/30/2019	04/22/2019	US Fund Muni California Long
<input type="checkbox"/>	6	Franklin CA High Yield Municipal A1	FCAMX	MF	—	—	US Fund Muni California Long
<input type="checkbox"/>	7	Franklin CA Interm-Term Tx-Fr Inc A1	FKCIX	MF	—	—	US Fund Muni California Intermediate
<input type="checkbox"/>	8	Franklin CA Tax Free Income A1	FKTFX	MF	11/30/2019	05/05/2019	US Fund Muni California Long
<input type="checkbox"/>	9	Invesco OppenheimerRchCaMncpl A	OPCAX	MF	—	—	US Fund Muni California Long
<input type="checkbox"/>	10	MFS CA Municipal Bond A	MCFTX	MF	—	—	US Fund Muni California Long
<input type="checkbox"/>	11	PIMCO California Municipal Bond A	PCTTX	MF	—	—	US Fund Muni California Long
<input type="checkbox"/>	12	Putnam CA Tax Exempt Income A	PCTEX	MF	—	—	US Fund Muni California Long

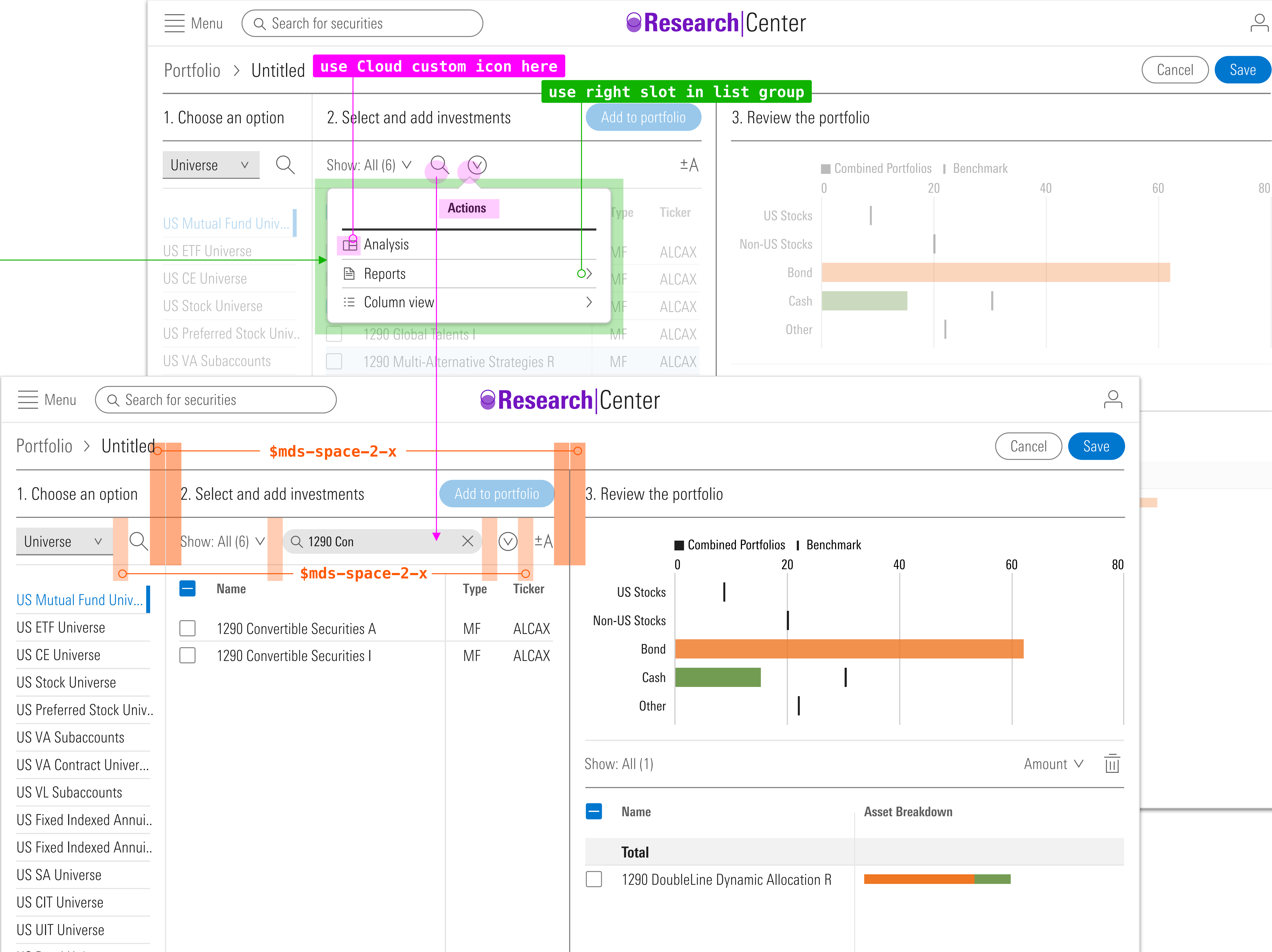
Toolbar w [Portfolio] Creation,
 3 Step Panels

- Updated header
- Updated all toolbar heights to 49px (50px including bottom borders)
- Updated toolbar within grid: ``Analysis`` and ``Reports`` and ``Column view: NAME`` are now rolled up into the ``Actions`` icon.

ADDED:

 mds-list-group with-icon

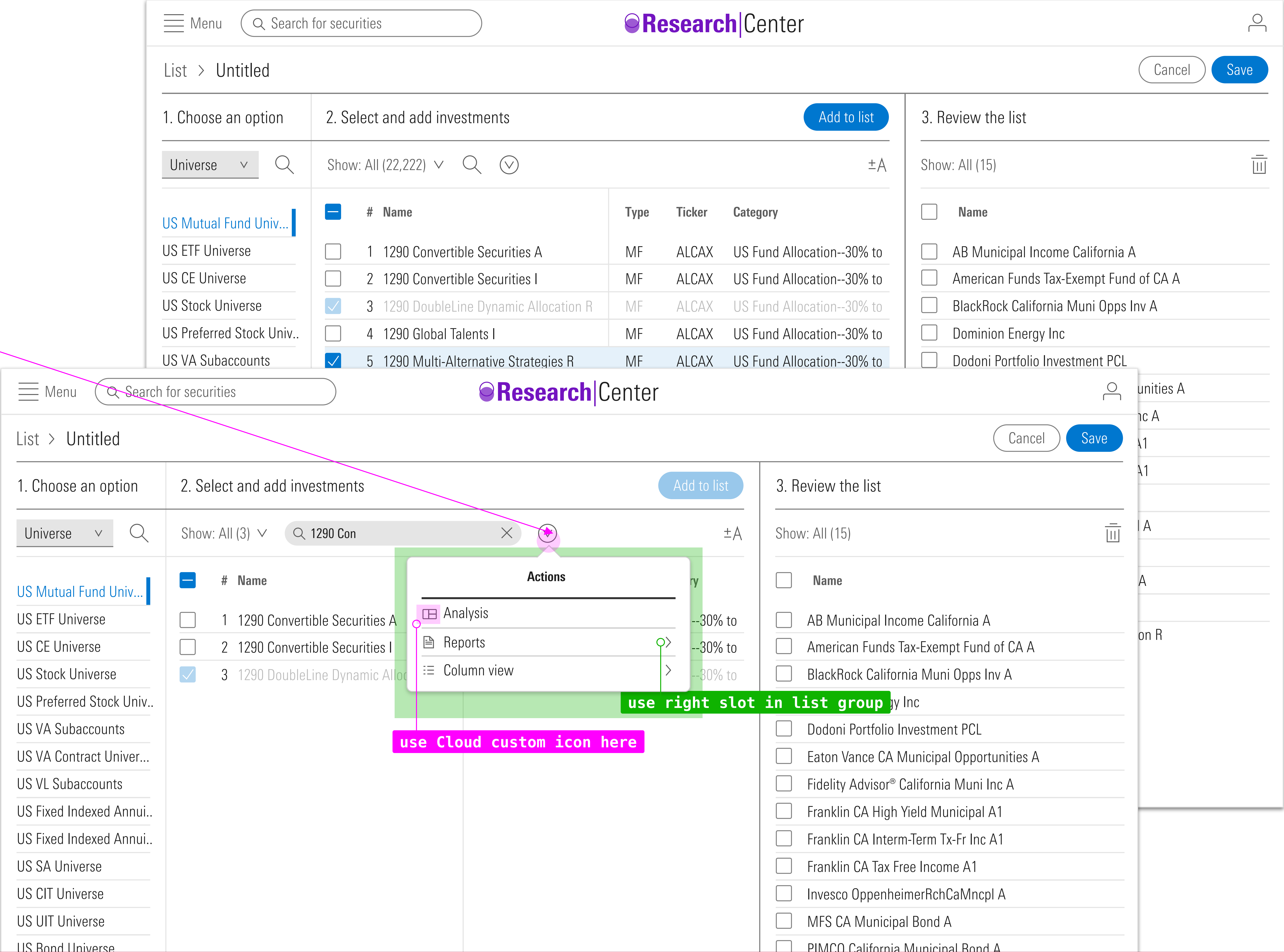
THIS TREATS THE GRID AS ≤768PX
 (when in panel 2 treatment)



Toolbar w. [List]
Creation, 3 Step Panels

- Updated header
- Updated all toolbar heights to 49px (50px including bottom borders)
- Updated toolbar within grid: 'Analysis', 'Reports' and 'Column View' are now rolled up into the 'Actions' icon as a menu.

THIS TREATS THE GRID AS ≤768PX (when in panel 2 treatment)



Toolbar w. Column View

Grid:

- Updated header
- Updated all toolbar heights to 49px (50px including bottom borders)
- Updated toolbar within grid: There are no actions except `Locate` when column view editing is open

Column View panel:

- Update header: 49px
- Update toolbar (selection/sort UI) to proper height and default icon sizes.

