

INBOX CUSTOMIZATION

ADMINISTRATION TOOL

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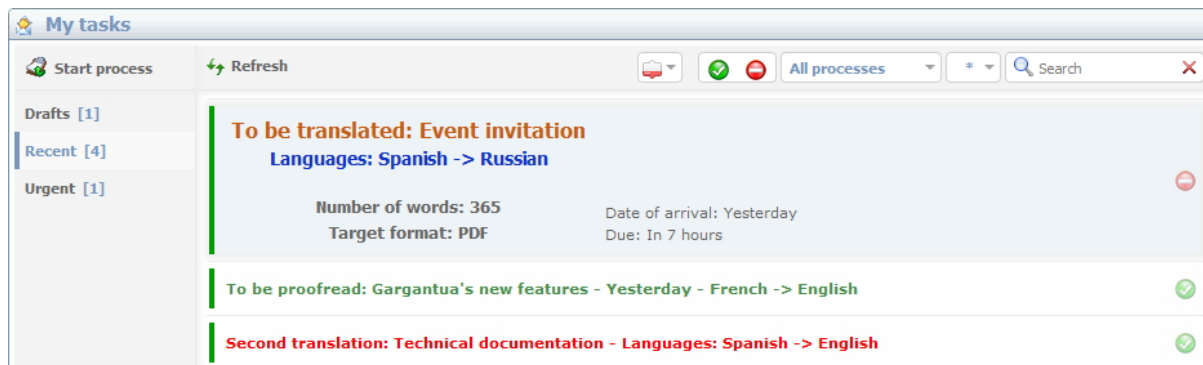
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WHAT IS THE CUSTOMIZED INBOX?

It is possible to customize the way the tasks will be displayed, by default, in the inbox of the simplified interface. You can configure:

- The displayed filters: drafts, urgent, roles, process, priority, etc.
- The way in which the tasks are displayed by default. You can, among others, define:
 - The type of object: text or image;
 - The content: form attributes, text or both;
 - The font: size, style, color;
 - The background color.

Here is an example of several customized tasks:



You can either customize the inbox for a 4:3 or 16:9 standard, or for both. For this, open the corresponding sub-branch(es) under the **Inbox customization** branch.

CUSTOMIZED INBOX MANAGEMENT SCREEN - AVAILABLE TABS

The **Inbox customization** management screen contains the following tabs:

- The **Inbox customization** tab allows you to define the attributes and filters that will be displayed in the inbox.
- The **Preview** tab allows you to check how the customized inbox will be displayed in the simplified interface.
- The **Help** tab allows you to access the contextual help.

“INBOX CUSTOMIZATION” TAB

The **Inbox customization** contains two sub-tabs:

- **Content**: allows you to define the attributes that will be displayed by default in a task;
- **Filters**: allows you to define the filters that will be displayed by default in the inbox.

“CONTENT” TAB

The **Inbox customization** tab allows you to customize the way the documents will be displayed in the simplified interface. For this, it is possible to “fragment” the display in a table, in which you can fill the rows and columns with the attribute values that you want to be displayed in the simplified interface: name of the task, name of the form, estimated processing time, etc.

Below is an example of fragmentation:

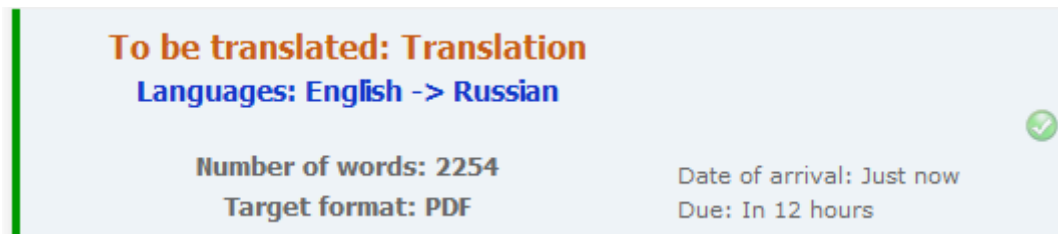
Display designer layout	
GENERAL CUSTOMIZED DISPLAY COLUMNS CELLS	
Customized layout	
65%	
To be translated: {lorem ipsum dolor sit amet}	
Languages: {lorem} -> {lorem ipsum}	
Number of words: {29}	Date of arrival: {14/12/2015}
Target format: {lorem ipsum dolor sit amet}	Due: {14/12/2015}

Note here that the table is made up of two columns:

- The first column is made up of four rows:
 - First row: name of the document, in bold and orange;
 - Second row: source and target languages, in bold and blue;
 - Third row: number of words of the document, in bold;
 - Fourth row: format of the final document, in bold.

- The second column is made up of two rows, aligned at the bottom of the column. Each of these rows contains a different **attribute**:
 - First row: date of arrival of the task;
 - Second row: estimated processing date of the task.

Below is the result of this customized display in the simplified interface:



DISPLAY CUSTOMIZATION TOOLBAR

The toolbar offers various possibilities to customize the display.



The toolbar icons allows you to perform the following actions:

General

-  **Show/Hide markers**: click this icon to show/hide the table rows and columns. Showing them allows to customize them more easily; hiding them allows to view the display as it will be shown in the Web Client;
-  **Legend**: click this icon to display the keyboard shortcuts list.

Customized layout

-  **Customized display properties**: click this icon to show the display properties: events and number of columns;
-  **Reset layout**: click this icon to delete the current layout and to go back to a blank table;
-  **Insert column before**: click this icon to insert a column at the left of the table;
-  **Delete column**: click this icon to delete the selected column;
-  **Insert column after**: click this icon to insert a column at the right of the table.

Columns

-  **Column properties**: click this icon to display the column properties: number of rows and cells, width, style, and vertical align;
-  **Insert column before**: click this icon to insert a column at the left of the selected column;

-  **Delete column:** click this icon to delete the selected column;
-  **Insert column after:** click this icon to insert a column at the right of the selected column;
-  **Insert a row above:** click this icon to insert a row above the selected row;
-  **Delete row:** click this icon to delete the selected row;
-  **Insert a row below:** click this icon to insert a row below the selected row.

Cells

-  **Merge cells:** click this icon to merge two or more selected cells;
-  **Undo merge cells:** click this icon to undo the merger of the selected cells;
-  **Copy cell:** click this icon to copy the selected cell;
-  **Paste cell:** click this icon to paste a cell;
-  **Select merged cells:** click this icon to select the cell containing the merged cells (you need to be in the column containing these cells before using this option);
-  **Reset cells:** click this icon to delete the content of the selected cell;
-  **Randomize cells content:** click this icon to change the random text that is shown in the table preview.

CREATING THE CUSTOMIZED TABLE

When you open the customized inbox management screen, a default layout is already configured as a table. You can choose to customize the display from this default layout, or start a new one from a blank table.

- To start the layout from a blank table, click the  **Reset layout** button in the toolbar.
- Then, use the [toolbar options](#) to create or modify your table: add columns, cells, etc.
- Finally, [configure each element of the table](#): choose a font, a background color, an icon, etc.

CONFIGURING THE CUSTOMIZED TABLE

Once you have created the structure of your table, you can configure its columns and cells.



Before configuring your table, make sure of displaying the markers. The markers allows to show the location of the table elements.

- To configure a column:
 1. Select the column that you want to configure, by clicking the top yellow line.
All the column rows are highlighted. A table appears at the bottom of the right pane.

Properties - [Column]	
rows	8
cells	3
width	1000
vertical align	≡↑ ≡↓ ≡↕ ×
style	

2. Fill in the fields of the table:

- **Rows:** field automatically filled, depending on the number of rows inserted in the column;
- **Cells:** field automatically filled, depending on the number of cells (or sub-columns) inserted in the column;
- **Width:** width of the column. Can be expressed in pixels or percentages. You can choose a value, or click the field to open a list of the possible values;
- **Vertical align:** vertical alignment of the column content, in relation to the content of the biggest column. The alignment can be done at the top, middle or bottom of the column;
- **Style :** CSS style of the column.

You have configured a column.

- To configure a cell:

1. Select the cell that you want to configure.

The cell is highlighted. A table appears at the bottom of the right pane.

Properties - [Cell]	
type	≡ ≡ ≡ ×
merged rows	
merged columns	
content	≡ ≡ ≡ × ≡↑ ≡↓ ≡↕ ×
width	16px
horizontal align	≡↑ ≡↓ ≡↕ ×
vertical align	≡↑ ≡↓ ≡↕ ×
font family	arial
font size	14px
font styles	B I U
color	#3819ff
background color	
events	
class CSS	
style	

2. Fill in the fields of the table:

- **Type:** choose to display a text or an image in the cell. The image or the text must then be added in the **Content** field;

- **Merged rows:** field automatically filled, depending on the number of merged rows to create the cell;
- **Merged columns:** field automatically filled, depending on the number of merged columns to create the cell;
- **Content:**
 - **Text:** the text can be free, or can be an attribute value. To choose the attribute, click the field to open a list of the available attributes;
 - **Image:** the image can be a preview of the document, a server resource or one of the available icons in the list. To choose the image, click the field to open a list of the available images;
- **Width:** width of the column. Can be expressed in pixels or percentages. You can choose a value, or click the field to open a list of the possible values;
- **Horizontal align:** alignment of the cell content. Can be aligned on the left, right, centered or justified;
- **Vertical align:** vertical alignment of the cell content. Can be aligned at the top, bottom or centre;
- **Font family:** font of the cell content;
- **Font size:** size of the font;
- **Font styles:** style of the font (bold, italic or underlined);
- **Color:** color of the font;
- **Background color:** background color of the cell;
- **Events:** JavaScript event of the cell;
- **Class CSS:** CSS class of the cell;
- **Style:** CSS style of the cell.

You have configured a cell.

- Once that you have finished configuring your table, click on **Apply**, then on **Deploy**.

“FILTERS” TAB

The **Filters** tab allows you to choose how the processes can be filtered and displayed in the inbox simplified interface: by task, overdue tasks, urgent task, etc.

To choose the filters to display in the inbox interface:

1. Select a filter in the **Available filters** table.
2. Click on  to transfer the filter in the **Process filters** table.
3. Click on **Apply**.

You have chosen the filters to display.



You can also use the  and  arrows to define the order in which the filters will be displayed.