

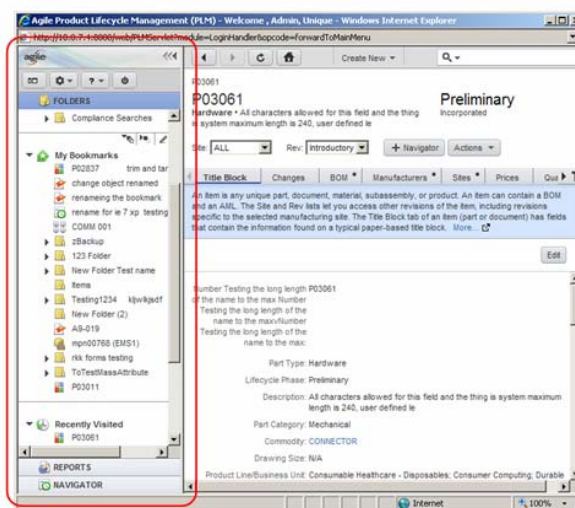
## Left Pane

The Left Pane exists to provide the user with convenient navigational aids to access content of interest. These aids include:

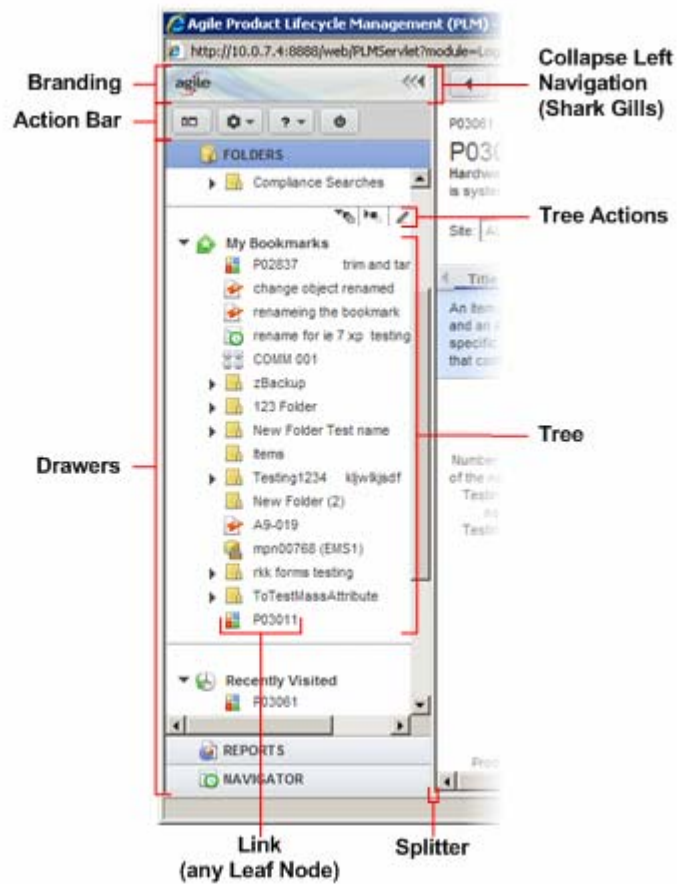
- 1) An action bar to manage windowing, access settings and tools, get help, and logout of Agile PLM.
- 2) A Folders Drawer that includes:
  - a) Saved searches
  - b) Bookmarks
  - c) History
- 3) A Reports Drawer
- 4) A Navigator Drawer that the user can populate from the Content Pane by replicating:
  - a) Search Results (after all sorting and filtering operations have been applied)
  - b) Program Trees
  - c) BOM Trees

In general, the navigational aids in the Left Pane drive the content of the Right Pane.

## Element Specification



## Anatomy



## Behavior

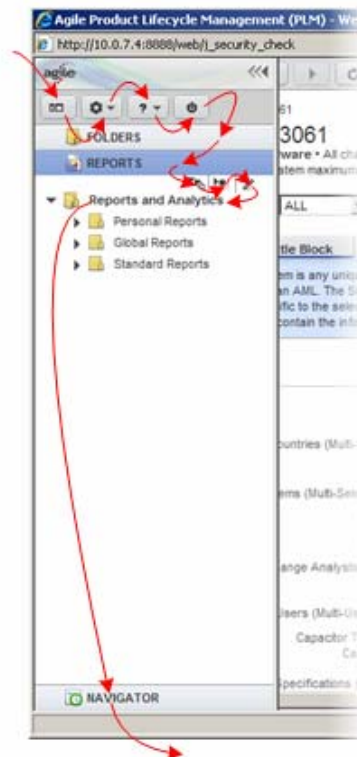
The following controls are active when the focus is anywhere in the left pane.

### Keyboard Controls and Shortcuts

- Tab (Shift-Tab)

Set the focus to the next (previous) control in the left pane tab order.

The Left Pane tab order is:



Arrows illustrate tab order. Shift-Tab order is the reverse.

The contents of an open Drawer will scroll as needed to show each control as it gains focus.

- Arrow Keys

Except where noted, these keys are used primarily for keyboard navigation within Trees. Please see the [Tree](#) UI Specification for more details.

## *On Collapse Left Navigation – Shark Gills*

### **Mouse Buttons**

- Click

Collapse the Left Pane to its minimal (placeholder) width so that it looks like this:



The selected Drawer and the state of all trees is retained during the collapsed state and restored on expand.

### **Mouse Over**

- Cursor
- Tooltip



Pointer

"Collapse Left Navigation"

## *On Expand Left Navigation*

### **Mouse Buttons**

- Click

Expand the Left Pane to its former width.

### **Mouse Over (Expand Left Navigation)**

- Cursor
- Tooltip



Pointer

"Expand Left Navigation"

## *Anywhere on the Collapsed Left Pane*

### **Mouse Buttons**

- Click

Expand the Left Pane to its former width.

### **Mouse Over**

- Cursor



Pointer

*On the Vertical Splitter between the Left Pane and the Right Pane*

**Mouse Over**

- Cursor  Horizontal Resize

**Drag**

- Change the width of the Left Pane.

**Note:** The expanded or collapsed state and the size of the Left Pane are retained between user sessions. After logging out and logging back in, the Left Pane will be restored as it was before logout.

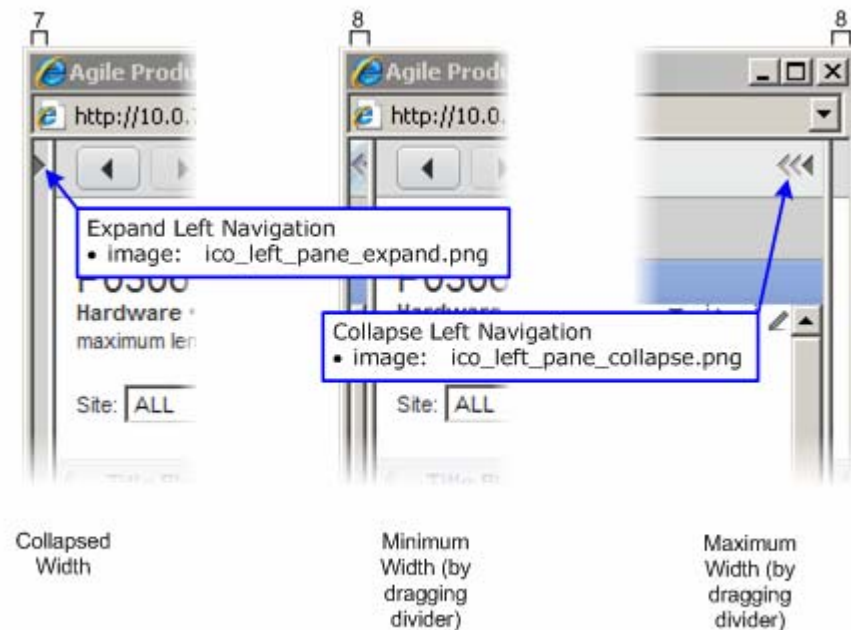
The expanded or collapsed state of drawers and trees within the Left Pane are not retained and will be displayed in their default initial states.

## Layout, Appearance and Styling

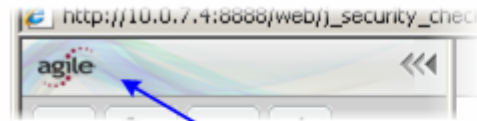
The dimensions of the Left Pane components are defined in the following diagram.



The three diagrams below illustrate the dimensions relative to the position of the Splitter at the extremes of its range (either by collapse or by dragging). The icon images for the Expand and Collapse Left Navigation control are also specified.



## Branding



### Branding

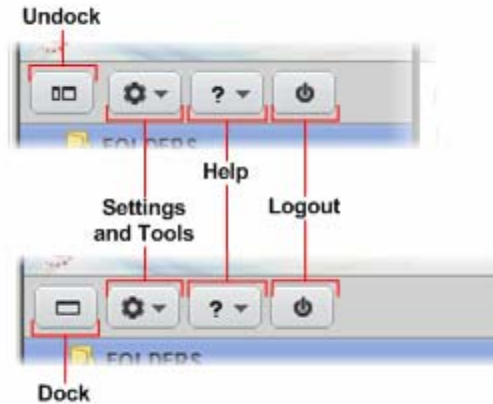
- image: Customer specified
  - image-size: 212 pixels wide by 28 pixels high (minimum)
  - background: #E9EAEA
- Default
- image: agi\_left\_pane\_branding\_bkg.png

### Behavior

The Branding image may be redefined and changed by the Administrator.

Please refer to the [Themes](#) UI Specification for details about this user interface.

## Action Bar



Except where otherwise noted, the Dock, Undock, and Logout buttons comply with the [Buttons](#) UI Specification.

Except where otherwise noted, the Settings and Tools and Help Menus comply with the [Menus](#) UI Specification.

### Behavior

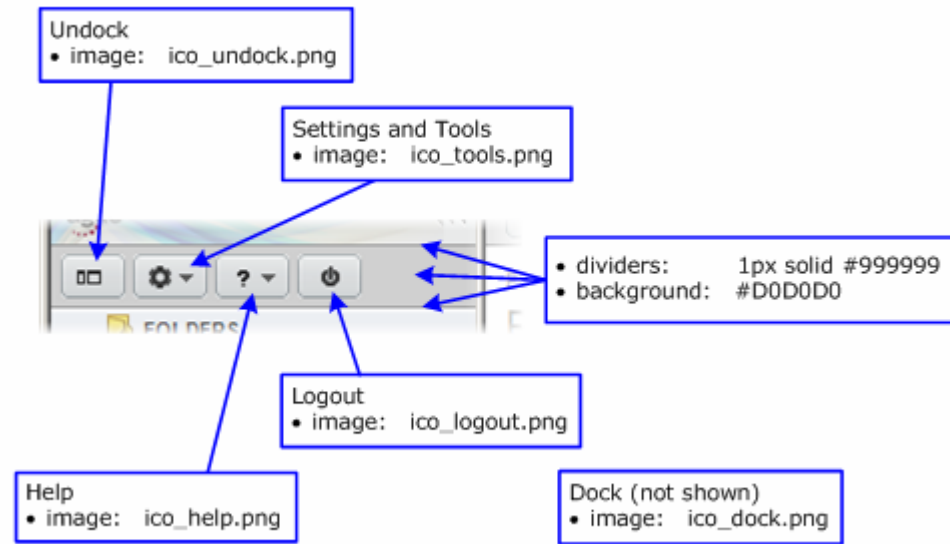
The first and obvious behavioral exception is that the launch buttons for these menus do display tooltips.

Button/Menu	Tooltip*
Undock	"Undock"
Dock	"Dock"
Tools	"Settings and Tools"
Help	"Help"
Logout	"Logout"
* Internationalized	

The specification of these buttons continues in the detailed sections below.



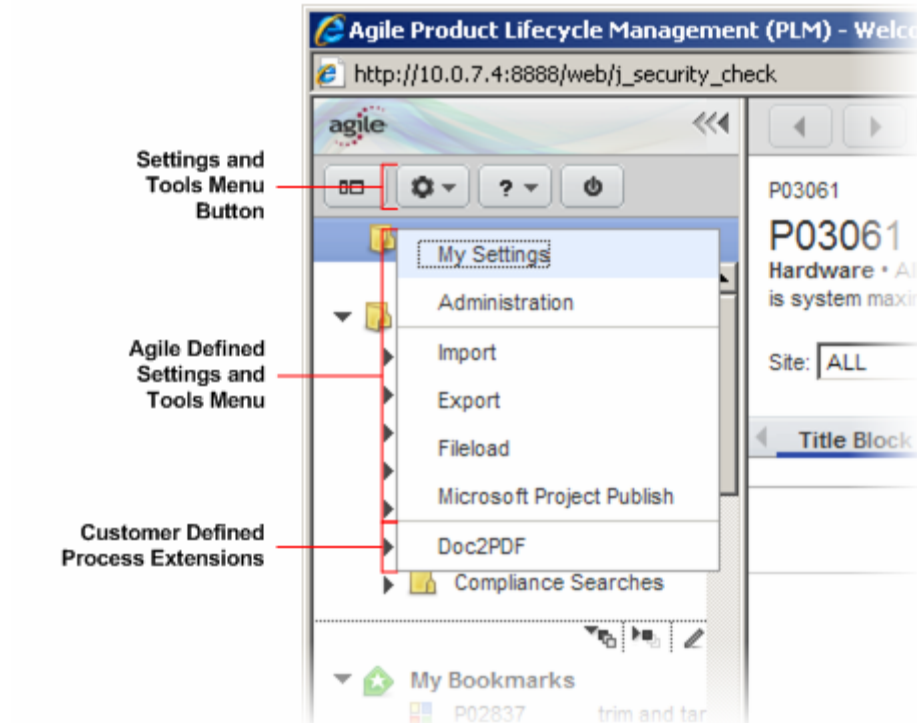
## Layout, Appearance and Styling



## Dock and Undock (AKA Multi-Windowing, MDI)

The operation of the Dock and Undock buttons will be specified in the [Multi-Windowing UI Specification](#).

## Settings and Tools Menu



Except where noted below, the Tools Menu complies with the Menu UI Specification.

### Behavior

#### Agile Defined Tools Menu

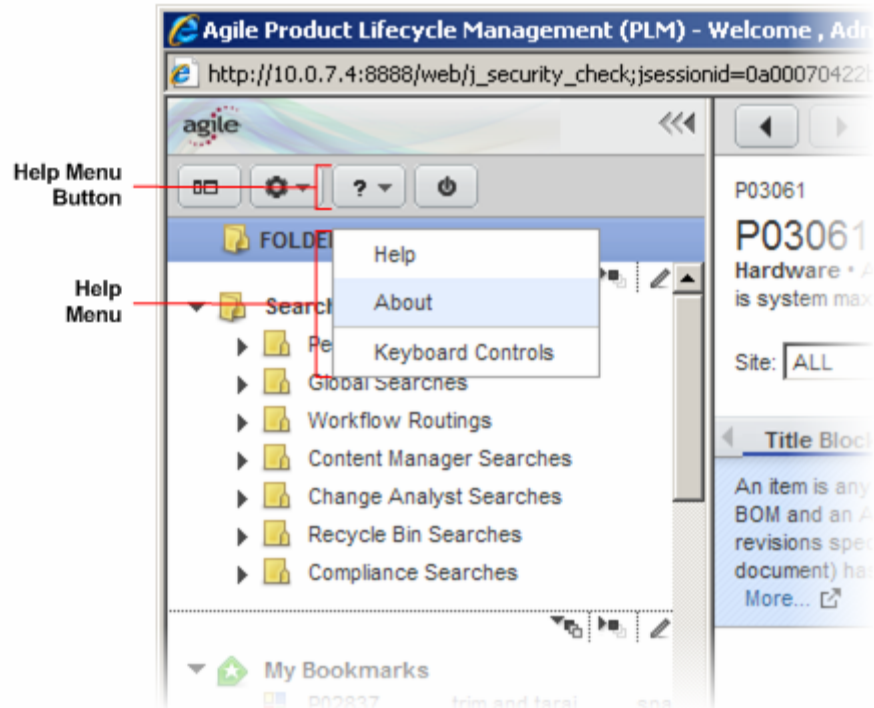
- My Settings Launch the My Settings page in the Right Pane.
- Administration Launch the Administration page in the Right Pane.  
  
This option will not be displayed if the user does not have the Administrator privilege.
- Import Launch the Import Wizard in a pop-up window.  
  
The Agile PLM Import Wizard provides a way for the user to import data from external files.  
  
This option will not be displayed if the user does not have the Import privilege.
- Export Launch the Export Wizard in a pop-up window.  
  
The Agile PLM Export Wizard provides a way for the user to export data to external files.  
  
This option will not be displayed if the user does not have the Export privilege.

- Fileload  
Launch the Fileload Wizard in a pop-up window.  
This option will not be displayed if the user does not have the Fileload privilege.
- Microsoft Project Publish  
Launch a wizard in a pop-up window to publish data from Agile PLM to Microsoft Project.  
This option will not be displayed if the user does not have the Microsoft Project privilege.

**Customer Defined Process Extensions**

- As defined by the customer:  
Process extensions are added in the Admin Client.  
When activated, process extensions may operate in the Right Pane or in another window.

## Help Menu

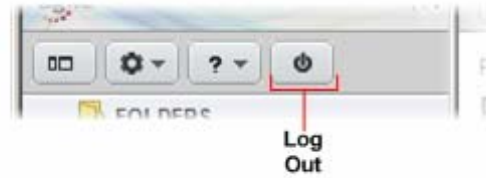


### Behavior

#### Help Menu

- Help  
Launch a new browser window to display the Agile PLM documentation website.
- About  
Display the About Agile page in a new pop-up window.
- Keyboard Controls  
Launch a pop-up window that displays the available keyboard shortcuts.

## Logout

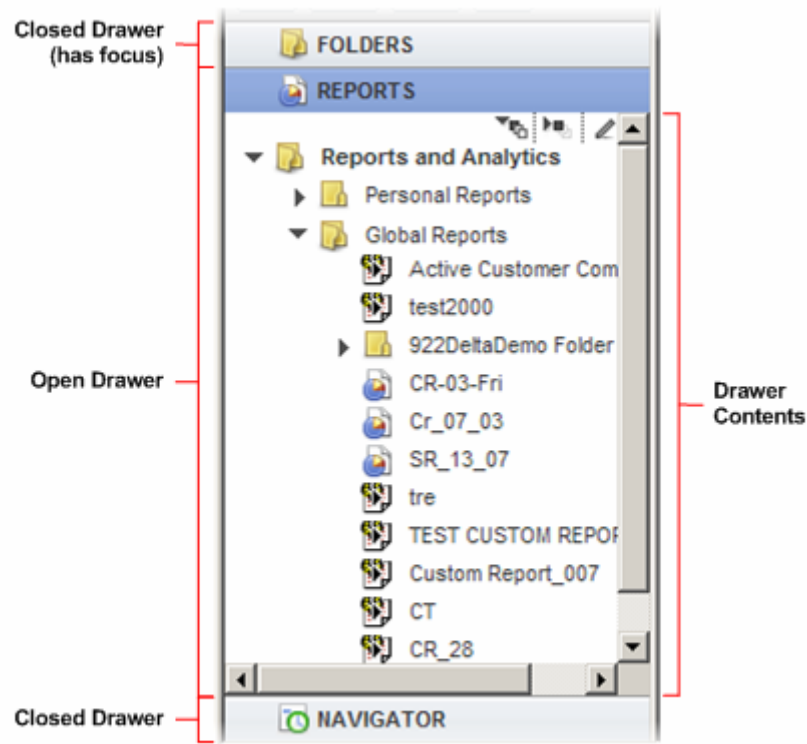


### *Behavior*

#### **When Activated**

- Prompt the user to save any unsaved edits.
- Close the Agile PLM user interface including any undocked Right Pane windows.

## Drawers



### Behavior

- The Folders Drawer is open by default when the Agile user interface is launched.

### Gains Focus

- Highlight the Drawer if it is not open. The "open" appearance takes precedence over the "has focus" appearance.

### Loses Focus

- Remove the highlight if the Drawer is not open. An open drawer will not change appearance when it loses focus.

### Keyboard Controls and Shortcuts

- Enter (focus on closed Drawer)      Open the Drawer.  
Close the Drawer that is currently open.

### Mouse Buttons (on Drawer)

- Click (on closed Drawer) Open the Drawer.
- Close the Drawer that is currently open.
- Arrow Keys No effect.

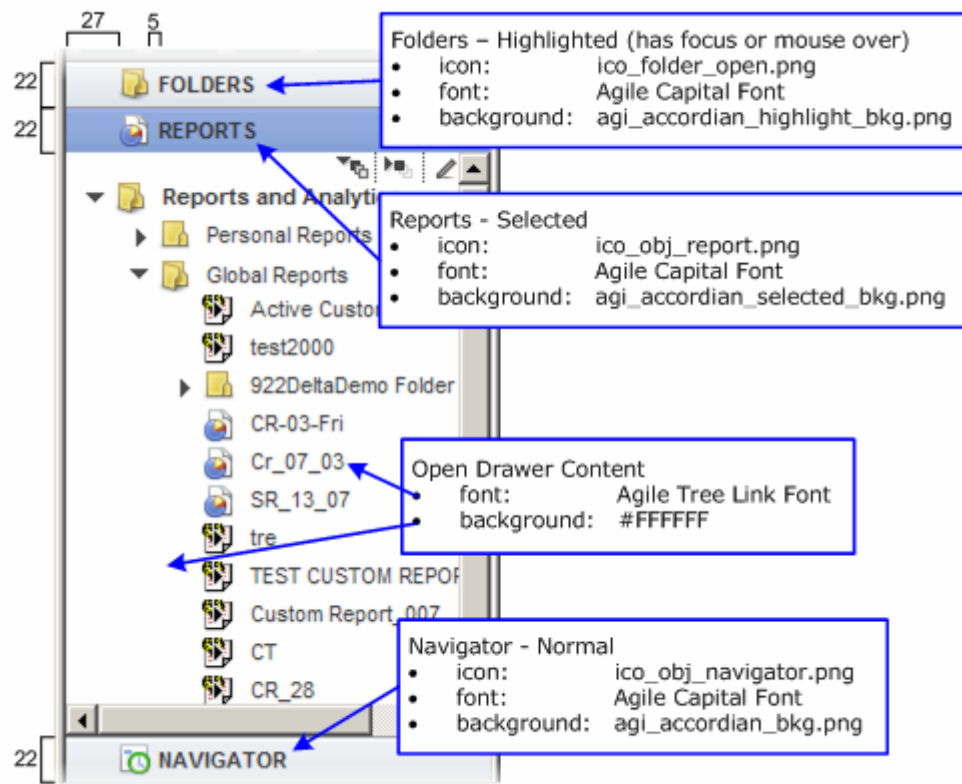
### Mouse Buttons (inside the Drawer Contents)

- Scroll Wheel Scroll the contents of the Drawer vertically or horizontally (depends on user's mouse).
- Arrow Keys (not in Tree) Scroll the contents of the Drawer vertically or horizontally.

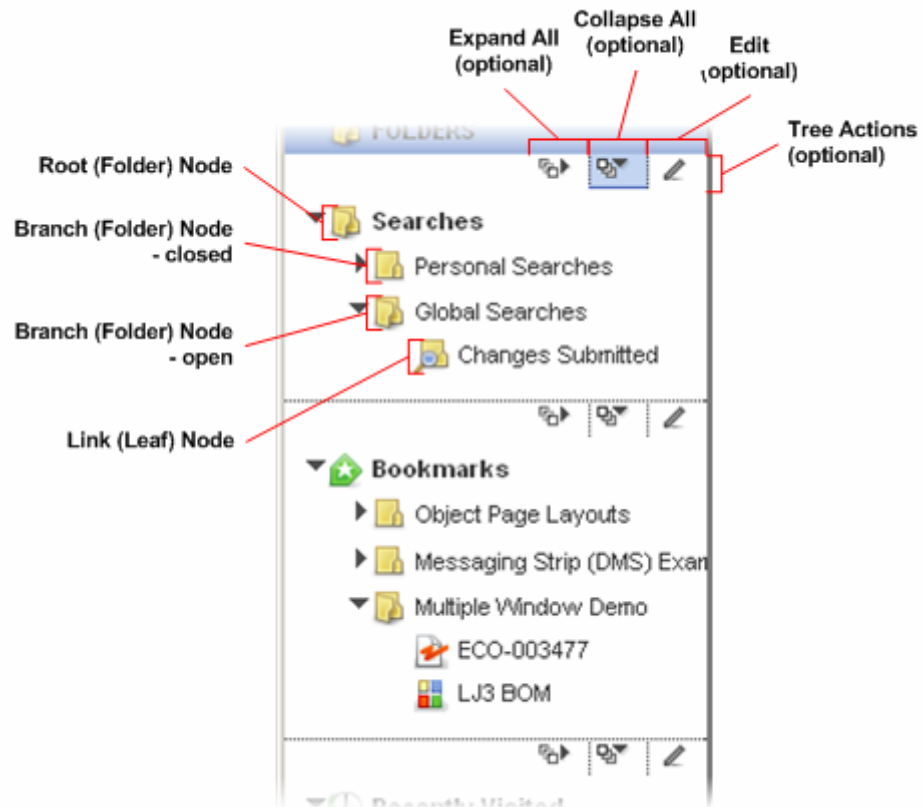
### Mouse Over (Drawer)

- Highlight the Drawer if it is closed.

### Layout, Appearance and Styling



## Generic Left Pane Tree



All Trees found in the Left Pane comply with the Tree UI Specification except where noted below. The Tree spec primarily focuses on keyboard navigation, the disclosure icons, most folder and leaf node icons, basic tree layout, and how to select nodes (although not what happens when you select a node).

### Behavior

- The selection of Leaf Nodes in Left Pane Trees drives the Right Pane.
- All Left Pane Trees (except for Program Trees in the Navigator Drawer) will initially display with the Root Node expanded and all Branch Nodes collapsed.
- The expanded and collapsed state of trees in the Navigator Drawer is retained until new content is loaded into this drawer or until the end of the user's session (either by explicit logout or by timeout).
- The expanded and collapsed state of all other trees is retained until the end of the user's session.



## Named Behaviors

*Expand All (does not apply to all Left Pane trees)*

- Expand the Root and all Branch Nodes in the Tree.

The Progress Indicator will be applied as described in the [Tree](#) UI Specification.

*Collapse All (does not apply to all Left Pane trees)*

- Collapse the Root and all Branch Nodes in the Tree.

*Edit Tree (does not apply to all Left Pane trees)*

- Launch a pop-up window so that the user can edit the tree by adding, removing, renaming, or deleting tree nodes.

*Display Tooltip*

- Display the appropriate tooltip.

Tooltips are defined in the Naming and Tooltips UI Specification.

## Refresh

The tree is refreshed whenever:

- The tree is modified.
- The user activates the refresh button on the top pane.

## Gains Focus

- Reserve Arrow Keys for keyboard navigation within the tree. Disable all other Arrow Key driven behavior in the Left Pane.

## Loses Focus

- Enable all other Arrow Key driven behavior in the Left Pane.

## Keyboard Controls and Shortcuts (on Tree Actions)

- Enter *Expand All, Collapse All, or Edit Tree* depending on the button pressed.

## Keyboard Controls and Shortcuts (on Leaf Nodes Only)

- Enter Open the target of the Link as a new page in the Content Pane.
- Left/Right Arrow Scroll the contents of the Drawer horizontally.

### Mouse Buttons (on Tree Actions)

- Click *Expand All, Collapse All, or Edit the tree depending on the button pressed.*

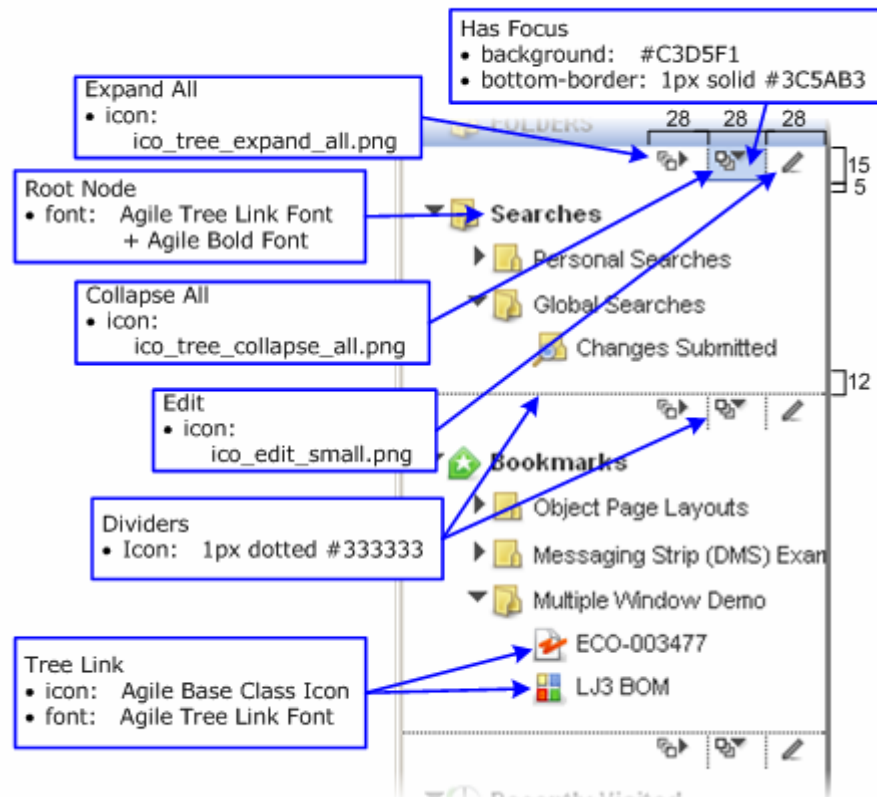
### Mouse Buttons (on Leaf Nodes Only)

- Click Open the target of the Link as a new page in the Content Pane.

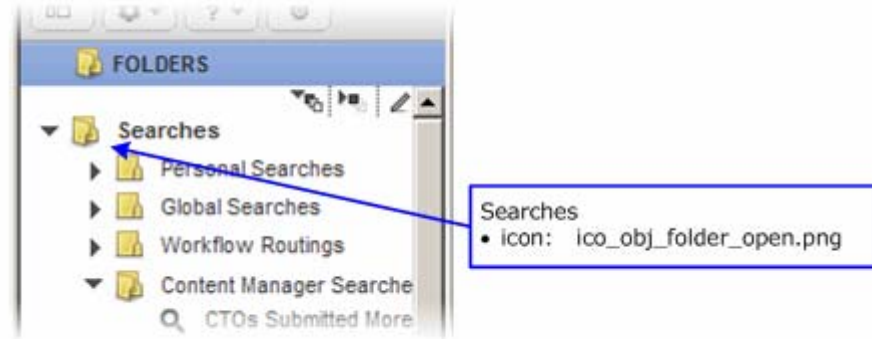
All text in Left Pane Trees complies with the definition of the Agile Link Font in the [Fonts](#) UI Specification except as noted below:

- All nodes exhibit the appearance change specified for Link Font on mouse-over/hover.
- All Leaf Nodes are Links that may be activated to drive the content of the Right Pane.
- Root and Branch Nodes are not Links. Activating them has no effect.

### Layout, Appearance and Styling



## Folders Drawer – Searches Tree



### Behavior

Searches may be classified into two basic types:

- Searches saved locally  
The tree is refreshed whenever the user saves a search. Thus, changes made in the current user interface are visible immediately.
- All other searches  
Changes made in other instances of the user interface will become visible when the user activates the Refresh button on the Top Pane.

### Refresh

- Whenever the user saves a search or otherwise modifies the Searches tree.

### Mouse Over (Root and Branch Nodes – Icon)

- Cursor  
Pointer
- Tooltip  
none

### Mouse Over (Root and Branch Nodes – Text)

- Cursor  
Pointer
- Tooltip  
Folder Name

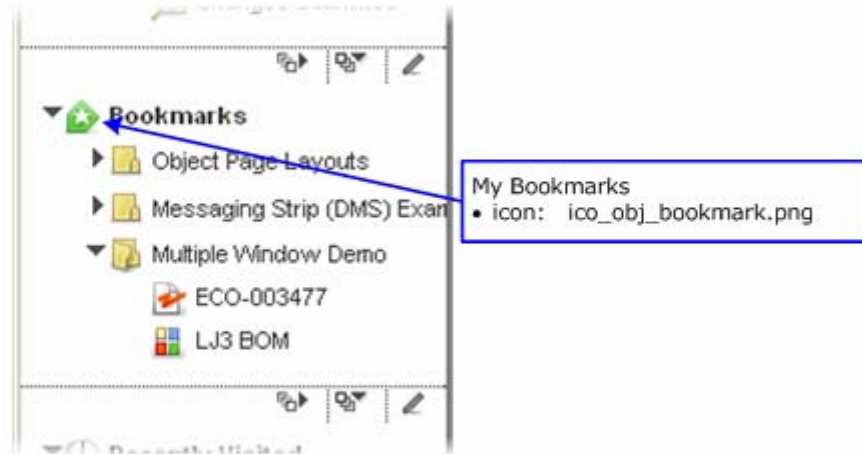
### Mouse Over (Leaf Node – Icon)

- Cursor  
Pointer
- Tooltip  
"Search"

### Mouse Over (Leaf Node – Text)

- Cursor  
Pointer
- Tooltip  
Search Name

## Folders Drawer – My Bookmarks Tree



### Behavior

- The user may access the Bookmark menu option in the Actions Menu of an object, search, or report page to add a bookmark to this tree.
- The Expand All, Collapse All and Edit buttons are supported.

### Refresh

- Whenever the user bookmarks a page or reorganizes bookmarks.


### Mouse Over (Root and Branch Nodes – Icon)

- Cursor  Pointer
- Tooltip none

### Mouse Over (Root and Branch Nodes – Text)

- Cursor  Pointer
- Tooltip Folder Name

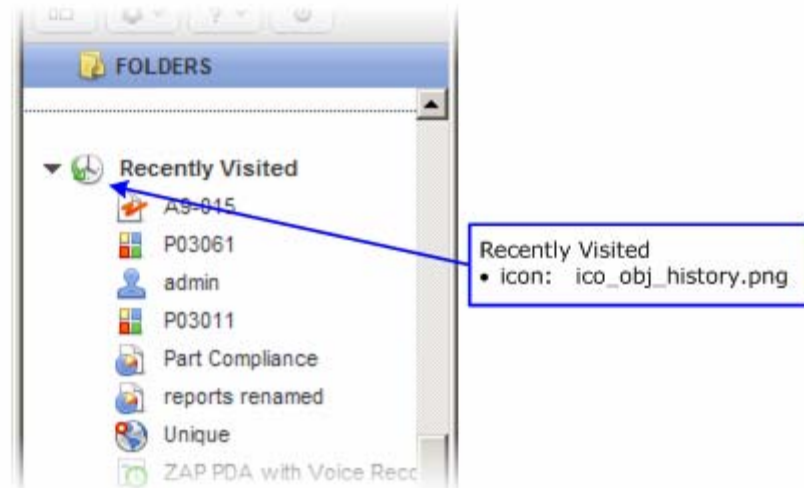
### Mouse Over (Leaf Node – Icon)

- Cursor  Pointer
- Tooltip Object Type (Class or Sub-class Name)

### Mouse Over (Leaf Node – Text)

- Cursor  Pointer
- Tooltip *Display Tooltip*

## Folders Drawer – Recently Visited List



### Behavior

- This list provides a history of the most recently viewed pages.
- The Expand All and Collapse All actions are not supported because while this list is implemented as a tree, it is flat – consisting of the Root Node and a list of Leaf Nodes – therefore these actions are redundant. The Disclosure Triangle on the Root Node is sufficient.
- The Edit button is not supported because the semantics of this list does not allow it to be rearranged by the user.

### Refresh

- Whenever the user pushes a link onto the top of the list by navigating to a new page.

### Mouse Over (Root Node – Icon)

- |           |                                                                                             |
|-----------|---------------------------------------------------------------------------------------------|
| • Cursor  |  Pointer |
| • Tooltip | none                                                                                        |

### Mouse Over (Root Node – Text)

- |           |                                                                                             |
|-----------|---------------------------------------------------------------------------------------------|
| • Cursor  |  Pointer |
| • Tooltip | Folder Name (“Recently Visited”)                                                            |

#### Mouse Over (Leaf Node – Icon)

- Cursor
- Tooltip



Pointer

Object Type (Class or Sub-class Name)

#### Mouse Over (Leaf Node – Text)

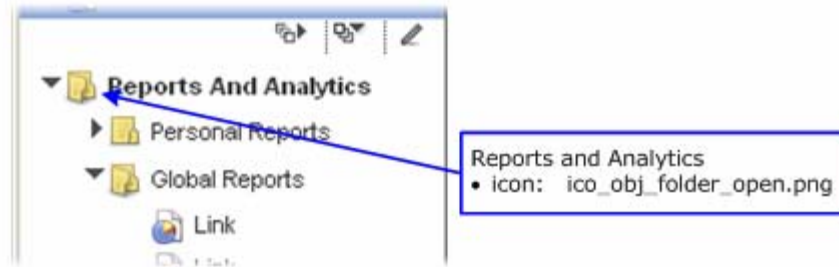
- Cursor
- Tooltip



Pointer

*Display Tooltip*

## Reports Drawer – Reports and Analytics Tree



### Behavior

Reports may be classified into two basic types:

- Reports saved locally  
The tree is refreshed whenever the user saves a report. Thus, changes made in the current user interface are visible immediately.
- All other reports  
Changes made in other instances of the user interface will become visible when the user activates the Refresh button on the Top Pane.

### Refresh

- The tree is refreshed whenever the user saves a report or activates the refresh button on the top pane.

### Mouse Over (Root and Branch Nodes – Icon)

- Cursor  
Pointer
- Tooltip  
none

### Mouse Over (Root and Branch Nodes – Text)

- Cursor  
Pointer
- Tooltip  
Folder Name

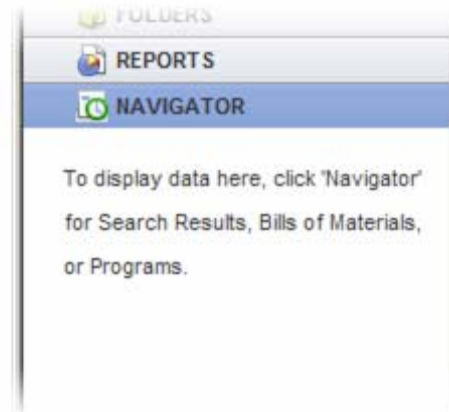
### Mouse Over (Leaf Node – Icon)

- Cursor  
Pointer
- Tooltip  
"Report"


### Mouse Over (Leaf Node – Text)

- Cursor  
Pointer
- Tooltip  
Report Description

## Navigator Drawer – Empty



### *Behavior*

- Upon initial login or until populated by activating the  **Navigator** button in an search results, bill of materials, or program object page, the Navigator Drawer is empty.

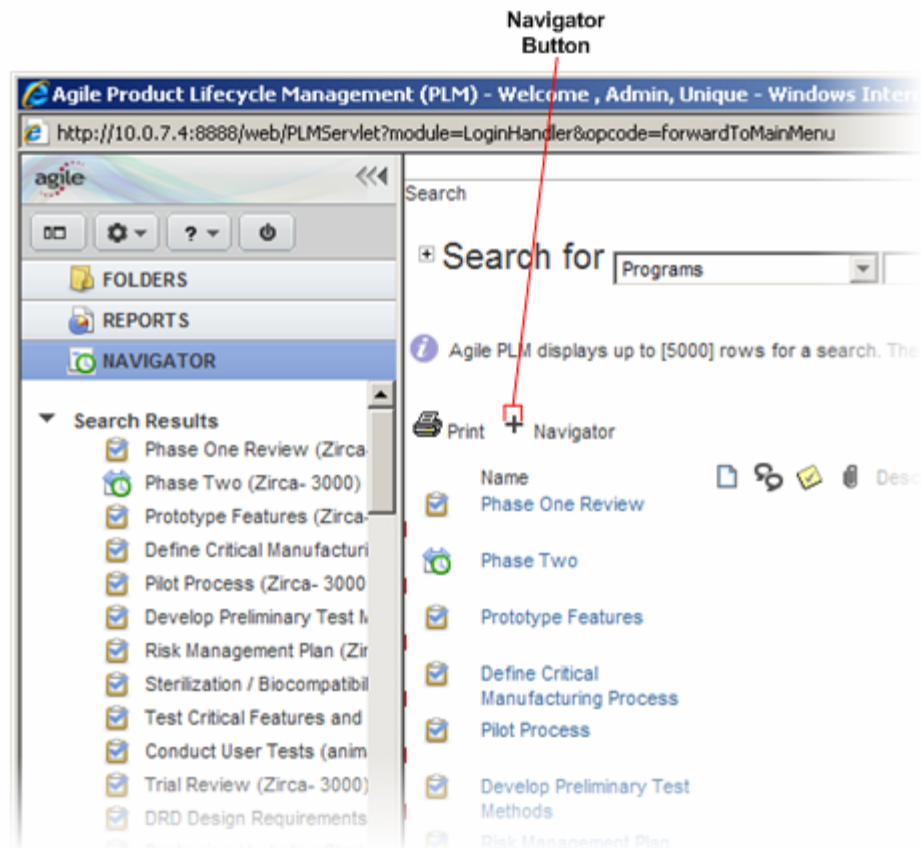
### **Named Behaviors**

#### *Load Navigator*

- Populate the Tree (in the Navigator Drawer) with the search results, program or BOM from the Content Pane. This is an exception to the general rule that the Left Pane drives the content of the Right Pane.
- Close the currently open Drawer.
- Open the Navigator Drawer.

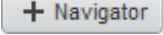


## Navigator Drawer – Search Results Tree

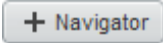


fix

### Behavior

- The user may activate the  button to replicate the first 100 search results in the Navigator Drawer of the Left Pane. Sorting and filtering operations may be applied to organize and/or narrow the results before replication.
- The Expand All and Collapse All buttons are not supported because the results Tree is flat – consisting of the Root Node and a list of links.
- The Edit button is not supported because the user has better tools on the original Right Pane search results page.

### Refresh

- The tree is refreshed when the user populates it with new content by pressing the  button.

#### Mouse Over (Root Node – Text)

- Cursor
- Tooltip



Pointer

"Search Results"

#### Mouse Over (Leaf Node – Icon)

- Cursor
- Tooltip



Pointer

Object Type (Class or Sub-class Name)

#### Mouse Over (Leaf Node – Text)

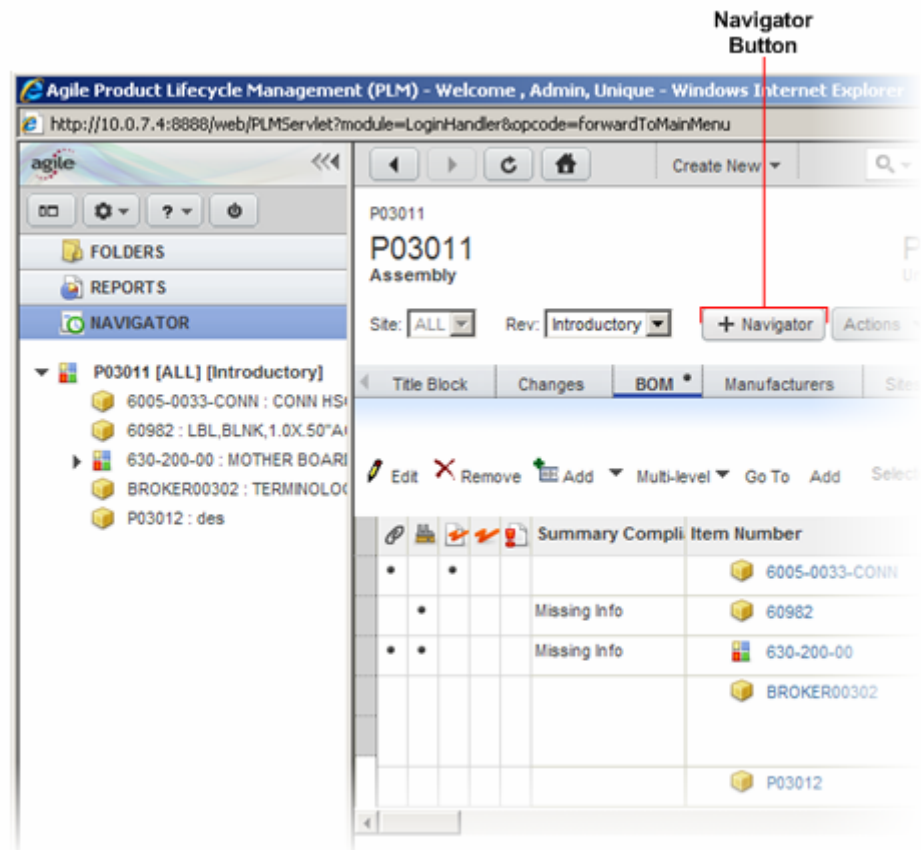
- Cursor
- Tooltip



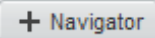
Pointer

*Display Tooltip*

## Navigator Drawer – Bill of Materials (BOM) Tree



### Behavior


- After accessing the BOM tab in the Right Pane, the user may press the  button to replicate the Bill of Materials in the Navigator Drawer of the Left Pane.
- The Edit button is not supported because maintenance of the BOM is properly performed in the referenced object pages in the Right Pane.
- The Expand All and Collapse All buttons are not supported because while they make semantic sense, the performance impact of suddenly expanding every node in a Bill of Materials is too great.

### Refresh

- The tree is refreshed when the user populates it with new content.
- BOM changes made by other users may become visible if they are made before to data is fetched from the server by the user's client machine.
- NOM changes made by other users **will** become visible when the user activates the refresh button on the Top Pane.

**Note:** In the BOM, folder nodes will not display the folder icon (folder\_open.png or folder\_closed.png) because folders are business objects like the leaf nodes. The difference is that they contain other objects in their BOMs while leaf nodes are indivisible components.


#### Mouse Over (Root and Branch Nodes – Icon)

- Cursor  Pointer
- Tooltip Object Type (Class or Sub-class Name)

#### Mouse Over (Root and Branch Nodes – Text)

- Cursor  Pointer
- Tooltip *Display Tooltip*

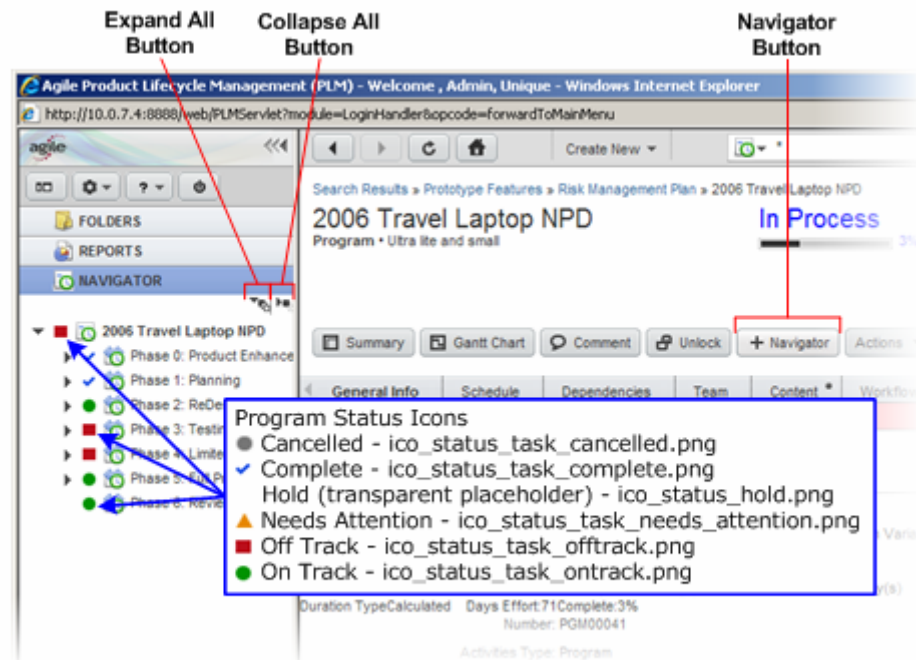
#### Mouse Over (Leaf Node – Icon)

- Cursor  Pointer
- Tooltip Object Type (Class or Sub-class Name)

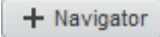
#### Mouse Over (Leaf Node – Text)

- Cursor  Pointer
- Tooltip *Display Tooltip*

## Navigator Drawer – Program Tree



### Behavior

- After accessing the program object in the Right Pane, the user may press the  button to replicate the complete Program Tree in the Navigator Drawer of the Left Pane.
- The tree displayed in the Navigator Drawer will be rooted at the Root Parent of the program object. The standard expansion of the Root Node and collapse of all Branch Nodes will apply except for the Branch Nodes that contain the program object. These will be expanded. The node corresponding to the program object displayed in the Right Pane will be displayed in Agile Link Font + Agile Bold Font.
- The Edit button is not supported because maintenance of the program is properly performed in the referenced object pages in the Right Pane.
- The Expand All and Collapse All buttons are supported.
- The Program Tree introduces a secondary status icon in front of the base class icon. For leaf nodes, this icon gives the status of the object. For xxx


### Refresh

- The tree is refreshed when the user populates it with new content.
- Changes made by other users may become visible if they are made before to data is fetched from the server by the user's client machine.
- Changes made by other users **will** become visible when the user activates the refresh button on the Top Pane.

#### Mouse Over (Status Icons)

Program Status Icon	Tooltip*
Cancelled	"Cancelled"
Complete	"Complete"
Hold (transparent placeholder)	"Hold"
Needs Attention	[START STATE]** + " - Needs Attention"
Off Track	[START STATE]** + " - Off Track"
On Track	[START STATE]** + " - On Track"
	* Internationalized
	** "Not Started" or "In Progress"


#### Mouse Over (Root and Branch Nodes – Icon)

Cursor	 Pointer
Tooltip	Object Type (Class or Sub-class Name)

#### Mouse Over (Root and Branch Nodes – Text)

Cursor	 Pointer
Tooltip	<i>Display Tooltip</i>

#### Mouse Over (Leaf Node – Icon)

Cursor	 Pointer
Tooltip	Object Type (Class or Sub-class Name)

#### Mouse Over (Leaf Node – Text)

Cursor	 Pointer
Tooltip	<i>Display Tooltip</i>

## Issues

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- 1) The user interface for changing the Branding is undefined.
- 2) The user interface is undefined for displaying a description of the keyboard commands in some future sprint in some TBD format.
- 3) The process to edit Left Pane Trees is not yet defined.

## Change History

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November 20, 2007	Vern McGeorge	Revised to comply with image file naming convention.
November 13, 2007	Vern McGeorge	Complete with Joel's feedback and some image/icon name changes.
November 8, 2007	Vern McGeorge	Complete.
October 4, 2007	Vern McGeorge	Publish for review.
September 21, 2007	Vern McGeorge	First draft.