



DISPLAY PROFILES

ADMINISTRATION TOOL

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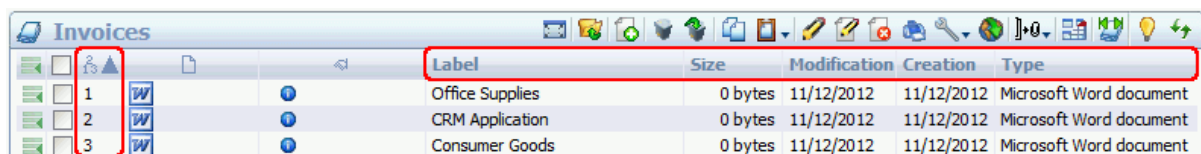
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WHAT ARE DISPLAY PROFILES FOR?

CUSTOMIZING THE DOCUMENTS LIST DISPLAY

Display profiles allow you to customize the appearance and content of the documents list, as it displays when a Web Client user views the content of a folder or a process instance.

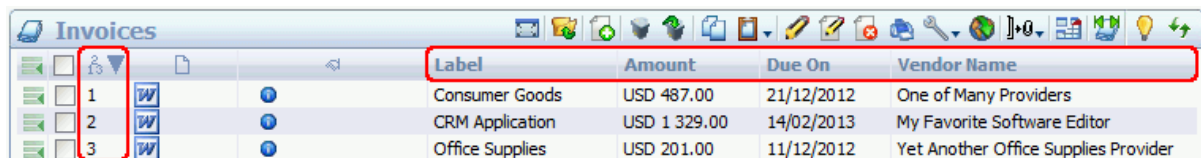
By default, the documents list is as follows:



	Label	Size	Modification	Creation	Type
1	Office Supplies	0 bytes	11/12/2012	11/12/2012	Microsoft Word document
2	CRM Application	0 bytes	11/12/2012	11/12/2012	Microsoft Word document
3	Consumer Goods	0 bytes	11/12/2012	11/12/2012	Microsoft Word document

This default display is not always optimal. In the case above, it would be useful to display the vendor name, the amount and the due date of the invoice rather than the file size and type or the modification and creation dates of each document. Besides, it would be interesting to reverse the default display order, so as to have the most recent invoices at the top of the list.

With a display profile, you can obtain the following result:



	Label	Amount	Due On	Vendor Name
1	Consumer Goods	USD 487.00	21/12/2012	One of Many Providers
2	CRM Application	USD 1 329.00	14/02/2013	My Favorite Software Editor
3	Office Supplies	USD 201.00	11/12/2012	Yet Another Office Supplies Provider

In the same way, for a picture bank, such as a Who's Who, a display profile can be used in order for the documents list to always display as thumbnails, possibly bigger than the default ones:

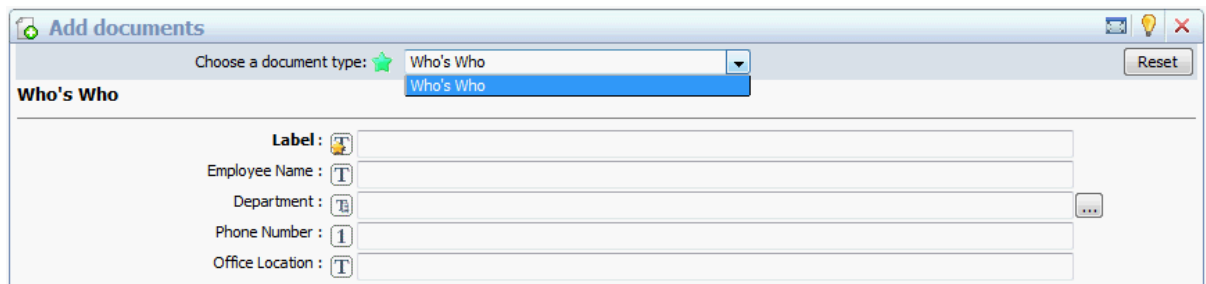


CUSTOMIZING GARGANTUA INTERFACE BEHAVIOR

Display profiles also allow you to customize GARGANTUA interface behavior to adapt it to the characteristics of your documents and to your work habits.

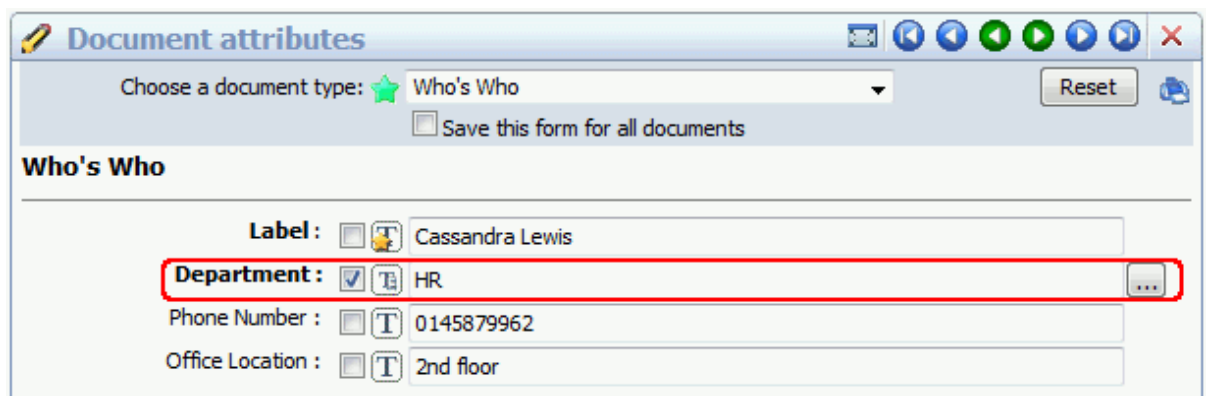
For example, in the case of a photo bank, you can configure the interface so that:

- Only the “Who's Who” form is available when users create a document;



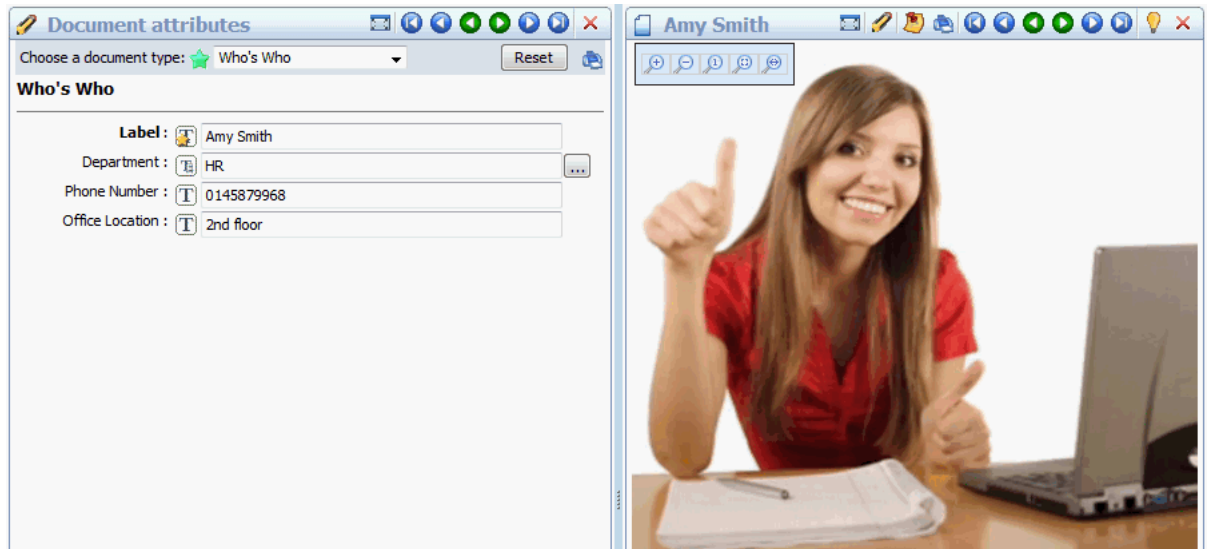
The screenshot shows a window titled "Add documents". At the top, there is a dropdown menu labeled "Choose a document type:" with a green star icon, currently set to "Who's Who". A "Reset" button is in the top right corner. Below the dropdown, the form is titled "Who's Who". It contains several input fields: "Label:" with a person icon, "Employee Name:" with a text icon, "Department:" with a text icon and a small menu icon, "Phone Number:" with a text icon, and "Office Location:" with a text icon.

- Users can specify the same attribute value for several pictures at the same type, for example for the pictures of people working in the same department;



The screenshot shows a window titled "Document attributes". At the top, there is a dropdown menu labeled "Choose a document type:" with a green star icon, currently set to "Who's Who". A "Reset" button and a "Save this form for all documents" checkbox are in the top right corner. Below the dropdown, the form is titled "Who's Who". It contains several input fields: "Label:" with a person icon and the text "Cassandra Lewis", "Department:" with a checked checkbox, a text icon, and the text "HR" (this row is highlighted with a red box), "Phone Number:" with a text icon and the text "0145879962", and "Office Location:" with a text icon and the text "2nd floor".

- When users preview a picture in the right pane, the corresponding form displays automatically in the left pane, in order, for example, for the contact information to be accessible quickly.



CREATING A DISPLAY PROFILE

REQUIREMENTS

Display profiles are an advanced feature, which implementation is usually not done during the first steps of GARGANTUA deployment. If you want to create display profiles, the following requirements must be met:

1. Make sure that you belong to the **Lists, attributes, forms and display profiles managers** for the GARGANTUA database where you want to create the display profile.
2. Make sure that you have created all the non-system attributes that you intend to display in the documents list.
3. Make sure that you have created the different forms to associate to the display profile: on the one hand, the folder and process forms to which the display profile will apply, and on the other hand, the forms that will be available when users create documents or sub-folders in the objects of the display profile.

PROCEDURE

To create a new display profile, proceed as follows:

1. In the left pane of GARGANTUA Administration Tool, expand the sub-branch corresponding to the database of your choice.
2. Click the **Display profiles** sub-branch.
3. In the bottom left corner of the right pane, click the **New** button.

The new display profile management screen displays in the right pane.

4. At the top of the right pane, in the **Identity** section, fill in the **Name** and **Description** fields of the display profile, and optionally add the profile to a package, in the **Package** field.
5. In the **Forms** and **Display options** section, [select the settings of your choice](#).
6. In the bottom left corner of the right pane, click the **Apply** button.

You can now [assign the new display profile to the objects of your choice](#).

DISPLAY PROFILE MANAGEMENT SCREEN - AVAILABLE TABS

The **Display profiles** management screen contains the following tabs:

- The **Properties** tab allows you to define the main display profiles settings: name, forms, display options, etc..
- The **Dependencies** tab allows you to display the items used by a display profile: forms, attributes, composition rules, etc.
- The **Summary** tab allows you to display a summary of a display profile.
- The **Log** tab allows you to view the list of all the operations performed on a display profile, and to filter them according to some criteria.
- The **Help** tab allows you to access the contextual help.

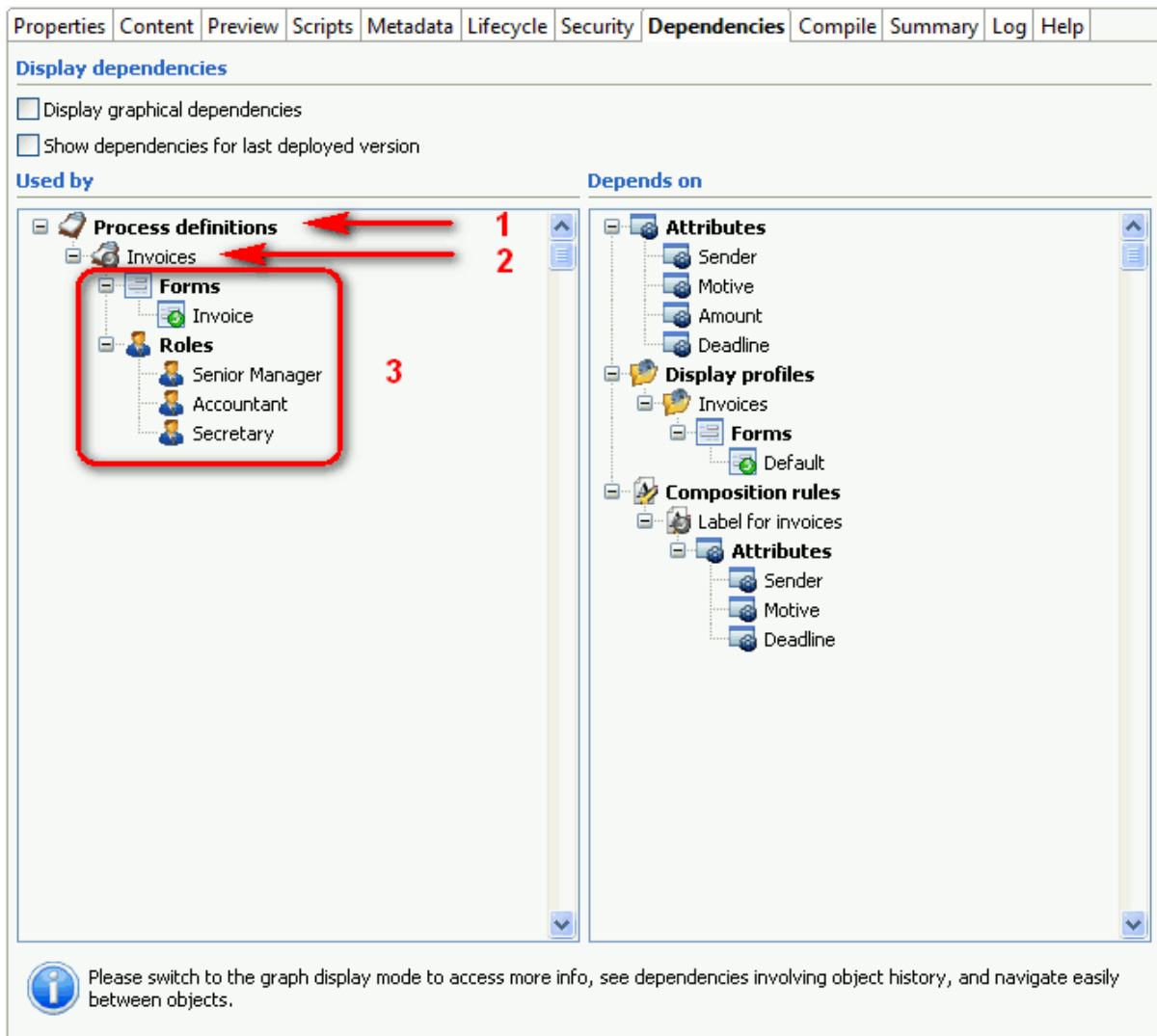
“DEPENDENCIES” TAB

The **Dependencies** tab allows you to know which other objects rely on or are used by the current design object.

DISPLAYING DEPENDENCIES IN LIST MODE

By default, dependencies are displayed in **list mode** and the **working copies** of the objects are taken into account.

Depending on whether the current object is used by and/or relies on other objects, dependencies are displayed in 1 or 2 columns. If there are 2, the objects that rely on the current object are listed in the left column, and the objects that are used by the current object appear in the right column:



1. Some objects in this category have dependencies to the current object.
2. This object has a dependency to the current object, that is the “Invoices” process uses the “Invoice” form.
3. Here is the list of all objects that have a dependency to the “Invoices” process.

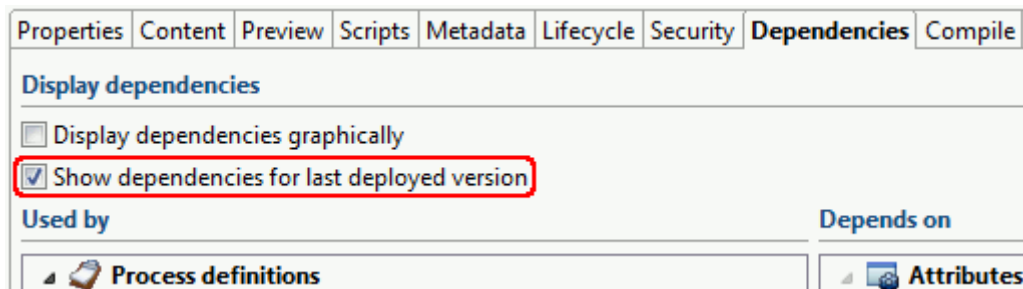
In the dependencies analysis screens as well as everywhere else in the interface, the  icon indicates whether an object is currently deployed and, if so, whether the deployed version is identical to the working copy:

- No icon - The object is not deployed.
-  - The object is deployed and there is no difference between its last deployed version and its working copy.
-  - The object is deployed but its last deployed version is not identical to its working copy.

WHAT IS THE “SHOW DEPENDENCIES FOR LAST DEPLOYED VERSION” OPTION FOR?

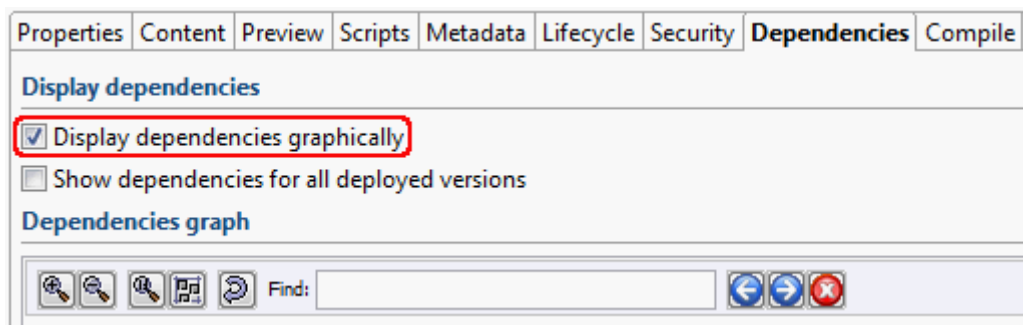
By checking the **Show dependencies for last deployed version** checkbox, you can choose to display the dependencies for the version of the object that is currently deployed, instead of the dependencies for the working copy.

This option is only available in list mode, for objects that support the **Deployment history** feature:

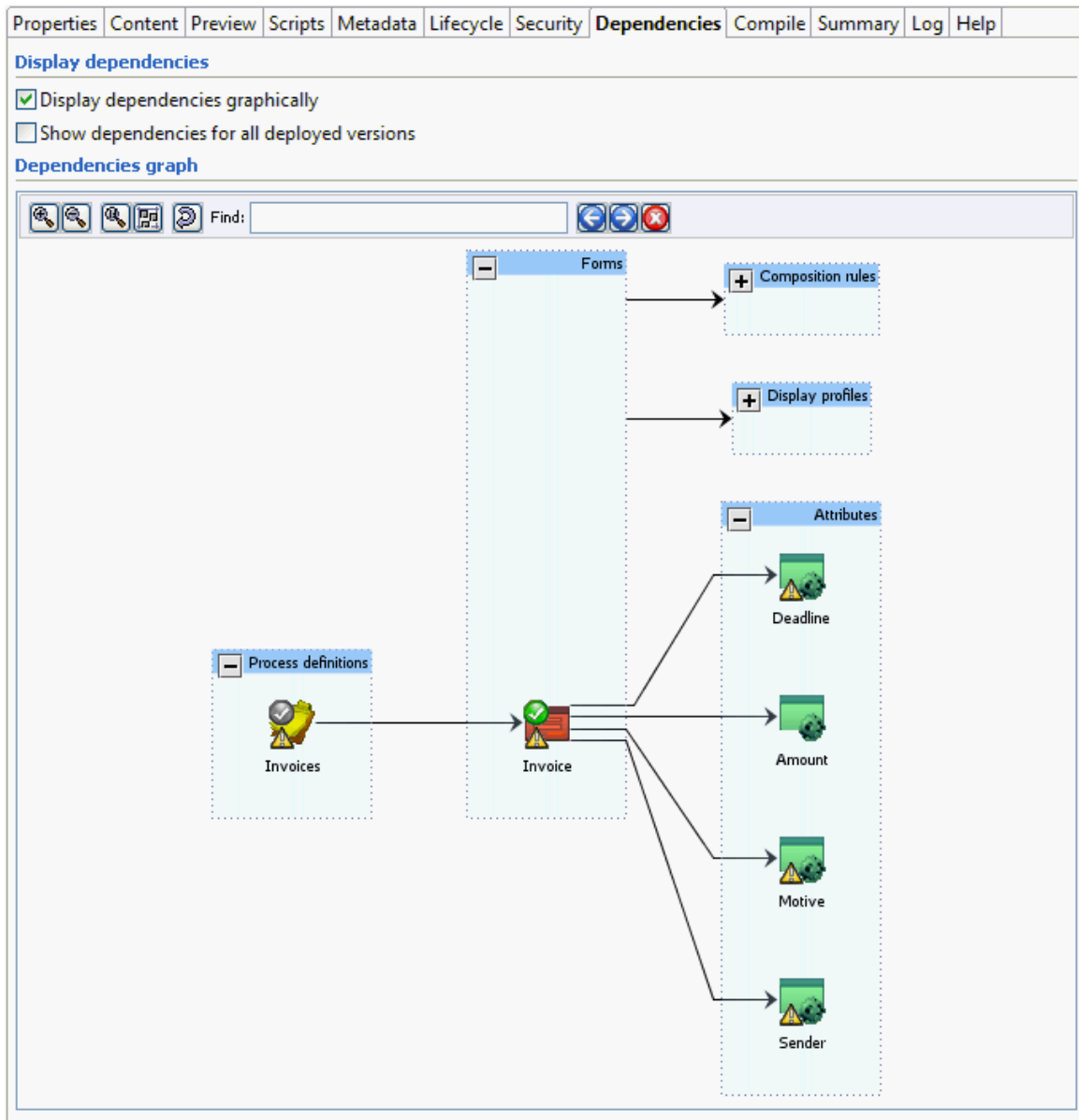


DISPLAYING DEPENDENCIES GRAPHICALLY

In order to switch from the list mode to the graphical display, check the **Display dependencies graphically** option:



The dependencies between the working copies of the various objects now take the form of a graph:



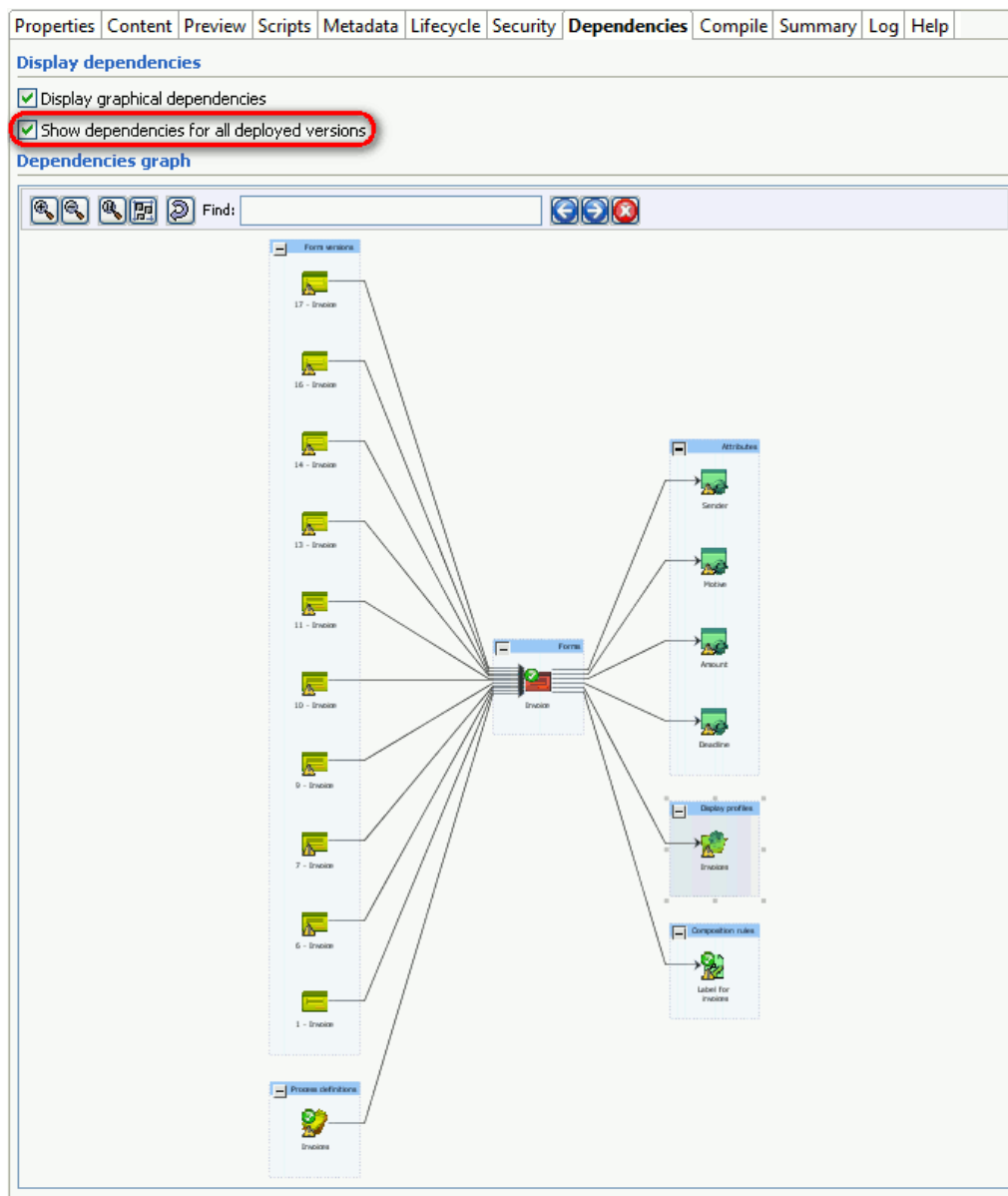
The toolbar above the graph allows you to:

- - Enlarge the graph;
- - Make the graph smaller;
- - Restore the default size for the graph;
- - Optimize the size of the graph;
- - Refresh the graph;
- Find: - Search the names of the objects in the graph for a particular string; the objects that match the search criterion are highlighted in pale blue;
- - Navigate between the objects that contain the search string;
- - Reset the search results so that no more objects are highlighted.

WHAT IS THE “SHOW DEPENDENCIES FOR ALL DEPLOYED VERSIONS” OPTION FOR?

If you check the **Show dependencies for all deployed versions** box, the dependencies graph will include all previously deployed versions of the objects, instead of just their working copies. If the current object supports the **Deployment history** function, then the list of all its previously deployed versions will also appear in the graph.

This option is only available when dependencies are displayed graphically:



“SUMMARY” TAB

The **Summary** tab allows you to display a summary of an item that presents its main features, like its manager, form, priority, content, etc.

The **Summary** tab is particularly helpful to have a general insight of the item, without having to browse through each tab.

The **Summary** tab also has a saving option in PDF format, which allows to view the summary of an item without the GARGANTUA Administration tool.

“LOG” TAB

The **Log** tab allows you to view a list of all the operations performed in one of the branches of GARGANTUA Administration Tool.

You can filter your search through the following criteria:

- Start date, end date;
- User;
- Operation.

To filter by dates:

1. Fill in the date from which you want to view the operations performed, in the **Start date** field.
2. Fill in the date until which you want to view the operations performed, in the **End date** field.
3. Click on **Display**.

The list of the operations performed between the two dates is displayed in the **Log entries** field.



You can also click on the “Week audits”, “Month audits”, “Year audits” and “All audits” icons, so as to view the operations performed in larger periods of time.

To filter by users:

1. Click on the magnifying glass, close to the **User** field.
2. Fill in the user name from whom you want to view the performed operations.
3. Click on **Display**.

The list of the operations performed by the user is displayed in the Log entries field.

To filter by operation:

1. Click on the arrow of the **Operation** field.
A list of the possible operations is displayed.
2. Click on the type of operation desired.

3. Click on **Display**.

The list of the operations performed in relation with the selected type of operation is displayed in the **Log entries** field.



You can tick the “Show login/logout events” box to display the users connections and disconnections. This functionality is only available for the “Users” and “Server log” branches.

You can tick the “Only Show error audits box” to only display the failed operations.



The “Reset” button allows you to cancel the last filtering.

You can also export the list of the performed operations, in .csv format.

To export a list of the performed operations:

1. Generate a list, depending on the previous criteria.
2. Click on the **CSV Export** button.
3. Choose the place where you want to save the export.
4. Click on **Save**.

You have exported a list of the performed operations.

DISPLAY PROFILES OPTIONS

DISPLAY PROFILE MANAGEMENT SCREEN

A display profile management screen is as follows:

The screenshot shows the 'Manage display profiles' window with the following sections and options:

- Properties** tab: Identification section with fields for Name ('Who's Who'), Description ('This display profile is used for the Who's Who folders containing employees' pictures.'), and Package.
- Forms** section:
 - Forms for folders or processes**: A table with columns Name, Select, and Default. The 'Who's Who' form is selected and marked as default.
 - Forms for documents**: A table with columns Name, Select, and Default. The 'Who's Who' form is selected and marked as default.
- Display options** section:
 - Available attributes**: A list of attributes including Amount, Category, Comments, Company, Continent, Country, create date, Date of reception, Famille, file size, file type, Genre, modified by, modify date, Ordre, owner, Recipient, Réponse urgente, and Résumé.
 - Displayed attributes**: A table with columns Attribute and Width (px). Attributes include number (30), icon (N/A), flags (110), label (140), Department (50), Office Location (50), and Phone Number (50).
 - Thumbnails' size**: w / h 200 x 200.
 - Display documents list in reverse order**: Checked.
 - Gargantua Explorer**: A table with columns Option and Value. Options include Dates format, Modify attributes for a series of documents, Display document and its attributes, Document display, Documents list, and External URL.
 - Document status flags**: A table with columns Option and Value. Options include CD archived, Notes, Notifications, Forum, Checked-out, and Locked.

Buttons at the bottom: New, Delete, Apply, Duplicate, Export.

1. Area allowing to [select the forms](#) that will be available when a user creates a document or a subfolder in an object associated to a display profile;
2. Area allowing to [select the attributes](#) to display in the documents list;
3. Fields allowing to [set the thumbnails size](#);
4. Checkbox allowing to [reverse the documents list order](#);

5. Area allowing to [configure the behavior of GARGANTUA interface](#);
6. Area allowing to [select the status flags](#) to display in the  column of the documents list and/or next to the thumbnails.

SELECTING THE FORMS AVAILABLE WHEN CREATING DOCUMENTS AND SUB-FOLDERS

The area 1 of the display profile management screen allows you to restrict the list of forms available when creating documents and sub-folders inside objects associated to a profile. Thus, when Web Client users click the **Creates a new folder**  or **Add new documents**  tools, they can only select forms relevant for the objects that the current folder or process can contain.

To select the forms accessible to Web Client users when they create sub-folders, proceed as follows:

1. In the **Forms for folders or processes** table, check the checkboxes of your choice in the **Select** column.
2. In the **Default** column, click in the row corresponding to the form that will be selected by default, if users do not select one themselves.

The default form must belong to the forms checked in the **Select** column.



If you do not select any form for folders or processes, the creation of sub-folders will not be allowed inside the objects associated to the display profile.

To select the forms accessible to Web Client users when they create documents, proceed as follows:

1. In the **Forms for documents** table, check the checkboxes of your choice in the **Select** column.
2. In the **Default** column, click in the row corresponding to the form that will be selected by default, if users do not select one themselves.

The default form must belong to the forms checked in the **Select** column.



If you do not select any form for documents, the creation of documents will not be allowed inside the objects associated to the display profile.

In the *Who's Who* example [above](#), only the 2 checkboxes corresponding to the "Who's Who" form have been checked for document creation.

SELECTING THE ATTRIBUTES TO DISPLAY IN THE DOCUMENTS LIST

The area 2 of the display profile management screen allows you to:

- Select the attributes that will correspond to a column in the documents list;

- Set the order in which the columns will display;
- Adapt the width of the documents list columns to their content.

To do so, proceed as follows:

1. To display a new attribute in the documents list, click its name in the **Available attributes** column, and click the ➡ button.

The attribute selected is moved to the **Displayed attributes** column: it will now display in the documents list.

2. To remove a default attribute from the documents list, click its name in the **Displayed attributes** column, and click the ⬅ button.

The attribute selected is moved to the **Available attributes** column: it will no longer display in the documents list.

3. To set the order in which attributes will display in the documents list, click the name of an attribute in the **Displayed attributes** column, and click the ⬆ or ⬇ buttons to move it up or down.
4. To adapt the width of the documents list columns to their content, double-click the value in the **Width (px)** column, and type the custom value of your choice, in pixels.



These settings only apply in report display mode. Custom attributes do not display in thumbnails display mode.

SETTING A SIZE DIFFERENT FROM THE DEFAULT SIZE FOR THUMBNAILS

The area 3 of the display profile management screen allows you to set the thumbnails dimensions in pixels when the documents list is in thumbnails display mode. For some types of documents, it is thus possible to override the default server configuration.

*In the Who's Who example [above](#), this option was used to set the thumbnails size to 200*200 px.*

DISPLAYING THE DOCUMENTS LIST IN REVERSE ORDER

The **Display documents list in reversed order** checkbox, in the area 4 of the display profiles management screen, allows you to reverse the order in which documents display by default.

By checking this checkbox, you can for example make most recently added documents display at the beginning of the list and not at the end.

This behavior is described [above](#), in the invoices example.

CUSTOMIZING GARGANTUA INTERFACE BEHAVIOR

DATES FORMAT

This option corresponds to the **Display dates in fuzzy format (e.g. “5 minutes ago”)** entries of the interface settings profiles available in the following sections :

- **General options > Display and layout** (option applying to all GARGANTUA Web Client, except the Workflow) ;
- **Inbox > Display and layout** (option applying only to the Workflow).

You can:

- Apply the option selected in the interface settings profile of the current user (**Apply the user profile**);
- Always apply the exact format to dates, whether the display profile is assigned to folders, processes, or both (**Exact format (e.g. 15/08/2013)**);
- Always apply the fuzzy format to dates, whether the display profile is assigned to folders, processes, or both (**Fuzzy format (e.g. 5 minutes ago)**).

MODIFY ATTRIBUTES FOR A SERIES OF DOCUMENTS

This option corresponds to the **Modify attributes for a series of documents** entry of the interface settings profiles (**Gargantua Explorer > Document attribute edit**).

You can:

- Apply the option selected in the interface settings profile of the current user (**Apply the user profile**);
- Always forbid to modify the attributes of several documents at the same time (**No**);
- Always allow to modify the attributes of several documents at the same time (**Yes**).

In this case, users will be able to select several objects in the documents list, and click the **Display attributes for the selected folder/document**  tool. They will then be able to assign the value of one or more attributes, or even the whole form, to all the documents selected.

This behavior is described [above](#), in the Who's Who example.

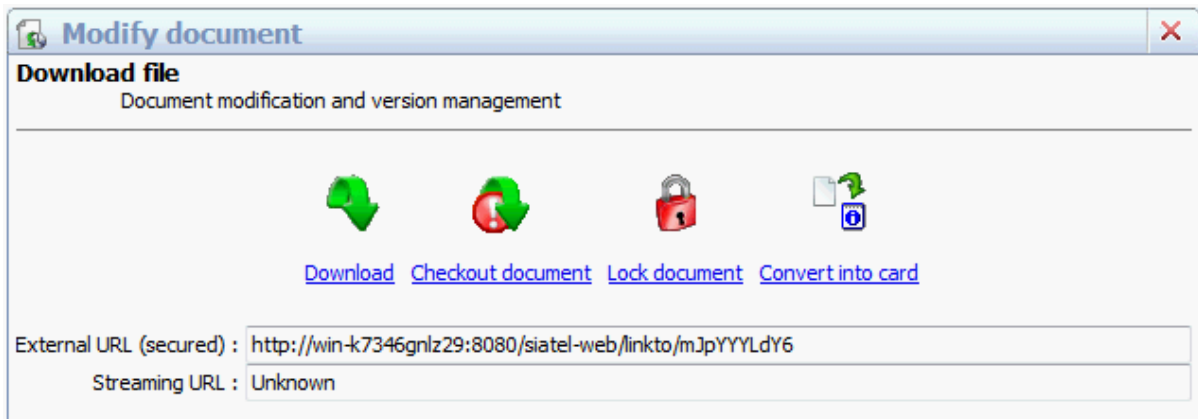
EXTERNAL URL

This option corresponds to the **Display external URL** entry of the interface settings profiles (**Gargantua Explorer > Document modification and version management**).

You can:

- Apply the option selected in the interface settings profile of the current user (**Apply the user profile**);
- Always hide the external URL of documents (**Hide**);
- Always display the external URL of documents (**Show**).

In this case, when users click the **Modify file**  tool, they will be able to view the external URL corresponding to the file on the GARGANTUA server.



DISPLAY DOCUMENT AND ITS ATTRIBUTES

This option corresponds to the **Display document AND its attributes** entry of the interface settings profiles (**Gargantua Explorer > Document viewer**).

You can:

- Apply the option selected in the interface settings profile of the current user (**Apply the user profile**);
- Always display the form document in the left pane when a user previews the content of a file in the right pane (**Yes**);

This behavior is described [above](#), in the Who's Who example.

- Always display the documents list in the left pane when a user previews the content of a file in the right pane (**No**).

DOCUMENT DISPLAY

This option corresponds to the **Document display mode** entry of the interface settings profiles (**Document viewer > Document viewer**).

You can:

- Apply the option selected in the interface settings profile of the current user (**Apply the user profile**);
- Always display the documents in HTML format (**HTML**);
- Always display the documents in PDF format (**PDF**);

- Always display the documents in ActiveX format (**ActiveX**).

DOCUMENTS LIST

This option corresponds to the **Document list display mode** entry of the interface settings profiles (**Gargantua Explorer > Document list**).

You can:

- Apply the option selected in the interface settings profile of the current user (**Apply the user profile**);
- Always display the documents list in report display mode (**List**);
- Always display the documents list in thumbnails display mode (**Thumbnails**);
- Always display the documents list in thumbnails display mode (**Thumbnails and details**);
- Always display the documents list in custom display mode (**Custom display**).

SELECTING THE STATUS FLAGS TO DISPLAY

The area 6 of the display profile management screen allows you to decide whether or not to display status flags in the  column of the documents list or next to the thumbnails. It allows you to save space for more relevant information.



You can choose not to display the “flags” system attributes in the documents list (see [Selecting the attributes to display in the documents list](#)). In that case, the settings described here will not apply.

Proceed as follows:

1. In the **Value** column, click the row corresponding to the flag of your choice.
2. In the drop-down list, select the value you want to apply.

For each flag, 3 values are available. You can:

- **Apply the user profile**: the flag will be either displayed or hidden, according to the option set in the **Interface settings profile** of the user, whether it has been set by an administrator from the Administration Tool (**Interface settings profiles > Gargantua Explorer > Document list**) or by the user himself from the Web Client (**Settings > Customize interface > Gargantua Explorer > Document list**);
- **Hide** the flag: the options set in the **Interface settings profiles** will be overridden and the flag will never display in the documents list;
- **Display** the flag: the options set in the **Interface settings profiles** will be overridden and the flag will always display in the documents list.

The status flags that you can choose to display or not are the following:

- **CD archived**: this option corresponds to the  flag, that can be found on documents archived on CD

using the Media Tool;

- **Notes:** this option corresponds to the 📝 flag, that can be found on documents with one or more notes;
- **Notifications:** this option corresponds to the 🔔 flag, that can be found on documents assigned to a notification;
- **Forum:** this option corresponds to the 💬 flag, that can be found on documents in which forum contains messages;
- **Checked-out:** this option corresponds to the 🟢 and 🔴 flags, that can be found on documents that the user has checked out himself (to work on a new version) or documents that another user has checked out;
- **Locked:** this option corresponds to the 🔒 flag, that can be found on documents locked as final versions.

ASSIGNING DISPLAY PROFILES TO OBJECTS

ASSIGNING A DISPLAY PROFILE TO A FOLDER OR A PROCESS

Assigning a display profile to an object cannot be done directly. You need to do it through the corresponding **form**. Therefore, to assign a display profile to folders and/or process instances, you need to assign it to the forms used to create these objects.

To do so, proceed as follows:

1. In the left pane of GARGANTUA Administration Tool, in the branch corresponding to the database of your choice, expand the **Forms** sub-branch.
2. Click the name of the form of your choice.

The form management screen displays in the right pane.

3. At the top of the right pane, click the **Properties** tab.
4. In the **Display profile** drop-down list, select the display profile to assign to the objects created with this form.

If this menu is grayed, it is because the current form is neither a **Form for folders** nor a **Form for processes** form: check the checkbox(es) of your choice in the **Options** section in the top right corner of the screen.

5. In the bottom left corner of the right pane, click the **Apply**, **Compilation** and **Deploy/Redeploy** buttons.

The display profile selected will now apply to all the folders and process instances created with this form.

ASSIGNING A DISPLAY PROFILE TO A PROCESS TASK

For processes, it is possible to manage display more accurately than for folders, by assigning a display profile to one or more tasks.

Assigning display profiles to tasks is always done through forms: for the list of documents associated to a process instance to display differently for a given task, you need to assign a specific form to the task, different from the process task.

To assign a display profile to a task, proceed as follows:

1. [Assign the display profile of your choice to the form](#) that you intend to use with the task.
2. Make sure that you belong to the **Processes managers** for the database.
3. In the left pane of GARGANTUA Administration Tool, in the **Processes** branch, click the name of the

process of your choice.

The process management screen display.

4. At the top of the right pane, click the **Graph** tab (unless it is already selected).
5. Double-click the icon corresponding to the task of your choice.

The **Task properties** dialog displays.

6. In the **Task form(s)** drop-down list, select the form of your choice.
7. Click **OK** to close the dialog.
8. In the bottom left corner of the right pane, click the **Apply**, **Compilation** and **Deploy/Redeploy** buttons.

The display profile selected will now apply to the task in all the new process instances.

ASSIGNING A DISPLAY PROFILE TO A DATABASE

You can assign a display profile to a database: this display profile will apply to all the folders and processes of the database, except if otherwise set at form level.

To assign a display profile to a database, proceed as follows:

1. Make sure that you belong to the **Database administrative managers** for the database.
2. In the left pane of GARGANTUA Administration Tool, click the name of the database.

The database management screen displays.

3. In the right pane, in the **Default display profile** drop-down, select the display profile of your choice.
4. In the bottom left corner of the right pane, click the **Apply** button.

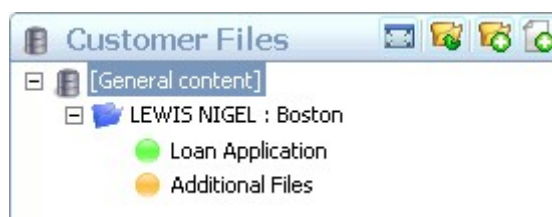
The display profile selected will now replace the default display profile.

EXAMPLE: IMPOSING A CLASSIFICATION STRUCTURE WITH DISPLAY PROFILES

INTRODUCTION

In a bank, customer advisors receive loan application files they want to store in GARGANTUA.

To make access to imported documents easier, they want to implement the following classification scheme:



Documents should be classified as follows:

- “Borrower” folder named after the customer's name and city, containing the customer's documents divided into two folders:
 - “Loan Application” folder containing documents required to grant the loan;
 - “Additional Files” folder containing documents provided by the customer when the loan has been granted in principle.

With the Administration Tool, an administrator creates a database called “Customer Files”.

As many customer advisors will have to import documents in the Web Client, the administrator decides to use display profiles in order to **limit the folder and document types that can be created** in the “Customer Files” database. Only the authorized forms will be available when creating a document or a folder.

FIRST STEP - CREATING ATTRIBUTES AND FORMS

Before creating display profiles, the administrator creates the attributes and forms used to index the different documents.

A form needs to be created for each type of folder:

- “Borrower”;
- “Loan Application - Folder”;
- “Additional Files - Folder”.

A form needs to be created for each type of document contained in one of the two subfolders:

- “Loan Application - Document”;
- “Additional Files - Document”.

SECOND STEP - CREATING DISPLAY PROFILES

When the forms have been created, the administrator creates the display profiles. For each display profile, he sets in the **Forms** section which forms will be available when creating folders or documents:

Manage display profiles

Properties | Dependencies | Summary | Log | Help

Identification

Name: Database

Description: This display profile applies to the "Customer Files" database root and restricts folder creation to folders with the "Borrower" form.

Package:

Forms

Forms for folders or processes

Name	Select	Default
Additional Files - Folder	☐	
Borrower	☒	☒
Défaut	☐	
Loan Application - Folder	☐	

Forms for documents

Name	Select	Default
Borrower	☒	☒
Défaut	☐	
Loan Application - Document	☐	

Display options

Available attributes:

- T Additional files
- T Advisor name
- T Agency
- T Application
- T Borrower First Na...
- T Borrower Last Na...
- T City
- T Company
- 1 Customer Number
- 1 Duration in Month
- € Loan Amount
- modified by
- owner
- T Subfolders
- type
- url
- version

Displayed attributes:

Attribute	Width
number	30
icon	N/A
flags	110
label	160
file size	65
modify date	65
create date	65
file type	150

Thumbnails' size: w / h 100 x 100

☐ Display documents list in reverse order.

Gargantua Explorer

Option	Value
Dates format	Apply user profile
Modify attributes for a series of documents	Apply user profile
Display document and its attributes	Apply user profile
Document display	Apply user profile
Documents list	Apply user profile

Document status flags

Option	Value
CD archived	Apply user profile
Notes	Apply user profile
Notifications	Apply user profile
Forum	Apply user profile
Checked-out	Apply user profile
Locked	Apply user profile

New Delete Apply Duplicate Export

The created display profiles are the following:

- A display profile called “Database” will apply to the root of the “Customer Files” database.

In the display profile management screen, in the **Forms for folders or processes** frame, the administrator only selects the “Borrower” form and sets it as default form:

Forms for folders or processes

Name	Select	Default
 Additional Files - Folder	☐	
 Borrower	☒	
 Défaut	☐	
 Loan Application - Folder	☐	

To apply the profile, the administrator goes to the management screen of the “Customer Files” database and, in the **Properties** tab, in the **Default display profile** drop-down list, he selects the “Database” display profile.

- A display profile named “Borrower” will apply to folders of “Borrower” type.

In the display profile management screen, in the **Forms for folders or processes** frame, the administrator only selects the “Loan Application - Folder” (default form) and “Additional Files - Folder” forms:

Forms for folders or processes

Name	Select	Default
 Additional Files - Folder	☒	
 Borrower	☐	
 Défaut	☐	
 Loan Application - Folder	☒	

To apply the profile, the administrator goes to the management screen of the “Borrower” form and, in the **Properties** tab, in the **Display profile** drop-down list, he selects the “Borrower” display profile.

- A display profile named “Loan Application - Folder” will apply to folders of “Loan Application - Folder” type.

In the display profile management screen, in the **Forms for documents** frame, the administrator only selects the “Loan Application - Document” form and sets it as default form:

Forms for documents

Name	Select	Default
 Borrower	☐	
 Défaut	☐	
 Loan Application - Document	☒	

To apply the profile, the administrator goes to the management screen of the “Loan Application - Folder” form and, in the **Properties** tab, in the **Display profile** drop-down list, he selects the “Loan Application - Folder” display profile.

- A display profile named “Additional Files - Folder” will apply to folders of “Additional Files - Folder” type.

In the display profile management screen, in the **Forms for documents** frame, the administrator only selects the “Additional Files - Document” form and sets it as default form:

Forms for documents

Name	Select	Default
 Additional Files - Document	☒	
 Défaut	☐	
 Loan Application - Document	☐	

To apply the profile, the administrator goes to the management screen of the “Additional Files - Folder” form and, in the **Properties** tab, in the **Display profile** drop-down list, he selects the “Additional Files - Folder” display profile.

THIRD STEP - TESTING THE RESULT IN THE WEB CLIENT

When the display profiles are created, the administrator logs in to the Web Client to test the result achieved. Here is how he proceeds:

1. He goes to the **Explorer** tab and clicks the **Customer Files** database.
2. At the database root, he clicks the  tool to add a folder.

The “Borrower” form displays in the right pane. It is the only form available in the drop-down list:

Create folder

Choose a folder type: **Borrower** Reset

Borrower

label LEWIS Nigel : Boston

Customer 192648753 create date

Agency New York ... Advisor Name SMITH

Company ACME

Groupe

Borrower Last Name LEWIS

Borrower First Name Nigel

ZIP Code 2208 City Boston

Loan Amount 50 000.00 USD Duration in Months 80

3. The administrator fills in the form fields, and clicks the **Create folder** button.
4. He selects the newly created “LEWIS Nigel: Boston” folder, and clicks the tool to add a folder.

The “Loan Application - Folder” form displays in the right pane. In the drop-down list, the “Additional Files - Folder” form is also available:

Create folder Reset

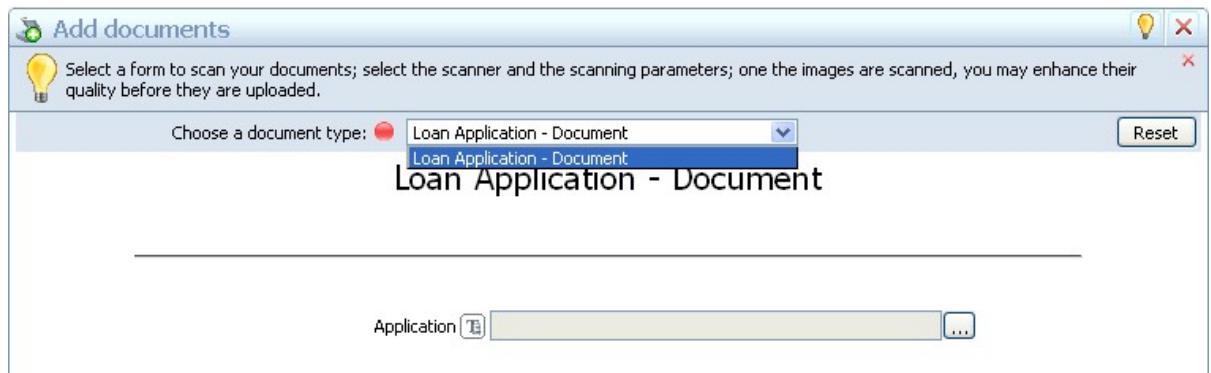
Choose a folder type: **Loan Application - Folder**

- Loan Application - Folder
- Additional Files - Folder
- Loan Application - Folder

label Loan Application

5. The administrator fills in the form fields, and clicks the **Create folder** button.
6. He selects the newly created “Loan Application” folder, and clicks the tool to add a document.

The “Loan Application - Document” form displays in the right pane. It is the only form available in the drop-down list:

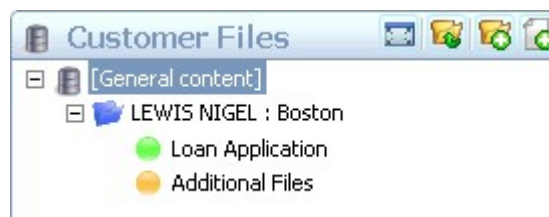


7. The administrator fills in the form field, and imports a document.
8. He selects again the “LEWIS Nigel: Boston” folder, and clicks the  tool to add a folder.

The “Loan Application - Folder” form displays in the right pane. In the drop-down list, the “Additional Files - Folder” form is also available.

9. He selects the “Additional Files - Folder” form, fills in the field, and clicks the **Create folder** button.

The imposed restrictions allow to create the wanted tree structure:



GOING FURTHER

The display profiles allow to impose some restrictions but do not cover all cases.

To put restrictions on the actions (edition, deletion, etc.) that can be performed on some objects, you can use security profiles. See chapter “Admin GARGANTUA 7 - BG - Security profiles”.

To get homogeneous folder or document’s names which will be automatically filled in according to values entered in some attributes, you can use composition rules. See chapter “Admin GARGANTUA 7 - BG - Composition rules”.

DISPLAY PROFILES PRIORITY ORDER

A priority order is needed because display profiles have some options in common with interface settings profiles, and because they can be applied at different levels (database, folder or process form, task form).

Settings are inherited in cascade: general settings are taken into account only if there are no specific settings available. As a result, priorities apply in this order:

1. Display profiles set at task level;
2. Display profiles set at folder or process level;
3. Display profiles set at database level;
4. Interface settings profile.



The interface settings profile options only apply when no display profile has been set or when the display profile is set to “Apply user profile”.